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The KAIZEN COMPLETE Marketing Checklist

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HyperText

The KAIZEN Marketing Checklist for SaaS, IT and Other B2B Companies

The complete map — and the prioritized path — for technical teams that need pipeline

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How to read the stage flags:
🚀 = founder-led marketing (SaaS startup, 1–20 people) · 📈 = marketing team of one or a few (20–200 people) · 🔧 = IT services / MSP / consultancy *No flag = applies to everyone.*

1. Introduction — The Map and the Path

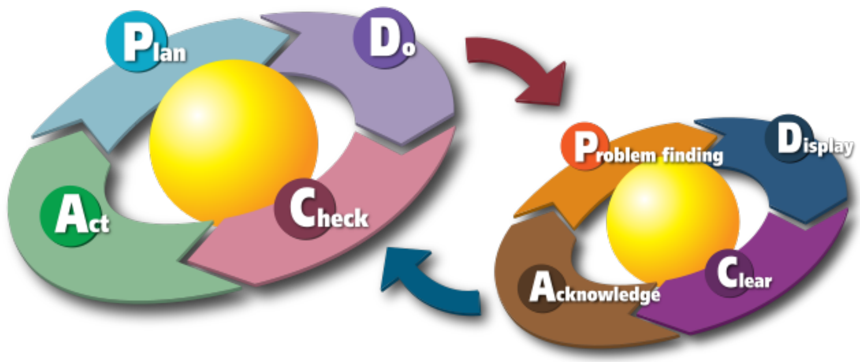
If you run marketing for a SaaS or IT company in 2026, you're playing the hardest version of the game:

- Your buyers ask ChatGPT and Perplexity before they ever type into Google — and if you're not in the AI's answer, you don't exist.
- Every channel is flooded with AI-generated noise, so trust is scarce and human credibility is the differentiator.
- Marketing budgets are flat while expectations aren't. Most technical companies are excellent at building and underpowered at pipeline.

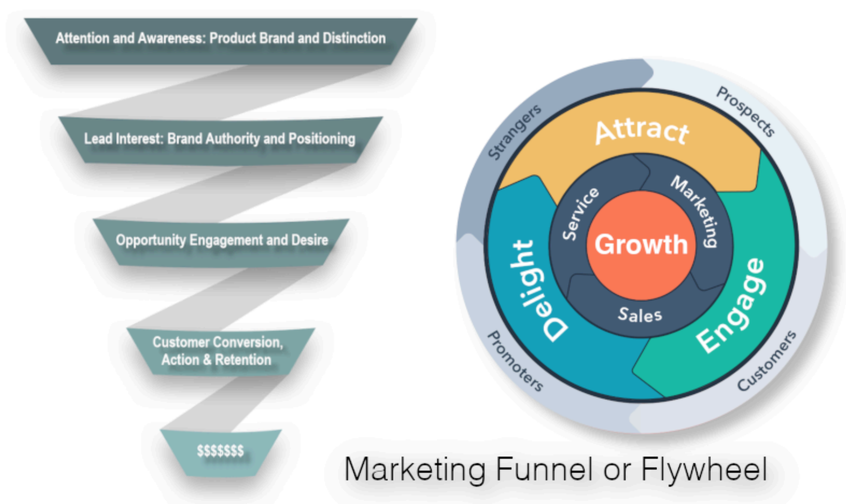
This checklist is two things at once:

A map. Every marketing activity that matters for a B2B technology company, organized by function, with the practitioner's notes I share with my own clients — you'll see them throughout as **Pro Insight** (what most teams miss) and **Consultant's Angle** (how I think about it when it's my client's money on the line).

A path. You can't do everything on the map, and you shouldn't try. So this edition starts with a 5-minute Health Check that scores your marketing system, then routes you to the phase that will move your number first. Do the items in order. Skip what your flag says to skip. That's kaizen — continuous, prioritized improvement — not "do more marketing."



One benchmark to hold onto as you read: buyers require roughly **7 hours of engagement, across 11 touchpoints, in 4 different locations** before they're ready to buy (the "7-11-4 rule," from Google's research). Every section in this checklist is a way to bank those hours honestly.



Marketing Funnel or Flywheel

Pro Insight: The companies that struggle aren't the ones doing too little marketing. They're the ones doing fragments of everything — a blog post here, a conference there, an ad experiment that died quietly — with no system connecting them. The fix is sequence, not volume.

