

About Your Organization

(Use Supplement Sheet Inside)

- Mission Statement
- Annual Sales
- Average Value of Transaction
- Life Cycle of Client
- Lifetime Value of Client

Branding & Design

(Gather & Include Copies of All of the Following)

- Logo (All variations)
- Brand Standards Guide
- Business Cards
- Stationery & Envelopes
- Brochures & Booklets
- Folders
- Newsletters
- Previous Mailers
- Internal Communications
- Invoices, Statements
- Photos of Office (Inside)
- Photos of Building (Exterior)

Email Marketing (Use Supplement Sheet if needed)

- Do you utilize email marketing?

How often are you using? _____

Who creates content/offers? _____

Who creates eblasts? _____

Do you have a budget allocated? Yes No _____

Are your lists segmented? Yes No

Do you have different campaigns accordingly? Yes No

What are your campaign(s) goals? _____

How are you tracking results? _____

Event Marketing (Use Supplement Sheet if needed)

- Do you attend / host / participate in:

- Tradeshows
- Networking Events
- Expos
- Dinners
- Fundraising Events

- Include photos or samples of existing event displays

- Booths
- Banner Stands
- Tables
- Promo Items
- Event Apparel
- Other

Do you feel these reflect your brand well? Yes No

If not, can you think of some that would be beneficial to attend?

Yes No Sample Events _____

Pre-marketing? Yes No Post Marketing? Yes No

Do you have branded apparel? Yes No (include photos)

Do you use promotional items? Yes No (include photos)

Do you feel they reflect your brand well? Yes No

Knowing Your Audience

- Do you have a House List?

Is it segmented? Yes No If so, list segments: _____

How many contacts (per segment) _____

- Describe your ideal client (per segment) _____

Have you purchased Mailing Lists in the past? Yes No

Describe list, and success or failure _____

Online Presence

(Include printouts of screenshots where applicable)

- Screenshot of website on

Desktop Computer Smartphone Tablet

Main website address: _____

Web addresses for all websites (use Supplement Sheet inside)

YouTube Channel: _____

(other video services use Supplement Sheet inside)

- Blogging (list blogs on Supplement Sheet inside)

Does your website provide you with leads?

Can your organization add content to your site easily?

Do you currently run SEO/PPC campaigns? Yes No

If so, are you happy with results? Yes No

We have in the past, but are not doing so now

Are you happy with the image your website conveys Yes No

Explain: _____

Are you happy with the functionality of your website Yes No

Explain: _____

Direct Mail (Use Supplement Sheet if needed for more detail)

- Do you have a current ongoing direct mail strategy?

If so, please include samples

Qty: _____ Frequency: _____ Cost: _____

Your "feel" for it's effectiveness (1-10) _____

Have you done so previously, but not now? Yes No

Past Successes / Challenges _____

Do you have ways to respond online? Yes No

Landing Pages (GURLs) Personalized (PURLs) QR Code

Social Media (Use Supplement Sheet if needed for more detail)

- Do you have a current documented social media strategy?

List your platforms on enclosed Supplement Sheet

How often are you posting? Scheduled No set schedule

Who is responsible for posting? _____

Where are you getting content? _____

Do you have a budget allocated? Yes No

If so, what is your budget? _____

What are your goals? _____

How are you measuring success? _____

Referral Programs

Do you have a referral plan in place? Yes No

Formal Informal Online Automated

Marketing Audit

(Please Complete Supplement Sheet Inside Also)

