

HOW TO DIAGNOSE NEED & CREATE DEMAND FOR INBOUND MARKETING SERVICES.





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HOW TO DIAGNOSE NEED & CREATE DEMAND FOR INBOUND MARKETING SERVICES.

Written and Designed By Shannon Johnson

After some time on the agency side of social media strategy, Shannon joined the community and content team at Radian6 (now part of Salesforce Marketing Cloud together with Buddy Media) to develop educational resources about becoming a social enterprise, developing and executing social and content strategies, and gathering business insights through social media monitoring and measurement. She also worked closely with the internal agency sales team to ensure company content met the educational needs of agency clients. Nowadays she plays a similar, agency-focused role as part of the HubSpot inbound marketing team. She's an Arizonan-turned-Bostonian, a dog lover, and an ASU alum who likes to dabble in digital photography.



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INTRODUCTION.

Clients likely often come to you with a single challenge in mind -- they may claim they need to improve their Facebook presence or their search engine rankings, but the truth is that the core problem they're trying to solve lies much deeper than these one-off tactics. They don't need a bigger Twitter following; they need more traffic. They don't need a website redesign to attract more customers; they need compelling content behind landing pages to generate leads.

Every marketing team, whether they realize it or not, has one or more of the following problems, each of which requires an ongoing solution:

- They need to attract more visitors to their website (top of the funnel);
- They need to convert more visitors into leads (middle of the funnel); or
- They need to convert more leads into customers (bottom of the funnel).

Since most prospective clients most likely won't approach your agency already aware of whether they have a top of the funnel-, middle of the funnel- or bottom of the funnel problem, how do you know how your agency can help them accomplish their business goals? How do you get your prospective clients



to realize they don't just need expert guidance and inbound marketing services -- they need yours?

The solution for solving broader business concerns for your client is to start back at square one: audit their existing inbound marketing efforts and ask them the right questions during an inbound marketing assessment.

Whether your agency is new to inbound marketing or simply trying to improve the client onboarding process, this guide can help. In the following chapters, we'll walk you through how to conduct an inbound marketing assessment to determine which of the four core inbound marketing services your prospects need most so you can set yourself up for an ongoing, retainer-based relationship that results in long-term client and agency success.

01

CHAPTER

WHAT'S AN INBOUND MARKETING ASSESSMENT?



The ultimate goal for any marketing agency is an enduring client engagement. You get there by becoming invaluable in solving the marketing challenges your clients can't solve on their own. But first, your client has to realize just how much they need services you sell.

That's exactly what an inbound marketing assessment intends to do: create an opportunity for your agency to give away a bit of expertise in order to get more information about what's plaguing your prospect's marketing success, ultimately allowing your services to sell themselves.

A proper inbound marketing assessment combines an audit of the prospect's current marketing efforts and a conversation that allows you to both educate them on the benefits of inbound marketing and ask them the probing questions to uncover their marketing goals and challenges. Combining these two elements -- educating and probing -- will help your prospect understand where their current marketing program falls short so they can begin to view you as the expert equipped to help them seize opportunities to improve their visibility, authority and likeability online.



Once you've assessed your prospect's current online marketing activities, you'll be ready for either an in-person or over-the-phone dialogue to discover the prospect's goals, challenges, and any other information that will help you better understand whether they're a good fit for the services you sell.

In the following chapters, we'll dig into what to audit and what to ask during the assessment, but in the meantime, these are a few pointers to set yourself up for a successful conversation ...

3 Keys to an Effective Dialogue.



Know Their Goals.

The more you know about what your prospect is trying to accomplish, the better you can tailor the questions you ask, the evidence and examples you present, and the focus of your audit to help clients come to the right conclusion -- that they need you.



Be Prepared to Paint a Picture.

Inbound marketing is a process, and auditing their online marketing strategy and website in a logical order will establish that you know how to make all the pieces work together. Know some statistics or bring some industry-related examples to the table. Have some best practices ready. Once you identify a need, give some pointers on the fly to position yourself as a credible expert -- ready and willing to help.





Let Them Do the Talking.

Probe as often as you can with questions to get prospects to reveal more. Pain is greater when self-diagnosed, so ask the questions that will get the prospective client closer to realizing they need inbound marketing on their own. For example, instead of asking, “What are your marketing goals?” try asking, “Can you tell me a little bit more about your sales process?” The latter may lead to greater insight that wouldn’t have been revealed otherwise.