Consultant's Angle: You are the architect; this checklist is the blueprint. If you want someone to swing the hammer with you — or for you — that's what I do. But everything here works without hiring me. That's the point.

2. The 5-Minute Marketing System Health Check

Answer yes or no. Every "yes" = 4 points. Be honest — nobody's watching, and the score only helps if it's true.

A. Foundation (positioning & measurement)

- [ ] We can state who we serve and what problem we solve in one sentence — and our homepage says it above the fold
- [ ] We have a written ideal customer profile (ICP) that sales/founders actually use
- [ ] We know our numbers: cost to acquire a customer, and what a customer is worth over their lifetime (CAC and LTV — even rough)
- [ ] Analytics and conversion tracking are installed and someone looks at them monthly
- [ ] We have a one-page growth plan for the next quarter (not a wish list — a plan with owners and dates)

B. Pipeline (getting found & getting conversations)

- [ ] We publish something useful for our buyers at least twice a month
- [ ] We have at least one lead magnet or free tool that captures emails
- [ ] We do outbound (warm or cold email/LinkedIn) on a regular cadence, not in panic bursts
- [ ] We show up where our buyers gather — events, communities, partner ecosystems — at least monthly

- [ ] We've checked whether AI assistants (ChatGPT, Perplexity) mention us when buyers ask about our category

C. Conversion (turning interest into revenue)

- [ ] Our website's key pages each have one clear call to action
- [ ] Leads get a response (human or automated-but-personal) within one business day
- [ ] We have a nurture sequence for leads who aren't ready yet — because in this industry, most aren't
- [ ] Sales conversations are supported by real materials: case studies, comparison pages, pricing guidance
- [ ] We know our conversion rate from lead → conversation → customer (even roughly)

D. Retention (keeping the revenue you won) — *SaaS teams especially*

- [ ] New customers have a defined onboarding path with milestones — not just a welcome email
- [ ] We track churn monthly and separate *voluntary* churn (chose to leave) from *involuntary* (card failed)
- [ ] Someone reaches out personally when a good customer's usage drops
- [ ] We have automated payment-retry and card-update flows (dunning) configured beyond the defaults
- [ ] We collect testimonials, reviews, and case studies on a schedule — not just when we remember

E. System (the kaizen part)

- [ ] Marketing activities live on a calendar someone maintains
- [ ] We review what worked and kill what didn't at least quarterly
- [ ] We use AI to accelerate research, drafting, and repurposing — with human judgment on everything that ships
- [ ] Our brand voice, personas, and messaging live in a document an AI (or a new hire) can be briefed with
- [ ] Marketing doesn't stop when we get busy with delivery (🔧 *MSPs: this is the one that kills you)*

Your score

Score	What it means	Where to start
80–100	You have a working system. Optimize and scale.	Sections 10, 13, 14
50–79	Good pieces, missing connections. Sequence them.	The Prioritized Path (section 3), focus on your weakest letter grade
Under 50	You don't have a marketing problem, you have a *system* problem. Good news: that's fixable in weeks, not years.	Foundation first (sections 3–5). And read the Consultant's Angle below.

Consultant's Angle: If you scored under 50, resist the urge to fix everything at once — that's how teams end up with fragments. The Digital Roadmap Workshop exists for exactly this situation: one day, your whole picture, and you leave with the prioritized plan. But whether you work with me or not: pick your weakest section, fix it, re-score in 30 days. That loop *is* the method.

3. The Prioritized Path

Work the phases in order. Each phase earns you the right to the next one.

Phase 1 — Foundation *(usually 2–4 weeks)*

Positioning, ICP, website core pages, analytics, growth plan.
→ Sections 4 (Steps 1–3), 5, 14

Phase 2 — Pipeline *(ongoing from week 3–4)*

One content engine + one outbound motion + one community/event presence. Not five channels — three motions done weekly.
→ Sections 4 (Steps 4–5), 6, 8, 9

Phase 3 — Retention *(SaaS: run parallel to Phase 2)*

Onboarding, churn separation, dunning, win-back. 🚀 📈 For SaaS companies, this is the highest-ROI phase in the whole book — a 5% monthly churn rate forces you to grow 16% just to stand still.
→ Sections 7, 12

Phase 4 — Scale *(only when Phases 1–3 hold)*

Paid ads, more channels, more content velocity, automation.
→ Sections 10, 13, 14

Pro Insight: Paid ads are in Phase 4 on purpose. Ads amplify what exists: a leaky funnel amplified is just a faster leak. The fastest way to waste $10K in this industry is to run ads to a website that hasn't earned Phase 1.

