

ZEN MEDIA'S COMPREHENSIVE MARKETING PLAYBOOK CHECKLIST

Want to level up your marketing strategy? Steal this checklist and use it to assess your brand from top to bottom. This checklist is broken into two sections:
Audit and **Execute**.

Once you have a full understanding of everything you're already doing, how your brand is positioned, and what your competitors are doing, you can create actionable strategies to execute.

AUDIT

Brand Foundation

- Identify target audience segments and develop ideal customer profiles (buyer personas).
- List your core value propositions.
- Map the customer journey from top-of-funnel to point-of-conversion, and understand trigger points along the way.
- Conduct a SWOT analysis to understand strengths, weaknesses, opportunities, and threats.
- Identify your top competitors and perform a SWOT analysis on each competitor.

Voice, Identity, and Messaging

- Analyze your brand's existing voice and consider how your voice may differ based on channel and platform.
- Review your visual identity across channels and identify strengths and weaknesses.
- Look at your messaging by product/service and your holistic brand messaging.

SEO

- Perform a full technical audit on your website to identify broken links, page loading times, duplicate URLs, and navigational structure.
- Review the keywords you are ranking for, and identify important keywords in your industry that you don't currently rank for.
- Compare your keyword rankings to those of your competitors.
- Audit your blog for length, keyword use, meta descriptions, and other SEO best practice adherence.
- Identify your website traffic over the last month, and month-by-month for the last 6 months. Determine which pages are ranking and which are not.
- Determine if your website is optimized for mobile.

Social Media

- Determine which social media platforms your brand is actively on.
- Determine which social media platforms your spokesperson (or spokespeople) are active on.
- Conduct a SWOT analysis based on organic social media best practices.
- Review your competitors' social media activity and evaluate their strengths and weaknesses.

Email Marketing

- Audit your existing email templates for visual appeal and brand alignment.
- Review your mailing lists and document how they are currently segmented.
- Read existing email campaigns and identify strengths and weaknesses in the copy, subject lines, and CTAs.
- Review open rates, click-through rates, and unsubscribe rates of the last several months to determine efficacy month over month.

Paid Advertising

- Review your existing ads and identify click rate, cost per click, cost per conversion, and ROAS over the last 3–6 months.
- Visit your landing pages and review the copy, design, and layout.
- Perform a SWOT analysis on your existing ads, considering copy and design as well as targeting and strategy across the ads and the landing pages they route to.
- Review your competitors' ads and landing pages, and identify their strengths and weaknesses.

Public Relations and Thought Leadership

- Use Snooze or News to rate your company's recent press releases and compile the feedback you receive.
- Review key press hits acquired across the last three years, as well as organic mentions and placements.
- Review any processes you have in place to amplify press hits (posting the hit to your website, sharing on social, etc.)
- Identify your share of voice in comparison to your competitors.
- Review your competitors' recent press hits and how they are positioned in the industry.
- Review any additional communications plans you have in place (crisis comms plans, internal comms, etc.)

Analytics and Optimization

- Review your marketing tech stack to determine and document the functions of each tool or software.
- Document the metrics that you are currently tracking and any preexisting goals.
- Review how the metrics you are tracking and any preexisting goals map to your overarching marketing goals.

EXECUTE

Brand Foundation

- Create an overarching brand architecture that aligns with your ICPs.
- Update your core value propositions based on your ICPs and competitor research.
- Determine areas where you can shorten the buyer's journey and create a strategy to put your findings into action.
- Based on your business goals, create a high-level overarching marketing strategy that takes each channel into consideration.

Voice, Identity, and Messaging

- Develop a clear brand message and value proposition.
- Create brand guidelines for consistent communication.
- Identify each asset that will need to be updated based on the new visual identity, voice, and messaging.
- Create a strategy for content creation that includes repurposing content across channels.

SEO

- Create a strategy to update your website for user experience and mobile responsiveness.
- Develop an internal linking strategy that prioritizes on-page SEO.
- Consider ways to incorporate AI and REO.
- Develop a content strategy focused on value-driven, SEO-friendly content.
- Create a game plan for adding a resource hub, FAQ section, and glossary of terms.

