CallRail

Digital Campaign Checklist

A step-by-step checklist of all the elements needed to launch a successful multi-channel digital campaign.

✓ Define goals and how success will be measured

✓ Determine concept or story

✓ Define target audience and what channels you'll be promoting

✓ Solidify resources and budget

✓ Define content and demand generation activities

✓ Create reporting and measurement framework

✓ Test campaigns, ensure data is being captured accurately

✓ Develop internal FAQ with links to content deliverables

Define goals and how success will be measured.

☐ **PAID**

What does success for this campaign look like? (views, a specific dollar amount as a return, a specific promo redeemed, etc.)

☐ **ORGANIC SEARCH**

What metrics are you using to define success? (click through rates, conversion rates, assisted conversions, direct conversions, organic traffic)

SOCIAL

☐ Build out metric goals against historical data

☐ What does success for this campaign look like? (is it engagements, impressions, reach, etc.)

EMAIL

☐ Define objective of campaign (increase downloads, sign-ups, opens, etc)

☐ Set metrics based on KPIs for campaign (open rates, click through rates, bounce rates, unsubscribe rates). Reference industry averages to ensure goals are realistic.

TIP Quantify targets for all interactions (inbound calls, forms, texts, chat, etc.)

Define target audience and what channels you'll use for promotion

☐ **PAID**

Determine targeting and ad channel - who are you going to be advertising to and what's going to be the best channel (Google, Bing, Yahoo, etc) to reach your target audience? This includes keyword research, audience research, etc., then based on your channel decisions you can think about how to best structure the campaign

☐ **SOCIAL**

Select the social media platform where your target audience engages most, or spends the most time, depending on your targets. Eg. if your target audience is between the ages of 45 and 65, Snapchat may not be the best platform to invest your marketing budget.

EMAIL

☐ Define target audience and define segments

☐ Determine if any new contacts need to be purchased

Solidify resources and budget

☐ **PAID**

You should always leave room to scale - start with an amount that you can use to test your initial hypothesis within the campaign (if I target X people with Y offer we can generate Z in results etc), then scale if hitting targets. If you're not hitting targets, rework your initial components or potentially redefine what value for that campaign may look like.

☐ **SOCIAL**

Determine if you want to run any promotions, giveaways, or sponsored posts

☐ **EMAIL**

Determine if you want to run any promotions or sponsored posts

Define content and demand generation activities

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☐ Writing copy and generating creative - what's the specific message that you'll be sending out, do you want to test different ways of framing value

☐ Ensure there is a lead capture form and landing page in pace for visitors

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☐ Determine primary keyword to target

☐ URL Structure
   - Keep URLs short and clean

☐ Title Tags
   - This is what searchers will see in SERPs. Consider the following:
       - Does it contain a primary keyword related to the article?
       - Keyword should be at the beginning of the Title Tag, but only if natural
       - Is it engaging? Would you click-through?

Define content and demand generation activities

ORGANIC SEARCH

☐ Check SERPs for existing related content to compare:
- Titles
- Keywords
- 60 character limit: Are you stating the article's intent in the first 60 characters?

☐ Meta Description
- This should be a summary of the content in 160 characters. Make it engaging and consider a using a CTA.

☐ Formatting
- Is your content digestible and easy to read? Avoid large blocks of content as users are more likely to skim for answers within the text rather than fully engage in your writing.

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☐ Ensure copy and design are cohesive with all other campaign elements

☐ Confirm all CTA links have accurate UTM parameters for campaign tracking

☐ Research relevant hashtags to include to drive traffic

☐ Decide whether to include customer testimonials, offers, influencers, etc.

Build reporting and measurement framework

PAID

☐ You've locked down what the metrics for success look like, but how do you access this info and determine the value? Establish what this looks like for your or your client's business (eg. closed/won opportunities in Salesforce or another CRM)

☐ Monitor performance closely and iterate based on the rules/guidelines outlined in the above steps, don't be afraid to eliminate losing content / campaign targeting etc and start with something new at the same time, once success is verified don't be afraid to try and scale.

ORGANIC SEARCH

☐ Set up your goals in Google Analytics (remember to create them for your inbound calls and forms)

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☐ Create a custom goal in Google Analytics

Build reporting and measurement framework

EMAIL

☐ Create campaign in email marketing platform and sync with all martech platforms

☐ Ensure UTMs are accurate and consistent across email campaign

☐ **ORGANIC SEARCH**

Set up your goals in Google Analytics (remember to create them for your inbound calls and forms)

Full-funnel analytics with CallRail

HEADLINE FOR CONTENT LIST

☐ Install javascript code for pages you're looking to track

☐ Create phone number

☐ Create a form
- Create a custom form in CallRail or,
- Integrate an existing form from a form builder provider

Full-Funnel analytics with CallRail

HEADLINE FOR CONTENT LIST

☐ Set up keyword spotted sets
- Identify what key words or phrases you want to identify

☐ Create tags
- Automatically apply a tag based on specific words or phrases spoken (eg. if a customer says "pricing" then tag as "hot lead"

☐ Configure automation rules
- Determine if you'd like to apply a tag, a value, or score the call and/or form based on particular criteria spoken by the agent or customer

☐ Set up integration triggers