Consultant's Angle: 🔧 For services firms, Phase 2 has a special clause: your sales cycle is 3–18 months, so pipeline work you do today pays out next year. That's not a reason to delay — it's the reason you can't afford to.

4. Content Marketing by Phase

The backbone of the 7-11-4 rule: content is how you bank engagement hours while you sleep.

Step 1 — Audit & Plan

- [ ] Audit existing content: what already influenced deals or sparked sales conversations?
- [ ] Identify remix opportunities — a webinar can become a blog post, five LinkedIn posts, and a sales leave-behind
- [ ] Plan around available budget and team — a sustainable cadence beats an ambitious one
- [ ] Get stakeholder input early (founders, sales, support — they hear the customer's words daily)

Pro Insight: Most teams jump straight to creating. The gold is in the prep: a dusty old blog post that once closed a deal is your best closer in disguise — find it, update it, promote it again.

Step 2 — Essential Research

- [ ] ICP and persona mapping: who buys, who evaluates, who blocks? *(In SaaS: the user, the champion, and the CFO are three different readers)*
- [ ] Pain-point mapping in the customer's own words — mine support tickets, sales calls, reviews
- [ ] SEO keyword research on key pages and competitors
- [ ] **New for 2026:** ask ChatGPT/Perplexity the questions your buyers ask ("best [your category] for [your niche]") and note who gets

cited — that's your real competitive set

- [ ] Collect testimonials and case-study candidates as you go

Consultant's Angle: Research isn't about knowing your audience in the abstract — it's about matching their *current* awareness. A buyer comparing vendors needs a comparison page, not a beginner's guide. Map content to the journey stage, and channel selection follows almost automatically.

Step 3 — Campaign Strategy

- [ ] Define the campaign goal type: awareness, authority, engagement, or conversion — pick one per campaign
- [ ] Funnel strategy: which landing page does this campaign feed? What's the next step after that?
- [ ] Content calendar with a realistic cadence (see section 14)
- [ ] Channel plan: choose 2–3 where your buyers actually are — for this industry that's usually LinkedIn + one community + email. YouTube if you demo well. *(TikTok and Instagram: only if you already know why.)*
- [ ] Define success metrics per phase: reach → engagement → leads → conversions

Pro Insight: Campaigns fail from fuzzy goals more than from poor content. "Are we aiming for awareness, leads, or conversion?" — that one decision shapes format, funnel, and follow-up.

Step 4 — Content Creation

Inbound (they find you):

- [ ] Blog posts mapped to buyer questions — including the unglamorous ones ("pricing," "alternatives to X," "how to migrate off Y")
- [ ] Case studies — the single highest-leverage asset for technical buyers; one good one feeds sales, web, email, and social
- [ ] Comparison / "alternatives" pages 🚀 📈
- [ ] Whitepapers/ebooks for deeper topics (for some of my clients, one great ebook was the only lead magnet they ever needed)
- [ ] Video: product demos and founder explainers beat a polished brand video at this stage

Outbound (you reach them):

- [ ] Email sequences (see section 6)
- [ ] LinkedIn posts in a real human voice — founder/owner accounts outperform company pages, consistently
- [ ] Newsletter — the most durable audience you can own
- [ ] Community participation where your expertise is genuinely useful (forums, Slack groups, subreddits)

Consultant's Angle: Think portfolio, not checklist. Every asset should serve multiple purposes — nurture leads, support sales, reinforce positioning. Build once, deploy many. And humanize everything before it ships; your buyers can smell raw AI output from across the room.

Step 5 — Distribute, Measure, Iterate

- [ ] Every piece gets a distribution plan before it's written (where will this live, who shares it, what's the CTA?)
- [ ] Repurpose systematically: long-form → social → email → sales enablement
- [ ] Monthly: review metrics against the campaign goal; kill or fix underperformers
- [ ] Quarterly: full content audit feeds the next quarter's plan (back to Step 1 — that's the loop)

5. Your Website & Landing Pages

Your website is not a brochure. It's your 24/7 salesperson, content hub, and — increasingly — the source AI engines quote when buyers ask about you.

