

See where the system comes apart.

A practical marketing infrastructure review. Use the checks to identify decisions and owners, not to produce a shopping list.

How to use this checklist

Mark each item: working / needs attention / missing / not relevant. Record the evidence, owner and next action. Start with failures that lose enquiries or prevent the team from doing routine work.

Message & presentation

Core message

Can a suitable customer explain who you help, what you do and why it matters?

Status: _____ Owner: _____ Evidence / next action:

Identity

Can the team find and use current logos, typography, imagery rules and templates?

Status: _____ Owner: _____ Evidence / next action:

Website

Does the site reflect the business today, work on a phone and provide a clear next step?

Status: _____ Owner: _____ Evidence / next action:

Customer proof

Is evidence specific, approved and stored with its source and context?

Status: _____ Owner: _____ Evidence / next action:

Communication & acquisition

Search

Are important pages indexed and relevant business details current?

Status: _____ Owner: _____ Evidence / next action:

Publishing

Are topics, drafts, approvals and publication responsibilities clear?

Status: _____ Owner: _____ Evidence / next action:

Social & email

Do channels carry the same message, and are permissions and preferences recorded?

Status: _____ Owner: _____ Evidence / next action:

Campaigns

Are audience, offer, destination, budget and enquiry owner agreed?

Status: _____ Owner: _____ Evidence / next action:

Sales & operations

Enquiry route

Does a test enquiry create a record, notification and owned next action?

Status: _____ Owner: _____ Evidence / next action:

CRM

Do stages mean something, and does each opportunity have an owner and date?

Status: _____ Owner: _____ Evidence / next action:

Integrations

Are triggers, stop conditions, alerts and backup routes documented?

Status: _____ Owner: _____ Evidence / next action:

Reporting

Are definitions agreed, data checked and decisions recorded?

Status: _____ Owner: _____ Evidence / next action:

Ownership

Does the business control accounts, recovery, billing, master files and exports?

Status: _____ Owner: _____ Evidence / next action:

Choose the next useful improvements.

1. Fix a working failure

What is currently preventing a customer or team member from completing an important task?

2. Strengthen a foundation

Which unclear decision is creating problems across several assets or channels?

3. Improve the routine

What repeatable habit, handover or review would make the system easier to run?

Make the work reviewable

For each change, record the action, owner, dependency, completion date and how you will check the result. Keep the list short enough to complete.

Next review date: _____