

Marketing on a shoestring checklist

If the marketing budget's looking tight but you need some big results, work your way through our checklist to help you create an action plan. We've got some great ideas that will help that precious cash stretch.

When you focus on the most effective strategies, leverage free and low-cost marketing, and make the most of every customer interaction, you can grow your business without breaking the bank. Use this checklist to refine your approach, strengthen customer relationships, and maximize every opportunity to increase sales.

✓ Refocus existing marketing

- Advertising is targeted to your best customers
- Identify what marketing is working and repeat
- Marketing methods have measurable outcomes
- Ask customers where they found out about you
- Focus marketing plan on the best methods

✓ Use free or low-cost marketing

- List your business in free directories
- Use free social media to engage customers
- Publish customer feedback and testimonials
- Send out press releases about newsworthy events
- Sponsor local community events

✓ Collaborate with other businesses

- See if you can build any strategic alliances
- Launch joint promotions to split the costs
- Provide each other with free reciprocal advertising
- Publish articles on your area of expertise
- Become well known as the expert by giving talks

✓ Maximize every sale

- Train staff to upsell at the point of sale
- Provide attractive guarantees or warranties
- Offer free add-ons to make a product bundle
- Offer deals to long-term customers
- Offer incentives for referring friends

✓ Strengthen customer relationships

- Invite customers to join your contact list
- Send regular email newsletters
- Contact customers who bring in most of your profit
- Focus your efforts on the highest-return customers
- Build customer loyalty programs

✓ Improve customer experience

- Map out every customer point of contact
- Write a plan for better service at each contact point
- Offer personalized service and follow-ups
- Encourage customer feedback to refine your approach
- Make it easy for customers to get in touch

SMALL BUSINESS

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Refocus existing marketing

Advertising is targeted to your best customers

Your best customers are those who bring the most value, whether through frequent purchases, high lifetime value, or strong referrals. Identify their characteristics, pain points, and buying behaviors to refine your targeting.

Focus your advertising on these customers and people like them. Tailor messaging to their needs and use the channels they engage with most. This makes your marketing more effective and maximizes your budget.

Identify what marketing is working and repeat

Analyze website traffic, social media engagement, and sales data to see which marketing efforts drive results. Customer feedback and performance metrics help pinpoint what's working.

Once you know what delivers, refine and expand those strategies. Repurpose high-performing content, invest in the best channels, and eliminate ineffective tactics. Small, data-driven tweaks can lead to big gains.

Marketing methods have measurable outcomes

Trackable metrics like sales revenue, conversion rates, and website traffic help gauge marketing effectiveness. Focus on measurable data to make informed decisions about where to invest time and money.

While brand awareness and customer perception matter, prioritize tangible outcomes. Clear, data-backed insights allow for smarter marketing adjustments and better long-term results.

Ask customers where they found out about you

Your current customers are great source of information about successful marketing tactics. After all, they've come to your business. Reach out to happy customers, such as after a sale is completed or a project is finished and ask them how they first heard about you.

Use their answers to guide your future marketing efforts. If people found you on social media, make sure to continue with your social media. If they heard about you through word of mouth, it might be a good idea to encourage more referrals.

Focus marketing plan on the best methods

Identify which marketing efforts generate the best returns and prioritize them. Shift resources toward high-performing strategies while reducing investment in lower-yield activities.

Marketing success depends on continuous refinement. Monitor performance, adapt to changing trends, and reallocate resources as needed to maintain strong results.

Use free or low-cost marketing

List your business in free directories

Free advertising opens your business to a new range of clients and can be highly effective, especially for local searches. [Google Business Profile](#) is one such listing that enables you to list your business so people who find you on Google Search can get more information about you. [LinkedIn](#) is another popular business platform and one you should be on.

Other online directories include [Bing Places for Business](#), [Yelp](#), and [Yellow Pages](#).

Use free social media to engage customers

You can build a following for free or at very low cost using social media such as [LinkedIn](#), [X](#), [YouTube](#), [Facebook](#), [TikTok](#), [Instagram](#), [Pinterest](#) and [Threads](#). Find out what social media platforms your target market is on and have a profile there.