Core pages

- [ ] Homepage passes the 5-second test: who you help, what you do, why anyone should care — above the fold
- [ ] One clear primary CTA per page (demo, trial, consult, download — pick one)
- [ ] Pricing page exists 🚀📈 *(hiding pricing costs you the buyers who research alone — which is most of them now)*
- [ ] Case studies / proof visible from the homepage, not buried
- [ ] About page with real humans — names, faces, credentials (🔧 *for services firms, this page closes deals)*

Landing pages

- [ ] One landing page per campaign/offer, message-matched to the traffic source
- [ ] Lead capture forms: ask for the minimum (email; maybe company). Enrich later.
- [ ] A/B testing on your highest-traffic page first — one variable at a time
- [ ] Thank-you pages that offer the next step, not a dead end

Technical & care

- [ ] Fast, mobile-first, SSL, accessible — table stakes, and technical buyers notice
- [ ] Schema markup on key pages (FAQ, product, reviews) — feeds both Google and AI engines
- [ ] Analytics + conversion events installed and tested
- [ ] Hosting, backups, updates, security monitoring on a care plan *(avoid budget hosts that aren't looking out for you — I offer hosting with a free care plan if you want this handled)*
- [ ] Go back to the top, iterate and improve — the site is never "done"

Pro Insight: Many websites look slick and fail the "so what?" test. Don't bury your best content — surface case studies, lead magnets, and testimonials on the pages people actually visit.

Consultant's Angle: A well-optimized landing page can outperform a dozen blog posts. Obsess over relevance and flow: match the message to the traffic source, keep the design clean, and make the call to action impossible to miss.

6. Email Prospecting (Warm & Cold)

Most cold outreach feels robotic. Automated. Transactional. That's not how I operate — and in 2026, when every inbox is drowning in AI-personalized spam, *genuinely* human outreach isn't just nicer. It converts better, because it's rare.

1. Targeting & list building

- [ ] Define ICP and buyer personas (done in section 4? Reuse them.)
- [ ] Build a quality list: Apollo, LinkedIn, referrals, event contacts, past downloads
- [ ] Verify addresses to protect bounce rate
- [ ] Prioritize by fit and timing signals (funding, hiring, tech-stack changes, new leadership)
- [ ] Start with the warm layer: engaged-but-unconverted contacts — downloaders, webinar attendees, referrals

2. Message crafting

- [ ] Lead with relevance: their pain or opportunity, not your product
- [ ] Personalize the first line with something real and specific — the first 10 words do the heavy lifting
- [ ] One clear pain point per message; under 120 words; no jargon
- [ ] Soft CTA: "Would it make sense to chat?" beats "Book a demo now"
- [ ] Reference genuine connection points when you have them (event, mutual contact, their content)

3. Follow-up sequence

- [ ] 3–6 touches over 2–3 weeks; vary format (short nudge, value drop, direct ask, Loom video)
- [ ] Add value in each touch — a resource, an insight, a relevant example
- [ ] Polite breakup email if no response ("Should I close your file?") — it gets the most replies of the sequence

4. Deliverability & compliance

- [ ] SPF, DKIM, DMARC configured; warm up new sending domains
- [ ] Clear opt-out; monitor sender reputation and bounce rates
- [ ] Avoid spammy phrasing and link/image overload

Pro Insight: Deliverability isn't just tech — it's trust. Bad targeting tanks your sender score faster than broken DNS records. Think of your domain like a credit score.

5. Test & optimize

- [ ] A/B test subject lines, openers, CTAs
- [ ] Track opens, replies, and *outcomes* (interested / later / no) — not just rates
- [ ] Refine list and message based on what real people respond to

Consultant's Angle: Cold messages that sound warm win. Match their context, not just their name. If your cold email isn't working, don't send more — send smarter. One small tweak can 10x replies.

7. Lead Nurturing

🔧 *Services firms: this is your money section. IT contracts take 3–18 months to close — nurture is how you're still in the room when the decision finally happens.*

- [ ] **Segment:** by source, interest, and buyer stage; tailor content and cadence to each
- [ ] **Design the journey:** map email sequences, retargeting, and educational touchpoints to the questions and objections at each stage
- [ ] **Create & automate:** helpful, non-salesy content; soft CTAs; behavior-triggered workflows
- [ ] **Monitor:** alert sales when a lead shows buying signals (pricing page visits, repeated opens); adjust timing and messaging from the data

Pro Insight: Nurturing isn't "checking in." It's being useful on a schedule. The best nurture sequences feel like a helpful guide, not a drip campaign.

