

# Leads-to-Revenue Checklist for Marketers

Before getting started with this checklist, make sure you're equipped with these marketing toolkit essentials:

- An articulated differentiator of why a customer should choose you over your competitors.
- A defined target audience. This could be geographic, demographic, and/or psychographic, but any inclusions and exclusions to this targeting should be decided in advance of campaigns.
- An understanding of the pain points and motivations of your customer, reflected in your messaging as problems your organization solves or your value proposition.

Once you are armed with the above, congratulations! You are ready for a world-class customer acquisition strategy to crush your business goals. To benchmark your current efforts, use this checklist as a guide for opportunities to make your digital marketing program even more effective and revenue-oriented.

**DONE!**

## Campaign Strategy and Setup

**Does your business operate in multiple geographic markets? If yes, do goals vary by market?**



If you are like many B2C services brands, the volume and variety of markets in which you operate add complexity to your marketing efforts. It's worth taking time during the planning phase to set up your goals reflective of how your business operates. Build campaigns accordingly, which may mean individual market-level goals or aggregated groupings.

**Does your organization have multiple service lines that impact your overall business goals differently?**



Not all departments or services are created equal from a revenue or margin standpoint. Your campaign setup should reflect your willingness to pay for a new customer or touchpoint in a given service line based on the impact to your bottom line.

**Are you leveraging your first-party CRM data to focus your media targeting to reach current or prospective customers?**



Partners like Liveramp allow you to target groups of individuals from your CRM in a PII-compliant way, and can even create "look-alike" audiences to find new customers. These tactics also can exclude existing customers from targeting as warranted.

## Messaging and Creative

Do your consumers experience your ads in a way that feels validating and/or relevant to their pain points?



With smart campaign creation and targeting, you can reach specific segments of your target audience with dedicated creative relevant to their needs.

Is your website leveraging best-in-class UX to convert visitors to customers?



With 90% of your customers visiting multiple websites during their purchase process, your digital home is one of your brand's most important assets in lead generation. Helping your customer understand your product or service when they visit your website is a must. If possible, run a focus group or inquire with Rise about a UX audit to get a data-driven understanding of your site's strengths and pitfalls.

## Measurement & Optimization

Do you have an integrated view between your CRM and media data to understand which keywords and ads are driving quality leads that actually convert?



You need a media strategy that invests your dollars towards keywords and ads that generate converted leads and revenue. Out-of-the box media configurations are often only making spend decisions based on raw leads that do not factor in lead quality, resulting in missed opportunities and wasted spend.

Do you know your lead-to-conversion rate for different marketing channels and tactics?



It's important to understand which digital efforts are generating leads or appointment requests that ultimately convert to revenue. In the set-up phase, make sure you have a reporting infrastructure that shows the impact of each dollar you are spending. Likely, you'll be working in lockstep with your finance team to connect revenue metrics back to media platforms in PII-compliant ways.

Do you have automated notifications enabled and customized to alert you to real-time opportunities for media optimizations?



Each of the major tech platforms will have its own email settings accessible in your account. Additionally, social listening tools can fill in the gaps on organic mentions of your brand.



We'd be remiss not to tell you about Connex Alerts here, Rise's automated notifications proactively alerting marketers to media anomalies. Our proprietary media optimization platform not only integrates performance data from every marketing channel, it also enables our team to make agile marketing decisions based on customized alerts sent via email, SMS, and Slack.