What A Fractional CMO Delivers

Full Checklist

- The Audit
- The KPI's
- The Plan
- Execution
- Measurement
- Reporting

The Audit

This audit phase creates *data confidence* — ensuring that decisions are based on verified facts, not assumptions or agency reports.

a. Channel Performance Review

- **What's checked:** Each acquisition channel — SEO, PPC, paid social, email, referral, and direct traffic — is examined for reach, engagement, cost per lead, and conversion rate.
- **Tools used:**
  • **Google Analytics 4 (GA4)** for multi-channel attribution and conversion paths.
  • **Google Ads & LinkedIn Campaign Manager** for ad spend and CPC analysis.
  • **SERanking / Ahrefs / Google Search Console** for organic visibility and keyword performance.
  • **Meta Business Suite / X Analytics / YouTube Studio** for social metrics.

b. Spend & ROI Validation

- **What's checked:** Actual spend vs budget across channels; cost-per-acquisition (CPA); return on ad spend (ROAS); and customer acquisition cost (CAC). The CMO ties each metric to pipeline value and revenue.
- **Tools used:**
  • **Looker Studio** or **Databox** for real-time ROI dashboards.
  • **HubSpot / Pipedrive CRM** for lead-to-deal tracking and sales velocity.
  • **Google Sheets or BigQuery** for data normalisation and custom ROI models.

c. Tracking & Attribution Accuracy

- **What's checked:** Whether UTM parameters are set up correctly; event tracking fires as expected; and CRM data matches source tracking. Mis-fires or duplicate attribution are corrected to avoid false positives.
- **Tools used:**
  • **Google Tag Manager (GTM)** to verify firing rules and event configuration.
  • **GA4 DebugView / Tag Assistant** for testing.
  • **HubSpot Tracking Code** for lead source accuracy.
  • **Segment / Zapier / Fivetran** for cross-tool data consistency.

d. Conversion Path Audit

- **What's checked:** End-to-end journeys — from first touch to MQL to SQL to customer. The CMO identifies drop-off points and bottlenecks in landing pages, forms, or sales handoffs.
- **Tools used:**
  • **Hotjar / Microsoft Clarity** for user behaviour heatmaps.
  • **CRM conversion reports** for stage-to-stage rates.
  • **Looker Studio Funnels** for visual journey mapping.

e. Data Integrity & Governance

- **What's checked:** Duplicates, naming inconsistencies, and privacy compliance (GDPR / PECR). Ensures data flows securely between platforms with accurate permissions and user roles.
- **Tools used:**
  • **Google Sheets / Data Studio audits** for cross-validation.
  • **Consent Management Platforms (Cookiebot, OneTrust)** for compliance.
  • **CRM Data Hygiene Reports** for clean records.

f. Benchmark & Trend Analysis

- **What's checked:** Historical performance over the last 3–6 months vs industry benchmarks and competitors to set realistic growth expectations.
- **Tools used:**
  • SERanking Competitor Gap Analysis.
  • Google Trends / SEMrush Market Explorer.
  • Looker Studio time-series dashboards.

Define — Align Every KPI to Commercial Outcomes

Once data accuracy is established through the audit, the next step is definition: turning metrics into meaning.

A Fractional CMO translates raw data into a set of clear, tiered KPIs that connect every stage of the funnel to revenue performance.

Each KPI must meet three tests:
It's measurable and trackable.
It's relevant to commercial goals.
It drives accountability across marketing, sales, and leadership

Top of Funnel — Awareness & Reach

At this stage, the goal isn't just traffic — it's *qualified visibility*. The CMO defines KPIs that measure *who's finding you* and *how efficiently you're attracting them*.

Core KPIs

- **Impression Share:** % of visibility across paid and organic channels (Google Ads, Search Console).
- **Website Sessions & Unique Visitors:** Measured in **GA4**.
- **CTR (Click-Through Rate):** Indicates message resonance and ad/SEO relevance.
- **Cost per Click (CPC):** Used to gauge acquisition efficiency for top-funnel audiences.
- **New vs Returning Visitor Ratio:** Assesses audience freshness and brand recall.

Target ROI Range

- Top-of-funnel activities typically achieve an **ROI of 1.5–2.5x** over 90 days when linked to strong mid-funnel nurturing systems.

Key Tools

- Google Analytics 4, Google Search Console, SERanking, LinkedIn Campaign Manager, Meta Ads Manager, Looker Studio Dashboards.

Mid Funnel — Engagement & Lead Nurture

Here the CMO shifts focus from *visibility to velocity*. The KPIs reflect whether traffic is converting into qualified engagement and progressing towards pipeline creation.

