

Marketing Accountability Form

Create a crystal clear marketing implementation process to help you move from a laundry list of ideas to a simple, cohesive action plan.



#1 TURN BIG STRATEGIES INTO SMALL TASKS

I will use:

1-Page Marketing plan to create an cohesive vision and plan for my yearly marketing goals
Marketing Task Tracker, CRM and Success Shifter to turn big plans into bite-size steps
Quarterly Launch Plan, CRM/Asana to translate these goals into quarterly strategies
Performance Benchmarking Tool to define metrics and measures
Other: _____



#2 TAG YOUR TEAM

I will:

Build a Virtual Marketing Team (watch Build a Virtual Marketing Team Breakout)
Hire a Virtual Assistant (see Outsourcing List)
Hire/train internally (see Staffing Solutions & Building & Managing Your Team lessons)
Other: _____



#3 CREATE YOUR REAL BUDGET

Schedule your time _____
Schedule your team time _____
Commit to a cash flow investment _____
Commit to a capital investment _____
Other: _____



#4 TECHNOLOGY

Build out Marketing Tech Stack (Infusionsoft, MailChimp, etc.) _____
Use CRM Processes / Project Manager (Asana, Trello, other) _____
Implement system for marketing automation (Infusionsoft, Salesforce, HubSpot)
Other: _____



#5 CREATE ACCOUNTABILITY

Set project owner, timeline and budget
Review progress via weekly meetings (use Sample Marketing Mtg Agenda)
Maintain marketing momentum and personal accountability with Success Shifter,
Marketing Task Tracking Tool, Performance Benchmarking Tool, CRM)
Other: _____





#6 KNOW YOUR PIPELINE

Review pipeline by stage
Identify performance improvements
Prioritize changes
Other: _____



#7 TRACK AND MONITOR SUCCESS

KPIs / Practice Benchmarking Tool
Other: _____