Consultant's Angle: Think of it like dating before a proposal. You're building trust, showing value, and learning their needs — so the "yes" comes naturally. Banking 7-11-4 hours is literally what this section does.

8. Conference & Event Marketing

Reframed for how this audience actually does events: most of you attend, speak, or sponsor small — you don't buy 20-foot booths. The Bay Area runs on rooms; be in them.

Before

- [ ] Pick events where your ICP concentrates — for Silicon Valley SaaS/IT that includes Startup Grind, SVE, founder communities, and industry-specific meetups, not just the big expos
- [ ] Define ONE measurable objective per event (leads, partnerships, a speaking slot, 10 real conversations)
- [ ] Pursue speaking and panel slots — a 15-minute talk outperforms a booth for a fraction of the cost
- [ ] Announce you're going; book meetings *before* you arrive
- [ ] Prepare your takeaway: a QR code to your lead magnet or Health Check beats a brochure *(and weighs nothing)*
- [ ] If you do exhibit: booth design, demos, lead capture, team roles, and a dress rehearsal — treat setup like a soft launch

During

- [ ] Open loops: ask questions, spark curiosity, invite the next step — don't wait to be approached
- [ ] Collect context, not just cards — jot a note after each conversation so follow-up is warm
- [ ] Attend sessions and be useful in them; the hallway track is the real event

- [ ] Share live updates if your audience is watching online

After

- [ ] Follow up within 48 hours, referencing something specific from the conversation — personal beats polished
- [ ] Qualify, don't just count: did leads match your ICP?
- [ ] Repurpose: the questions people asked you at the event are next month's content calendar
- [ ] Document lessons learned; compare outcomes to the objective before booking the next one

Pro Insight: Don't just "go" to the event. Engineer your presence around a single measurable objective — clarity there makes every downstream decision easier.

Consultant's Angle: The fortune's not just in the follow-up. It's in the *fast*, *relevant*, *human* follow-up. Automate the grunt work, never the relationship.

9. Influencer & Partnership Marketing

In B2B tech, "influencer" doesn't mean Instagram. It means the newsletter your buyers read, the podcast they commute with, and the consultant they already trust.

- [ ] **Map the real influencers in your niche:** newsletter authors, podcast hosts, community moderators, analysts, respected practitioners
- [ ] **Choose the collaboration:** podcast guesting (usually free), newsletter sponsorship, co-hosted webinar, guest essay, tool integration + co-announcement
- [ ] **Vet for audience fit** — engagement and relevance beat reach; a 3K-subscriber niche newsletter of exactly your ICP outperforms a 100K generalist audience
- [ ] **Make it a real agreement:** deliverables, dates, disclosure, usage rights
- [ ] **Give structure, not a script** — their voice is the entire value; a native-sounding mention converts, an ad read doesn't
- [ ] **Amplify and measure:** share it, tag them, track clicks/conversions against the goal, and build the long-term relationship — the second collaboration always outperforms the first
- [ ] 🔧 **Partner ecosystems count here too:** vendor partner programs (Microsoft, Sophos, ConnectWise, etc.) have newsletters, events, and co-marketing funds most MSPs never touch

Pro Insight: Relevance beats reach. Micro-voices your buyers actually trust outperform big names — and they're affordable.

10. Online Ads

Phase 4. Ads amplify a working funnel; they cannot create one.

- [ ] One clear campaign goal: leads, traffic, or sales — pick one
- [ ] Platform follows audience: for B2B SaaS/IT that's usually Google Search (intent) and LinkedIn (targeting); Meta only for retargeting
- [ ] Compelling offer with message-matched landing page — no bait and switch
- [ ] One CTA, one promise, no clutter
- [ ] Pixels, conversion events, and audiences (custom, lookalike, retargeting) set up *before* spending
- [ ] Watch CTR, CPC, and cost-per-lead in the first 72 hours; pause losers fast, feed winners
- [ ] A/B test headlines, visuals, CTAs; refresh creative before fatigue sets in
- [ ] Post-campaign: measure against KPIs, document, apply learnings to the next cycle

Pro Insight: Great ads aren't "set and forget." They're tuned like race cars — test, tweak, stay close to the data.

