|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  | If No, When to Evaluate? | | |
| **Resources** | Yes No |  | Now ASAP | Next Month | Next Quarter |
| Do you have a business name and logo? |  |  |  |  |  |
| Have a business website? |  |  |  |  |  |
| Maintain a database of prospects, leads and customers? |  |  |  |  |  |
| Use marketing automation software? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Customer Experience** |  |  |  |  |  |
| Have you defined the demographics of your target audience? |  |  |  |  |  |
| Completed personas for ideal customers? |  |  |  |  |  |
| Mapped customer journey/experience? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Competition** |  |  |  |  |  |
| Have you identified your top 3 competitors? |  |  |  |  |  |
| Know how they market their solutions/services? |  |  |  |  |  |
| Completed a competitive analysis? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Value Proposition** |  |  |  |  |  |
| Have you explained your value proposition? |  |  |  |  |  |
| Identified your key differentiator? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Marketing Goals** |  |  |  |  |  |
| Have you defined marketing goals? |  |  |  |  |  |
| Do marketing goals align with company sales goals/sales funnel? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Marketing Budget** |  |  |  |  |  |
| Do you allocate a % of company gross revenues for marketing? |  |  |  |  |  |
| If yes, what % do you allocate? \_\_\_\_\_\_\_\_\_\_\_ |  |  |  |  |  |
|  |  |  |  |  |  |
| **Marketing Tactics** |  |  |  |  |  |
| Do you use traditional marketing tactics? |  |  |  |  |  |
| Networking? |  |  |  |  |  |
| Referral programs? |  |  |  |  |  |
| Cold calling? |  |  |  |  |  |
| Press releases? |  |  |  |  |  |
| Exhibits at local events? |  |  |  |  |  |
|  |  |  |  |  |  |
| How about digital marketing tactics? |  |  |  |  |  |
| Website marketing? |  |  |  |  |  |
| Email marketing? |  |  |  |  |  |
| Pay-per-click (PPC) advertising? |  |  |  |  |  |
| Search engine optimization? |  |  |  |  |  |
| Content marketing? |  |  |  |  |  |
| Video marketing? |  |  |  |  |  |
| Social media marketing? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Metrics as of** \_\_\_\_\_\_\_\_\_\_\_ |  |  |  |  |  |
| Database |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of prospects |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of leads |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of customers |  |  |  |  |  |
|  |  |  |  |  |  |
| Website scorecard (using Hubspot’s free [Website Grader](https://website.grader.com/)) |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ /30 points for performance |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ /30 points for SEO |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ /30 points for mobile optimization |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ /30 points for security |  |  |  |  |  |
|  |  |  |  |  |  |
| Promotional emails |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ average open rate |  |  |  |  |  |
|  |  |  |  |  |  |
| LinkedIn |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of updates |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of followers |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of visitors |  |  |  |  |  |
| Facebook business page |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of people reached |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of post engagements |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of page likes |  |  |  |  |  |
| Twitter |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of tweets |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of tweet impressions |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of profile visits |  |  |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_ # of followers |  |  |  |  |  |
|  |  |  |  |  |  |
| **Tracking** |  |  |  |  |  |
| Regularly survey customers to gauge satisfaction? |  |  |  |  |  |
| Monitor metrics? |  |  |  |  |  |