YOUR MARKETING AUDIT

A reflection tool for what you're actually doing and whether it's working

I Will Be Frank With You

BEFORE YOU FILL THIS IN

This is not a marketing plan. It's an honest audit of what you're currently doing to bring customers in and keep them coming back. Most businesses have a mix of intentional marketing and things that are just happening out of habit. The goal here is to tell the difference.

Fill this out before Your Marketing Reality session. The more honest you are, the more useful the session will be. If you don't know whether something is working, say that. Not knowing is useful information too.

PART 1: WHAT YOU'RE CURRENTLY DOING TO REACH YOUR CUSTOMERS

For each way you are currently reaching or communicating with customers, whether you are spending money on it, spending time on it, or both, fill in the row. Add rows as needed.

Ways you're doing	What's the strategy? What are you trying to do with this?	How are you tracking it?	What result are you seeing?	Working, habit, or unsure?

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PART 2: WHAT YOU'VE TRIED AND STOPPED

List anything you tried that you're no longer doing. For each one, write down why you stopped.

What Your Tried	Why did you stop?

PART 3: WHAT YOU'VE THOUGHT ABOUT BUT NEVER STARTED

List anything you've considered doing but haven't started. For each one, write down what's stopped you.

What You've Considered	What's stopped you?

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PART 4: YOUR HONEST ASSESSMENT

Answer these before we meet. A sentence or two is enough.

1. What is currently bringing you the best customers, meaning the ones most likely to come back, spend more, and refer others?

2. What are you investing time or money in right now that you have the least evidence is actually working?

3. If you had to cut everything except two ways of reaching customers tomorrow, which two would you keep and why?

4. What does a good week look like for your best approach to reaching customers? What's the number that tells you it's working?

5. What does a bad week look like? What's the number that tells you something is off?

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