

8-Step Marketing Audit

Step
1

Plan marketing audit

Step
2

Launch marketing audit

Step
3

Review of current state

Step
4

Interview staff

Step
5

**Conduct focus groups or
individual interviews**

Step
6

Perform survey

Step
7

**Recommendations
for future state**

Step
8

Implementation plan

8-Step Marketing Audit: Overview

The complete marketing system will be reviewed from the perspective of its contribution to the generation of leads (“Lead Generation”) and the conversion of these leads (“Lead Conversion”) into clients. In addition to the traditional marketing channels, particular attention will be paid to the effectiveness of the website, email, content and social media tactics in generating leads.

Step 1: Plan marketing audit:

Identify stakeholders for interviews and approvals.

Step 2: Launch marketing audit:

Identify and articulate needs, the objectives of the audit, and the components and process needed to conduct an effective audit.

Step 3: Review of current state:

Existing policies and marketing programs, marketing mix, cost per acquisition per channel and organize the results to be included in the audit report:

1. Brand Identity and Brand Standards
2. Advertising (TV, Radio, Transit, PPC, Print), PR, DM and Social Media
3. Marketing Collateral (Brochures, Educational Materials)
4. Online Content (Webpages, Blogging, Opt-ins, Offers, Webinars and Whitepapers)
5. SEO (Onsite and Offsite)
6. Email Marketing (Newsletters, Lead Nurturing Programs and CRM Integration)
7. Community Outreach Programs (Trade shows)
8. Partnership Programs (Joint ventures and affiliate programs)
9. Referral Programs: Identify opportunities to strengthen this pipeline through targeted engagement of current and recent clients.
10. CRM System

Step 4: Consult with staff and consultants:

Staff and marketing consultants (SEO and PPC) to generate significant information about the organization, its culture, its goals and how these have been marketed.

Step 5: Interview existing clients:

Consult with a select number of clients to understand what motivated them to take action all through the marketing funnel (from first awareness of the organization through to deciding to call). In addition, the review of ongoing survey data of prospects and clients will provide valuable information on what motivated or would motivate them to take the step of calling in.

Step 6: Perform internal survey and review results of external surveys:

Key aspects of the organizational marketing, including the culture, the marketing vehicles, and employee relations. This survey of the organization's staff can help understand some of the differences between offices located in different parts of the country (where clients may respond very differently to marketing tactics).

Step 7: Recommendation for future state:

Marketing recommendation report to include:

1. Marketing Objectives
2. Ideal Customer Profile (Identify niches where the organization can excel)
3. Competitive Advantage & Unique Selling Proposition (What makes your business different)
4. Core Strategy & Messaging (Of all print and web materials)
5. Brand Identity (Includes review of Brand Standards)
6. Marketing Collateral (Collateral Matrix and Collateral GAP Analysis)
7. Web Content (Content Matrix and Content GAP Analysis)
8. Lead Generation (Includes Advertising, PR, DM and Social Media)
9. Lead Conversion (Includes Marketing Automation* and CRM) *Marketing automation systems are designed to close the loop for marketing and sales teams, with marketing tools to execute campaigns, such as event and campaign management, lead scoring and nurturing. This enables your marketing team to effectively pass qualified leads through your auto-synched CRM, to your sales team.*
10. Marketing Resources (Includes Staffing, Technology and Tracking) *Is the organization appropriately staffed (internal and external resources) to meet marketing objectives in a cost effective manner? What technology and tracking would allow the organization to achieve its objectives?*

Step 8: Implementation Plan:

Marketing mix budget, cost per acquisition per channel, schedule of activities and identify key resources for responsibilities.

SUMMARY

