
THE BBD BOOM

Ultimate Campaign Checklist

So, you've got an idea for a campaign. You know which personas and which funnel stage it's perfect for, and you've started to piece together what the finished product might look like. But how do you make sure your audience knows about it? How do you increase your reach and conversions? Most importantly, how do you make sure it functions to propel your lead generation strategy as a whole rather than operating in isolation?

To help you tackle these questions and more, we've put together our tried-and-tested campaign checklist to make sure you don't miss a single piece of the puzzle. Tick off each item as you complete it for a campaign that will help you reach your lead generation goals.

Checklist



Campaign Asset

Every campaign starts with a strong asset. From whitepapers to quizzes and everything in between, a well-written, well-designed asset is the cornerstone to your campaign.



Website

Website visitors are some of the most motivated prospects, so make sure there's appealing content for them to discover, like your latest campaign. Here are the website assets you'll need.



Landing page - This is the page you'll link to when promoting your asset, which should contain your download form and a brief description. Remember, your landing page doesn't need to read like a novel. You're getting someone to download a free piece of content, not selling them a business. Keep it short and simple, with bullet points and simple sentence structure to make it skimmable.



Thank you page - Rather than in-line messaging, we suggest a redirect to a thank-you page. Here you can have a text link to the asset so people don't have to wait for the email, and thank-you pages are more easily tracked, especially when it comes to retargeting, which we'll cover later.



Add it to the resource page - Every downloadable piece of content or interactive tool you have should be linked to from your resource page. This is your source of truth for every piece of lead gen content you have.



Add it to the home page - For important assets, add a call to action to the home page so users can find it easily when visiting your website.

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Website

- ☐ **Add to pillar pages** - If you're not already using pillar pages, click here to learn more about why you should be. Add the asset to the relevant pillar page for SEO and longevity purposes.
- ☐ **Pop-ups** - Pop-up lead gen forms can be added to relevant pages to improve conversions.
- ☐ **Calls to action on relevant blog posts** - Each time you publish a new campaign, it's worth doing a quick sweep of your blog posts, especially those that consistently bring in traffic, and add a call to action to your gated content to the end.



Emails

- ☐ **Promo email** - The promo email is the first time most people will become aware of the asset you've created. Like the landing page it should be short and sweet. Use personalisation tokens to improve results.
- ☐ **Non-open email** - We always recommend sending out a non-open email, which is the same as the promo email but with a different subject line. This is sent to those who were sent the promo email but didn't open it.
- ☐ **Thank you email** - You'll want to be sure those who download the asset receive it via email. Even if your asset is an interactive tool, you should send results to their emails after the fact. This makes it easy for them to access moving forward. This email should include a text link to the asset and a secondary call to action to take the next step, whether that's another content download or booking a meeting with a sales rep – that depends on the asset and its position in the funnel.

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Automation

-  **Non-open workflow** - Usually we send non-open emails 3 days after the promo email is sent. To create this workflow, the trigger is a contact having been sent the promo email. Then you add in the delay, followed by an if/then branch; if the contact has opened the promo email they end there, but if they have not opened then they are sent the non-open email. Be sure to set this up as soon as you send the promo email, as the delay starts when you turn the workflow on.
-  **Thank you workflow** - Thank you workflows are much simpler. They're triggered by a contact filling out the relevant form on the relevant page, and the only action is to immediately send the thank-you email. Easy peasy.

Lists

-  **All leads list** - This should be an active list of everyone who has downloaded the asset. We recommend the enrollment being the form fill rather than the thank you page in case it doesn't load. Don't forget to exclude existing customers, partners and your own company.
-  **Net new leads list** - The net new leads list is also an active list. The best way to create it is to clone the all leads list and add to the enrollment criteria that the contact creation date is on or after the day you push the campaign live.
-  **Data list** - This refers to the list you'll be sending your campaign to. We recommend pulling a static list for every campaign. Do this as close to the send as possible so that it's fully up to date.

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Social media

- **Company accounts** - Obviously you'll want to promote new campaigns on your social media channels. Depending on how often you post, don't be afraid to share multiple times; not everyone will see each post, and you want to convert as much of your audience as possible.
- **Employee/business owner accounts** - Almost equally important is that those in your business are sharing on their personal accounts. These posts are far more likely to get reach and clicks, so make sure your team knows about every campaign, and encourage them to share by providing visuals and suggested copy.



Paid media

- **Campaign creative** - Video works really well for promoting lead gen assets. Record a quick video of you explaining the asset and the value your audience will get from it, and be sure to add subtitles.
- **Media plan** - If you have an ABM or target customer list you're actively promoting to, it's a great idea to serve them ads for helpful resources like the one you're promoting now. Put together a plan outlining audience, creative, any A/B testing, budgets and durations.
- **Retargeting** - When you're using website visits as a retargeting trigger, you don't necessarily need to worry about smaller audience sizes, so consider targeting people who have visited your thank-you page (and therefore have downloaded the asset) with another piece of relevant content.

CHECKLIST



Nurturing

There are many different types of lead nurturing, but one type is content-based nurture sequences, meaning automated sequences that offer relevant content to downloaders of your campaign asset. This can push them further through the funnel or just keep them engaged; either way you learn more about the leads with every download.



Nurture emails - Your nurture emails should all reference the original piece of content so people understand why they're being sent new content.



Nurture workflow - Nurture workflows depend entirely on the structure of the sequence, but they tend to be fairly linear; a contact is sent relevant emails at regular intervals until they complete the workflow or are unenrolled.



Reporting

Of course, what good is it pushing a campaign out into the void if you don't keep track of its performance and learn from it? We recommend setting up campaign-specific reports, as well as attribution reporting if you're using it.

CHECKLIST



Sales enablement

The last thing you need to think about is how to enable sales with this content. Here is a brief list of what we like to do with key pieces of content:



Sales sequences - If your sales reps are currently working contacts that need to be nurtured, they can enroll them in a sequence that presents the content and then follows up on it offering to answer any questions.



Email signature snippets - For more important campaigns, sales reps can add a call to action to their email signatures.



Add to sales document library - If the asset is more middle or bottom of funnel, adding it to the sales document library will allow your sales reps to utilise it throughout their prospecting and outreach efforts.

With this checklist, you'll be well on your way to more comprehensive, more productive lead generation campaigns. For help planning your next campaign or implementing any of these steps in your marketing automation platform.



Click here to book in a meeting with one of our specialists.