

KNOW HOW

TO CONDUCT A MARKETING AUDIT

Presented by





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Strategy & Planning

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WHAT EXACTLY IS A MARKETING AUDIT?

A process that examines your marketing ecosystem to evaluate what's working and what's not. The final product is a written analysis.



Why conduct a marketing audit?

- Understand what's working and what's not before investing in new marketing initiatives
- Allows you to gather feedback from an objective professional
- Reveals insights that can act as building blocks for a strong foundation for future marketing efforts



When to conduct a marketing audit

- Before planning your next big marketing or advertising campaign
- To determine what aspects of your current efforts are having the most impact
- In preparation for a rebrand
- During budgeting season
- If you suspect reputational issues that need to be corrected.

What does a marketing audit process look like?

POSITIONING
REVIEW


STAKEHOLDER
AND AUDIENCE
INTERVIEWS OR
SURVEYS

COMPETITOR
REVIEW

ASSESS
ONLINE
PRESENCE

REVIEW
MARKETING
COMM PLAN

WRITTEN
FINDINGS
REPORT

- 
- ☐ Identify who is on your committee or team and set up a kick-off meeting.
 - ☐ Create a comprehensive list of existing brand collateral to assess during the audit. Ensure you have access to all online accounts.
 - ☐ Identify key audiences, including contact info for one-on-one interviews.
 - ☐ Begin writing interview/survey questions. Consider segmentation of the questions based on audience.
 - ☐ Identify your top 3-4 competitors. Make a list of their brand elements to review: website, any online advertising you can find, Google reviews or share of voice.



Positioning review



EXAMINE EXTERNAL MATERIALS

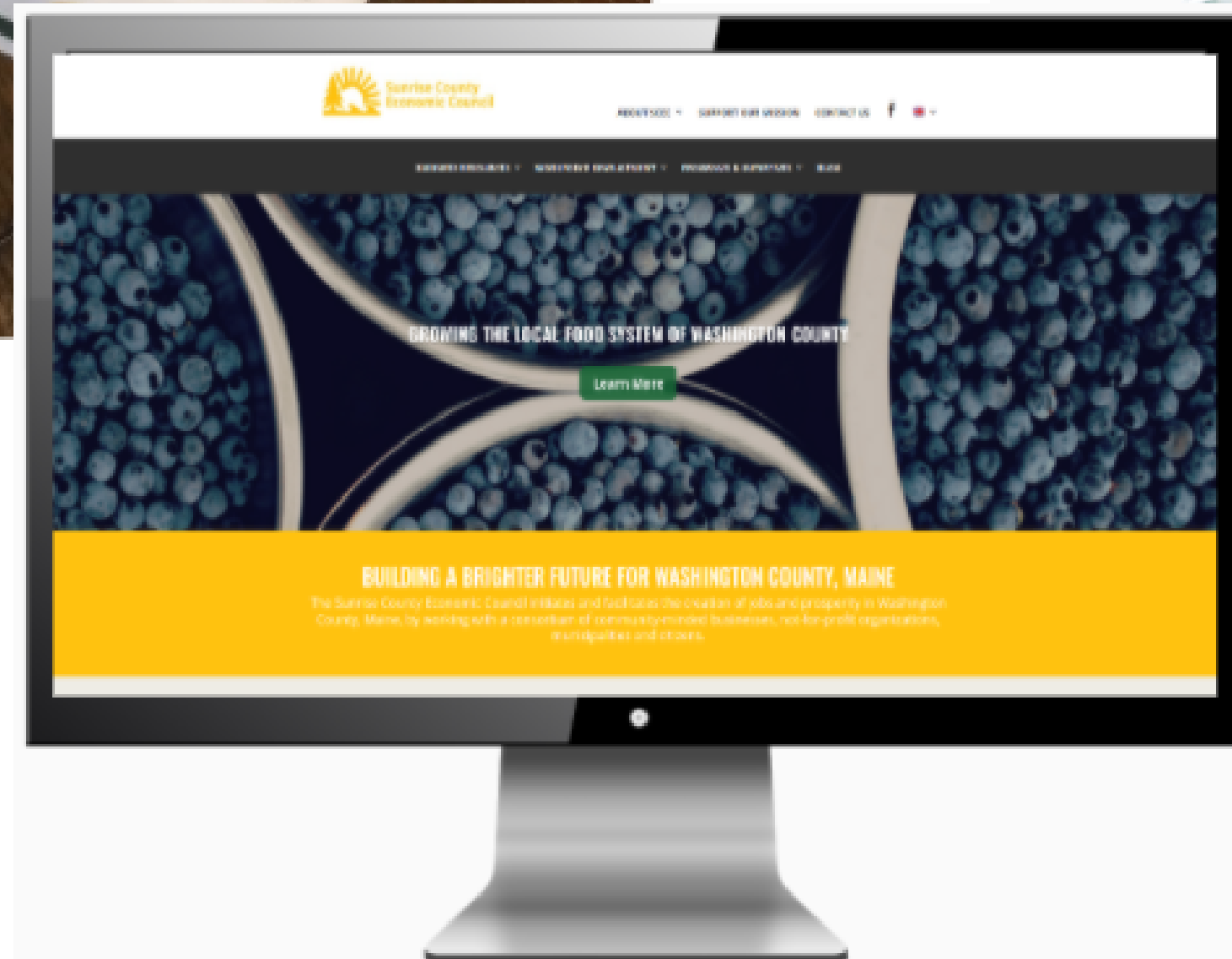
Review current marketing plan, materials that communicate your brand (logo, identity materials, sales materials, ads, website, online tools, etc.) and media contracts.

