



All-in-One Marketing Checklist: Beginner to Intermediate

A step-by-step guide to build, launch, and scale your online business using one platform. Follow each section in order.

Quick Start (Do this first)

1. Pick your main offer

Decide what you will sell: a lead magnet, a course, a webinar, coaching, or a product. Keep it simple.

2. Create an account

Sign up for an all-in-one platform so you have one dashboard for pages, emails, payments, and courses.

3. Set your brand basics

Add your business name, logo, default email, payment details, and timezone.

4. Add your domain

Connect a custom domain or use the platform subdomain so links look professional.

Minimum-Viable Funnel (MVP)

1. Lead magnet

Create a simple lead magnet (PDF, checklist, short video). Upload as a resource or file.

2. Landing page

Use a pre-built template and add headline, short benefits, and the signup form.

3. Thank-you page

Create a page that delivers the lead magnet and confirms next steps.

4. Email sequence

Write a welcome email + 3 short follow-ups. Schedule them in the platform's email tool.

5. Checkout setup (if selling)

Create a product, add price, set up checkout page and payment integration.

Automation & Tags

1. Tag plan

Create tags for source, interest, and customer status (e.g., lead, buyer, trial, student).

2. Workflow basics

Build workflows: signup > welcome email > nurture > sales sequence.

3. Trigger rules

Use form submits, purchase events, or tag changes as triggers to run automations.

4. Test flows

Go through the full flow as a user to confirm emails, access, and tags fire correctly.

Courses, Memberships & Delivery

1. Course structure

Break your course into modules and lessons. Keep lessons short and actionable.

2. Content upload

Add videos, PDFs, and quizzes as lessons. Set access rules per product.

3. Membership levels

Create tiers if needed (free, basic, premium). Set different access and pricing.

4. Student onboarding

Automate welcome emails, login instructions, and an intro lesson sequence.

Affiliate Management & Tracking

1. Affiliate setup

Turn on an affiliate program for your product. Add affiliate terms and payout settings.

2. Affiliate links

Generate referral links and test tracking so affiliates get credited for sales.

3. Payouts & reporting

Decide manual or automated payouts. Check reports weekly to spot top partners.

Website, Blog & Pages

1. Home page

Use a simple homepage that explains who you help and the main call to action.

2. About & Contact

Add an about page and a contact form for credibility and trust.

3. Blog basics

If you blog, add categories and a clear subscribe box on every post.

Launch, Grow & Optimize

1. Pre-launch sequence

Warm your list with content and a low-barrier offer before launch.

2. Offer stack

Use one main offer + one upsell. Keep the checkout simple.

3. Split testing

A/B test headlines, page layouts, and email subject lines. Run short tests.

4. Analytics review

Check conversion rates, email open rates, and revenue per visitor weekly.

5. Scale plan

Double down on channels that convert. Add ads or partnerships when profitable.

Minimum Viable Tech Setup (Checklist)

- Domain connected and SSL active
- Payment gateway connected (PayPal/Stripe) and tested
- One landing page live with opt-in form
- Lead magnet uploaded and delivered
- Welcome email + 3 follow-ups scheduled
- One product or course created with checkout
- Basic automation workflow created and tested
- Tags for key contact states added

Troubleshooting & Quick Tips

Common issue: Email not sending

Check sender address, verify domain records, and review spam settings.

Common issue: Access not granted

Confirm product access rules and test with a new test account.

Quick tip: Use templates

Start with templates for pages and emails to save time.

Quick tip: Keep it small

Launch with one funnel. Improve after it works.

[Want to get started with an easy all-in-one platform? Try Systeme.io for free and use this checklist to launch faster.](#)