



Marketing Campaign Setup Checklist

1) Define the Campaign Foundation

- Campaign name** — clear, goal-oriented, and dated (e.g., “Q1 2026 Lead Gen – Healthcare Execs”)
- Campaign goal** — what outcome counts as success? (e.g., leads, MQLs, SQLs, revenue)
- KPIs & metrics** — how you’ll measure success (e.g., conversion rate, CPL, ROI)
- Start & end dates** — set firm time boundaries
- Campaign owner / point person** — accountable team member

This aligns everyone on purpose before execution starts.

2) Audience & Messaging

- Target audience defined** — segments, personas, or contact lists
- Audience research / insights documented**
- Core messaging & value proposition** — what story you’ll tell
- Supporting messaging hierarchy** — how messages change by channel
- Brand voice & compliance checked**

Knowing who you’re talking to and what resonates prevents wasted spend and irrelevant messaging.

3) Budget & Channels

- Overall campaign budget set**
- Channel mix selected** (email, paid ads, social, print, events)
- Budget allocated per channel & tactic**
- Media buy / placements booked**
- UTM conventions & tracking plan established**

Plans without budgets or tracking are just guesses.

4) Creative & Content Assets

- Landing page(s) designed & developed**
- Copy written for each asset** (email, ads, page, social)
- Creative assets produced** (images, video, graphics)
- Visuals sized per channel requirements**
- Content calendar created & scheduled**
- SEO / keyword considerations documented**
- All assets proofread & peer-reviewed**

Visual consistency and strong CTAs dramatically improve performance.

5) Technical & Tracking Setup

- Tracking URLs / UTMs created** across tactics
- Analytics setup validated** (Google Analytics, platform pixels)
- CRM campaign tracking & lead source fields configured**
- Form conversion tracking implemented**
- Testing completed** (forms, landing pages, email links)

If you don't measure it properly, optimization becomes impossible.

6) Assign Roles & Approvals

- Internal approvals documented** (leadership, stakeholders)
- Team roles / responsibilities assigned** (content, design, ads)
- Launch day schedule created** (who does what, when)
- Compliance & legal review done** (e.g., email CAN-SPAM, GDPR)

Clarity on roles and approvals prevents last-minute scrambles.

7) Launch Prep

- Final QA on all assets**
- Proof of campaign path confirmed** (click-to-conversion journey)
- Backup plans & contingencies considered**
- Internal communication plan ready**
- Channels scheduled to go live**

Being ready makes launch day smooth and stress-free.

8) Post-Launch Monitoring & Optimization

- Real-time tracking dashboards live**
- Initial data checkpoints scheduled** (Day 1, Day 3, Week 1)
- Optimization plan ready** (what to adjust if goals aren't met)
- Feedback loop set up** (what insights get saved for next campaign)
- Reporting cadence established** (daily weekly monthly)

Campaign launch isn't the end — it's the beginning of learning.

Optional Add-Ons

- ◆ **Competitive landscape analysis**
- ◆ **A/B testing plan (headlines, creatives, offers)**
- ◆ **Audience segmentation matrix**
- ◆ **Retargeting setup**