



Marketing Assessment Guide





Identifying Your Customer

1. Who is the target niche of your product or service?
(Don't have a product or service yet? Chose a niche of people you would love to help.)
2. Describe them in great detail?
Demographics: Age, Sex, Location, Income, Religion, Ethnicity, Family constellation, etc.
3. Who do you feel you could be in the most rapport with in general as a person? Who do you think would have the most rapport with you? (Describe them)
4. What problem(s) do they have, that they would pay to have solved?
5. What opportunities would they like, that they can't get?



Identifying Marketing Channels

1. Where do your customers hang out?
(What publications do they read, groups do they belong to? Social media sites do they like? Etc)
2. Where are your competitors marketing right now?
3. Where does it logically make sense for you to offer your product? (Specific locations? Stores? Websites? etc)
4. What are the buying behaviours of your customers - where do they like to shop and spend money on solutions of this nature?
5. Where is the industry trending towards for exposure and outlets to the customers?



Messaging To Get Attention

1. Is your message clear about who you work with, what pain you solve (or opportunity) and what solutions you provide?
2. Does your market resonate with your message? Is it clear, simple and full of opportunity to them?
3. Have you sent out surveys recently and asked for feedback on your message to the market?
4. Do you collect keywords that the market is using in their description of themselves, their pain or the solution they want?
5. Are you a B2B company or a B2C company? Is this a Done For You Market or a Do It Yourself Market?



Brand Building Efforts

1. Do you have a “Sticky Brand”? Do people remember it? Are you using a “Corporate” or a Personal Brand?
2. Do you saturate the marketplace with your brand in media ways? (Video, Web banners, etc?)
3. Are you actively publishing or being published in journals, magazines, newspapers or through books?
4. Do you have nurture campaigns that are actively running to your database and social media pages?
5. Are you being featured in media - like TV, Radio, Magazine, etc often through interviews and highlighted segments?



Your Lifeblood: Your Database

1. Do you have a database? Are you using a database tool online?
2. Are you segmenting your database? If so, how are you segmenting?
3. Do you have different campaigns that are taking “new leads” through a process separate then “established leads”?
4. Do you have active and ongoing database building activities happening? On social media and off social media?
5. Do you have automated campaigns that are continuing to give your database cool free stuff?



Partnerships, Joint Ventures & Affiliates

1. Do you feel comfortable creating partnerships and joint ventures? Are you familiar with how to structure the deals? Or what your partners would need?
2. Do you have an active “hit list” of potential partners that you are talking to about co-promoting or working together?
3. Do you have a good JV broker or someone you work with that can help you get access to lists or good JV partners?
4. Do you have an active affiliate program with good incentives?
5. Do you have an effective refer a friend program or do you actively solicit for referrals?



Team & Marketing Collateral

1. Are you connected to a good and affordable graphic design partner? Coder?
2. Do you have a good copywriter in your back pocket?
3. Do you have a marketing expert/strategist/partner that can look over your campaigns before you launch them? Help you create free products? Concept?
4. Do you have assets ready to go for marketing like a website, opt in page design, free product, banners, ads (graphics and copy), pop up boxes, etc?
5. Do you have a brand style guide for your brand?



Copy & URLs

1. Are you attentive to your email subject lines? Are you attentive to marketer's subject lines that get you to open their emails?
2. Do you follow copywriting experts online?
3. Are you versed in copywriting enough to write basic emails, letters and product descriptions?
4. Are you attentive to the URLs you use for you websites, landing pages and ads?
5. Do you understand how to select a good/effective title for your product, services or events?



Design Elements

1. Are you familiar with physical design elements that work for online conversion? Layouts? Colors?
2. Do you have a resource that you keep up to date on the newest research and testing?
3. Do you or your designer use proven conversion strategies when putting together websites, landing pages, ads or banners?
4. Are you familiar with the psychology behind colours, placement layouts and copy choices?
5. Do you actively split test between different designs, colours and layout choices?



Digital Marketing Strategy

1. Do you have a specific platform(s) you use to communicate with your clients regularly?
2. Do you feel like you are focused on 1 or 2 platforms, or spread out with many different platforms?
3. Do you understand how to build marketing funnels online - the strategy? Or does it feel like a mystery to you?
4. Do you experience a high amount of open rates from your emails? High engagement rates from your social media posts?
5. Are you familiar with product launch formulas? Do you understand Ad buying? Email strategies to databases? Do you feel comfortable buying and monetising cold traffic?



Offline Marketing Strategy

1. Do you actively network regularly, and show up physically at groups to network?
2. Are you actively being featured in or buying ad time/space on radio, TV or in magazines?
3. Do you have an offline ad buyer or someone that is connected in the offline ad buying space that brings you specials and distressed ad space opportunities?
4. Have you worked with or tested direct mail for your industry or products/services?
5. Do you test your online marketing strategies first offline?



Marketing Plan

1. Do you have a marketing calendar that details your quarter or yearly marketing activities?
2. Do you feel comfortable planning tours or events, and the lead time for marketing them?
3. Are you actively planning product launches throughout the year and have dates on your calendar for the next ones?
4. Do you know how to time JV launches of your products, arrange them for optimal effectiveness and track them via leader boards/incentivised emails?
5. Do you have nurture campaigns laid out with a clear understanding of what monetisation strategy they are driving to?



Marketing Budgets

1. Do you have a monthly, quarterly and annual marketing budget set aside for driving new leads?
2. Do you have a sense of what happens if you increase or decrease that budget - other than a linear response? Would bulk buying or increased budgets, reduce your CPL?
3. Do you feel uneasy about spending money on marketing - like it disappears with no measurable return?
4. Do you have a relationship to your overall revenue in comparison to your marketing budget, and if it is a reasonable amount to be spending in relation to your industry competitors?
5. Have you budgeted across different channels, know how to prioritise the channels and understand how much is enough to test each channel?



Testing & Measuring

1. Do you actively measure your marketing campaigns and results? Do you feel comfortable understanding what to measure, how to interpret that data and how to change things to be more effective?
2. Are you actively split testing? Do you understand how to continue to split test down to the most effective campaign?
3. Do you use web analytics tools on your websites?
4. Do you know how to use keyword research tools?
5. Do you review campaigns, tours and events and create a spreadsheet of all the data to review the results and draw new conclusions?



Actions to take

- 1) Answer all these questions!
- 2) Discuss with someone close to you
- 3) Identify areas you are going to focus on