Consultant's Angle: Treat paid like a lab: winners scale, losers teach, both are valuable. But only run the lab once retention is solid — 🚀 SaaS founders, acquiring users into a leaky product just relocates this quarter's loss to next quarter.

11. Sales Enablement

📈🔧 *Most relevant once someone besides the founder sells — but even a founder-led sales motion needs the Proof kit.*

- [ ] **Audit first:** inventory existing content, map to the buyer journey, find the gaps and the repurposing wins
- [ ] **Foundational tools:** battlecards, comparison sheets, pricing one-pagers, discovery/pitch/onboarding decks
- [ ] **Proof kit (everyone needs this):** testimonials, reviews, case studies, competitor intel — curated and current
- [ ] **Interactive & educational:** webinars, demos, ROI calculators, onboarding courses
- [ ] **Communication templates:** email sequences per sales stage, re-engagement flows, FAQ libraries
- [ ] **Track usage:** define success metrics (close rates, content engagement) and review with sales regularly

Pro Insight: Your best sales enablement content often already exists — trapped in a blog post, a webinar, or a product doc. The magic is repackaging it for the moment of need.

Consultant's Angle: You're building a sales armory: the right tool, at the right time, for the right conversation. When sales and customer success co-create the content, you get buy-in *and* distribution for free.

12. Customer Onboarding & Churn Prevention

🚀📈 *If this section were about fishing, it would be about getting the caught fish safely into the boat — and then keeping it from flopping right back out. Retention failures are marketing failures: a 5% monthly churn rate requires 16% growth just to compensate. And here's the stat most founders have never checked: 20–40% of churn is typically* involuntary *— failed payments from people who never decided to leave.*

Onboarding

- [ ] Welcome email with next steps and a human point of contact
- [ ] Guided path to first value: milestones, walkthroughs, in-app tooltips
- [ ] Check-ins at critical usage points; celebrate early wins
- [ ] Success roadmap shared with the customer — expectations, timeline, responsibilities

The two churns (treat them differently)

- [ ] **Separate voluntary from involuntary churn in your metrics** — this one report changes how you see your business
- [ ] **Involuntary:** configure dunning beyond defaults — multiple smart retries, card-update emails, in-app banners. This is recovered revenue you already earned.
- [ ] **Voluntary:** identify churn signals early (usage drops, support friction, billing issues) and reach out *personally* before the cancel button

- [ ] Replace exit-survey dropdowns with a real conversation where you can — behavioral data beats what people click to escape a modal

Ongoing engagement & expansion

- [ ] Monitor usage; nudge underused features; invite to webinars/community
- [ ] Proactive training or support before renewals, not after cancellations
- [ ] Win-back campaign for recent churns (14–30 days later)
- [ ] Upgrade paths based on usage; expansion revenue is how net churn goes negative
- [ ] Collect testimonials and case studies from your healthiest customers — retention and marketing feed each other

Pro Insight: Don't wait for the renewal date to show value. Drip helpful content that reinforces the customer's decision and makes them feel smart for choosing you.

Consultant's Angle: Your price is part of retention too. Cheap plans attract curious users who churn; committed customers self-select at honest prices. If your support burden is high and your retention is low, your price may be filtering for the wrong customers — raising it is sometimes the best retention move available.

13. AI for Marketing — Work Smarter, Stay Human *(2026 Edition)*

Your humanity is your core value

AI won't replace your marketing — but it has changed what one person can produce. Used well, it compresses days of work into hours. Used lazily, it makes you sound like everyone else, because everyone else is using it lazily too. In a world drowning in generated noise, *human judgment plus AI leverage* is the whole game. Every channel in this checklist is flooded with AI slop; the winners are the teams whose output has a human fingerprint and an AI engine underneath.

The Four Levels of AI Leverage

Find your level. Move up one. That's the kaizen move — you don't need to leap to Level 4 this quarter.

Level 1 — Chat assistants (where most teams are)

Claude, ChatGPT, Gemini as drafting and thinking partners.

- [ ] Brainstorm content themes, angles, and A/B variations
- [ ] First-pass drafts: outlines, emails, social snippets, meta descriptions
- [ ] Summarize competitor content; analyze reviews and testimonials for pain-point language

- [ ] Repurpose: transcript → article, blog post → LinkedIn posts, case study → sales one-pager

Level 2 — Context-loaded AI (the quality unlock)

Generic prompts produce generic output. The fix is giving the AI your context *once*, so every output starts from your voice and your customer.

