

Lifecycle Marketing Checklist

Use this checklist to make sure your B2B SaaS lifecycle marketing strategy covers all the key touch points—from Awareness to Advocacy.

Awareness

- ✓ Define ICP (ideal customer profile) and personas
- ✓ Create SEO-optimized blog and website content
- ✓ Run paid campaigns targeting top-funnel intent
- ✓ Promote thought leadership on LinkedIn and/or industry publications
- ✓ Offer downloadable assets (eBooks, guides) with lead capture forms

Consideration

- ✓ Set up email nurture sequences for new leads
- ✓ Provide case studies and comparison content
- ✓ Host webinars or product tours
- ✓ Use intent signals (email engagement, page views) to score leads
- ✓ Align with Sales on MQL (marketing qualified lead) handoff criteria

Decision / Conversion

- ✓ Personalize follow-up messaging after demos or trials
- ✓ Enable Sales with battle cards, ROI calculators, and proposal templates
- ✓ Offer time-sensitive incentives (where appropriate)
- ✓ Track pipeline velocity and deal stage progression
- ✓ Automate reminders for dormant deals

Onboarding & Adoption

- ✓ Build an automated onboarding email sequence
- ✓ Include training videos, quick-start guides, or setup checklists
- ✓ Assign a Customer Success contact for onboarding
- ✓ Set up product usage tracking DAUs (daily active users) and key feature adoption
- ✓ Trigger in-app tips and nudges for new users

Retention & Expansion

- ✓ Schedule QBRs (quarterly business reviews) or check-ins at regular intervals
- ✓ Use usage data to flag at-risk accounts
- ✓ Send renewal reminders well in advance
- ✓ Create upsell/cross-sell nurture flows
- ✓ Offer access to advanced content or premium features

Advocacy

- ✓ Request testimonials or case studies from successful customers
- ✓ Launch a referral or partner program
- ✓ Encourage reviews on business software and service review platforms such as G2 and TrustRadius after onboarding or reaching milestones
- ✓ Invite customers to user communities or advisory councils
- ✓ Celebrate customer wins and milestones on social media