Core KPIs

- **MQL Volume:** Marketing Qualified Leads generated from campaigns.
- **Lead Quality Score:** Weighted score based on engagement, source, and fit.
- **Conversion Rate (Visitor → Lead):** Percentage of visitors filling forms or booking demos.
- **Engagement Rate:** Interaction with mid-funnel assets (case studies, webinars, comparison pages).
- **Email Open & Click Rates:** Gauges nurture sequence performance.
- **Cost per MQL:** Cost of acquiring a marketing-qualified lead.

Target ROI Range

- Mid-funnel systems typically return **ROI of 3–5x**, as nurturing content converts awareness into qualified leads.

Key Tools

- HubSpot CRM, Pipedrive, ActiveCampaign, Looker Studio, Databox, GA4 Event Tracking, Hotjar, Microsoft Clarity.

Bottom of Funnel — Conversion & Revenue Impact

This is where accountability meets performance. The Fractional CMO ensures that final-stage KPIs track *commercial impact*, not marketing noise.

Core KPIs

- **SQL Volume (Sales Qualified Leads):** Opportunities validated by sales.
- **Opportunity-to-Close Conversion Rate:** % of SQLs turning into customers.
- **Customer Acquisition Cost (CAC):** Total marketing & sales cost per closed deal.
- **Pipeline Velocity:** Average time (in days) from MQL → SQL → Customer.
- **Customer Lifetime Value (LTV):** Revenue contribution over time.
- **Marketing ROI (ROMI):** (Revenue Attributed ÷ Marketing Spend).
- **LTV:CAC Ratio:** Key measure of marketing efficiency$

Target ROI Range

- Bottom-funnel activity typically drives **ROI of 5–8x**, depending on sales cycle and LTV/CAC ratio.

Key Tools

- CRM (HubSpot, Pipedrive, Salesforce), Looker Studio, Google Sheets for CAC/LTV, Attribution Platforms (Dreamdata, Ruler Analytics), Revenue Dashboards.

Board Reporting

Funnel Stage	Primary KPI	ROI Target	Tools / Source	Reviewed By	Frequency
Top of Funnel	CTR, CPC, Traffic Growth	1.5–2.5x	GA4, Search Console, Ads	Marketing Team	Weekly
Mid Funnel	MQL Volume, Conversion %, Cost/MQL	3–5x	HubSpot, Looker Studio	CMO	Bi-Weekly
Bottom Funnel	CAC, LTV:CAC, Pipeline Velocity	5–8x	CRM, Revenue Dashboards	MD / Board	Monthly

Plan — The 90-Day Marketing Roadmap

Once the data is accurate and KPIs are defined, the Fractional CMO moves into structured planning — creating a **rolling 90-day roadmap** that aligns every action to measurable business outcomes.
This plan removes guesswork, assigns ownership, and gives leadership clear visibility over priorities, timing, and ROI expectations.

Strategic Objectives

- Translate commercial goals (revenue, pipeline, acquisition targets) into measurable marketing objectives.
- Prioritise **growth levers** — the 20 % of channels or tactics likely to deliver 80 % of results.
- Ensure every initiative has a defined KPI, owner, and success metric.

Campaign Calendar & Cadence

- Map campaigns, launches, and key content themes across the next 90 days.
- Balance **short-term demand generation** (paid search, LinkedIn, retargeting) with **longer-term SEO & content** compounding assets.
- Schedule quick-impact experiments alongside foundational brand and data work.

Channel & Budget Allocation

- Reallocate spend toward channels with proven ROI from the audit phase.
- Define budget splits across funnel stages:
  - **Top of Funnel:** Awareness / Traffic – 25–35 %
  - **Mid Funnel:** Nurture / Engagement – 30–40 %
  - **Bottom Funnel:** Conversion / Retention – 30–35 %
- Identify "pause or pivot" channels where ROI is below target.

Content & Creative Priorities

- Build a content plan mapped to the funnel:
  - **Awareness:** Blogs, SEO guides, thought-leadership posts.
  - **Consideration:** Case studies, webinars, comparison pages.
  - **Decision:** Landing pages, testimonials, ROI calculators.
- Assign ownership between interns, freelancers, and AI-assisted workflows.
- Create templates and style guides to maintain brand consistency.

Automation & AI-Driven Workflows

- Deploy automation for reporting, email sequences, and campaign triggers.
- Integrate **AI intern tools** for research, keyword expansion, and content drafts.
- Connect Looker Studio / Databox dashboards for real-time metric visibility.

