

How to Plan and Execute Your Marketing Objectives

The 10-Point Checklist That Every Marketer Needs

Successful marketing hinges on setting the right marketing objectives and meeting them. Use this checklist to ensure your team's success at both.



Planning

During planning, engage others to gather different perspectives and get buy-in as you walk through these steps.



1. Select your marketing objectives

Express each objective in a brief, memorable sentence that inspires action. Explain to company leaders why you've prioritized these objectives over others. And share them with the team who will be executing against them.

Example: A fictional company that provides accounting exam study materials to people who want to become CPAs may have the following objective.

EXAMPLE OBJECTIVE

To help more accounting students than any other provider pass their CPA exam in the next two years.



2. Quantify as a goal

Define how you will measure the success of your marketing objective. Sometimes called goals, metrics, key performance indicators (KPIs), or key results, these outcomes help your company track progress. Each objective will have 2-5 goals.

EXAMPLE GOAL

Increase sales to new customers by 20%



3. Summarize your strategy

In just a few sentences, explain how you plan to reach the outcome of each objective. Succinctly stating your strategy helps you articulate it to your team and company leaders to keep everyone aligned.

EXAMPLE STRATEGY

Optimize site content to be found in search engines by potential customers.



4. Define tactics and their metrics

Spell out the tactics your team will use to implement the strategy and how you will measure their success. Assigning metrics to your tactics lets you assess the impact of each tactic on reaching your broader goals.

EXAMPLE TACTIC AND METRIC

Blog 2x per week with success measured by traffic to the website.



5. Establish critical success factors

Critical success factors are the elements without which your strategy cannot succeed. Planning to implement [content marketing](#)? Good writing talent will be critical. Make sure you fill any gaps in resources.

EXAMPLE CRITICAL SUCCESS FACTOR

Writing talent and team to support blog production



6. Set milestones and target dates

Identify important milestones and establish when each must be reached in order to reach your objectives. Your team should know what needs to be done, by when, and whether they're on track.

EXAMPLE MILESTONE AND TARGET DATE

New blogger hired by 5/15



7. Carry out tactics

Deploy the tactics you have planned according to their key dates and milestones.



8. Track progress

Keep the results in plain view to reinforce the progress the team is making toward your goals and to help them prioritize tasks. Together, reflect on results at key dates or when each milestone is met.

TIP: Communication both up and down the organization helps keep people aligned and motivated. It also makes it easier to inform stakeholders if you have to adjust timing or other expectations.



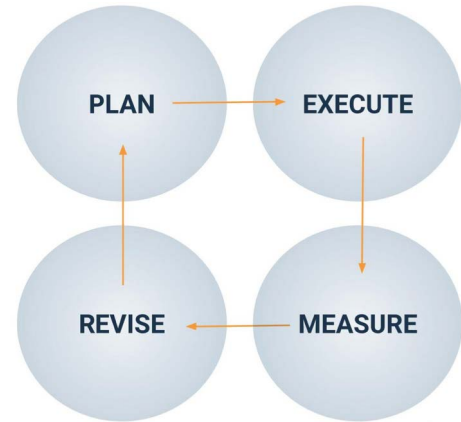
9. Discuss progress

Talk with your team and other stakeholders about progress regularly. Encourage your team to report obstacles and setbacks quickly. Correct course and help your team stay on track when you notice any deviations.



10. Revisit objectives and adjust

Depending on your industry, a strategic plan may be in place for 2-3 years, with tweaks annually or semi-annually. Revisit tactics quarterly or semi-annually based on results as they become apparent.



Example

Pulling it all together in an example: a fictional company that provides accounting exam study materials to people who want to become CPAs

Objective	Goals	Strategy	Tactics	Metrics	Critical Success Factors	Milestones	Target Dates
To help more accounting students than any other provider pass their CPA exam in the next two years.	Increase sales to new customers by 20%	Optimize site content to be found in search engines by potential customers.	Blog 2x per week	Traffic to the website	Writing talent and team to support blog production	New blogger hired	5/15
			Offer downloads of study materials on our site	# of downloads resulting in new leads	Implementation of marketing automation system	Testing of follow-up sequence begun	7/1
					Production of new study guide	Guide sent to graphics team	6/1
	Log 25% more exams passed by customers	Extend study support to customers at key times during the exam season	Support reps to reach out to customers at 1, 5, 7 weeks post-purchase to offer help with study schedule.	# of customers who say they have started studying by each touchpoint	Training for support staff	New training sessions scheduled	7/1