
Marketing Self-Assessment



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order to ensure that the house is a solid structure capable of standing up to time, weather, and everyday living. Building a marketing and advertising program for your small business is very similar – there are four distinct steps that need to be taken so that your business stands up over time. The good news is that, unlike building a house, you can go back and fix any of the steps in your marketing program you may have missed along the way without the whole thing falling down!

The elements of building a marketing program are the same as building a house: you start with a good set of plans, lay a solid foundation, erect the framework, and add the finishing touches.

A **good set of plans** includes a Business Plan, a Marketing Plan (that is separate from the Business Plan), and a Budget.

A solid **foundation** for your marketing program includes five (5) elements: your logo, brand standard, website, social media profiles, and business collaterals. These are the items that make your program stand strong across all of your strategies, campaigns, events, printed materials, media, apparel, and promotional products. It is your company identity and usually the first impression a prospect has of your company.

Think of your **framework** as all the elements you will need to build your house. Included in your framework are: sales materials (Brochures, flyers, product sheets, presentation folders, direct mail pieces, yard signs, etc.), marketing tools (the things you use to generate new business and communicate with your customers and prospects: email marketing, newsletters, trade shows, offers, free downloads, VIP programs, speaking engagements/presentations, networking, professional memberships, and video are all tools that you can use to market your business), advertising, and management of the marketing, advertising, and sales program.

Finishing touches are the things that make your house a home, so to speak. Included would be things like promotional products and apparel, but should also include things like your building exterior signage, parking lot and landscaping, your showroom or lobby area (any place that customers are allowed to be in), vehicle graphics, and client gifts.

How does YOUR company stack up? This Marketing Assessment covers 52 different elements of a solid marketing program for any small business or non profit organization. Don't worry if you have a lot of "No" answers – this tool was specifically designed to give you a blueprint for taking your company's marketing program to the next level!

Need help? Return your completed assessment to laura@nextlevelad.com. I will review and schedule a NO CHARGE call with you to go over your results and give you an honest evaluation of what your next steps should be.

To your success –

Laura

Marketing Self Assessment

Company Name: _____ Date: _____

Contact Name: _____ Phone: _____

Email Address: _____

SECTION ONE: Plans

Yes No

_____ _____ Company has a written business plan
If yes, when was it last updated _____

_____ _____ Company has a written marketing plan separate from the
business plan
If yes, when was it last updated _____

_____ _____ Company has a budget for marketing and advertising

SECTION TWO: Foundations

Yes No

_____ _____ Company has a logo suite
Company does not have a logo _____

_____ _____ Company has a brand standard

_____ _____ Company uses email signatures with live links to website and social media accounts

_____ _____ All of company's business collateral materials (cards, envelopes, letterhead, etc.)
match and are consistent with the brand standard

_____ _____ Company has a website

The last website update was on: _____

Company has a domain name but no website _____

Company does not have a domain name _____

_____ _____ Company's website colors and fonts match the brand standard

| Yes | No | |
|-------|-------|---|
| _____ | _____ | Company has at least two social media accounts (List) |
| | 1 | _____ |
| | 2 | _____ |
| | 3 | _____ |
| | 4 | _____ |
| _____ | _____ | Company social media account profile pictures and headers are consistent with company brand standard |
| _____ | _____ | Company has claimed its Google Business Profile. |
| _____ | _____ | Company has a Messaging Strategy (Unique Selling Proposition and/or Core Message) that it uses in all communications. |
| _____ | _____ | Company has made a list of keywords and uses them regularly |

SECTION THREE: Framework

| Yes | No | |
|-------|-------|--|
| _____ | _____ | Company posts at least 3 times per week on Social Media. |
| _____ | _____ | Company owner and key employees use LinkedIn regularly to build professional network and share information about the business |
| _____ | _____ | Company has a Content Strategy |
| _____ | _____ | Company owners and/or key employees attend at least one networking event per month |
| _____ | _____ | Company's sales collateral materials (brochures, order forms, mailers, folders, flyers, etc.) are up-to-date and use both colors and fonts that are consistent with my brand standard. |

| Yes | No | |
|-------|-------|--|
| _____ | _____ | Company has a database of customers and prospects that includes their email address |
| _____ | _____ | Company uses email marketing to promote offers, product/service |
| _____ | _____ | Company publishes an email newsletter regularly |
| _____ | _____ | Company offers an incentive for people who opt in to the email list |
| _____ | _____ | People can join email list from company website |
| _____ | _____ | Company writes and publishes a blog regularly |
| _____ | _____ | Company has incorporated video into website and social media marketing |
| _____ | _____ | Owner and sales staff regularly ask for referrals and company has a way of thanking people who give referrals. |
| _____ | _____ | Company regularly asks for testimonials and publishes those testimonials on website and in social media posts. |
| _____ | _____ | Company uses trade shows, events, and/or conferences as a way to promote my business and generate new business leads |
| _____ | _____ | Company trade show booth design and materials are consistent with brand standard |
| _____ | _____ | Company belongs to professional / trade organizations (Chamber, etc.) |
| _____ | _____ | Company owner and/or key employees attend professional conferences and events whenever possible. |
| _____ | _____ | Company owner and/or key employees participate as a speaker or presenter at trade shows, professional conferences and/or events. |
| | | <i>Have not done this but would like to _____</i> |
| _____ | _____ | Company uses sponsorship of events and/or conferences as a way to grow my company's brand awareness |

| Yes | No | |
|-------|-------|--|
| _____ | _____ | Company uses a CRM/ Lead Management System |
| _____ | _____ | Company has explored Co-Op Advertising and has incorporated it into their marketing program |
| _____ | _____ | Company has a procedure for following up on leads generated at trade shows, events, and conferences |
| _____ | _____ | Company has a VIP program for its best clients |
| _____ | _____ | Company has claimed its Google My Business listing and updates it regularly. |
| _____ | _____ | Company uses radio advertising |
| _____ | _____ | Company uses television advertising |
| _____ | _____ | Company uses print advertising |
| _____ | _____ | Company uses billboard advertising |
| _____ | _____ | Company uses direct mail advertising |
| _____ | _____ | Company uses coupons to attract new customers. |
| _____ | _____ | Company uses digital (online) advertising (site retargeting, keyword search, Facebook ads, Google AdWords, etc.) |
| _____ | _____ | Company owner feels confident that company is getting a good return on investment for advertising dollars. |

SECTION FOUR: Finishing Touches

| Yes | No | |
|-------|-------|---|
| _____ | _____ | Company uses logoed apparel consistent with brand colors when attending events and/or making sales calls. |
| _____ | _____ | Company owner and/or key employees incorporate the company brand into their personal work wardrobes. |

| Yes | No | |
|-------|-------|---|
| _____ | _____ | All employees who attend events representing the company wear logo'd apparel or name tags consistent with the company brand. |
| _____ | _____ | All employees who interact with customers (in house) wear logo'd apparel or nametags |
| _____ | _____ | Company uses promotional products that are consistent with brand as give-aways, leave behinds, client thank you's, and/or at trade shows and events |
| _____ | _____ | Company's reception area / showroom reflect the company's brand |
| _____ | _____ | Company's reception area / showroom promote the company's services and/or any special promotions or offers |
| _____ | _____ | Exterior signage reflects the company's brand and makes it easy for customers to visit the business. |

Comments/Questions About Your Marketing Program:

Ready to take your business to the next level? Return this Assessment to me (laura@marketingblueprintsfor-smallbiz.com) and receive a FREE 30 minute review and action plan for developing a complete Marketing Program for your business!