



Digital Transformation Timeline Planner

As you begin the transition to digital marketing, you can take small steps that will have a major impact on your business growth. Here is a planner to get the foundation of your web presence up and running. Later, you'll be able to expand and update, but the focus of this 7 week process is to get you online and generating new business.

Timeline	Activities	Notes/Deadlines
WEEK 1 Audit	<p>Compile + audit all existing sales and marketing materials</p> <ul style="list-style-type: none">• Dig up your logo, promotional materials, spreadsheets, mailing lists, and anything that has worked for you in the past	<i>Here, you can keep notes on to-dos, teams, and deadlines to keep you on track for the transition.</i>
WEEK 2 First Steps/ Data Migration/ CRM	<p>List your business on online directories like Google My Business</p> <p>Upload all of your contacts to a Customer Relationship Management (CRM) software like HubSpot's free CRM</p>	
WEEK 3 Website/Reporting	<p>Create a website and make sure to include keywords your prospects will be using, a form, and a way for people to contact you</p> <p>Make sure your reporting and analytics are set up and working properly. Create a test report for traffic, sources, or leads to confirm</p> <p>Tip: Add the HubSpot Tracking Code to your website to automatically collect information on site visitors/prospects</p>	
WEEK 4 Marketing	<p>Use the HubSpot Marketing Hub to start tracking contacts and learning more about visitors</p>	

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WEEK 5 Blog, Social, and SEO	<p>Start a blog using your website platform's option or a site like Medium, WordPress, or HubSpot</p> <p>Create social media accounts for your business and include links to your website + contact info</p> <p>Start optimizing your website with additional keywords and search terms</p>	
WEEK 6 Sales	<p>Set up your new sales flow based on contact forms on your website. Talk to your sales team about additional form fields (like company size, location, etc.) that may help during preliminary sales calls</p>	
WEEK 7 Email/Paid	<p>Using the email software you chose, segment your lists based on lifecycle stage (prospect, lead, customer) or other demographic data. Send out an email letting your customers and prospects know that you have a new website, social media accounts, or blog</p> <p>Test out a paid ad on social media (& try HubSpot Marketing Hub's ads tool.) Try Facebook, Twitter, Instagram, or LinkedIn and do a low-budget campaign as a baseline for future ads</p>	