Information Experts®

PRACTICAL SERVICES.
MEASURABLE IMPACT.

SMALL BUSINESS
MARKETING PRIORITY CHECKLIST

For solopreneurs and businesses with up to 25 employees

GOAL Generate leads | Close business | Retain clients | Grow profitably

TIER 1 MUST DO / HIGHEST ROI

WEBSITE & SEO

- [ ] Clear value proposition on homepage
- [ ] Strong calls to action (Book a Call, Request a Quote)
- [ ] Mobile-friendly website
- [ ] Google Business Profile optimized
- [ ] Basic SEO on key pages
- [ ] Contact forms tested monthly

LEAD GENERATION

- [ ] Consistent referral program or process
- [ ] LinkedIn presence maintained
- [ ] Lead capture forms on website
- [ ] Email list actively growing
- [ ] Lead follow-up process documented
- [ ] CRM in place (even if simple)

CUSTOMER RETENTION

- [ ] Formal client onboarding process
- [ ] Quarterly client check-ins
- [ ] Testimonial collection process
- [ ] Client satisfaction survey
- [ ] Upsell and cross-sell opportunities reviewed

TIER 2 IMPORTANT GROWTH ACTIVITIES

CONTENT MARKETING

- [ ] Publish 1-4 LinkedIn posts per week
- [ ] Publish at least one case study monthly
- [ ] Monthly email newsletter
- [ ] Customer success stories documented
- [ ] Short-form video content (optional)

BRAND POSITIONING

- [ ] Clearly define ideal customer
- [ ] Differentiate from competitors
- [ ] Consistent branding across channels
- [ ] Develop key messaging and value statements

TIER 2 CONTINUED

ANALYTICS

- [ ] Track website traffic
- [ ] Track leads generated
- [ ] Track conversion rates
- [ ] Track revenue by source
- [ ] Monthly marketing review

TIER 3 ADD AS BUSINESS GROWS

MARKETING AUTOMATION

- [ ] Automated email nurturing
- [ ] CRM workflows
- [ ] Lead scoring

ADVANCED MARKETING

- [ ] Paid search campaigns
- [ ] Retargeting ads
- [ ] Webinar program
- [ ] Strategic partnerships
- [ ] Marketing playbooks

USUALLY NOT A PRIORITY UNDER 25 EMPLOYEES

DEFER UNLESS THERE IS A CLEAR NEED

- [ ] Complex MarTech stacks
- [ ] Enterprise-level marketing automation
- [ ] Multi-touch attribution modeling
- [ ] Brand awareness studies
- [ ] Data warehouses
- [ ] AI personalization platforms
- [ ] Large-scale market research projects