



Standard Project Kick-off Checklist

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Summary

This document is meant to help both the client and the CMO prepare for an engagement by identifying gaps. Here, we'll outline the core Discovery information necessary to load your growth springs: Insights, Strategy, Execution, and Optimization. We'll gather any information you have on your customers, company, and competitors. We will assess the core elements of your current marketing strategy, including your markets, offerings, positioning, messaging, and planning. Finally, we will determine if you have the necessary resources and systems to execute a marketing program; if not, we will identify where the gaps need to be filled first. All these inputs will help us define a scope of work that will achieve your goals.

Business Strategy

Before diving into the marketing, I always like to ground myself in the overarching business strategy. Sometimes, it may not be written down. If it is widely known and well understood, that may not be a concern. Nevertheless, it's always good to have the big picture in mind...

- ☐ [Are you sure you have a strategy?](#) Are your arenas, vehicles, differentiators, stages, and economic logic clear and known within your organization?
- ☐ Is your business strategy documented, and can you share it with us?
- ☐ Do business plans or updates to business plans exist for the current and last year (initiatives, budgets, operational metrics, pricing strategies, cost drivers)?

Marketing Insights and Strategy

Customers:

- ☐ Do you have buyer personas and ideal customer profiles (if any)? How long ago were these developed? Do you believe in them, or is there data that shows they are still accurate and relevant?
- ☐ Is there a priority list of most valuable products/services/customer personas? Are they also the most profitable customer? If not, which products are the most profitable, and who are they sold to most commonly?

- ☐ Do you have or have you deployed ROI models or value calculators for buyers/customers?
- ☐ Have you tracked your brand awareness, and can you identify clear associations in the minds of customers? What would they say if they were to describe your company in three words? How is that different from the way they view your competitors?
- ☐ Do you have Buyer/Customer journeys mapped? Do you know, and can you share, the steps a buyer goes through from awareness to purchase? What triggers purchase intent?
- ☐ Have you defined your customer purchase criteria? If you win a customer, what makes you stand out? If you lose one, why do you lose them? Do they come back, and why?
- ☐ Do you have any customer surveys on satisfaction, loyalty, acquisition, retention, and/or Net Promoter Scores?
- ☐ Do you have qualitative “Voice-of-customer” information for review, and does your team/partners know it?
- ☐ Do you have any quantitative customer studies that reveal who your customers are, what they want, where they reside, and why they make purchases?

Competitors:

- ☐ Can you provide a list of direct and indirect competitors? Who takes business from you today? Who would you like to or believe you can take business from? Who are you most envious of? Why?
- ☐ Does any analysis of competitive business models exist? How do they acquire market share? Is their customer different from yours? Is their acquisition strategy different than yours? Should it be?
- ☐ What is the brand identity/positioning for known competitors in the eyes of your desired customers, and is that different from how you are or wish to be positioned?
- ☐ What are your competitors’ growth strategies – are they in direct competition with you or only in certain situations? Do any pose a particular threat? Are there specific opportunities to take share from a competitor?
- ☐ Do you have current competitive keyword and media analysis? Does any SEO analysis exist? If not, should one be completed?
- ☐ Can you share any primary or secondary research about the competition?
- ☐ Can you share any SWOT analysis for you and your competitors (if any)

☐ Do you have a Share Of Voice analysis or sense for your Share of the Addressable Market?

Company:

☐ What are your core values, mission, and vision? Are there any cultural norms? Taboos or Totems of a prototypical team member? How would you describe your company culture?

☐ Can you provide a list of corporate partners and roles in your funnel (e.g., distributors, resellers, influencers, etc)

☐ Can you share existing marketing plans for the current and last year (programs, working dollars, marketing metrics, sponsorships)?

☐ Do you have current strategic assets (e.g., Brand House/Standards, [Positioning Statement](#), differentiators, SWOT for your company...)

☐ What are your specific markets or arenas you compete in, and ones in which you intend to grow? Which offers the shortest path to new MQLs, in your opinion? Is there any data to support that?

☐ Where are you growing now, and in which product categories? Where are you, flat or contracting? Let's discuss why. Have you mapped growth goals per channel or geography?

☐ Do you have any new products planned for launch, and when?

☐ What features or benefits of your products or services are the most critical differentiators?

☐ Please include corporate charts and contact information for individual interviews to gain diverse perspectives. Who is critical to any new execution plans regarding support and resources? Are roles and responsibilities clear (RACI or Accountability Chart)? Who should I sit with to gather insights?

☐ Voice of the Employee (VOE): Are any employee surveys relevant to understanding the organization at the corporate or field level? Are compensation and incentive plans aligned with your current goals?

Industry:

☐ Industry/Market Data (*any* third-party research, association data, industry analyst reports)

☐ Do you have IBIS and Pitchbook reports? If we work together, I can source one at no cost.

☐ Industry reports? How do you monitor the industry today?