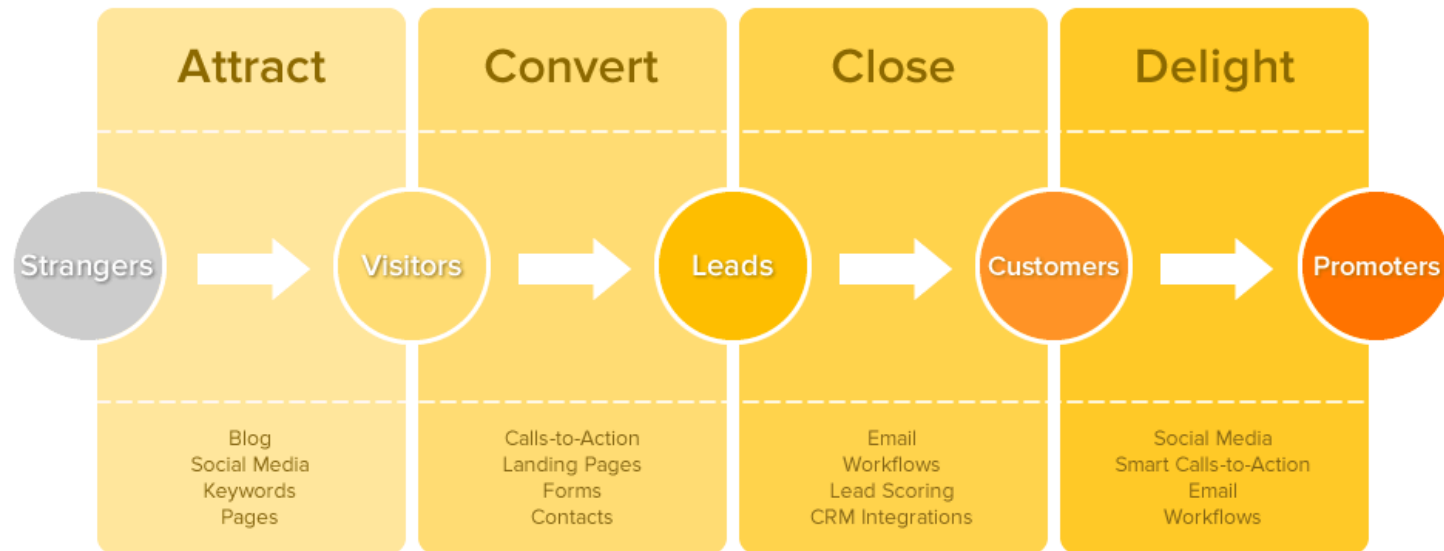


02

CHAPTER

**THE 4 CORE INBOUND
MARKETING SERVICES
EVERY INBOUND AGENCY
SHOULD OFFER.**

It's important to reflect upon the Inbound Marketing Methodology before we dive into how to assess client needs because it's the framework behind the core marketing services every digital marketing agency should provide. The inbound marketing services that you deliver to your client will fall into one of the first three categories below (Attract Visitors, Convert Leads or Close Customers).



Now that you have reviewed the inbound marketing methodology, the following four core inbound marketing services we'll discuss will seem like complete no brainers.

The 4 Core Inbound Marketing Services.

Depending on whether your client needs to immediately focus on attracting, converting or closing customers, your initial project plans will fall into one of these four buckets:

1. Traffic Generation (attracting visitors at the top of the funnel)
2. Lead Generation (converting leads in the middle of the funnel)
3. Lead Nurturing and Customer Acquisition (closing customers at the bottom of the funnel)
4. Analysis and Measurement (reporting on performance of all of the above)

Let's dive further into each category and discuss some of the tactics-oriented statements you may hear prospective clients say that indicate a larger need for traffic, lead generation, lead nurturing or measurement.





1 Traffic Generation.

Generating a higher volume of traffic for a website is like baking: you need to combine many complementary ingredients for the dough to rise. Blogging, social media, content creation and on-site optimization are three of those ingredients that work together to help prospects get noticed on the web. If a prospect isn't spending much time on all of these tactics, they're likely to have a traffic problem.

Things Prospects Might Say If They Have a Traffic Problem.

- “We aren't showing up in search results when people search for our products.”
- “We need to be using social media to get the word out.”
- “We need a website redesign so more people will want to visit our site.”

Inbound Marketing Services that Solve the Traffic Problem.

- Onsite SEO Optimization | Blogging | Content Creation | Social Media

Lead Generation.

