

The Marketing *Health* *Check.*

A diagnostic, not a fix-it manual.

Five sections. Forty-three checks. About 90 minutes if you do it carefully. By the end you'll have a written list of what's actually broken in your marketing stack — and a clear sense of what's worth fixing first.

This is the same checklist I run for clients on The Roadmap. It's been used on Da Life Outdoors (\$8,658 in ads → \$56,357 back over 6.5 months), Ceremony (full Shopify rebuild in 7 days), and a handful of other online + service brands.

Run it like an *operator*, not a tinkerer.

Five sections, in this order: Storefront, Paid Ads, Klaviyo + Email, Brand Voice, Automation. Each section has 7-12 checks. Every check is a yes/no question with an optional "flag" explanation showing what "broken" looks like.

Three rules before you start:

1. **Don't try to fix while you check.** The check and the fix are separate work. Note every issue you find — you'll prioritize at the end. Fixing as you go means you'll get distracted on the first issue and never finish the rest.
2. **Open all your tools before you begin.** Shopify admin, Klaviyo dashboard, Google Ads dashboard, Meta Ads Manager, GA4, Google Search Console. If you don't have access to one of these, that's already a finding — write it down.
3. **Be honest about "not sure."** If you're not sure what a check means or whether your account passes, mark it as a flag. Uncertainty *is* the issue. The best operators know exactly what's running on every channel; uncertainty equals risk.

What to do at the end:

You'll have a list of issues. Group them into three buckets:

- **Quick wins** — under 15 minutes to fix, would catch a deliverability or conversion leak today
- **Project work** — takes 1-3 days, has compounding impact (e.g., welcome flow rewrite, schema markup overhaul)
- **Strategic shifts** — multi-week, requires planning (e.g., switching ad channels, brand repositioning)

Fix the quick wins this week. Schedule the project work. Hold the strategic shifts for a quarterly planning conversation.

— Renan Hernandez, Tradewindstack · Kaua'i, HI

Does your site *actually convert*?

Tools needed: **Shopify admin**, **Google PageSpeed Insights**, **Google Rich Results Test**.

Above-the-fold + homepage

- [] Within 3 seconds of landing, can a stranger tell **what you sell, who it's for, and why they should care**?
- [] Is your homepage hero copy in your **brand voice**, or is it stock theme placeholder ("Welcome to our store" / "Find your perfect product")?
- [] Is there **a single primary CTA** above the fold, or are there 4+ buttons competing for attention?
- [] Does the homepage load in **under 3 seconds** on mobile (PageSpeed Insights)?

SEO + meta tags

- [] Does every product page, collection, and content page have a **custom title tag + meta description** set in Shopify metafields?
- [] Does the homepage have its own custom title and description, or does it default to your shop name?
- [] Does **Product schema** render correctly in Google Rich Results Test for at least one product page?
- [] Is there **BreadcrumbList schema** rendered on category/collection pages?
- [] Is there **Organization or LocalBusiness schema** in the homepage head?
- [] Does `sitemap.xml` include all important URLs and was it submitted to Google Search Console?

Conversion path

- [] Is the "Add to cart" -> "Checkout" path frictionless, or are there required fields, popups, or forced account creation?
- [] Do you have **Shop Pay** enabled (one-click checkout for repeat buyers)?

// WHAT "BROKEN" LOOKS LIKE

Stock theme copy still on the homepage. Default Shopify product title format ("Product Name — Shop Name"). Schema missing entirely. Mobile load over 4 seconds. If 3+ are flagged, your storefront is leaking conversions before you even spend on ads.

Are your ads working, *or just spending?*

Tools needed: **Google Ads, Meta Ads Manager, GA4, Shopify analytics.**

Conversion tracking (the foundation)

- [] Is there a **purchase conversion event** firing into Google Ads (and/or Meta) on the order confirmation page?
- [] Is the conversion **value** dynamic (uses actual order total) or hardcoded?
- [] Is **Meta Conversions API (CAPI)** set up server-side, OR does your tracking rely entirely on the browser pixel?
- [] If running Google Ads with offline conversions (e.g., bookings), are conversions imported via webhook or manual upload at least weekly?

Google Ads structure

- [] If running Performance Max: do you have **one campaign per product/service**, or one campaign trying to cover everything?
- [] Are **audience signals** set up (custom segments, customer match, retargeting), or running broad demographic only?
- [] Is **final URL expansion** intentionally on or off (PMax)? Default-on can scatter traffic to your blog and About page.
- [] Is the daily budget "limited by budget" for any high-performing campaign? Hitting the cap is a feature, not a bug — but only if you raise it.

Meta Ads structure

- [] Have you consolidated to **fewer campaigns with more spend each**, or do you have 47 ad sets each spending \$5/day?
- [] Is creative refreshed at least **quarterly**?
- [] Are exclusion audiences set (existing customers, past 30-day visitors) so you're not retargeting people who already bought?

Reporting + decisions

- [] Do you check **actual ROAS** at least weekly, or only watch "impressions" and "clicks"?

[] If a campaign is under-performing, do you have a defined **kill-or-iterate threshold** (e.g., "30 days at <2x ROAS = pause")?

// WHAT "BROKEN" LOOKS LIKE

Conversion event missing or hardcoded. No server-side tracking (relying on browser pixel only post-iOS 14). One Performance Max campaign pushing 5 different products. Same audience as customer base (paying to retarget current customers). If 3+ are flagged, your ad spend is far less efficient than it could be.

Is your email list *actually a list*?

Tools needed: **Klaviyo**, **Shopify customer data**, **your inbox** (yes, actually open the welcome email and read it).

