

MARKETING TRAINING CHECKLIST



For new hires and staff who need to use YMCA marketing tools

Complete this checklist before submitting marketing requests, creating YMCA materials, posting to YMCA social channels or editing website content. Your supervisor will identify the tools and role-based training you need.

Before You Begin

Employee name:

Job title/branch or program

Supervisor

Target completion date

Supervisor: Assign the Right Training

Review the employee's responsibilities together. Check each applicable training path and confirm that the employee has time to complete it before receiving tool credentials or publishing content.

- ☐ **Core training** — required for anyone who will request or create marketing work
- ☐ **Social media training** — required before posting to YMCA-managed social accounts
- ☐ **Website training** — required before editing any YMCA website page
- ☐ **One-on-one support** — recommended when the employee's role requires frequent or advanced use

1. Open the Marketing Resource Center

The Marketing Resource Center (MRC) is the central location for training videos, request forms, tool logins, project timelines, planning resources, checklists and Marketing staff contacts.

Use either path below:

- ☐ In Chrome, open Association Managed Bookmarks and select Marketing Resource Center.
- ☐ Or go directly to clevelandymca.org/mrc/

2. Complete the Core Training

Everyone who uses Marketing Department services or tools should watch these videos in the MRC. Check each item only after viewing the full video.

- ☐ **Brand Standards** — learn the basic rules that protect and strengthen the YMCA brand.
- ☐ **Marq** — learn how to customize approved templates and create on-brand materials.
- ☐ **Wrike** — learn how to submit a complete marketing request and track the work.
- ☐ **SocialPilot** — learn how to schedule and manage social media content.

3. Complete Training Required for Your Role

If you will...

Complete this training video

Done?

Post on social media

Creating and Posting Reels, Tips and Tricks for Social Media

Edit the YMCA website

Website Training Video Series (entire series)

Need additional practice?

Schedule one-on-one training session with Samantha

4. Request Access—After Training

Tool access is assigned according to job responsibilities. Completing a video does not automatically create an account or authorize publishing.

- ☐ **Email** Samantha Guest at sguest@clevelandymca.org after completing the assigned training.
- ☐ **Copy your supervisor** and list the tools you need: Wrike, Marq, SocialPilot and/or website access.
 - ☐ Include your name, title, branch/program and the work you will perform in each tool.
- ☐ **Sign in and confirm that your access works.** Ask questions before beginning live work.

5. Know When and How to Use Marketing Support

Start in the MRC whenever you are planning an event, launching a program, creating a communication or promoting a YMCA service. Use the resources below before submitting a request:

- ☐ **Requesting Services:** review what Marketing provides, how to request it and expected project timelines.
- ☐ **Marketing Planning Resources:** use planning checklist and flowchart showing when to involve Marketing.
- ☐ **Marketing Tools:** Wrike request forms, Marq, SocialPilot, stock-image resources and other approved tools.
- ☐ **Marketing Training Videos:** Required, Website and Additional videos whenever you need a refresher.
- ☐ **Marketing Staff Directory:** contact the appropriate person if the MRC does not answer your question.

Completion Review

Employee and supervisor should review this section together after all assigned training is complete.

- ☐ I know where to find the MRC and Association Managed Bookmarks.
- ☐ I completed the core and role-based training assigned above.
- ☐ I understand which tools I am authorized to use and how to request access.
- ☐ I know to use approved brand standards, templates, request forms and publishing processes.
- ☐ I know where to ask for help before submitting, creating, posting or publishing.

Signature

Completion/Review Date

Employee:

Supervisor:

Remember: The MRC is not just an onboarding resource. Bookmark it and return to it whenever you need Marketing resources, instructions, training, or support.