**Marketing Audit Preparation Form**Please fill out this form by completing it online. If you have any questions or would like to discuss your marketing further, please contact 01323 769130 or email [office@pearcemarketing.co.uk](mailto:office@pearcemarketing.co.uk) 😊  
  
*Please click on the**far left of each text box/cell in order to start typing.*

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| **General Information** | |
| Company Name: |  |
| Contact Name: |  |
| Contact Telephone: |  |
| Contact Email: |  |
| Website URL: |  |
| How did you find out about Pearce Marketing? |  |

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| **Business Objectives & Target Market** | |
| 1. What are your current business/marketing objectives? Are you looking to grow via an:   1. Increase in the number of clients 2. Increase in the average transaction value? 3. Increase in the frequency that the average client buys from you? 4. Do you have another SMART marketing objective?   Specific - what needs to be done   * Measurable - can it be measured? * Achievable - can it be done? * Relevant - should it be done? * Time-bound - When will it be done?   Please also advise on targets (if known):   * How many new clients you want to gain each year (how many has it been previously?) * How many new leads you want to have each month (and what it has been previously)? * What do you want the initial order value and/or annual value of a client to be (and what has it been previously)? * What can you afford to invest in a lead? * Other important KPIs? |  |
| 2. Describe your product/service range. |  |
| 3. What is the size of your business?  Number of staff…  Turnover…  Locations… |  |
| 4. Who is your target audience? Please describe your ideal customer profile…   Are they the General Public, Business/Trade (which industry sectors?), Public Sector or Charity?  Job Title, Gender, Age, Interests, Income/Turnover, Years established, number of employees etc.  **What pain are they feeling that you could solve?**  Any other information… |  |
| 5. What geographic areas do you serve?  What towns/counties/countries are your priorities? |  |
| 6. Which are your most profitable products/services that you would wish to focus on?  Are there other key products/services that often initially draw people into your business? |  |
| 7. Are your customers making one-off purchases or are they repeat customers purchasing the same and/or other products/services? |  |
| 8. Who are your competitors for each of your product/service areas? |  |
| 9. Who refers you to their clients? E.g. an estate agent may recommend a builder |  |

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| **Customer research** | |
| 1. Do you undertake any customer research?   Please describe… |  |
| 1. Do you know how customers/ prospects find out about you? |  |
| 1. Do you know why customers buy from you (and not your competition)? |  |
| 1. Do you know what your customers value most? |  |
| 1. Do you know what your customers wish you could improve on? |  |

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| **Branding, Positioning & USPs** | |
| 1. Describe your brand - *just fill in what you can right now…* | |
| What are your company’s core values? |  |
| What is your WHY? Why do you do what you do? Why should anyone care? People buy from you because they connect to your purpose. It can be the ultimate differentiator.  *(Simon Sinek – “People don’t buy what you do, they buy why you do it”)* |  |
| How do you want to make people feel when they see your company/brand or use your services?  What are your ESPs – Emotional Selling Points? (People buy due to emotion that is backed up by logic).  Do you have a word or short phrase that defines your brand promise?  (eg BMW = Joy, Volvo = Safe, Disney = Magical, Harley Davidson = Independent) |  |
| What is your business personality and tone of voice and communication style (e.g. friendly, formal, funny, Hi Jim or Dear Mr Smith) |  |
| Do you have a strapline?  What is it? |  |
| 1. How are your products/services currently positioned? (please fill in the following 3 boxes) | |
| Price: |  |
| Quality: |  |
| What is your Unique Value Proposition?    Succinct statement about what you promise to deliver – your core competitive advantage:  ○ how your product/service solves problems/pains (for particular target markets)  ○ specific benefits you provide (ideally USPs - unique selling points - identify benefits that are different your competition - how are they different and better?)  ○ and why buy from you and not your competition (and what do you do that is hard for your competition to copy?)  (Please also supply your internal positioning statement(s), business vision and mission statements if you have them…. ) |  |
| 1. What are your main sales and marketing messages now? |  |
| 1. Do you have a brand guidelines summary – for example do you have set brand colours, fonts, styles etc. and web and internet logos? |  |
| 1. What are the most important elements of your history? |  |
| 1. Who are your influences? (From Famous people to other brands.) |  |

