

MARKETING & COMMUNICATIONS CHECKLIST

Name:
Business Name:
Industry:
Email:

3-6 MONTHS BEFORE LAUNCH

DEFINE YOUR TARGET AUDIENCE

- Identify your ideal customer profile (ICP)
- Understand their demographics, interests, and pain points through market research

DEVELOP A BRAND IDENTITY

- Create a compelling brand story and mission statement
- Design a logo, select brand colors, and establish brand guidelines
- Develop a unique value proposition that differentiates your business

BUILD A USER-FRIENDLY WEBSITE

- Create a professional and mobile-responsive website
- Ensure easy navigation, clear messaging, and compelling visuals
- Optimize your website for search engines (SEO) and fast loading times

2-3 MONTHS BEFORE LAUNCH

CONTENT MARKETING

- Develop a content strategy aligned with your target audience
- Create valuable and engaging content (blogs, articles, videos, infographics)
- Share content on your website, social media, and email newsletters

SOCIAL MEDIA PRESENCE

- Identify relevant social media platforms for your business
- Create and optimize social media profiles
- Plan and schedule regular posts to engage with your audience

EMAIL MARKETING

- Build an email list of interested prospects and customers
- Design visually appealing and personalized email campaigns
- Share valuable content, promotions, and updates via email

Tel: 843.973.7298

Email: info@climbfund.org

Website: CLIMBFund.org

Brought to you by the Branding Department of:

CLIMBFund
Lending for Opportunity

MARKETING & COMMUNICATIONS CHECKLIST

Name:
Business Name:
Industry:
Email:

1 MONTH BEFORE LAUNCH

FINALIZE CONTENT PLANNING

- Complete and optimize your website content
- Develop a content calendar for blog posts and social media updates
Craft an elevator pitch and key messaging for your business
- Create branded templates for emails and social media posts

LOCAL SEO

- Claim and optimize your business listing on Google My Business
- Include accurate contact information, business hours, and photos

NETWORKING & PARTNERSHIPS

- Attend industry events and join relevant professional associations
- Begin building relationships with complementary businesses for potential partnerships and co-marketing

LAUNCH WEEK

PUBLIC RELATIONS

- Announce your business launch on social media and through email campaigns
- Share engaging content and stories about your brand and offerings
- Start building relationships with local media outlets for potential coverage

ONGOING MONTHLY TASKS

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

- Nurture customer relationships through regular communication
- Publish regular blog posts and share on social media
- Send out monthly newsletters to your email list with valuable updates
- Implement a CRM system to track customer interactions
- Segment your customer base for personalized marketing efforts

Tel: 843.973.7298

Email: info@climbfund.org

Website: CLIMBFund.org

MARKETING & COMMUNICATIONS CHECKLIST

Name:
Business Name:
Industry:
Email:

QUARTERLY TASKS

MEASURE AND ANALYZE RESULTS

- Use analytics tools (Google Analytics, social media insights) to track website traffic, engagement, and conversions
- Monitor the success of your marketing campaigns and adjust strategies as needed
- Adjust strategies and tactics based on data and customer insights
- Use results to seek opportunities for collaborations and partnerships

ANNUAL TASKS

REVIEW, RENEW, REFRESH

- Conduct a comprehensive review of your marketing and communications activities
- Update and refresh your website content and design as needed
- Set new goals and objectives for the upcoming year
- Evaluate the success of your branding and adjust as necessary

Tel: 843.973.7298

Email: info@climbfund.org

Website: CLIMBFund.org