With platforms like these dominating user engagement, businesses can now reach millions through 15-60 second videos that showcase personality, behind-the-scenes insights, quick tutorials, and creative brand storytelling.

Publish customer feedback and testimonials

Before making a purchase, people want to see proof that your business delivers. Testimonials and reviews from satisfied customers help build trust and show potential buyers how you've helped others like them. Encourage happy clients to leave reviews on social media or third-party review sites, and make it easy for them by providing direct links.

If a customer shares positive feedback via email, ask for permission to feature their comments on your website or social media. Sending out feedback surveys is another great way to gather testimonials. Just be sure to get consent before sharing.

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Send out press releases about newsworthy events

Press releases attract attention. When your business does something newsworthy, share it by writing a press release and sending it to your local media. This can include an expansion, a grand opening or reopening, a new product or service, awards or. Recognition, partnerships, charitable activities, and special events.

Make sure the event is newsworthy, as you won't get attention for your regular, daily activities. In the first paragraph include the most important information that readers need to know and make sure to include a quote or two.

Sponsor local community events

Your local community is likely still your best place for clients and customers. Not only that, but consumers typically like to support businesses that are involved in the local community. Find community events that have some overlap with your business and find ways to sponsor those events or get involved. This becomes a mutually beneficial situation in which the event gets necessary funding or resources while your business receives goodwill.

For example, a dentist could sponsor a community health fair, a gym could sponsor a marathon or Fun Run, and a music store could sponsor a local concert series.

Collaborate with other businesses

See if you can build any strategic alliances

Partnering with complementary businesses, i.e. those that offer related but non-competing products or services, can be a valuable source of referrals and leads. These partnerships create mutually beneficial opportunities, such as cross-promotions, bundled offerings, or shared marketing efforts that expand your reach without increasing costs.

Strategic alliances can take many forms, including referring clients to each other, co-hosting webinars or workshops, launching joint promotions, or collaborating on industry insights. By working together, you can provide more value to customers while strengthening your market presence.

Launch joint promotions to split the costs

If you're looking to cut back on marketing costs, see if you can partner with a complementary business to share the costs. You could collaborate on a content marketing campaign that highlights a similar aspect of your business.

For example, a travel agency and a luggage company could co-brand a travel guide or a series about travel essentials. You could split the costs of hosting joint workshops or webinars at which you both present your expertise and build your brands. Or you could share advertising space to cut back on the cost of advertising.

Provide each other with free reciprocal advertising

If you have an email list, website, or social media presence, you can expand your reach by partnering with another business for cross-promotion. Highlight their products or services in your newsletter, give them a shoutout on social media, or feature their content on your platform. In return, they do the same for you, exposing both businesses to new potential customers.

There are many ways to collaborate, from sharing each other's posts to co-hosting social media takeovers or running joint giveaways. These partnerships help both businesses grow their audience at no extra cost while building credibility through trusted recommendations.

Publish articles on your area of expertise

Writing and sharing industry insights helps attract potential clients and build credibility. Publish articles on your blog, contribute to industry newsletters, and share content on social media to reach a wider audience.

Expand your reach by submitting guest posts to relevant blogs or trade publications. Focus on practical, valuable topics like industry trends, how-to guides, and expert advice. Well-crafted content strengthens your reputation and drives traffic to your business.

Become well known as the expert by giving talks

Speaking engagements help establish you as a trusted authority. Presenting at events allows you to share knowledge, connect with potential clients, and demonstrate your expertise in a compelling way.

Seek opportunities to speak at conferences, trade shows, business groups, or webinars. Workshops and panel discussions also provide valuable exposure. The more you engage with your industry, the more recognition and trust you'll build.

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Maximize every sale

Train staff to upsell at the point of sale

Customers already making a purchase may be open to buying complementary products. Upselling increases transaction value while enhancing their experience, making repeat business more likely.

Train staff to suggest relevant add-ons that provide real value. A pet store employee might recommend a popular treat with dog food, or a tech store associate could suggest a protective case for a new phone.

Provide attractive guarantees or warranties

Offering guarantees or warranties can significantly affect a consumer's decision to purchase. It reduces the perceived risk of buying, instills confidence in the product or service, and highlights your business's commitment to customer satisfaction. Small business owners can offer returns, repairs, or replacements within a set period if the product or service doesn't meet the customer's needs.