Marketing Execution Considerations

Tech Stack:

- ☐ Do you have website data and journey tracking in place? Such as Google Analytics 4 and Tag Manager. Who manages it today? Are there existing reports you regularly review that we can discuss?
- ☐ Do you have a Content Management System for your website, such as WordPress, Sitecore, or is everything hosted on GoDaddy, Squarespace, or another platform? Are all plug-ins updated? Who manages it today? Are there existing reports we can review? How regularly is it updated?
- ☐ What CRM do you use (if any)? Such as HubSpot, Salesforce, Pipedrive, or another similar platform. Who manages it? An agency? An internal staffer?
- ☐ Does your CRM have existing journeys, tracking, and active marketing plays? Is the CRM where your sales funnel is managed as well, or is that in another tool (see above)?
- ☐ Social Media management platform? Or do you manage natively? Who manages the accounts? Are there existing reports to review? What's your best post to date and why?
- ☐ Do you have a Google Ads account? Who manages it? Are there existing reports to review?
- ☐ Have you measured your existing Marketing and Sales funnel and compared conversion rates to norms for like companies? Can you share them?
- ☐ Do you know the channel that provides most of your MQLs today? Are they attributed to the last touch or the first touch? Do you have lead scoring in place? What is your scoring rationale?
- ☐ Do you have other tools in place we should review (examples include Artificial Intelligence, Hotjar, leadfeeder (dealfront), chatbots, etc.)?
- ☐ Have you operationalized or automated best practices for upselling, cross-selling, and referrals?
- ☐ Is AI being utilized in your organization, marketing, or products? Is it an integral part of your growth strategy? Would you like help assessing how AI may be helpful?
- ☐ Does your company use its own workflow and task management in its daily operations or any other solutions? Do you have a Project Manager(s)?
- ☐ Can I have admin access to the entire tech stack, from CMS to Analytics, and Social account access to conduct an evaluation of launch readiness, or can someone walk me through it to confirm Go-to-market readiness?

Budgets and Key Metrics:

- ☐ Do you have an established marketing budget, for what period, and how is it determined?
- ☐ Do you have a clear picture of the winners and losers in terms of marketing ROI?
- ☐ Have you defined key metrics and how they are gathered? (Examples include Customer Acquisition Cost, Customer Lifetime Value, Churn or Retention, NPS scores, etc.)
- ☐ How are you measuring your funnel, and how reliable is the data you're collecting?
- ☐ What is the best success metric for our work together?

Vendors:

- ☐ Do you use freelance and agency partners? What are their roles, pros, and cons in your experience? Who are the critical account contacts?
 - ☐ Website
 - ☐ Advertising creative and distribution
 - ☐ Media
 - ☐ SEO/SEM
 - ☐ ABM experts
 - ☐ Social Media
 - ☐ Influencers
 - ☐ Direct marketing
 - ☐ Data Analytics
 - ☐ Content development and marketing
 - ☐ Others?
- ☐ Are any contracts with vendors up for review or renewal? Would you like any vendor evaluations?
- ☐ Are you aware of vendor gaps that need to be filled, and are you open to recommendations?

Other Key Points

Is there anything I missed that you feel is important to review, such as time zone considerations, virtual

team members, or other considerations critical to a successful collaboration? What is the biggest barrier to your success? What is the biggest driver? ...

Finally, Some Logistics

- ☐ Could you please tell me about your work style and your preferences for one-on-one meetings? What does a good 1-1 meeting look like? How long? Do you have an established format?
- ☐ Can we book these check-in meetings weekly (at least, initially)?
- ☐ Would a weekly written summary of what has been accomplished and the next steps be helpful ahead of our 1-1? Or is there a task-tracking solution you would like to use?
- ☐ Are there essential leadership meetings that need to be scheduled and attended?
- ☐ Do you want to collaborate on in-process work or wait for the “finished product”?
- ☐ Media Preference: Text or phone? Slack or Gmail – would you like me to be added to your systems?
- ☐ Email and phone contact lists I need that you can share?
- ☐ Conference call coordination (e.g., is Jason’s Zoom account, OK? Are you ok with AI meeting note takers?)
- ☐ Document sharing (e.g., I prefer Dropbox, but I can use others if desired)
- ☐ What confidentiality and distribution controls do you require, if any?
- ☐ Do you already have templates for the presentations and plans we should use, or should Jason create them?
- ☐ Have you thought about your internal communications plan for this engagement? How will we inform others who are not directly involved about our progress? What should we keep confidential until we are ready to share it broadly?
- ☐ Are there any calendar events we should be aware of to schedule around or to participate in (PTO, Holidays, corporate events, business activities, etc.)? Let’s plan for any disruptions that may occur.
- ☐ What drives you crazy? People being late for meetings, or typos? Or...something else?
- ☐ When can we conduct our next big meeting or kick-off workshop?

Satisfaction:

If I wanted you to ensure you felt ready to refer me to your colleagues, what would we need to accomplish to make that easier?

Is there anything else to help make this an effective engagement for you?

Thank you! I’m looking forward to working with you and helping you achieve your marketing goals.