



## MARKETING ASSESSMENT

1. What are your business challenges?
2. How would you describe your brand?
3. What are your strategic and sales goals?
4. Describe the competitive climate  
Market position                      Strengths                      Weaknesses
5. Have you done a SWOT Analysis of the business environment and how it affects your goals?
  - a. Strengths
  - b. Weaknesses
  - c. Opportunities
  - d. Threats
6. How should the focus of your business model be divided?
  - a. New customer acquisition
  - b. Existing customer retention
7. What is your overall marketing strategy now?
  - a. Creative
  - b. Content
  - c. Media/Advertising
  - d. Social Media/PR
8. What are your current marketing assets?

Brochure	Product Sheets	Website	Blog	Newsletter
Ads	Mailers	Email		Internet ads
SEO	Social Media	Trade Shows/Events		Content Documents
9. What makes your product/service unique?
10. Does your firm question social media and blogs as a marketing channel?
11. Is your website's traffic not reaching expectations? Can it do a better job of generating leads or sales?
12. Are you staying on top of new media channels such as Mobile, QR Codes, Location-based marketing, and social media developments?
13. Are you measuring ROI for each media channel and tactic?
14. Do you understand the importance of landing pages for lead generation vs. a general website?
15. Are you aware of your website metrics with analytics and are decisions/changes being made due to the analysis?
16. Do you follow a marketing plan that follows branding, media, creative, and lead management strategies and tactics?

## **AUDIENCE ASSESSMENT**

1. Buying Decision. Why is a prospect engaging with you? What do they need?
2. Have you done focus group research or surveys supporting your target audience definitions?
3. Products and Services. What are the key products we'll be focusing on?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

4. What are the roles/titles of your key target audiences?

Priority target \_\_\_\_\_

Secondary target \_\_\_\_\_

5. Is your target responsible for the budget or an influencer?

Priority target    Yes            No

Secondary target    Yes            No

6. What are the top 3 needs a prospect has to consider your solution?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

7. What are the top 3 reasons why a prospect should consider your solution?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

8. Where does your target audience go to research solutions?

Search Engines

Industry websites

Trade Journals

Consumer Media

Associations

Social Media Channels

9. Goal of your Marketing Campaign

Awareness/Branding

Lead Generation

Conversion/Call-to-action

Post-Purchase Marketing

Other

## LEAD MANAGEMENT ASSESSMENT

### Marketing & Sales Alignment

- Do both departments agree to what is defined as a universal lead definition/customer profile?
- Do both departments meet frequently to review objectives, goals, and quotas?

### Data Strategy

- Are you using a CRM properly and taking advantage of the key features?
- Is the database housed centrally and are data fields segmented strategically?

### Lead Generation

- Are all lead sources and lead capture data being synced to the central database?
- Is the marketing department responsible for the lead generation plan?

### Lead Conversion

- Are leads being converted on unique landing pages that offer incentives?
- Are leads synced to a marketing automation system, email, or a CRM?

### Lead Scoring

- Is there a lead scoring model in place?
- Are explicit and implicit variables incorporated into the scoring matrix?

### Lead Nurturing

- Is there a lead nurturing system in place that includes drip marketing automation?
- Are prospects or customers communicated differently through targeted content?

### Lead Routing

- Are there guidelines in place for when marketing sends leads to sales?
- Are there guidelines in place for when sales follows up with leads?

### Lead Analysis

- Is your firm measuring conversions rates (lead to conversion, and conversion to sale)
- Are wins being recorded in CRMs, and are campaign results being analyzed (and by who)?