REVEAL TROUBLE SPOTS

Are there any areas that might cause confusion or mistrust with your audience?

IS EVERYTHING UP TO DATE?

Has your messaging evolved since these materials were developed?



IDENTIFY KEY AUDIENCES

Determine key audiences, stakeholders & referral sources/Centers of Influence, community stakeholders and internal audiences.

CONDUCT INTERVIEWS & SURVEYS

Use one-on-one interviews for individual stakeholders and surveys for larger groups.

This step can help highlight misconceptions and shine a light on your strongest brand attributes.

Stakeholder interviews

The background of the slide features a light gray area with various abstract shapes and icons. There are green concentric circles, a red scribble, a yellow circle with a diagonal line and two dots, and a red circle with two dots. A vertical orange line is positioned on the right side of the slide.

"I love the organization, but what's really missing from their services offered is this one key element."

"This particular feature is the biggest benefit of membership in my opinion. I wish the organization would do more along these lines."

"People know the organization from how they're connected to it, but they don't have a broader understanding of all the programming that's offered or the benefits provided to the community."



Competitor review

AUDIT OF COMPETITORS

Review competitor marketing materials to better understand their strategy.

STAND OUT FROM THE CROWD

Use your findings as a basis to differentiate from your competition.

LOOK AT:

- Key brand messages and positioning
- Types of media coverage / storylines
- Number of placements and where they occurred
- Review social media content and voice



KEY MESSAGES

"You matter more"

MEDIA COVERAGE

Found 777 media results since Feb 2018; a mix of thought leadership, deal announcements, new hires and grants / community news. Commercial lending content mostly related to merger with Granite Bank in April 2018.



KEY MESSAGES

"Everyone needs an anchor"

MEDIA COVERAGE

Found 968 media results since Feb 2018; similar coverage to BSB. MaineBiz article on launch of BusinessTouch online lending tool in Oct 2018.



KEY MESSAGES

No clear positioning messages.

MEDIA COVERAGE

Found 386 media results; Commercial lending stories mostly on launch of their Portland office in fall 2018.

REVIEW ONLINE CHANNELS

Take your website, blog, social media presence, online content and online advertising into account.

DOES IT ALIGN?

Check for consistency across channels that reflects your brand positioning.

IS IT ENGAGING?