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| **Database – Customer, Prospect & Referral Source Data** | |
| 1. Do you have a database of business customers, prospects and referral sources?   If yes which ones?   * Customers * Prospects * Referral Sources | |
| 1. What information do you have on them (eg first name, last name, email, mobile, address)? |  |
| 1. Do you use a CRM system? Which one? Does it have function to send a series of automatic emails? |  |
| 4 Are you GDPR compliant? eg Do you have a Privacy Policy, is your website up to date? We can help. |  |

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| **Your current marketing activities** | | |
| What type of marketing is done now? Please tick the appropriate boxes and provide additional information. | | Additional information: |
| Exhibitions  (please name) |  |  |
| Telephone sales |  |  |
| Case Studies/Testimonials |  |  |
| Rep Visits |  |  |
| Your Own Podcast |  |  |
| Award Entries  (which awards?) |  |  |
| Brochures/Leaflets |  |  |
| Leaflet Distribution |  |  |
| Print Advertising  (where?) |  |  |
| Online Advertising  (e.g. Google Adwords/ Google Shopping, Banner Adverts / Ads on other websites) |  |  |
| Social Media  (which platforms – Facebook, Twitter, Pinterest, LinkedIn, YouTube, Instagram, TikTok etc.?) |  |  |
| Social Media Advertising  and Remarketing Ads  (Do you have pixels set for each platform on your website?) |  |  |
| Networking  (which ones?) |  |  |
| Speaking at Events / Seminars / on someone else’s Podcast  (which ones?) |  |  |
| Website  What platform is your website built on e.g. wordpress?  Does your website pass Google’s Mobile Friendly Test?  Do you use a B2B lead generation software tool for identifying visitors to your website (cross match IP address with company details) – eg Lead Forensics or Spotler (was GatorLeads)?  Do you use any pop ups on your website that encourage people to enter name and email to get access to useful resources?  Do you use the data to enter people into an automated marketing funnel of any kind (eg get email saying x, get another in 6 days saying y if they click on link in first email etc.)  Do you have any specific landing pages on your website for marketing campaigns? |  |  |
| Blog |  |  |
| SEO  (search engine optimisation) on your website.  Do you have a Google My Business listing and Bing page?  Do you have backlinks in place (online directory listings)? |  |  |
| PR |  |  |
| Referral incentive schemes |  |  |
| QR Codes |  |  |
| Email Marketing |  |  |
| Email Signature (with social media & website links) |  |  |
| Road Signage/Van Signage/Job Boards & Stickers, Shop Fronts, Signage |  |  |
| Do you have a profile on Checkatrade or NextDoor or other referral websites for your industry (Trust Pilot, Buy with Confidence, Vouched For etc.)? |  |  |
| Promotional Merchandise (eg pens, fridge magnets, mugs etc.) |  |  |
| Radio |  |  |
| Do you have any ebooks or whitepapers/articles/ samples/vouchers that you could give away (in return for an email address)? |  |  |
| Other: |  | |
| What photography and video do you already have?  Are there opportunities to develop more? |  | |

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| **Customer and Staff Feedback** | |
| Do you have an ongoing system for asking **clients** for feedback on their experience of working with you (during or at the end of a project/sales), and/or ask staff about whether they have everything they need to do their job, how they are doing from a mental wellbeing point of view etc.? | Clients (Yes/No):  Staff (Yes/No):  How do you collect this information now?  What costs are involved (£ / hours per month etc.)? |
| Where do your clients leave public reviews (or would you like them to)? (eg TrustPilot, TripAdvisor, Google, Checkatrade)? |  |

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| **Your marketing plans for the coming year** | |
| What have you committed to already? |  |

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| **Measuring your marketing activities and sales** | |
| How do you measure your marketing and sales? (Eg from asking people how they found out about your business to Google analytics tracking) |  |
| What marketing activities generate enquiries and sales? |  |

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| **Your current sales and marketing/lead nurturing processes** | |
| Please explain the steps you take in your processes… (from advertising and email marketing, for example, through to first contact, follow ups (by what methods/by whom), closing the sale and ongoing contact) | |
| Sales process to win customers: |  |
| Sales process to up-sell or cross-sell: |  |
| Do you have any dedicated sales staff? |  |

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| **Any other notes:** |
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If you have any marketing questions, please just ask!

[office@pearcemarketing.co.uk](mailto:office@pearcemarketing.co.uk) - 01323 769130

We help SME clients in all sectors to feel confident and in control of their traditional and digital marketing, leading to growth and a positive ROI.

We help you to create a cost-effective, targeted and measurable marketing plan, get your marketing tasks completed and provide marketing training too.

Your flexible, outsourced marketing service is right here!

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