

Asset-Map Marketing Checklist

You may not realize how essential marketing is to your company's success but often it is undervalued or doesn't include a strategic approach. Marketing creates brand recognition and educates potential customers about your services, which will ultimately lead to higher sales. You may offer state-of-the-art products and an exceptional customer experience but if no one has heard of you, then how will you be successful?

According to Demand Metric, content marketing generates over three times as many leads as outbound marketing and costs 62% less. After all, businesses succeed by sharing relevant information, thus increasing their client base and making sales.

Check out our marketing checklist below to see where you stand in terms of strategy and how you can better implement these best practices into your business.

Content Editorial Calendar

Plan your content ahead to avoid stress over upcoming deadlines. Include conferences, webinars, virtual events, social media posts (breakdown by platform), advertising campaigns, and promotions.

Publishing content relevant to your audience helps establish yourself as a trusted and reliable source for not only your ideal clients, but search engines as well. By planning your content schedule out ahead, you and your team will know how to track your team's content creation in all phases: ideation, execution, publishing, and result tracking. Use [Optimizely's Content Calendar Guide](#) to help establish a publishing schedule for your team.

Blogs

Set a reminder on your calendar a few times a month (or week if you have time) to brainstorm blog post topics and write articles related to your business or the financial services industry. The [recommended word count](#) is around 1,447, so make sure you're mindful of the length of your blog when brainstorming articles. Catchy headlines tend to garner more attention when sharing blog posts with your audience, however this can be challenging. Use HubSpot's [Blog Topic Generator](#) where you can type in a few keywords from your blog and receive headline options for free.

Keyword Research

By doing keyword research, you may get insights and inspiration on what to write about that also helps optimize your posts to favor search engines. Two keyword research tools that are effective are [Google Keyword Planner](#) and [Moz Keyword Explorer](#). More information on Google Keyword Planner and Moz Keyword Explorer. Use these tools to quickly check what topics your audience is searching for so that you can write content that's relevant and timely.

Email Marketing

Email marketing allows you to build relationships with leads, retain your current customers, and even re-engage past customers. You can share your latest business updates, success stories, trending industry topics, and other relevant information with your particular audience. When sending out emails or a newsletter, your goal should be to send valuable content on such a consistent schedule that your prospects or subscribers actually look forward to receiving your content.

To start your research on free email marketing tools - here is a list of the [7 best free email marketing tools in 2022](#).

Revisit Your Messaging

Your writing style should be consistent across your social posts, blog, website, emails, and any other forms of communication. By changing your tone across platforms, you are missing an opportunity to maintain consistency and frequency, and to connect your communications back to your brand. Here are [101 Copywriting Dos and Don'ts](#) to help you.

Prospect Marketing

Prospect leads can be acquired by offering a free demo or consultation, through a referral program, or by subscribing via social media or on your website. Make sure you are following the Federal Trade Commission CAN-SPAM ACT. More information on the FTC CAN-SPAM regulations can be [found here](#).

Qualified leads are potential customers based on your ideal customer persona. These individuals or organizations fit your criteria to become a potential customer - this includes demographics, total assets, and location.

Marketing-Qualified Leads (MQLs) are generated through various marketing channels such as signing up for a newsletter, downloading "gated content" (checklists, case studies, white papers, etc.), attending an online event, joining your in-person seminar, and filling out a contact or demo request form.

To learn more about the difference between a prospect and a lead, [G2 has more information](#).

□ Contact Information

Part of your marketing process should include highlighting your contact information.

1. **Email signature:** Your email signature should always include your current title, using the same font and size, and includes a link to your website along with your direct phone number. Note: you don't need to include your email address unless you're sending from a different email address.
2. **Social Media profiles:** Perform an audit to ensure you have your current logo on all of your social media accounts, your contact information is current, and you have included your website address.
3. **Business Cards:** There are multiple websites that print business cards in all shapes, sizes, and paper types. [Here is a list of websites](#) to get you started.

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