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Intentional Marketing Framework:

Backend Strategy Checklist

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Ready to Go Deeper? Start with My Intentional Marketing Framework: Backend Strategy Checklist.

If you're serious about improving your marketing, don't start with another piece of content, start with the foundation.

Audience + Strategy

- ☐ Have we clearly defined our core customer personas beyond basic demographics?
- ☐ Do we understand our buyer's journey from awareness to conversion?
- ☐ Is every marketing activity aligned with a specific business goal?

Data + Tracking

- ☐ Are we using UTM tracking to identify campaign-level performance?
- ☐ Do we know which channels generate the highest-quality leads?
- ☐ Are we tracking customer lifetime value and attribution over time?

Automation + Workflows

- ☐ Do we have automated sequences for new leads, follow-ups, and reactivations?
- ☐ Is our email marketing segmented based on behavior or stage in the journey?
- ☐ Are our workflows designed to support our sales pipeline—not just marketing activity?

CRM + Operations

- ☐ Is our CRM properly integrated with our lead sources and forms?
- ☐ Are we using lifecycle stages or deal pipelines to track buyer progress?
- ☐ Are there any manual steps that could be automated or improved?

Step 1: Strategic Foundation

Before any automation or execution begins, your marketing must be grounded in clear strategy.

Key Elements to Audit:

- Do we have a documented brand positioning and core messaging framework?

- Have we defined a clear value proposition for each audience segment?

- Is there a content strategy that supports every stage of the buyer's journey?

- Are business goals translated into specific marketing KPIs?

- Do we understand what problems we solve, who we solve them for, and what actions we want them to take?

What to Build:

- Audience personas

- Core message house (value prop, brand promise, tone of voice)

- Journey-aligned content plan

- Funnel goals mapped to business objectives

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Step 2: Backend Infrastructure

This is the invisible architecture that holds your system together your tech stack, integrations, and data flow.

Key Elements to Audit:

- Is our CRM fully integrated with all lead sources and forms?

- Are lifecycle stages clearly defined and automated within the CRM?

- Do we have a central dashboard or reporting hub to track campaign ROI?

- Is our website connected to Google Analytics, retargeting pixels, and call tracking?

- Are lead sources tagged with UTM parameters for accurate attribution?

What to Build:

- Lead flow map from capture to CRM

- UTM tracking conventions

- Funnel attribution reporting

- Google Tag Manager and analytics tracking structure

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Step 3: Conversion Architecture

Your backend must guide leads toward action with systems designed to nurture, educate, and convert.

Key Elements to Audit:

- Do we have strong CTAs across all key touchpoints and content?

- Are our landing pages aligned with traffic sources and buyer intent?

- Do we have automated email and SMS sequences tailored by journey stage?

- Is there a re-engagement system for cold or abandoned leads?

- Are we segmenting leads based on behavior, intent, and source?

What to Build:

- Welcome and nurture sequences

- Segmented reactivation workflows

- Decision-stage content triggers (e.g. demo requests, case studies)

- Custom landing pages for high-intent channels

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Step 4: Optimization Engine

Intentional marketing doesn't stop at launch, it's powered by iteration, review, and learning.

Key Elements to Audit:

- Are we conducting monthly performance audits across channels?

- Is there a system for A/B testing landing pages, CTAs, and email subject lines?

- Do we hold regular team reviews to assess pipeline health and campaign ROI?

- Are we reviewing lead quality and close rates — not just volume?

- Are growth experiments baked into our process each quarter?

What to Build:

- Performance dashboards with meaningful KPIs

- Weekly or monthly review cadence

- A/B testing roadmap

- Feedback loops between sales and marketing

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Final Thoughts

This framework isn't about chasing the next big tactic. It's about intentionally building the core systems that make your marketing scalable and accountable.

If your marketing feels "active" but not effective, this is why I created this framework. Each section is a checkpoint. Each system you implement creates leverage. Review it monthly. Build it quarterly. Improve it continuously.
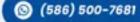
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I hope this is a valuable tool for you. I am ready to help.

How can a Fractional CMO drive

Business Growth?

A Fractional CMO delivers expert marketing strategies part-time, boosting growth and aligning your brand with goals without the full-time cost.

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