Governance & Alignment

- Schedule recurring meetings:
    - **Weekly:** Tactical performance review (marketing team).
    - **Bi-Weekly:** Channel deep-dives (CMO + sales).
    - **Monthly:** Board-ready performance summary.
- Maintain shared documentation in project systems (Asana, Notion, ClickUp).

Outputs of the Planning Phase

- A single, visual **90-Day Marketing Roadmap** in Gantt or Kanban format.
- Channel-level budgets with expected ROI and KPI targets.
- Role clarity for every contributor — CMO, intern, specialist, and board.
- Clear timeline for the next cycle's audit and optimisation.

A Typical CMO Day in Motion

Morning — Data, Alignment & Direction (8:00 – 10:30 AM)

- **Dashboard Check:**
  - Open **Looker Studio** or **Databox** dashboards to review yesterday's performance (traffic, CAC, MQL volume, conversions).
  - Identify early signals — what's improving, what's slipping, and where to adjust spend.
- **Campaign Snapshot:**
  - Check **Google Ads**, **LinkedIn**, and **Meta Ads Manager** for CPC trends, click-through rates, and conversion cost.
  - Flag anomalies or underperforming creatives.
- **Daily Stand-Up:**
  - Meet with interns or execution team (15 min huddle).
  - Assign daily priorities — content tasks, reporting updates, outreach adjustments.
- **AI Assistant Briefing:**
  - Review queued AI-generated content (blogs, posts, subject lines) for tone and accuracy before approval.

Late Morning — Strategic Oversight (10:30 – 12:30 PM)

- **Channel Optimisation:**
  - Review top-performing keywords, audiences, and ads; reallocate budget to best-performing segments.
  - Ensure tracking events in **GA4** and **Tag Manager** are firing correctly.
- **CRM Pipeline Check:**
  - Verify lead flow from marketing forms into **HubSpot** or **Pipedrive**.
  - Spot any bottlenecks between MQL → SQL → Opportunity stages.
- **Stakeholder Sync:**
  - Quick call with Sales or MD to confirm alignment between pipeline metrics and marketing activity.

Afternoon — Execution, Enablement & Creation (1:00 – 4:00 PM)

- **Campaign Deployment:**
  - Approve and launch new paid ads, nurture sequences, or remarketing lists.
  - Test new creatives, CTAs, or landing pages for CRO improvements.
- **Intern Workflows:**
  - Review AI intern output — reports, keyword research, analytics summaries.
  - Give quick feedback loops to build accuracy and speed.
- **Content Activation:**
  - Publish mid-funnel assets (case studies, comparison pages, short-form video).
  - Tag and track everything with **UTMs** and goal events for attribution.
- **Automation Checks:**
  - Test email triggers, chatbots, and lead scoring rules.
  - Adjust sequences if open/click rates deviate from targets.

Late Afternoon — Reporting & Forward Planning (4:00 – 6:00 PM)

- **Mini Performance Review:**
  - Pull day-end metrics snapshot to identify daily gains or dips.
  - Note anomalies for discussion in tomorrow's morning huddle.
- **Leadership Update:**
  - Send a concise 3-bullet Slack or email summary:
    1. Wins (e.g., "CPC down 14 %, MQLs up 18 %")
    2. Risks (e.g., "LinkedIn retargeting cost rising")
    3. Actions planned for tomorrow.
- **AI Task Scheduling:**
  - Queue overnight AI workflows — content outlines, report drafts, or keyword updates — so the morning starts with ready insights.

Outcome

By the end of each day, the Fractional CMO ensures:

- Every channel and campaign is optimised for measurable outcomes.
- Interns and freelancers are aligned to strategic priorities.
- Dashboards and reporting remain up to date and board ready.
- Marketing operations move with **agility, accountability, and transparency** — the hallmarks of the Communications Edge model.

Measure — Weekly Performance Review Checklist

Top-of-Funnel — Traffic & Awareness

- Website Sessions & Unique Users – check GA4 trends week-on-week.
- Source/Medium Attribution – confirm organic vs paid mix is stable and accurate.
- Impression Share & CTR – spot campaigns losing visibility or message relevance.
- Cost per Click (CPC) & Bounce Rate – ensure traffic quality is high and cost efficiency holds.
- Top Landing Page Engagement – measure time on page and scroll depth via Hotjar or Clarity.

Mid-Funnel — Engagement & Lead Quality

- MQL Volume – compare current vs target and previous periods.
- Lead Source Breakdown – see which channels drive qualified leads vs noise.
- Form Conversion Rate & CPL (Cost per Lead) – track lead efficiency per channel.
- Email Engagement – open rate, click-through rate, unsubscribe rate.
- Content Performance – views and CTA clicks on case studies, guides, and webinars.
- CRM Data Health – check lead enrichment accuracy and duplication levels.