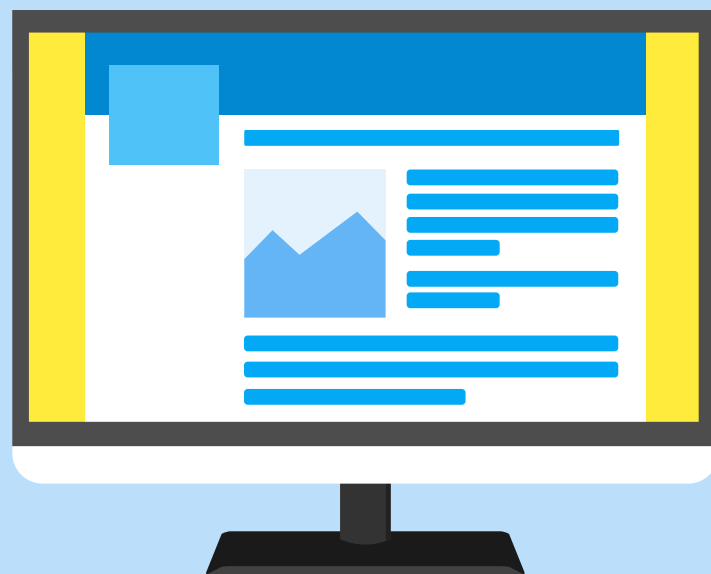
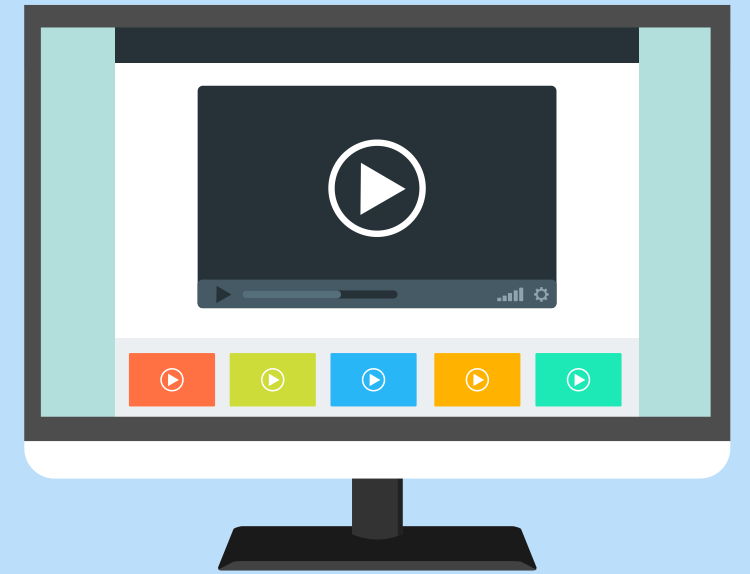
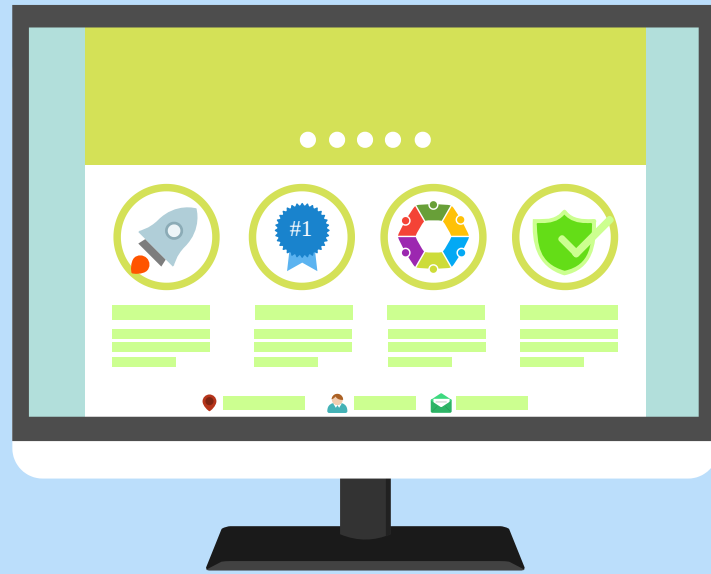
Look at analytics to determine if your current efforts are reaching your target audience.



