Checklist

Discovery

Use multiple tools for discovery

- ☐ Start with Google Keyword Planner to identify main topics and search clusters
- ☐ Expand using **SEMrush** (check competitor keywords + long tails)
- ☐ Build an **initial negative keyword list** from irrelevant or B2C-oriented suggestions
- ☐ Cross-check new ideas using **Google search bar + "People also search for"**
- ☐ Use **AI tools (e.g., ChatGPT)** only for topic discovery, not raw keyword lists
- ☐ Explore Chrome extensions (e.g., Keywords Everywhere) for quick SERP data

Prioritize intent-driven terms

- ☐ Include modifiers like "for business," "for companies," "for SMEs"
- ☐ Exclude career-related queries: "jobs," "career," "internship"
- ☐ Note industry-specific jargon and save it for ad copy alignment

Document your findings

- ☐ Organize keywords by **intent stage (TOFU/MOFU/BOFU)**
- ☐ Create a dedicated **negative keyword master list**

Plan around limited data realities

- ☐ Don't exclude keywords with "0" predicted volume – test them
- ☐ Add ~30% **budget buffer** to Google's forecast (to capture untracked searches)
- ☐ Expect to recalibrate budgets monthly for the first quarter

Optimization

Account for new, conversational search trends

- ☐ Run an **AI Max campaign** to capture emerging queries and intent shifts
- ☐ Review new search terms weekly to harvest valuable additions

Structure campaigns for intent

- ☐ Create separate or labeled ad groups/campaigns for:

  Top-funnel: "How to choose…", "Best software for…"

  Mid-funnel: "Vendor", "Provider", "Platform", "Solution"

  Bottom-funnel: "Pricing", "Demo", "Integration with [tool]"

- ☐ Use audience signals to guide algorithm learning

Search Term Report (STR) review

- ☐ Pull STR weekly (or biweekly for low-volume accounts)
- ☐ Tag irrelevant terms and continuously update **shared negative lists**
- ☐ Identify high-quality long-tail terms to add to existing ad groups or build new if needed

Evaluate by funnel and quality, not volume

- ☐ Monitor soft conversions (e.g., high-intent page visits, time on site)
- ☐ Track true KPIs: SQLs, pipeline influence, deal contribution
- ☐ Avoid pausing low-conversion keywords without full context

Refine ad copy & landing experience

- ☐ Match messaging to funnel intent (educational → value proof → conversion)
- ☐ Highlight differentiators (platform features, integration, ROI)
- ☐ Ensure landing pages reflect the searcher's industry context

Reporting

Monthly

- ☐ Analyze keyword-level performance beyond CTR and CPC
- ☐ Review conversion lag and attribution paths
- ☐ Identify which keywords drive MQL → SQL → Closed-Won deals

HELION™

Quarterly

- ☐ Refresh keyword list with new industry terms
- ☐ Review AI Max campaign findings for fresh search trends
- ☐ Re-evaluate budget allocation by funnel stage

Continuous

- ☐ Collaborate with Sales and client teams to align terminology
- ☐ Stay updated on product updates and new features (source of long-tails)
- ☐ Maintain clean structure and documented learnings for scaling