An effective website generates leads on a consistent basis and improves the rate at which leads are produced month over month. If your prospective client can't point you to several offers (white papers, ebooks, webinars, etc.) they have ready for download on their site, or demonstrate that they've improved lead generation over time, then their website is likely nothing more than a stagnant, unproductive entity.

Things Prospects Might Say If They Have a Lead Generation Problem.

- “Our bounce rate is too high.”
- “It’s been awhile since we updated our site with new content.”
- “Our sales team is complaining they don’t have enough prospects to contact.”

Inbound Marketing Services that Solve the Lead Generation Problem.

- Content Creation and Conversion Path Mapping | Email Marketing and Segmentation | Social Media

3 Lead Nurturing and Customer Acquisition.

If the traffic coming to your prospective client's site isn't qualified, you can bet that the resulting leads (if any) will be junk. How will they be able to tell this? Feedback from their sales folks most likely.

If the traffic is good, and they are still not converting website leads into customers, then something is fundamentally wrong with the middle of their online marketing funnel. Usually this means the email nurturing processes is broken or nonexistent, so leads aren't getting the series of tailored, relevant follow up messages that help draw them closer to the buying stage.

Things Prospects Might Say If They Have a Customer Acquisition Problem.

- “We send the same follow up emails to all of our contacts.”
- “Our sales team rarely hits their numbers.”
- “Our sales team keeps blaming marketing for handing off leads that waste their time.”

Inbound Marketing Services that Solve the Customer Acquisition Problem.

- Email Workflow Creation and Execution | Lead Scoring and Qualification | CRM Integration

4 Analysis and Measurement.

Any executive or business owner who wants to embrace inbound marketing as a way of achieving growth needs to understand that it is an ongoing process that requires incessant experimentation, testing, and optimization. Some experiments will be home runs, and others won't. A great prospective customer understands that they won't reach their goals overnight, but regular reporting and analysis from an inbound expert like you is imperative for knowing where to focus marketing efforts in order to get there.

Things Prospects Might Say If They Have a Measurement Problem.

- “We don't have any benchmarks in place.”
- “We need to do an audit of our site to fix what's not working.”
- “We don't know where to focus our marketing efforts.”



Inbound Marketing Services that Solve the Measurement Problem.

- Overall Progress Assessment | Closed Loop Reporting | Social Media Engagement Reporting | SEO Visibility Reports

Now that we've covered the four core inbound marketing services your prospective client may need you to deliver, let's move on to Chapter Three into discuss the various stages of the inbound marketing assessment so you know how to collect the information you need to sell them on an irresistible inbound marketing plan.



03

CHAPTER

INBOUND MARKETING ASSESSMENT STEP 1: DETERMINE CLIENT GOALS.

In order to track the success of your inbound marketing engagement, both you and your client have to know exactly what you are trying to accomplish. That's why uncovering, understanding, and establishing specific goals is a necessary first step toward determining what inbound marketing services are right for your client's specific needs. Sometimes your clients won't have specific goals in place, and even if they do, it might be difficult to get the entire picture if you're not prepared to ask the right questions.

Before even thinking about proposing any sort of inbound marketing solution, you should have one or more SMART goals defined. SMART goals are:

- Specific
- Measurable
- Attainable
- Realistic
- Time Bound

Below are some questions you can use to get your clients reveal exactly what they're trying to accomplish by when.

Questions to Ask.

- When someone comes to your site, what are you hoping they do?
- What are the top three marketing initiatives you are currently working on?
- What type of marketing programs do you run today?
- Tell me more about how your marketing team works with your sales team.

Once you know you're prospective client's goals, it's time to find holes in their current marketing endeavors so you can make the appropriate recommendations that get them excited about achieving the results they desire. You do this by auditing their online marketing program, which we'll discuss in Chapter Four.



