

Marketing setup checklist

Check the basics that help customers find you, understand the work and get a reply. Mark only what you have checked. Use the linked steps to fix what is missing.

Mark what you have checked. Use Not applicable only when there is a reason to skip. No email required. Blank printable copy.

01 You can access the accounts

Your business keeps control when a staff member or supplier leaves.

Check: Sign in to the domain, website, business profiles and measurement accounts. Can your business add or remove a user?

Fix: Use business-controlled recovery details, turn on two-factor authentication and give each person their own access. Record the account owner and renewal dates in a private record. Never put passwords in this checklist.

[Check who owns each part](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

02 Your social profiles explain the business

The profiles you actually use should help someone recognize you and contact you.

Check: View them while signed out. Check the name, logo, services, area, hours, website link and contact button. Is anyone responsible for messages?

Fix: Correct the profile details and test each destination. Keep useful work examples current, with permission. Pick channels you can maintain; a profile on every platform is not a requirement.

[Plan the facts customers need](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

03 The first screen names the work

A visitor can tell what you offer, where you work and what to do next.

Check: Open the main service page on a phone. Can you name the service, service area and next step without hunting through the menu?

Fix: Write a plain service heading, explain who the work fits and label the action clearly: request an estimate, call or book. Link to a page for each genuinely different service.

[Build a service page](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

Marketing setup checklist / continued

04 The page shows what you do

Relevant work and clear process details help a buyer judge fit.

Check: Can a visitor see real work examples or clearly labeled illustrations, what the job includes and what happens after a request?

Fix: Add accurate project descriptions, permitted photos and a clear scope or process. Label examples. Remove invented outcomes, borrowed logos and guarantees you cannot support.

[See a roofing page example](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

05 People can use the contact path on a phone

The phone link and form work at the size people use.

Check: Use a real phone and a keyboard. Check readable text, labels, tap targets, errors and the confirmation. A visible button alone is not proof of delivery.

Fix: Fix clipped fields and broken links. Ask only for what the first reply needs. Keep a contact alternative visible when the form fails. Arrange the delivery test in item 11.

[Check the form](#) / [Make confirmation clear](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

06 Google Business Profile matches the business

Eligible businesses can manage how their details appear in Google Search and Maps.

Check: Check ownership, verification, category, phone, website, hours and service area against what the business actually does. Online-only businesses may not be eligible.

Fix: Correct inaccurate details and choose the best available category for the business. Follow Google's address rules. Keep useful information current; weekly posts are not a published ranking requirement.

[Check your Business Profile](#) / [Google: local ranking](#) / [Google: business eligibility and details](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

Marketing setup checklist / continued

07 You can check the site in Search Console

Google Search Console reports search visibility and whether Google can index a URL.

Check: Open the property for your real domain. Confirm ownership, inspect a main service URL and check the sitemap status, if you use one.

Fix: Verify ownership using Google's offered method. With DNS access, a Domain property covers subdomains and protocols. Submit the actual sitemap URL and investigate reported errors. Verification does not guarantee indexing or ranking.

[Set up Search Console](#) / [Google: verify ownership](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

08 Your website measurement records useful actions

Google Analytics 4 can measure visits and actions when its use fits your measurement and privacy plan.

Check: In the correct property, check a permitted test visit in Realtime. Confirm that an accepted inquiry is distinguished from a button click and is counted once.

Fix: If GA4 is appropriate, create or use the business-owned property, add a Web data stream and install the tag once through your site platform or tag manager. Verify consent behavior and reconcile inquiry events with actual records.

[Define the event and check setup](#) / [Measure forms accurately](#) / [Google: set up Analytics](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

09 Meta Pixel has a reason to be there

Website event tracking may be useful for a defined Meta advertising plan. It is optional.

Check: If you use website conversions for Meta ads, ask the account owner to show a permitted test event in the correct data source and check for duplicates.

Fix: Use the supported setup for your website platform and business-owned data source. Confirm consent before sending events. If you have no relevant Meta campaign or permitted measurement need, select Not applicable. Screen labels vary; use the signed-in help for your account.

[Decide and check the Meta setup](#) / [Meta: Pixel setup help \(login may be required\)](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

Marketing setup checklist / continued

10 The privacy choices match what the site does

People can understand collection and make the choices your setup requires.

Check: Compare the privacy notice with the tools installed. Test before consent, after accepting, after rejecting and after changing the choice. Check that form text stays out of analytics.

Fix: Document purpose, access and retention. Configure tags to honor the applicable consent choices. Keep names, emails, phone numbers and request text out of URLs and analytics events. Get advice for the laws that apply to your business.

[Check privacy and measurement](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

11 An inquiry reaches the person who handles it

A success screen, a stored request and a delivered notification are different things.

Check: Agree a labeled test with the receiving team. Verify the request is stored, arrives at the right inbox or CRM, and can be replied to. Check spam and the fallback path.

Fix: Fix the destination, delivery or reply problem you observed. Record who receives calls and forms, who covers absence and how failed delivery is noticed. Use authorized test details; do not send surprise test inquiries.

[Check delivery and handoff](#) / [Check the confirmation](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

12 Every open inquiry has a next action

Someone owns the reply, qualification and estimate follow-up.

Check: Pick an open inquiry. Can you find the owner, requested work, first response, next action and due date? Can you tell an inquiry from a booked or completed job?

Fix: Set a response target your team can meet during stated hours. Assign a backup. Record the outcome and next contact after each attempt; stop when asked. Keep private customer details in your existing job record.

[Build the response checklist](#) / [See a roofing handoff](#)

☐ Verified ☐ Needs fixing ☐ Don't know ☐ Not applicable

[Continue with the online checklist](#)

Restore access or a broken inquiry path first. Assign one next action, owner and due date in your work record. A completed checklist does not guarantee rankings, leads or jobs.

Google guidance checked October 1, 2026. Meta help may require login; account-specific screens were not verified.