Welcome flow

- ☐ Do you have a **welcome flow** (3-5 emails) that fires when someone subscribes, or just a one-off welcome?
- ☐ Does the **first email send within 5 minutes** of signup (not next day)?
- ☐ Is there a **discount code** in the flow somewhere (typically Email 2 or 3, not Email 1)?
- ☐ Open the welcome flow's emails in your own inbox — do all **links resolve**, or are any 404'ing?
- ☐ Is the unsubscribe footer pointing to the **correct domain**?
- ☐ Is the welcome flow **conversion rate above 1%** (Klaviyo's analytics tab)?

Segmentation

- ☐ Do you have **engagement-based segments** (e.g., "opened in last 30 days", "clicked in last 90")?
- ☐ Do you have a **sunset segment** for unengaged subscribers (no open in 90+ days) and is it suppressed from sends?
- ☐ Are you **excluding existing customers** from acquisition campaigns, or sending them "new customer" offers?

Cadence + campaigns

- ☐ Are you sending **at least 2 campaigns per month**?
- ☐ Is your **open rate above 25%** on average? (industry benchmark)
- ☐ Is your **click-through rate above 2%**?
- ☐ Is your **revenue-per-recipient (RPR)** tracked per email, and do you know your average?

// WHAT "BROKEN" LOOKS LIKE

Welcome flow with broken links nobody has touched in 18 months (THE most common finding). No segmentation — every send goes to everyone. Welcome flow conversion at 0.00% (the funnel is broken, not the audience). I see this in 7 of every 10 accounts I review.

Is your brand *actually ownable*?

Tools needed: **Your eyes and 30 minutes.** Open your homepage, top 3 product pages, About page, last 5 emails, last 10 social posts.

The "ownable language" test

Read every line of brand-facing copy and ask one question: **"Could a competitor in my category say this without lying?"** If yes, it's rented. Cut it.

- [] Are you using rented industry words: **clean, sustainable, transformative, leverage, unlock, ecosystem, journey, cutting-edge**?
- [] Do you have a **written brand voice document** with approved language and rejected language?
- [] Is your voice **consistent** across homepage, product pages, emails, ads, and social?
- [] Do your product descriptions sound like **you**, or like a Fiverr copywriter from 2019?
- [] Do you have a **tagline or signature line** that's specific to your brand and ownable?

Photography + visual content

- [] Are you using **real product photography**, or stock + AI-generated imagery that doesn't match your actual product?
- [] Do your hero images have **your specific aesthetic**, or generic "tech startup" vibes (white background + minimal sans-serif)?
- [] Is there **founder-led content** on your About or homepage (face, voice, story)?

Content + storytelling

- [] Is there an **articles/blog page** with at least 3 posts, each >1,000 words?
- [] Do articles include **real numbers, real customer stories, or real internal data**, or are they generic SEO listicles?
- [] Is each article doing **one specific keyword**, or are you writing "benefits of [generic category]" pieces?

// WHAT "BROKEN" LOOKS LIKE

The exact same words your top 3 competitors use. Stock photography on the homepage. No founder presence on About. If your brand voice could be transferred to a competitor by find-and-replace, you don't have a brand voice — you have rented language.

What's running *without you?*

Tools needed: **Klaviyo, Shopify Flow, Make.com / Zapier, any other automation platforms you've signed up for and forgotten.**

What should be automated

- [] **Welcome flow** (covered in Section 3) — check.
- [] **Abandoned cart** — running on either Shopify default or Klaviyo. Open the email and verify it works.
- [] **Browse abandonment** — fires when someone views a product but doesn't add to cart.
- [] **Post-purchase** — thank-you email + asking for review at the right delay (10-14 days for most products).
- [] **Win-back** — for customers who haven't purchased in 60-90 days.
- [] **VIP / repeat customer** — segment for top 10% of buyers with different messaging.
- [] **Out-of-stock alert** — when a product is back in stock, fires to interested subscribers.

Automation hygiene

- [] Do you know **which automations are currently active**, or did you set them up 18 months ago and stop checking?
- [] Have you opened the **actual email content** of every active automation in the last 60 days?
- [] Are there any automations with **broken links, expired discount codes, or out-of-date product references**?
- [] Do you have a **monthly automation review** on your calendar?

// WHAT "BROKEN" LOOKS LIKE

You can't list every active automation from memory. Welcome Email 3 references a discontinued product. Post-purchase email points to an old domain. Browse-abandonment off for 6 months from a silent integration error. Automations are silent revenue leakers — they break without alerting anyone.

If this took you longer than *90 minutes*, that's the signal.

You ran the checklist. You have a list of findings. You're now staring at 15-30 issues spread across 5 categories and trying to figure out:

- Which 3 to fix first?
- Which are real problems vs which are theoretical?
- What does "broken" actually look like for YOUR business model and revenue level?
- Where are the gaps you didn't even know to check for?

Those answers don't come from a checklist. They come from **14 years of seeing what's normal vs what's broken across 50+ online and service business accounts**. That's what The Roadmap is.

\$497

ONE-TIME

90 min

LIVE CALL

5 days

WRITTEN REPORT

**30+
pages**
OF ANALYSIS

What The Roadmap adds beyond this checklist:

- **Live access** to your Shopify, Klaviyo, ad accounts — I see the actual data, not your description of it
- **Prioritized fix list** with effort vs impact scoring — you'll know exactly what to do first
- **Specific recommendations** tied to your business model, AOV, traffic mix, and goals

Run the checklist. Hit the wall. *Then we talk.*

If you ran through this and feel stuck on more than 3 items, that's the signal. The fastest path to clarity is paying for it. \$497, written report in 5 days, yours to keep.

GET THE ROADMAP • \$497 ->

