

Google Drive Marketing Success Checklist

Use this checklist to set up Google Drive as your central hub for marketing, content, and teamwork. Keep it simple, organized, and secure.

Set Up Your Drive

- ☐ Log in to your Google account and open drive.google.com.
- ☐ Create a main folder named 'Business'.
- ☐ Install Drive for desktop and choose Stream or Mirror for backup.

Build Your Folder System

- ☐ Create numbered folders to keep things in order (01_Campaigns, 02_Templates, etc.).
- ☐ Inside Campaigns, make subfolders for briefs, creatives, ad copy, assets, and final files.
- ☐ Keep a folder for Finance, Leads, and Social media planning.

Upload and Manage Files

- ☐ Drag and drop files into Drive on web.
- ☐ Use the mobile app's Scan feature to save paper as PDFs.
- ☐ Place files in your synced desktop folder for auto upload.

Create and Edit Files

- ☐ Use Docs, Sheets, or Slides directly in Drive.
- ☐ Share files for real-time collaboration.
- ☐ Check Version history to roll back changes.

Share Files Safely

- ☐ Choose Viewer, Commenter, or Editor roles when sharing.
- ☐ For links, pick Restricted or Anyone with the link.
- ☐ Block downloads or set expiration dates if needed.
- ☐ Use Shared drives for team-owned files.

Marketing Workflows

- ☐ Keep drafts, review copies, and finals in separate folders.
- ☐ Build an Affiliate Pack folder with images and copy (set to Viewer only).
- ☐ Store a social media calendar in Sheets and mockups in Slides.
- ☐ Create Google Forms for lead capture and store responses in Sheets.

Automate and Integrate

- ☐ Link Drive with Zapier or Make for automation.
- ☐ Auto-save email attachments into Drive.
- ☐ Auto-create folders for new orders or signups.
- ☐ Deliver bonus files with Drive links inside emails.

Keep It Secure

- ☐ Review sharing settings once a month.
- ☐ Enable two-factor authentication.
- ☐ Replace files using Manage versions without breaking links.
- ☐ Turn on offline access before traveling.

Quick 30-Minute Action Plan

- ☐ Make a Business folder and Campaigns subfolder.
- ☐ Set up your first campaign folder using the structure.
- ☐ Install Drive for desktop and adjust sync settings.
- ☐ Build a simple Google Form for leads.
- ☐ Share an Affiliate Pack with a partner to test sharing.