

PRE-FLIGHT CHECKLIST

Q1 Marketing Planning

A pre-flight checklist for revenue-accountable Q1 plans. Goals, channel allocation, measurement, and integration touchpoints — captured before the year starts.

FORMAT

PDF Workbook

LENGTH

8 Pages

EDITION

Edition 2026.1

BEFORE Q1 STARTS

Most Q1 plans fail in November.

Not because the plan was wrong, but because the work to make Q1 succeed had to happen the previous quarter. Pre-flight is the difference between a quarter that compounds and a quarter that scrambles.

This checklist is built backward from the start of Q1. It runs across four windows — **T-60, T-30, T-14, and T-0** — and four work streams: **Goals, Channels, Measurement, and Integration Touchpoints**. Treat it as a checklist of conversations to have, decisions to lock, and assets to ship before the first business day of the quarter.

The principle. Every item on this list answers a question someone will ask you in week two of Q1. The point is to answer the question now — when there is time to think — instead of in the moment, when there isn't.

How to use this

Walk through every item with your CMO, your most senior strategist, and one finance partner. Tick what is done. For everything unticked, name an owner and a date. Anything still unticked at T-7 is a Q1 risk that should be visible to leadership.

72

TOTAL CHECKLIST ITEMS

4

PRE-FLIGHT WINDOWS

90 min

TOTAL TIME TO COMPLETE

T-60 · GOALS WINDOW

Goals, audience, offer.

Run this window 60 days before Q1 starts. The output is one document that says *"here is what we are trying to do, for whom, with what offer."* Every later checklist item depends on this being unambiguous.

REVENUE & GROWTH TARGETS

- Q1 revenue target is locked, signed by CFO, and visible to every channel lead.

- Q1 target is decomposed into monthly and weekly goals.

- Year-over-year and quarter-over-quarter comparisons are documented (with explanations for the deltas).

- Pipeline coverage ratio (or B2C equivalent) for Q1 is defined and tracked.

- Revenue mix targets (new vs returning, paid vs organic, channel split) are written down.

AUDIENCE & ICP

- Q1 ICP is documented in one place — referenced identically by paid, organic, and CRM.

- Top three audience segments for Q1 are named, sized, and prioritized.

- Any audience changes from Q4 are documented with the rationale and the affected channels.

- First-party data refresh has been run — duplicates, decay, and consent status reviewed.

OFFER & POSITIONING

- Q1 hero offer is decided, priced, and approved by product / commercial.

- Q1 messaging architecture is written — one-liner, value props, proof points, objections.

- Competitive positioning is refreshed — at least one new comparison artifact exists.

- Brand & performance teams have reviewed and agreed on Q1 narrative.

T-30 · CHANNELS WINDOW

Channel allocation & setup.

Run this window 30 days before Q1 starts. The output is every channel ready to spend on day one — accounts, creative, calendars, tracking, and budget all aligned to the Q1 plan.

CHANNEL ALLOCATION

- Q1 channel mix is decided as a percentage of total budget — paid search, paid social, programmatic, content, SEO, email/CRM, organic social, partnerships, events.
- Each channel's Q1 budget is approved, in-system (Google Ads, Meta, etc.), and reconciled with finance.
- Test budget (separate from working media) is carved out and ringfenced.
- Reserve / contingency budget is named and held by a single owner.

PAID MEDIA

- Account structures reviewed; campaigns retired, renamed, or restructured as needed.
- New audiences uploaded; old audiences pruned.
- Creative refresh for Q1 is briefed; production timeline locked to launch date.
- Landing pages reviewed for Q1 offer alignment; CRO test queue prioritized.
- Tracking pixels and conversion events validated in test mode.

SEO & CONTENT

- Q1 content calendar published — topics, formats, owners, ship dates.
- Priority pages reviewed for AI search visibility (GEO) and on-page signals.
- Internal link plan agreed for new content.
- Quarter's link-building / digital PR targets are agreed.

CRM, EMAIL & LIFECYCLE

- Q1 lifecycle calendar (broadcasts, journeys, lifecycle nudges) is locked.

- Suppression rules, frequency caps, and consent state reviewed.

T-14 · MEASUREMENT WINDOW

Measurement, KPIs, test plan.

Run this window 14 days before Q1 starts. The output is one dashboard, one set of targets, and one test plan that every channel can act on without ambiguity.

REPORTING INFRASTRUCTURE

- Q1 executive dashboard is built, validated, and bookmarked.
- Every Q1 KPI traces back to a defined data source and a refresh frequency.
- Attribution model for Q1 is documented (and any changes from prior period are flagged to finance).
- Reporting cadence is agreed — weekly stand-up, monthly business review, quarterly board.

KPIS & TARGETS

- Each channel has 2–4 KPIs (lead, intermediate, and outcome) — not a dashboard of 30.
- Targets per KPI are set per month, not just per quarter.
- Vanity metrics have been moved off the headline dashboard.
- Each KPI has a named owner and a defined response action when it goes off-target.

TEST & LEARN

- Q1 test backlog is prioritized — top three tests per channel, hypothesis written.
- Test sample sizes and read-out dates are pre-calculated.
- Test review cadence is on the calendar.

T-0 · INTEGRATION WINDOW

Integration touchpoints & launch.

Run this window in the final week before Q1. The output is a quarter that launches connected — every channel pointing at the same goals, every team briefed on the same plan, every metric flowing into the same dashboard.

INTEGRATION TOUCHPOINTS

- Single Q1 plan document exists in one location — every channel and partner links to it.
- Cross-channel campaign moments (launches, promos, content drops) are mapped on one calendar.
- Brief templates are unified — paid, organic, content, and CRM all use the same one.
- RACI is published — who is Responsible, Accountable, Consulted, Informed for each Q1 workstream.
- Handoffs between teams (paid → SEO, content → CRM, social → service) are documented.

STAKEHOLDERS & RHYTHM

- Q1 kickoff session is scheduled with internal team + agency partners.
- Weekly performance stand-up is on the calendar.
- Monthly business review is on the CFO / CMO calendars.
- Escalation paths are defined for off-target weeks.

RISK & READINESS (T-0)

- Any unticked items above have a named owner and a date.
- Q1 launch dependencies are visible to leadership.
- Communications plan exists for the first two weeks of Q1.
- Q4 retrospective findings have been incorporated into Q1 planning.

IF YOU ONLY DO THREE THINGS

The three non-negotiables.

If time, budget, or attention forces you to cut this list down, do not cut these.

01 One plan document, in one location.

If the plan exists in three decks, two spreadsheets, and a Notion page, it does not exist. Pick one canonical home and make every channel and partner reference it.

02 One dashboard before day one.

If the executive view does not exist on the first business day of Q1, the quarter starts blind. Building the dashboard reactively in week two means every decision in weeks two and three is made on incomplete data.

03 One revenue owner.

A quarter without a single named human owner of cross-channel revenue is a quarter where every channel optimizes locally and the number suffers globally.

The hardest item on this checklist is not on the list. It is saying no to the late-arriving idea, the unbudgeted campaign, the surprise sponsorship. Pre-flight is what gives you the right to say no — because the quarter has a plan and you can show why the new thing breaks it.

Make Q1 the quarter that compounds.

If you ticked fewer than 75% of the boxes, you do not have a marketing problem — you have a pre-flight problem. A 30-minute strategy session is the fastest way to scope what gets done by whom before Q1 starts. No pitch deck. Just the work.

[Book a Strategy Session →](#)