When you offer a guarantee, make sure you're clear with the terms and can uphold your promise. Overpromising and failing to follow through can affect customer trust and your reputation.

Offer free add-ons to make a product bundle

Adding a free item can make a purchase more appealing and create a sense of goodwill. Customers may be more inclined to buy when they feel they're getting extra value.

Keep add-ons affordable and relevant. A bookstore might include a free bookmark, a pet store could offer sample-size pet food, or a consulting business could provide a short free session. Small extras can set your business apart.

Offer deals to long-term customers

Rewarding loyal customers encourages repeat business and strengthens relationships. Special deals, exclusive discounts, or added perks make them feel valued and keep them engaged.

Consider discounts, bulk savings, package deals, or subscription benefits. A well-structured loyalty program creates a sense of exclusivity and encourages continued business.

Offer incentives for referring friends

Referrals are a powerful way to attract new customers. People trust recommendations from friends and family, making word-of-mouth one of the most effective marketing tools.

Offer small, meaningful rewards for successful referrals, such as discounts, complimentary services, or thank-you gifts. A well-planned referral program brings in new customers while reinforcing relationships with existing ones.

Strengthen customer relationships

Invite customers to join your contact list

An email list helps keep your business top-of-mind and strengthens customer connections. Encourage sign-ups at checkout or offer incentives like discounts or exclusive content to attract engaged subscribers.

Once a customer joins, send a welcome email with a thank-you message and an overview of what they'll receive, such as special offers or insider news. Regular updates keep your business relevant and encourage repeat purchases.

Send regular email newsletters

These are an easy and low-cost way to stay in touch. Share valuable content like industry insights, tips, and exclusive deals to keep subscribers engaged.

Segment your list by purchase history or interests to send relevant content. Keep emails well-designed, easy to read, and balanced between informative and promotional content. Always follow email marketing regulations.

Contact customers who bring in most of your profit

Your most valuable customers contribute the most to your business, so maintaining a strong relationship with them is essential. Personalized messages, exclusive offers, and occasional check-ins show appreciation and build loyalty.

Set reminders for key dates like birthdays or purchase anniversaries. A simple, thoughtful message can deepen customer connections and encourage continued business.

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Focus your efforts on the highest-return customers

High-value customers generate the most revenue over time. They're loyal, engaged, and likely to refer others, making them essential to long-term success.

Analyze purchase frequency, average order value, and engagement levels to identify them. Prioritize these customers by tailoring offers, communication, and experiences to their needs.

Build customer loyalty programs

A well-structured loyalty program encourages repeat business and strengthens relationships. Reward customers through point-based systems, tiered perks, cashback, or exclusive membership benefits.

Choose a format that fits your business and appeals to your audience. Keep it simple and valuable so customers stay engaged and continue choosing your brand.

Improve customer experience

Map out every customer point of contact

Each interaction with your business is an opportunity to build trust and strengthen relationships. Mapping touchpoints helps identify areas for improvement and maintain consistency.

List all possible interactions, from discovery to post-purchase support. Use a visual tool like a flowchart to group them by journey stage, assess quality, and refine the experience.

Write a plan for better service at each contact point

Every interaction should provide a smooth, positive experience. Gather customer feedback through surveys or direct conversations to identify weak spots where customers disengage.

Enhance these areas with personalization, consistency, and streamlined processes. Reduce unnecessary steps and use technology to track and refine interactions.

Offer personalized service and follow-ups

Personal touches make customers feel valued. Use their name, remember past purchases, and offer tailored recommendations to strengthen relationships.

Following up after a purchase shows you care. A check-in email, call, or short survey allows customers to ask questions, provide feedback, and stay engaged.

Encourage customer feedback to refine your approach

Customer insights reveal what's working and what needs improvement. Make feedback easy to give through surveys, reviews, or direct messages.

Use responses to enhance products, services, and experiences. Address concerns, highlight positives, and show customers their input drives meaningful change.

Make it easy for customers to get in touch

Accessible support improves customer satisfaction. Offer multiple contact options like phone, email, live chat, and make them easy to find.

Respond quickly and professionally. Automated replies acknowledging messages and providing response times help manage expectations and improve service.