Assess online presence

LOOK AT:

- Website (overall positioning; digital content or tools)
- Google Analytics
- Google My Business/location search results for keywords
- Google Reviews
- Social media (overall tone/approach of organic content; paid advertising)



Users
7,784

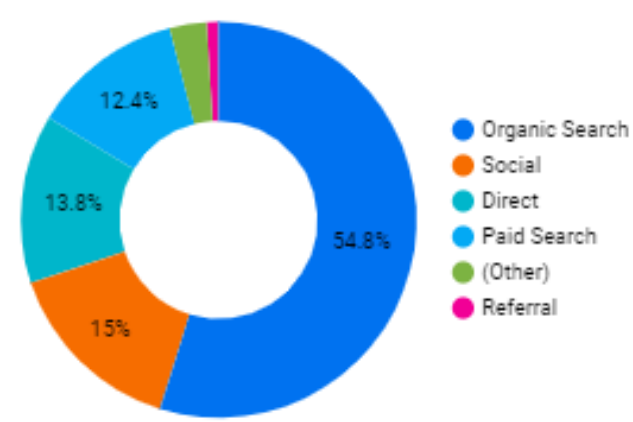
Sessions
9,206

Bounce Rate
74.58%

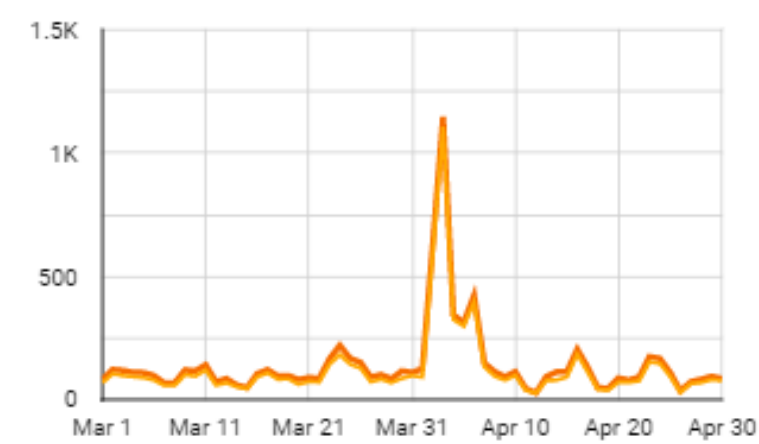
Goal Completions
120

Avg. Time on Page
00:01:36

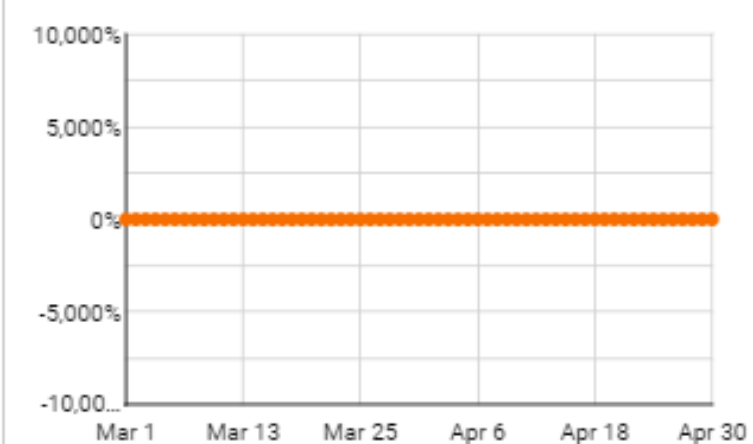
Top Acquisition Channels



Users (vs. New Users)

