

# Marketing Health Check

Business name: \_\_\_\_\_ Date: \_\_\_\_\_

**Self assessment:** I think I'm about a \_\_\_\_\_ / 10 (1 being 'genius' and 10 being 'what marketing?')

## Your business

**YES NO**

1. Are you still as passionate and committed towards your business as the day you started? Still having fun?? Think about WHY you started in the first place.

Those reasons are: \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_

2. Do you have a healthy work / life balance?

3. Do you have clear and defined business objectives of what you want to achieve (not just marketing)?

4. You know what your business strengths and advantages are and do you REALLY focus on them?

My strengths are: \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_



5. Business activities appear to be planned, strategic and thought out, not 'off the cuff' and reactive?

6. Do you have a marketing plan?

7. If you do have a marketing plan, do you follow it and update it?

8. Do you have a marketing budget?



9. You know what makes the product or service different from your competitors?

What are they? \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_

**tip :** Be 'something' that your competitors can't and do something that they won't.

10. Of the 'marketing' you do now, do you know what works and why it works?

11. Do you know where you want to be in 1, 5 and 10 years?

**Notes:**

# Marketing Health Check

## Your 'look' and 'branding'

YES NO

12. Do you have a professional looking logo?

13. Does it include a simple image or icon?

**tip :** People remember simple and appropriate images more than just a business name.



14. The 'look' and 'design' of everything is consistent? Eg. Letterhead, business cards, flyers, website, advertising, etc.



15. The look and design is appropriate for the customers / industry?

My customers expect: \_\_\_\_\_, \_\_\_\_\_

**tip :** Don't keep re-inventing yourself – use the same logo, same 'colours' and same 'look'.

16. Do you have a 'tagline' to help describe what you do, and does it reflect your position?



17. I know what you stand for and what you believe in?



18. The marketing material is professional and available when requested? Proud to give it out?



19. Do you have digital (PDF) versions of your marketing material?

**tip :** Check & update material at the start of each month so it's always up to date and ready to email / send.



20. Every experience with the business is always a consistent and positive one?

My ideal experience is: \_\_\_\_\_, \_\_\_\_\_

21. Do you know how to describe your 'brand personality'? If it was a person, it would be ... examples are corporate, formal, relaxed, fun, alternative ...

\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

### Notes:

# Marketing Health Check

## Customers

YES NO

**This is a very, very, very important question!!!!**

22. Do you offer your customers what they want, or are you offering what you have?

23. Can you describe 'who' your best customers are and 'why'?

Who? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Why? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

24. Do you know enough about your 'type' of customer to recognise them when you see them, meet them, talk to them?



25. Customers feel appreciated and recognised for referring work on. I am 'thanked'.

26. Do you know why your customers come to you instead of your competition?

**tip :** Next time in general conversation; ASK your customer what it is that you do better and WHY.

27. Do you make sure that you SHOW your customers that they can trust you, rely on you and respect you?

How? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_



28. There is regular and appropriate contact with your customers and potential clients?

29. Are you getting the most out of your existing customers? Do they know ALL of the products and services you offer? You'll be surprised!

30. Do you know why customers have 'left' and gone else where?

Why? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

**tip :** Surprise' a long term (and profitable!) customer with a small gift of appreciation – thank them for their business.

31. When you speak with 'potential' clients, do you know who the real leads are?

Do you qualify them?

### Notes:

# Marketing Health Check

## Promotion & Communication

YES NO

32. Do you actively and consistently promote your business?

How? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

33. Are you aware of the best ways to promote to your 'type' of customers?

34. Before you make a big commitment to any form of promotion, you TEST it to see if it works first?



35. When potential clients ask 'what you do' or 'how can you help me', can you answer confidently and easily 'sell your self'?

**Tip :** Tell people what 'problem' you fix and explain it – not just WHAT you do.

36. Is your website a good information tool – it clearly says what you do, it is easy to find your contact information and is updated regularly?

37. Do you make the most of every opportunity and network when ever you can?

**Tip :** Don't try to promote to everybody – target your type of customers and your customers only. Be fussy & specific.



38. How you promote is suitable and appropriate to customers?



39. Advertisements / promotions spell out the benefits of the product / service?

**Tip :** Don't promote in the same way / same places that your competitors do. Try something new! Stand out!

40. Word of mouth advertising may be FREE but do you make it easy for people to be your 'flag wavers'?



41. Promotion gives customers the solution to the problem? It was like that ad or promo was just for them?



42. All of the promotion is consistent and sends the same 'message'?

Notes:

# Marketing Health Check

## Research

YES NO

43. Are you always looking for new or better products/services to offer your customers?

How? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

44. Do you dump products or services that aren't profitable or selling over a long period of time?

45. When you promote and advertise, do you measure the response in terms of 'return on investment'?

**Tip :** LISTEN to your customers and RECORD it. Do they have kids, pets, been on holiday, got a promotion? Great excuse talking to them again and building a relationship.

46. Do you keep an eye on what your competitors are doing, how & what they are promoting?

47. Do you keep up to date on what is happening in your industry?

How? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

48. Are you measuring the amount of visitors to your website?

**Tip :** Don't be afraid of change – if your 'research' is telling you a strong message, consider it, plan for it and then ACT!

### Notes:

**PHEW ... that's it! What now? That important part is up to you.**

Don't forget to rate yourself again.

Now, I think I'm about a \_\_\_\_ / 10 (1 being 'genius' and 10 being 'what marketing?')

Don't waste the time and energy you spent tonight; review these questions again in 6 months time and be proud of yourself where you've changed the NO to a YES!