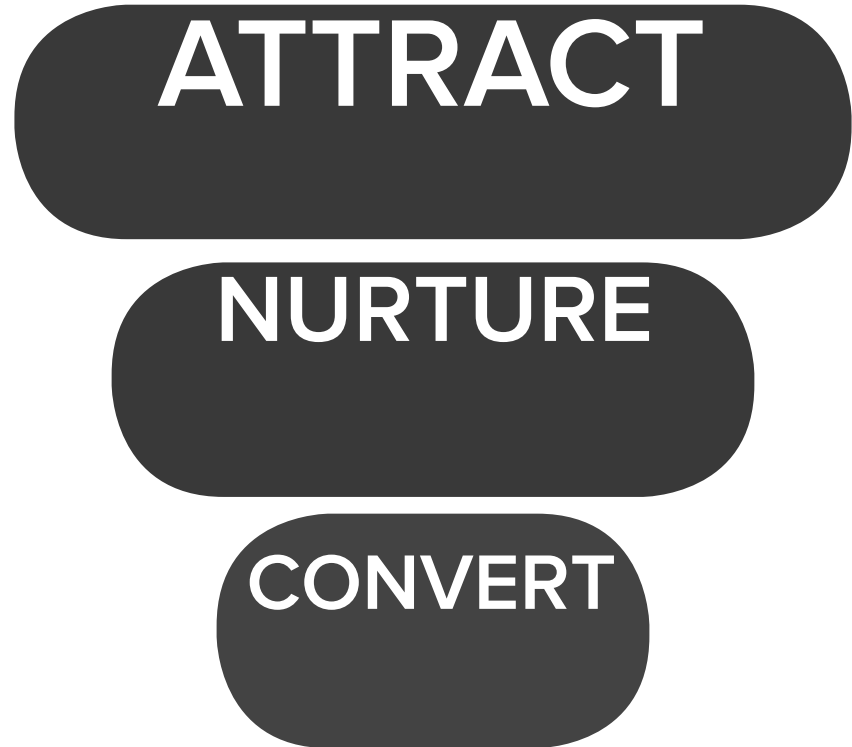
04

CHAPTER

INBOUND MARKETING ASSESSMENT STEP 2: AUDIT YOUR PROSPECT'S INBOUND MARKETING EFFORTS.

Regardless of budget size or brand equity, every marketing program has room for improvement. If you were to spend even an hour or less digging around on your prospective client's website and social media profiles, chances are you'll discover several missed opportunities. We recommend taking the time to do this before you meet in person or hop on a call with them because you'll be much more prepared to reveal your expertise by providing a recommended solution to a marketing problem you've identified.

Now, what specifically do you look for? In order to do inbound marketing well, your potential client needs to excel at four things: driving traffic to their website (top of the funnel), turning that traffic into leads (middle of the funnel), converting those leads into customers (bottom of the funnel), and keeping those customers happy. Since it's difficult to ascertain whether your prospect successfully converts site visitors into customers without asking them or looking at their analytics software, we've focused the audit on the top and middle of the marketing funnel. Read on for some questions to help you focus your analysis.



What to Audit: Top of the Funnel.

- Can they describe what they do in four words or less, and do they rank well in search engines for that phrase? How do their competitors rank for that phrase?
- How many inbound links does their site have?
- Do they have a blog? Do they publish a post at least several times a week?
- Are they creating compelling content, such as ebooks, white papers, webinars or videos that provide information their target audience craves?
- Do both their website and blog have keyword-centric, optimized page titles, descriptions, headers, images and copy?
- Are they encouraging site visitors to do something using calls to action (CTAs)?
- Do they have social media sharing functionality incorporated into their website and blog?
- Do they have a presence on Facebook, Twitter, LinkedIn and other social media platforms? Do they have an active, engaged community? Do their posts get shared?

What to Audit: Middle of the Funnel.

- Does the content they create and publish indicate they have a sales funnel?
- Do they use landing pages with contact forms on their site? Does the site give visitors other cogent reasons to hand over their contact information (Ex: promotional sweepstakes)?
- Are there several ways to subscribe to their website or blog? Can you subscribe via email?
- Do they gate any of their content behind contact forms? If so, are these pieces of content valuable enough to entice someone to give up their contact information?

ATTRACT

blog posts, ebooks, webinars

NURTURE

fact sheets, case studies, targeted emails

CONVERT

demos, trials

Prospective customers look for different kinds of information depending on their stage in the buying cycle. To attract potential customers, the content your client creates should be void of any overt sales pitches. Content created for leads further down the funnel can be more product- or service-focused, as prospects with a higher propensity to buy will be more open to learning what makes your client's offerings better than those of competitors.

- Are they using a CRM system and marketing automation software to automate lead nurturing and follow up after a content download?
- Are they sending segmented emails?

While you can do a web presence audit manually, one free tool that will make auditing both faster and easier is our handy-dandy [Marketing Grader](#). In addition to grading your prospect's inbound marketing efficacy, Marketing Grader will provide you with a few actionable recommendations to keep in your back pocket so you can swiftly pull them out when the time is right during your conversation -- the next step in the inbound marketing assessment.

Although the auditing phase can be incredibly insightful, it won't reveal everything you need to know to diagnose your prospective client's marketing pain points. Next, schedule a time to get the client on the phone or in a meeting so you can get their perspective on where their marketing program needs to go. Read on to Chapter Five to learn more about what questions to ask when you do.