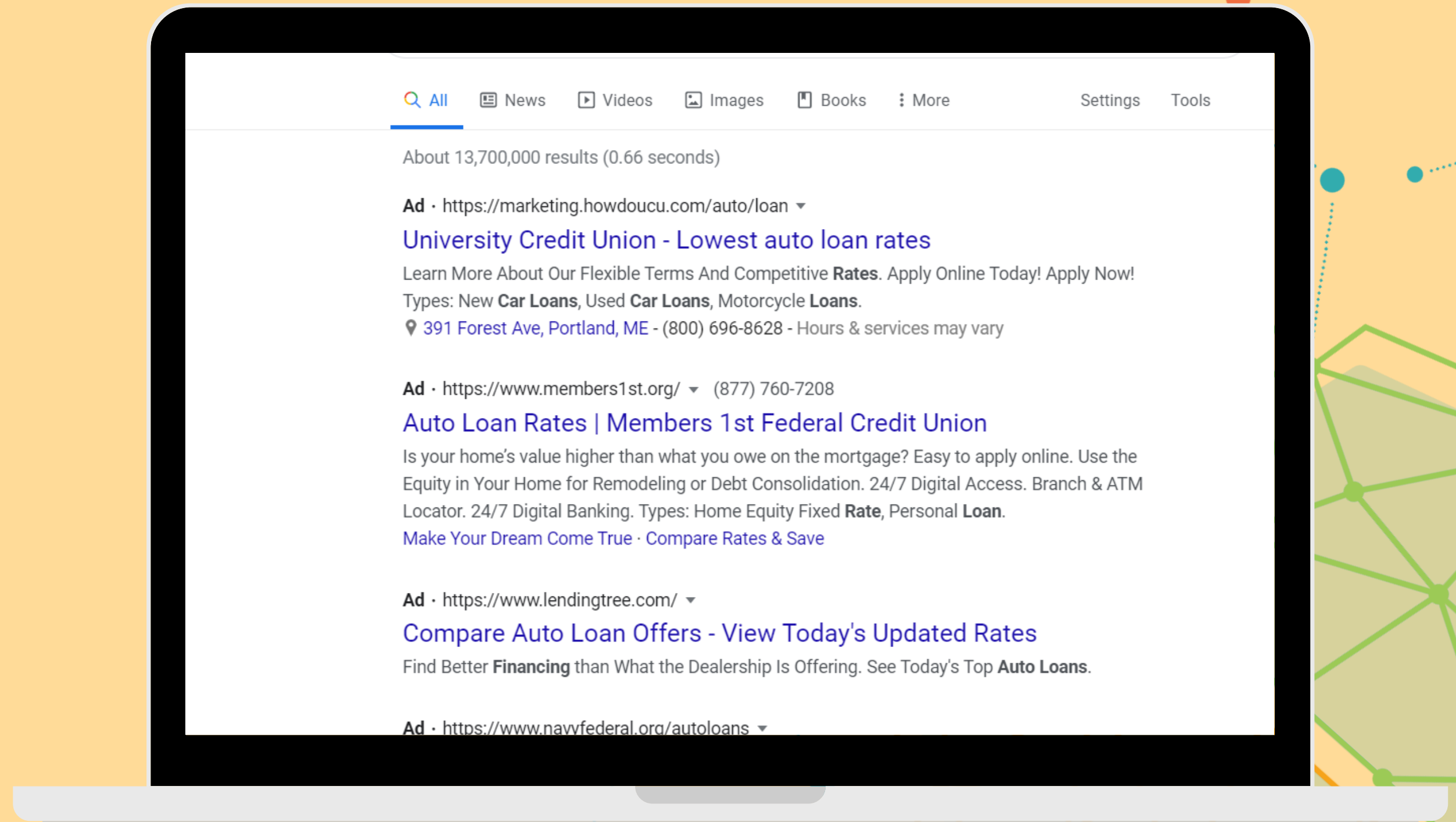