- [ ] Create a Project (Claude/ChatGPT) loaded with brand voice, ICP, personas, past campaigns, and messaging docs
- [ ] Maintain a "brief an AI or a new hire" doc — one source of truth for voice and positioning *(you scored this in the Health Check)*
- [ ] Use deep-research modes (Claude, ChatGPT, Perplexity, Gemini) for competitor and market research that used to take a week — then verify the citations; they're good, not infallible
- [ ] Build a persona-simulation habit: "You are our ICP. React to this landing page. What's confusing? What's missing?"

Level 3 — Agentic tools (the 2026 frontier) 🚀📈

This is the biggest change since the last edition of this checklist. The new generation of AI tools doesn't just *write* — it *does*. They work with your actual files and systems, execute multi-step projects, and check their own work.

Claude Code (Anthropic) is the flagship example: an agentic assistant that runs in your terminal, as a desktop app, on the web, or inside your code editor. Give it a goal and access to a folder, and it plans the work, does it across as many steps as needed, and shows you the result. What that means for marketing at a technical company:

- [ ] **Landing pages and site changes:** describe the page; it builds it, matching your existing site's patterns — then you review and ship
- [ ] **Batch content operations:** reformat 40 blog posts, add schema markup across a site, generate meta descriptions for every page — in one instruction
- [ ] **Data analysis without a data team:** hand it a CSV export of leads, churn, or campaign results and ask the questions you'd ask an analyst — it writes and runs real analysis, not vibes
- [ ] **Research agents:** point it at a competitor list; get back a structured comparison built from live sources
- [ ] Adjacent tools worth knowing: Cursor (AI code editor — good when your site work is code-heavy), and the deep-research agents from Level 2, which are agentic under the hood

Pro Insight: The teams getting outsized results from agentic tools aren't more technical — they're better *delegators*. The skill is writing a clear brief with context and constraints (sound familiar? See the SOP below). If you can brief a contractor, you can brief an agent.

Level 4 — Connected agents & automation 📈

- [ ] MCP (Model Context Protocol) connectors let AI work directly inside your tools — HubSpot, analytics, Slack, Gmail, your CMS — instead of copy-pasting between windows
- [ ] Scheduled/recurring agents: weekly competitor digests, monthly analytics summaries, content-calendar prep
- [ ] Workflow platforms (n8n, Zapier, Make) orchestrating AI steps inside larger automations — lead enrichment, triage, personalization at scale
- [ ] **The guardrail that makes all of this safe:** a human approves everything customer-facing. Agents execute; you edit and own.

That loop is written into the SOP below — use it.

Consultant's Angle: Don't buy tools; buy outcomes. Pick ONE recurring, annoying, time-eating task — reporting, repurposing, research — and move it up one level. When it works, take the next task. That's kaizen applied to your own operation, and it compounds faster than any single campaign. *(Want these workflows installed and documented for your team? That's literally what the KAIZEN Action Subscription does.)*

Getting Found by AI: The GEO Checklist

Your buyers ask ChatGPT, Perplexity, and Google's AI Overviews before they ever visit your site. Generative Engine Optimization (GEO) is making sure you're in the answer. This is 2026's version of showing up on page one.

- [ ] **Run the test:** ask ChatGPT, Perplexity, and Gemini the questions your buyers ask ("best [category] for [niche]," "[your product] vs [competitor]," "top MSPs in [your city]"). Are you cited? Who is?
- [ ] **Unblock the crawlers:** check robots.txt and your CDN aren't rejecting AI bots (GPTBot, ClaudeBot, PerplexityBot)
- [ ] **Server-side render** important content — if it only exists in JavaScript, many AI crawlers never see it
- [ ] **Ungate your best thinking:** AI engines can't cite a PDF behind a form. Keep a strong public version of your key content; gate the tools and templates instead
- [ ] **Publish category-definition content:** "What is [your category]?" pages get cited disproportionately
- [ ] **Structure for machines:** clear headings, FAQ sections, schema markup, direct answers near the top of the page

- [ ] **Original data wins citations:** benchmarks, surveys, real numbers from your own work — AI engines strongly prefer sources that say something new
- [ ] **Get mentioned elsewhere:** AI answers draw on third-party sources (review sites, directories, communities, press) — your off-site footprint is part of your GEO
- [ ] Re-run the test quarterly and track changes

Pro Insight: GEO rewards exactly what good marketing always rewarded — genuine expertise, clearly stated, widely referenced. The tactics are new; the strategy is Grandma's advice: be useful, be specific, be cited.