The image shows a screenshot of the HubSpot's Marketing Grader tool. At the top, the title "HubSpot's Marketing Grader" is displayed in a large, bold font, with the HubSpot logo. Below the title is a subtitle: "Grade your marketing. Make it better. Outpace your peers." The main form area contains two input fields: the top one is for a website address (indicated by a cursor) and the bottom one is labeled "Your email address". Below these fields is a blue button labeled "Grade Me". To the right of the form, there is a grey arrow pointing to the website address field, accompanied by the text: "Enter your website address and we'll work up a full report on how you're doing with your marketing online." At the bottom center of the interface is a faint HubSpot logo.

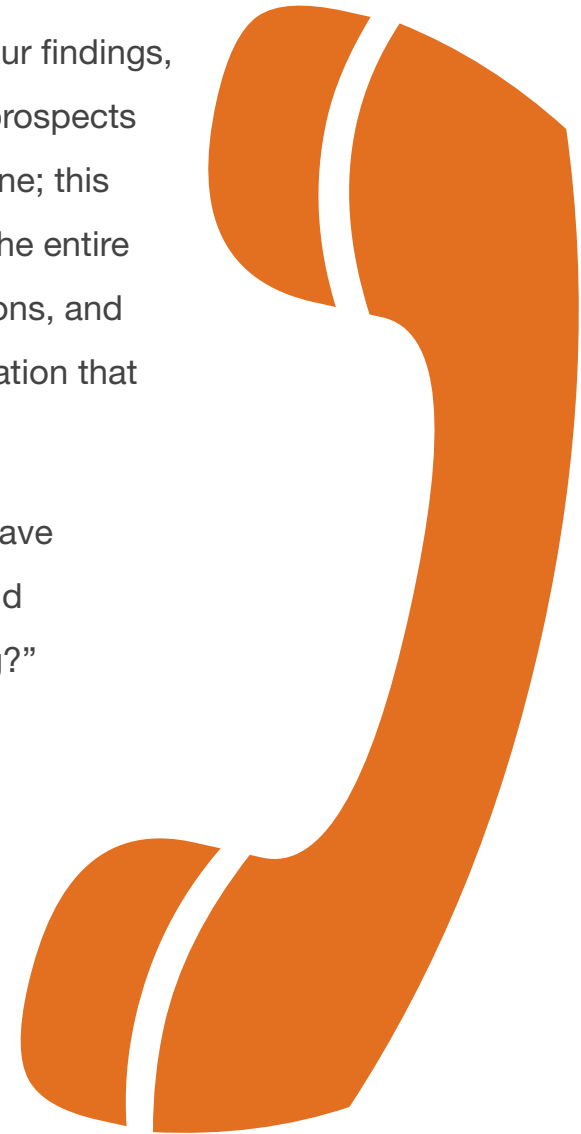
05

CHAPTER

INBOUND MARKETING ASSESSMENT STEP 3: ASK YOUR PROSPECTS THE RIGHT QUESTIONS.

After appraising your prospect's web properties and synthesizing your findings, your next step in the inbound marketing assessment is to get your prospects either on the phone or in a meeting with you. This is your time to shine; this is when you get to showcase your expertise by educating them on the entire process of inbound marketing, giving away a couple recommendations, and asking the questions that get your future client to come to the realization that they need your agency to help them exceed their marketing goals.

If your client isn't versed on how online marketing works, you may have to start off the conversation explaining the basic concepts of inbound marketing. Try asking, "How familiar are you with inbound marketing?" and see what clients have to say. Then, give them an overview and explain that you'll expand deeper into how it applies directly to their business as the conversation evolves.



What to Ask: Top of the Funnel.

- Have you defined the demographics and other characteristics of an ideal customer?
- Are you driving and tracking visits originating from organic search engine, social media, blog, or paid ad traffic?
- How do you go about managing company accounts on Twitter, Facebook, LinkedIn, YouTube, Google+, SlideShare, Pinterest or other social sites?
- Do you monitor social media for mentions of your brand name, important keywords and competitors?
- How many offers (ebooks, whitepapers, webinars) do you have available on your website to attract website visitors?

What to Ask: Middle of the Funnel.

- What percentage of your website visitors convert into a lead?
- How many offers (ebooks, whitepapers, webinars) do you have available on your website?

