

Marketing Ownership Checklist

Here is a printable or in-post checklist for owners and leadership teams.

Name and marketing owner

- One person is clearly named as "Marketing Owner" in the org chart.
- That person is ultimately responsible for lead flow, marketing spend, and results.
- Strategy and budget decisions live inside the business, not with an agency.



Define the four core "hats"

- Strategic planner is assigned (often the owner/GM or marketing manager).
- Numbers and reporting lead is assigned (scorecard, tracking, and weekly numbers).
- Channel owners are assigned for web/SEO/GBP, paid media, and customer marketing.
- Implementors (internal staff, vendors, or both) are named for execution work.



Connect marketing to call center and sales

- CSRs understand which campaigns are running and how to talk to them.
- Lead handling expectations (answer rate, speed-to-lead, booking rate) are documented.
- Sales and field teams know which leads are being targeted and why.



Build a simple scorecard

- Leads are tracked by source (SEO, LSAs, PPC, referrals, memberships, etc.).
- Booked calls and cost per booked call are measured for each major channel.
- Revenue and average ticket are connected back to lead sources where possible.
- The scorecard is reviewed at least monthly.



Put basic guardrails on vendors

- You own your website, domain, tracking numbers, and ad accounts.
- Each vendor has a written scope, clear KPIs, and a reporting rhythm.
- Vendor success is defined by your numbers (booked calls, revenue), not just theirs (clicks, impressions).
- Long-term contracts include performance expectations and a reasonable exit path.



Set your rhythms

- Weekly: quick check on lead volume, phones, and booked calls by source.
- Monthly: review channel performance and adjust spend or campaigns.
- Seasonal: plan ahead for peak and shoulder seasons with specific offers and capacity alignment.



Watch for red flags

- You can answer, "How many leads did we get last month and from where?"
- You know which campaigns and vendors are delivering profitable jobs.
- If not, marketing ownership and/or tracking needs attention.