The AI-Ready SOP (condensed template)

The difference between AI chaos and AI leverage is a written procedure. Steal this structure:

SOP: [Task name] — v1.0 — Owner: [name]

1. **Purpose & scope** — what this covers; what it explicitly doesn't
2. **Roles** — *Human:* sets goals, provides context, reviews, approves, owns the result. *AI:* asks clarifying questions, produces v1 to the Definition of Done, runs its own QA pass, suggests one process improvement.
3. **Context the AI gets every time** — brand voice doc, ICP, examples of past winners, edge cases to avoid
4. **Workflow** — Human briefs → AI drafts → Human edits/approves → Publish → Log learnings
5. **Definition of Done** — meets objective, on-brand, factually verified, correct format

6. **Revision log** — version, date, what changed

Prompts Worth Stealing

The formula: set the scene → define the goal → add guardrails. Then always ask for 3 options, never 1.

- **Competitor summary:** *"Act as a B2B marketing analyst. Summarize the positioning, key features, and calls-to-action of [competitor] from their homepage and top pages. Format as bullets under Product / Messaging / CTAs."*
- **Persona from data:** *"From this customer review data, generate 2 buyer personas: job title, goals, pain points, common objections. Concise and realistic."*
- **Nurture email:** *"You're a B2B SaaS marketer writing to IT managers evaluating [category]. Goal: build trust and offer [resource]. Tone: helpful, not pushy. Under 150 words, soft CTA. Give me 3 versions."*
- **Objection script:** *"Create a short script for the objection 'We already have a solution in place.' Audience: mid-level IT decision maker. Tone: consultative, not defensive. End with a question that reopens the conversation."*
- **The meta-prompt:** *"Here's my draft. Punch it up: sharper opening, tighter middle, stronger CTA. Keep my voice — don't make it sound like AI."*

14. Running the System: Growth Plan & Content Calendar

You can't do everything in this checklist — and after the Health Check and the Path, you know you don't have to. Two tools keep the system running without chaos:

The Growth Plan. A one-page examination of your mission, ideal customer, their pains and desires, your competitors, and the marketing activities that will produce measurable growth *this quarter* — with owners and dates. When you examine the elements closely, the priorities pick themselves.

- [ ] Quarterly growth plan exists, one page, with owners and dates
- [ ] Activities live on a kanban or task board that the team actually sees
- [ ] Monthly review: what moved, what stalled, what gets killed

The Content Calendar. The visibility engine. A simple cadence that ships beats a perfect plan that doesn't.

- [ ] Calendar covers topics, formats, owners, dates, and the promotion plan for each piece
- [ ] Brainstorm and filter topics quarterly; schedule monthly; adjust weekly
- [ ] Every entry names its campaign goal (awareness / authority / engagement / conversion)
- [ ] Audit last quarter's content for winners worth repromoting or remixing

Consultant's Angle: This checklist is continuously updated — that's the kaizen promise on the cover. Yours should be too: the checklist you customize and re-score every quarter becomes *your* marketing system, not mine.

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15. Next Steps — Choose Your Speed

You took the Health Check. You know your score and your weakest section. Here's how to move, at whatever speed fits:

🛠️ Do it yourself — free

- Work the Prioritized Path a phase at a time. Re-score every 30 days.

🤝 Do it with help

- **The Digital Roadmap Workshop** — I spend 4–5 hours with you or your team, then deliver a Digital Roadmap and Growth Plan with your priorities and highest-ROI activities mapped. The fastest way from "score under 50" to a working plan. → Details
- **The Content Calendar Plan Workshop** — an online course with the tools and templates to get your content system running without bottlenecks, at your own pace. → Details

🚀 Have it done for you

- **The KAIZEN Action Subscription** — your marketing activities, content, and AI workflows handled in a simple monthly subscription. No contracts, no request limits. Also available as

Fractional Management, where I run the system and coordinate the experts so you can focus on what you build. → Details

- **À la carte** — one-off projects: content, landing pages, websites, and more. → johnsimmonshypertext.com

The simplest next step: do the Health Check, then book a free 15-minute debrief — bring your score, leave with your first three moves. → johnsimmonshypertext.com

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