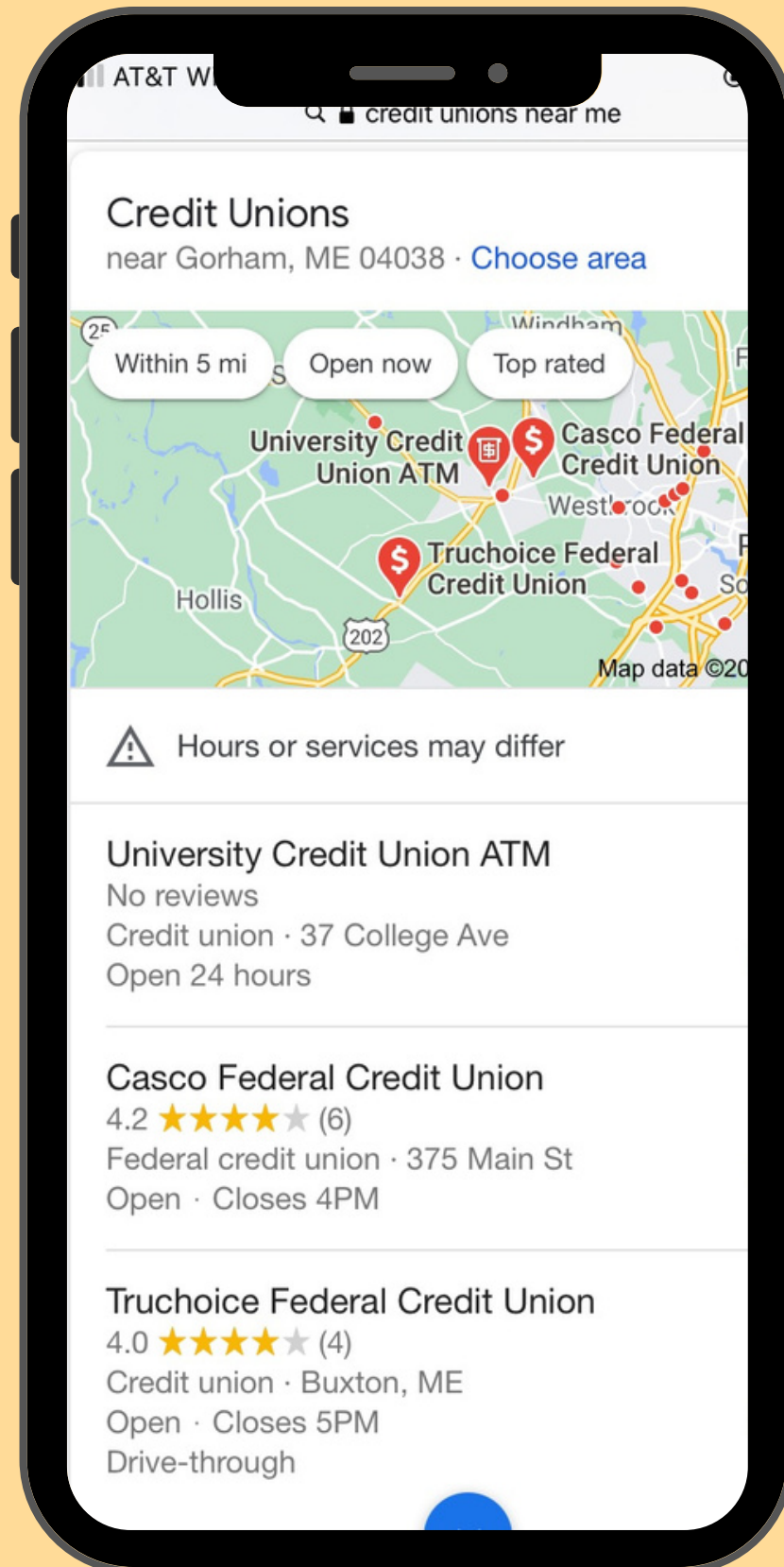



