Marketing Audit Template

How to Use

Every marketing plan should start with an honest internal marketing assessment. The assessment should consider perspectives from multiple stakeholders, including marketing and sales leaders, as well as key executives. The more involved all parties are in the entire strategic process, the easier it is to align needs, goals, expectations, and priorities.

Use insights to drive digital transformation, set organizational priorities, and benchmark performance.

Talent

1. What are the roles and responsibilities of the existing marketing team?

2. How are gaps in capabilities affecting performance?

3. Do team members understand the metrics used to evaluate their performance and development?

4. How can we improve efficiency and productivity?

5. What opportunities exist to strengthen company culture as a means to better recruit and retain top marketing talent?

6. What are our plans to augment the team through more advanced internal training, staff changes and hires, and/or outsourcing?

7. How do we measure the performance of agencies and/or freelancers?

Technology

8. What are the core components of our existing marketing technology stack?

9. Do we clearly understand the features, functionality and value of our existing marketing technology solutions?

10. Are we immersing our marketing team in the technologies that drive our company's success?

11. Are the existing technologies being fully utilized by the marketing team?

12. Are the technologies we have tightly integrated with each other?

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13. Are gaps in technology affecting performance? For example, is the lack of a marketing automation solution hindering our lead-to-sale conversion rate?

14. Are redundancies within our marketing technology solutions leading to inefficiencies?

15. Do marketing and IT work together closely to maximize the value of marketing technology investments?

16. Is an all-in-one solution that bundles core technologies (e.g. automation, email, analytics, social, CMS) together best? Or, should we build through a collection of best-in-breed solutions?

17. What are we doing to keep up with innovations in marketing technology products and services?

Strategy

18. What makes our company unique in the market? What is the value proposition?

19. How can we better convey our value proposition and core brand messages to audiences in all marketing communications?

20. Who are our top competitors, and what can we learn from their marketing programs?

21. What are our current target markets (e.g. verticals, geographic)? How will those evolve in the next 1 – 3 years?

22. What is our current revenue mix (e.g. products/services, markets)? How will it evolve in the next 1 – 3 years?

23. What is our product/service roadmap, and how will it affect marketing strategy and budgets?

24. Are sales and marketing aligned to optimize processes and performance?

25. Have audience contact lists been audited, segmented and prioritized?

26. Have buyer persona profiles been clearly defined and prioritized?

27. Are there any milestones (e.g. product updates, major events, industry activities) in the next 6-12 months that would be highly relevant to marketing strategy?

28. What existing assets (e.g. content, databases, events, partnerships) can be leveraged to accelerate growth?

29. What are the company's greatest opportunities for growth?

30. What marketing strategies/campaigns have been most effective at driving website traffic, leads, customer conversions and loyalty?

31. What have been the least effective marketing strategies/campaigns?

32. What are the top sources (e.g. paid, social, organic, etc.) over the last 12 months for website traffic, leads and customer conversions?

33. Do we have company leaders and/or subject matter experts willing to take prominent roles in public speaking, social media and/or media relations?

34. What is the estimated monthly marketing budget?

35. How does our budget break down in terms of internal team compensation, outside consultants/agencies fees, technology fees and campaign costs (including paid media)?

36. What percentage of our budget is allocated to builders (campaigns such as blogging, social media engagement and planning that lay the groundwork for future success) and drivers (campaigns such as lead generation, lead nurturing and conversion optimization that capitalize on existing assets to generate short-term returns)? Is this allocation aligned with growth goals?

Performance

38. Have we defined monthly, quarterly and annual goal values for priority KPIs?

39. Do the marketing KPIs clearly affect the achievement of overall business goals?

40. Does every campaign have a primary KPI and target goal value (e.g. 500 ebook downloads; 50 event registrations; 1,000 referring visits)?

41. Can we calculate ROI of marketing overall, and at a campaign level?

42. Can we provide estimated totals for the following metrics for the last 12 months? (Note: KPIs may vary.)

- Total website visitors =
- Total leads =
- Total new customers =
- Total new customer revenue =
- Avg. website visitors/month =
- Avg. leads/month =
- Avg. visitor-to-lead conversion rate (%) =
- Avg. cost per lead =
- Avg. new customers per month =
- Avg. lead-to-customer conversion rate (%) =

43. How are KPIs currently being tracked and monitored?

44. Do we have a standardized scorecard and reporting process?

45. Are we using consistent attribution modeling to ensure accuracy of ROI reporting and asset allocation?

46. Are we fully utilizing Google Analytics for campaign tracking and marketing performance reporting?

47. Should we consider a business intelligence solution that aggregates all marketing data sources, improves performance visualization, delivers insights and supports strategy development?

Ready for a full evaluation on your marketing program? Get your free **Marketing Score**, an online assessment tool that examines the strength of your business and marketing foundations, forecasts potential and aligns expectations. **Sign up for free today**!

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