- How many active landing pages do you have on your website?
- How often do you build and launch new calls to action to drive traffic to your landing pages?
- Are your landing pages, content and CTAs the same for every site visitor, or are they tailored to fit the visitor's behavior and needs?
- How often do you send email marketing messages?
- Do you segment your email marketing lists and send different messages to different segments?
- Do you use automated lead nurturing?

What to Ask: Bottom of the Funnel.

- What percentage of your website leads convert into customers?
- Do you have a monthly goal for quantity and quality of leads?
- Does your web analytics notify your sales team when a lead is visiting your website and which pages they view?

- Does your website analytics track the traffic source, marketing activity, or campaign for each lead?
- Does your sales team connect with your leads via social media channels?

By asking the questions above to prompt your prospects to do the majority of the talking, they'll be more likely to articulate and acknowledge their marketing problems, only to further draw attention to their need for the inbound marketing services your agency provides. With an understanding your prospect's current marketing maturity and their buy-in for your services, you'll be more than prepared to craft a follow-up pitch and ongoing project plan to address their most pressing concerns.



CONCLUSION.

Conducting an inbound marketing assessment at the onset of a client engagement enables you to establish your agency's credibility by allowing you to demonstrate that, unlike many agencies, your firm is grounded with an ongoing marketing process that leads to proven results.

Perhaps the biggest perk of the inbound marketing assessment is that it sets you up for retaining client work, which makes growing your business exponentially more feasible. Having already demonstrated the amount of effort, technical expertise and marketing prowess required to carry out an inbound strategy throughout your conversation, the client will be more inclined to hire you for an ongoing, retainer-based engagement.

After auditing your prospect's web properties, asking probing questions, and earning some initial client trust by giving away a few recommendations and bite-sized bits of expertise, you'll know their goals, what they're doing well and not so well, and be able to diagnose whether they need to focus on generating traffic, converting traffic, or converting customers (or, a combination of the three).

Now all you have to do is prescribe an inbound marketing solution to help them get found, gain authority, and increase their brand affinity online.

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INBOUND MARKETING ASSESSMENT

Cheat Sheet

Need a friendly reminder of what to assess at every stage of your prospective clients' marketing funnel? Print out this handy one-pager and add your own notes in the margins to make this your very own go-to inbound marketing assessment script guide.

WHAT TO *Audit*.

WHAT TO *Ask*.

TOP: ATTRACT

- They rank better than competitors for keyword phrases.
- They have _____ inbound links.
- They have a blog and publish _____ times a week.
- They are creating compelling content.
- Their website and blog have keyword-centric, optimized page titles, descriptions, headers, images and copy.
- They use calls to action (CTAs).
- They have social media sharing functionality.
- They have a presence on Facebook, Twitter, LinkedIn and other social media platforms and have an active, engaged community.

- Have you defined the demographics and other characteristics of an ideal customer?
- Do you have a company account on Twitter, Facebook, LinkedIn, YouTube, Google+, SlideShare, Pinterest or other social sites?
- Do you monitor social media for mentions of your brand name, important keywords and competitors?
- Is your company using social media to build brand awareness, engagement and traffic?
- How many offers (eBooks, whitepapers, webinars) do you have available on your website to attract website visitors?

MIDDLE: NURTURE

- The content they create and publish indicates they have a sales funnel.
- They use landing pages with contact forms on their site.
- Their website or blog has an option to subscribe via email.
- They gate some of their content behind contact forms.
- The content they create is valuable enough to entice someone to give up their contact information.
- They using a CRM system and marketing automation software to automate lead nurturing and follow up.
- They sending segmented emails.

- What percentage of your website visitors convert into a lead?
- How many offers (eBooks, whitepapers, webinars) do you have available on your website?
- How many active landing pages do you have on your website?
- How often do you build and launch new calls to action to drive traffic to your landing pages?
- Are your landing pages, content and CTAs the same for every site visitor, or are they tailored to fit the visitor's behavior and needs?
- How often do you send email marketing messages?
- Do you segment your email marketing lists and send different messages to different segments?
- Do you use automated lead nurturing?

BOTTOM: CONVERT

Since it's difficult to ascertain whether your prospect successfully converts site visitors into customers without asking them or looking at their analytics software, focus the audit on the top and middle of the marketing funnel.

- What percentage of your website leads convert into customers?
- Do you have a monthly goal for quantity and quality of leads?
- Does your web analytics notify your sales team when a lead is visiting your website and which pages they view?
- Does your website analytics track the traffic source, marketing activity, or campaign for each lead?
- Does your sales team connect with your leads via social media channels?