Conversions



| | Acquisition | | | Behavior | | | Conversions | | |
|----------------------|-------------|-------|-----------|-------------|-----------------|-----------------------|----------------------|------------------|------------|
| | Sessions | Users | New Users | Bounce Rate | Pages / Session | Avg. Session Duration | Goal Conversion Rate | Goal Completions | Goal Value |
| | 9.2K | 7.8K | 7.6K | 74.6% | 1.7 | 01:12 | 1.3% | 120.0 | No data |
| Source / Medium | Sessions | Users | New Users | Bounce Rate | Pages / Session | Avg Session Durat... | Goal Conversion ... | Goal Completions | Goal Value |
| google / organic | 4,221 | 3,675 | 3,557 | 67.95% | 1.89 | 00:01:09 | 2.25% | 95 | \$0 |
| (direct) / (none) | 1,344 | 1,077 | 1,062 | 73.74% | 1.81 | 00:01:20 | 0.82% | 11 | \$0 |
| google / cpc | 1,186 | 968 | 940 | 87.1% | 1.22 | 00:00:39 | 0.42% | 5 | \$0 |
| m.facebook.com... | 624 | 592 | 553 | 94.39% | 1.1 | 00:00:15 | 0% | 0 | \$0 |
| facebook / social | 487 | 426 | 413 | 89.73% | 1.33 | 00:00:50 | 0% | 0 | \$0 |
| bing / organic | 467 | 408 | 391 | 72.38% | 1.76 | 00:00:57 | 0.86% | 4 | \$0 |
| linkedin.com / re... | 178 | 99 | 84 | 62.92% | 3.13 | 00:05:56 | 0% | 0 | \$0 |
| yahoo / organic | 178 | 167 | 164 | 82.02% | 1.43 | 00:01:03 | 1.69% | 3 | \$0 |
| pressherald.com... | 97 | 91 | 88 | 63.92% | 1.99 | 00:01:38 | 0% | 0 | \$0 |
| facebook.com / | 95 | 75 | 70 | 84.71% | 1.02 | 00:02:08 | 0% | 0 | \$0 |

1 - 56 / 56 < >



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- ☐ Review Google Analytics reports for web traffic, popular pages, referring sites and other website performance insights.
 - ☐ Review your Google My Business page for locations, business details and any Google reviews.
 - ☐ Pull any digital advertising analytics directly from Facebook or Google Adwords if you have been running campaigns on those platforms.
 - ☐ Visit your competitors' websites for overall impression and to trigger any potential retargeting ads they may have in place.
 - ☐ Look at your competitors' Facebook presence via Page Ad Transparency on their business page.
 - ☐ Use SEM Rush or Builtwith.com to identify competitors' keywords and advertising activity with SEM marketing or Google Adwords.

A background image showing a workspace with a tablet, a smartphone, and various papers. A hand is pointing at the tablet screen. The overall theme is business and technology.

Review marketing plan

IS YOUR CURRENT PLAN WORKING?

Assess your current efforts and review data to determine effectiveness.

HAVE YOUR GOALS CHANGED?

And have you updated your strategies to reflect this shift?

ARE YOUR TACTICS EFFECTIVE?

Consider whether your existing tactics are helping you reach your goals.

A COMPREHENSIVE OVERVIEW

The final deliverable is a report that addresses all of the above and analyzes your current efforts.

EXPERT RECOMMENDATIONS

Working with a marketing consultant means expert perceptions on your existing marketing plan and recommendations for best next steps.

Written findings report





Next steps

PRIORITIZE KEY FINDINGS


Work your key takeaways into your annual plan and budget.

MAKE NECESSARY ADJUSTMENTS

Utilize your findings to address areas that could use improvement.

MOVE FORWARD CONFIDENTLY

Feel confident that you've maximized every aspect of your marketing plan.

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- ☐ Make sure any existing collateral is consistent and identify anything that should be adjusted.
 - ☐ Turn feedback from your stakeholder interviews into a list of action items that might help move your marketing plan forward.
 - ☐ Consider how you might leverage existing top traffic sources based on your review of website analytics.
 - ☐ Use your competitor analysis to identify opportunities that can make your company stand out from the crowd.
 - ☐ Create an actionable marketing plan for the coming year so you can manage your efforts and track your results.
 - ☐ Use your audit findings to identify a baseline to use for comparison before implementing new measures.



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