

# The Manufacturer's Mid-Funnel Checklist



## QUICK SNAPSHOT

ICP defined (plant size, SKUs, geo, system stack) \_\_\_\_\_

Pilot scope (product family/line) \_\_\_\_\_

Baseline marketing metrics (last 90 days): qualified lead #s, win rate %, etc.  
\_\_\_\_\_

Pilot owner(s) (marketing + ops + sales) \_\_\_\_\_

## PROOF SCOREBOARD

*(Publish rolling 90-day proof)*

For each KPI tile, confirm fields and thresholds.

- ☐ Scrap / rework % shown with 90-day window
- ☐ Inspection time / pass rate with window + source
- ☐ On-time delivery % with window + source
- ☐ Throughput or similar key metric
- ☐ Refresh cadence set to weekly (owner & calendar invite)

**Gate:** If any required tile lacks all the info you need, do not publish; use “process proof” (SOP snapshot) until ready.

## WEBSITE MODULES

*(Your site = mid-funnel)*

- ☐ Proof blocks above the fold on pilot page (tiles link to footnotes)
- ☐ Use-case paths (role/problem navigation) with “related proof” snippets
- ☐ Offer router limited to 3 bottom-funnel offers: teardown / consult, ROI check / calculator, checklist
- ☐ Next best action component (contextual; not generic “contact us”): Shows a different offer when a user does something specific
- ☐ Instrumentation live (events firing for tile views, offer clicks)

**Gate:** If you can’t name the offers in 10 seconds, you have too many. Kill or consolidate.

## SIGNALS → SALES PLAYS

*(Route in hours, not weeks)*

- ☐ Warm signal #1 (e.g., viewed “QA” + scrolled 75%) → Pricing teardown  
Owner: \_\_\_\_\_ ; SLA: \_\_\_\_\_
- ☐ Warm signal #2 (e.g., proof blocks + Key services page) → Consultation  
Owner: \_\_\_\_\_ ; SLA: \_\_\_\_\_
- ☐ Actioned signal (form/chat) → Schedule (calendar link)
- ☐ Views/Lists for each signal (any tool or spreadsheet)
- ☐ Auto-task or manual SOP (who creates the task, where)

**Gate:** If time-to-first-touch > 48h for warm signals, fix routing/ SLA before scaling.

COMPLIANCE  
& RISK

(Publish safely)

- ☐ Numbers use windows + variance (e.g., “-1.8% over 90 days”)
- ☐ Confidential client data removed or generalized
- ☐ Confidence rubric; Low → show process proof instead
- ☐ Audit log sheet started

MEASUREMENT

(Prove this works)

Leading:

- ☐ Proof tile views/clicks tracked
- ☐ Offer clicks tracked
- ☐ Warm replies (LinkedIn/email) counted
- ☐ Time-to-first-touch measured

Lagging:

- ☐ SQLs created from warm signals
- ☐ Win rate delta vs. baseline
- ☐ Margin impact (if applicable)

Sanity:

- ☐ “More meetings with the right firms?” (yes/no with notes)

SCORING  
RUBRIC

(Quick triage)

Score each item 0/1/2:  
0 = missing  
1 = partial  
2 = complete

Proof Scoreboard: \_\_\_\_\_ / 2  
Website Modules: \_\_\_\_\_ / 2  
Signals → Plays: \_\_\_\_\_ / 2  
Compliance: \_\_\_\_\_ / 2  
Measurement: \_\_\_\_\_ / 2  
TOTAL: \_\_\_\_\_ / 10

Readout:

0–4 Not Ready (fix proof + offers first)  
5–8 Pilot-Ready (run one product family)  
9–10 Scale-Ready (roll to second page; add paid boosts)

QUICK WINS

(Ship in a week)

- ☐ Publish two proof blocks with proper footnotes
- ☐ Reduce offers to three and define the next best action
- ☐ Create two warm-signal views and a manual SLA (spreadsheet is fine)



NEED SUPPORT WITH YOUR STRATEGY?  
WE’RE HERE TO HELP.

Book a no-pressure meeting to learn more about us.