Social Media

- Create personas for each platform to guide content creation and engagement strategies.
- Create a social media strategy that is tailored to each social media platform, considering best practices for each platform.
- Establish brand style guidelines for social media.
- Create a social media calendar that coincides with your broader content calendar but leaves room for organic posts, responses to influencers, reposting user-generated content, and responding to trending topics.
- Create a hashtag strategy that includes branded hashtags, considering how hashtags are used across platforms.
- Create a community management handbook that standardizes how you engage with and respond to your audience.
- Map out a game plan to join new and emerging platforms, as necessary, to interact with your target audience.
- Determine if influencer marketing is a good fit for your brand at this time.
- Identify the influencer niches and profiles that may serve your audience.
- If your brand will benefit from influencer marketing, map out a process for working with influencers, including a plan to source influencers, contract considerations, creative briefs, and UTM tracking.

Email Marketing

- Segment your email list based on core audience segments and sales funnel placement.
- Develop a game plan to design or refine email templates, ensuring consistency in branding and messaging across all campaigns.
- Consider the email types that will move the needle for your audience, including nurture campaigns, newsletters, and retargeting campaigns.
- Create an email marketing strategy that includes each campaign, content topics, frequency, feedback mechanisms, goals, opportunities for a/b testing, and calls to action.
- Ensure that email campaigns are optimized for mobile viewing and accessibility.
- Verify that your email marketing strategy complies with relevant regulations (e.g., GDPR, CAN-SPAM Act) and follow industry best practices for opt-in and privacy.
- Define clear, measurable KPIs for new email marketing strategies, focusing on engagement, growth, and conversion metrics.

Paid Advertising

- Create a paid ad strategy that aligns with your overarching marketing strategy and identifies key platforms, audience targeting, objectives, budget, and guidelines for copy and creative.
- Map the buyer journey and align your ad strategy with different phases of that journey, from awareness to engagement and conversion.
- Leverage advanced targeting options, such as lookalike audiences and retargeting, to increase campaign efficiency.
- Set up robust tracking mechanisms to measure the ROI of all paid advertising activities based on performance data.
- Plan for regular reviews of campaign performance data to make informed in-flight adjustments to strategies and budgets.
- Seek relevant paid influencer opportunities.
- Develop criteria for evaluating influencer partnerships based on engagement rates, audience relevance, and campaign performance.
- Consider additional paid opportunities, such as high-impact sponsorships, editorials, podcasts, conferences, and awards.

Public Relations and Thought Leadership

- Create a PR roadmap that outlines key messaging in alignment with your brand's overarching marketing strategy.
- Create a media list that includes key media outlets in your industry, and identifies preexisting friendly relationships with journalists, editors, and other media stakeholders.
- Identify non-print PR opportunities such as podcasts, broadcast media, influencer partnerships, speaking engagements, and award submission opportunities.
- Map out timely and relevant pitch ideas that tie into key messaging pillars, newsjacking opportunities, and the expertise of your company spokespeople.
- Develop a strategy that includes monitoring brand, competitors, and keywords in online coverage and social media mentions daily.
- Create a process for amplifying press coverage through social media, the company's website, and other channels to maximize the visibility and impact of PR efforts.
- Define clear KPIs for PR and thought leadership activities, including media coverage quality, audience engagement metrics, and thought leadership impact.

- Create a media training handbook to help prep your thought leaders and spokespeople for press opportunities.
- Create a high-level crisis communications plan based on any risks identified.

Analytics and Optimization

- Adjust your tech stack based on your audit, considering which tools no longer serve your team and where you can consolidate.
- Identify measurable metrics for each marketing tactic and set achievable goals.
- Create a dashboard view so you can easily access all of your metrics and get a holistic picture of your marketing performance.
- Establish a framework for continuously optimizing marketing tactics based on data insights. This framework should include criteria for testing, metrics for success, and a process for implementing changes.
- Plan for A/B testing and other experimentation methods to validate assumptions and refine tactics based on performance data.
- Ensure analytics practices comply with data privacy laws and regulations, including GDPR and CCPA, and maintain transparency with users about data collection and usage.



Z E N M E D I A

Congratulations! You've aced both parts of the checklist. You now have a comprehensive playbook to lead your team to marketing success. It's time to use your newfound wisdom and bespoke strategies to drive real results for your brand.

Feeling a bit overwhelmed? That's totally normal. If you need help putting your playbook into motion, [reach out](#). We're happy to partner up for your success.