

# Your step by step checklist

For achieving B2B marketing campaign success

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## 1 Plan

- ☐ Set objectives and SMART goals
- ☐ Create targeted personas
- ☐ Source high-quality data
- ☐ Decide on which channels to use

## 2 Prepare

- ☐ Craft informative, engaging and eye-catching content
- ☐ Create all supporting assets:
  - ☐ External
    - ☐ Company overview
    - ☐ Proposition sheets
    - ☐ Email templates
    - ☐ Case studies
    - ☐ White papers or thought leadership pieces
    - ☐ Landing pages
    - ☐ Lead capture forms
  - ☐ Internal
    - ☐ Sales decks and playbooks
    - ☐ Competitor positioning and detailed overviews
    - ☐ Client list (for relevant namedrops)

- ☐ Prepare your systems:
  - ☐ CRM set up
  - ☐ Email accounts created
  - ☐ Diary booking links shared
- ☐ Train your team to excel:
  - ☐ Topics:
    - ☐ Corporate background
    - ☐ Solution portfolio
    - ☐ Propositions and campaigns
    - ☐ USP's
    - ☐ Competitive messaging
    - ☐ Qualification process
    - ☐ Challenger session
    - ☐ Systems and processes
  - ☐ Live demo of product or service

## 3 Review

- ☐ Agree format, channels and frequency of reporting
- ☐ Identify who is responsible for each aspect of the live campaign
- ☐ Know how you'll manage the unexpected