Bottom-of-Funnel — Pipeline & Revenue Impact

- SQL Volume – how many MQLs became sales-qualified this week.
- Opportunity Conversion Rate – SQL → Opportunity → Closed Won.
- Pipeline Value & Velocity – average deal size and time to close.
- Customer Acquisition Cost (CAC) – review marketing spend vs new revenue.
- LTV :CAC Ratio – confirm marketing efficiency meets target range (≥ 3:1).

Channel Performance & ROI

- Paid Media ROI – ROAS (Revenue / Ad Spend) by platform.
- SEO ROI – track organic lead volume growth vs content cost.
- Social Engagement vs Traffic – does reach convert into sessions or leads?
- Email Automation ROI – revenue per send and unsubscribe rate.
- Attribution Accuracy – ensure multi-touch data matches CRM closed-won records.

Efficiency & Agility Checks

- Budget Variance – compare planned vs actual spend by channel.
- Performance Anomalies – identify outliers requiring manual review.
- Creative Fatigue – ad CTR drops or frequency spikes signal refresh needed.
- Workflow Automation – confirm AI intern reports and dashboard sync run on schedule.
- Action List – document quick optimisations for the next execution cycle.

Outputs of the Measure Phase

- A 1-page Looker Studio or Databox dashboard highlighting green/red performance areas.
- A summary email to leadership: 3 wins, 3 risks, 3 next actions.
- Updated ROI forecast for next month's board review.

Report — Board-Ready Monthly Summary Checklist

1. Executive Overview

- Headline summary: key growth metrics, campaign performance, and ROI in one slide.
- Traffic → Lead → Pipeline → Revenue flow visualised (top-to-bottom conversion).
- 1-minute narrative: “What worked, what didn’t, and what we’ll do next.”
- Highlight measurable business outcomes, not marketing activity.

2. Performance Dashboard Summary

- Top-level KPIs at each funnel stage:
  - Awareness – Traffic / Impressions / CTR
  - Consideration – MQL volume / CPL / Engagement
  - Decision – SQL conversion / Pipeline value / Win rate
- Channel ROI overview (Paid, Organic, Email, Social, Referral).
- Comparison vs previous month and quarter-to-date.
- Trend graphs showing leading and lagging indicators.

3. Budget & ROI Analysis

- Spend vs Plan – variance by channel and campaign.
- ROI / ROAS per channel with benchmark targets.
- Customer Acquisition Cost (CAC) and Lifetime Value (LTV) trend.
- Spend reallocation recommendations based on data.
- Forecasted ROI for next month’s budget approval.

4. Channel & Campaign Insights

- Top 3 Performing Campaigns – KPIs and success drivers.
- Bottom 3 Performing Campaigns – root cause and planned fixes.
- Emerging opportunities – new keywords, audiences, or partnerships.
- Creative or message testing insights (A/B results, conversion improvements).

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5. SEO & Content Impact

- Organic traffic growth and ranking movements (top 10 keywords).
- New content performance – views, dwell time, CTA clicks.
- Backlink and domain authority updates (if relevant).
- Content ROI – conversions driven by organic sources.

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6. Pipeline & Sales Alignment

- Leads → MQLs → SQLs → Opportunities → Closed Won.
- Marketing-to-Sales handover conversion rate.
- Average sales cycle time and velocity trend.
- Attribution breakdown – first-touch vs multi-touch.
- Joint marketing + sales actions to improve handover quality.

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7. Learnings & Optimisations

- Key insights from tests and data experiments.
- Lessons learned from underperforming initiatives.
- Quick wins implemented during the month.
- Process improvements to increase efficiency next cycle.

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8. Next Steps / Action Plan

- Top 5 actions to improve next month's results.
- Channel and campaign priorities for the next 90-day roadmap.
- Upcoming tests (A/B ads, landing pages, automation flows).
- Resource requirements – intern allocation or budget shifts.
- Targets reset or reconfirmed based on current data.

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9. Board Decision Points

- Budget approvals or adjustments.
- Strategic direction (e.g., new markets or products).
- Technology investments (dashboards, automation, AI).
- People or agency resource changes if performance gaps persist.

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10. Presentation Format

- Delivered as a 10-slide summary deck or interactive dashboard walk-through.
- Colour-coded red / amber / green status for instant visibility.
- End with a one-page "Marketing Health Scorecard" — a Communications Edge signature element.
