



Business Development Foundations Inventory

Checklist

MARKETING STRATEGY

- Budget set**
 - Marketing budget allocation defined
- Audience groups/buckets defined**
 - Applicable demographics defined (e.g., age, gender, occupation, income, location, job title, parental status, etc.)
 - Needs/pain points described
- Channels & platforms selected**
 - Accounts created
 - Publication schedule/cadence defined
- Security best practices in place**
 - Encrypted password storage system in place
 - Staff/contractor password access needs defined
 - Staff/contractor password access granted
 - Password confidentiality rules defined
 - Employee handbook
 - Freelancer contracts
 - Password update job responsibilities assigned
 - Appropriate account ownership assigned
 - Platform admin/access roles recorded
- Asset library established**
 - Photos
 - Videos
 - Designed graphics
 - Logo files in full range of formats (e.g., JPG, PNG w/transparent background)
- Marketing team in place**
 - Roles & responsibilities for key positions defined

- Approval hierarchy defined & in effect
- Reputation management job responsibilities assigned

BRANDING & CORE MESSAGING

Business bio complete

- Brand persona created
- Unique Value Proposition (UVP) described
- Mission defined
- Boilerplate/elevator pitch written

Brand design style complete

- Brand fonts defined
- Font files properly purchased/licensed & stored within company filing system
- Brand colors defined
- Logo created
- Image treatment & style defined
- Combine with business bio info into a single guide for creatives

Competitor analysis complete

- Business core messaging is sufficiently distinct from competitors' branding
- Effective competitor marketing recorded
- Findings applied to budget & strategy

VISIBILITY/DISCOVERY

Qualified website development services retained

- Competency confirmed
- Accountability measures defined
- Support & revision policy satisfactory

Account & listing creation complete

- Maps & directories
- Social media
- Review platforms

- Ongoing information management assigned to specific job role

ANALYTICS

- Goals & Key Performance Indicators (KPIs) defined**
 - Goals communicated to relevant team members
 - Reporting/accountability measures in place
- Reporting program in place**
 - Analytics platforms identified & properly connected/set up
 - Reporting cadence defined
 - Report project management system in place
 - Report presentation meetings calendared each quarter
 - Reporting is written into the job descriptions/contracts of appropriate personnel