



Confidential – Do Not Distribute Without Permission



## Step 2: Strategic Marketing Assessment

Accelerate your learnings about a client so you can build a winning strategy.

# Introduction

## Congratulations on moving forward with a new prospective client!

The Discovery Call is just the beginning; now it's time to dig deeper.

This Marketing Assessment is designed to help you quickly understand your client's current state, challenges, and opportunities. So, you can build a more tailored and impactful marketing strategy during your upcoming Strategy Session.

This process isn't about overwhelming the client with questions. It's about gathering the right information efficiently, professionally, and strategically.

**The goal: Accelerate your learning curve and lay the foundation for a high-impact partnership.**

Please have your client complete this assessment before your scheduled Strategy Session so you can walk into that meeting fully prepared to lead.

# Business & Marketing Assessment

## Section 1: Company Overview

- 1. Company Name:
- 2. Website URL:
- 3. Year Founded:
- 4. Industry/Niche:
- 5. What are your core products or services?
- 6. Who is your primary target audience?
- 7. What are your top 1–2 business goals for the next 12 months?

## Section 2: Engagement Objectives

**What would make this engagement feel like a clear success for you in 6–12 months?**

*Consider these examples:*

- Building a demand generation program
- Repositioning the brand
- Setting up marketing systems
- Driving more qualified leads
- Increasing marketing ROI
- Achieving specific revenue targets
- Improving key marketing performance indicators (KPIs)
- Implementing operational improvements
- Securing leadership support

## Section 3: Current Marketing Activities

8. What marketing channels are you currently using? (Select all that apply)



Website/SEO



Paid Search (Google Ads)



Paid Social (Meta, LinkedIn, TikTok)



Organic Social Media



Email Marketing



Content Marketing (blogs, resources)



Events/Webinars



Partnerships/Co-Marketing



Other (please specify)

9. Which channels are generating the most leads or revenue today?

10. Do you have a documented marketing strategy? (Yes / No / Not Sure)

11. What is your approximate monthly marketing budget (including ad spend and vendors)?

# Section 4: Website & Lead Generation

**12.** Is your website currently optimized for lead generation? (Yes / No / Needs Improvement)



**13.** How are you currently capturing leads? (Select all that apply)

- Contact Forms
- Lead Magnets / Gated Content
- Chatbot / Live Chat
- Direct Outreach / Sales Team
- Other (please specify)

**14.** Approximately how many inbound leads/new customers/sales do you generate per month?

**15.** What is your current website conversion rate from visitor to lead form fill/sale (if known)?

# Section 5: Content & Messaging



## Brand Clarity

16. How clear is your brand messaging across your website and marketing materials?

- Very clear
- Somewhat clear
- Needs work
- No clear messaging



## Content Process

17. Do you have a consistent content creation process? (Blogs, social posts, case studies, etc.) (Yes / No)



## Value Props

18. What are the top 3 value propositions you communicate to your customers?

19. Are you actively using customer testimonials, case studies, or online reviews in your marketing? (Yes / No)

## Section 6: CRM, Reporting & Technology Stack

**20.** Are you currently using a CRM system? (HubSpot, Salesforce, Zoho, etc.) (Yes / No / Which One?)

**21.** How frequently are you reviewing marketing KPIs (traffic, leads, conversion rates, ROI)?

- Weekly
- Monthly
- Quarterly
- Rarely/Never

**22.** Which tools do you currently use for marketing automation, analytics, or operations?

*Examples:*

Mailchimp, ActiveCampaign, Google Analytics, Hotjar, ClickUp,  
Databox



## Section 7: Challenges & Opportunities

**23.** What do you feel is your biggest marketing challenge right now?

**24.** Which areas are you most interested in improving over the next 6–12 months? (Select all that apply)

Lead Generation

Brand Awareness

Sales Enablement

Marketing Strategy

Website Optimization

Content Marketing

Paid Advertising

CRM Setup/Management

Reporting & Analytics

Hiring/Fractional Team Support

**25.** Anything else you 'd like to share about your business, your team, or your goals?

## Closing Message

Thank you for taking the time to complete this Marketing Assessment.

Your thoughtful responses will help ensure we can hit the ground running with a strategic marketing plan that fits your business goals, not just generic tactics.

Looking forward to diving into the details with you during our Strategy Session.

## Build Smarter, Scale Faster with Hey CMO

This Marketing Assessment is just the beginning.

If you want more proven tools, templates, and strategic frameworks to grow your Fractional practice faster and more profitably, Hey CMO can help.

We provide the exact systems, resources, and playbooks used by top-performing Fractionals. So, you can focus on scaling your impact, not reinventing the wheel.

### You've closed the deal.

**Now build the business that lets you keep winning, and accelerate your growth today.**

EXPLORE MORE

# Your Partner in Fractional Success

At *Hey CMO*, we're dedicated to empowering Fractional entrepreneurs like you with the knowledge and tools needed to build, scale, and protect your business. From expert guides on business structures to practical advice on growth, we're here to help you thrive.

[Visit Hey CMO](#)

[Contact Us](#)

Ready to take the next step? Explore our resources today.

# *Hey CMO* © 2025 | All Rights Reserved.

This downloadable content was created exclusively by *Hey CMO* and is protected under applicable intellectual property laws. No part of this material may be copied, reproduced, stored, distributed, or shared in any form – digital, mechanical, or otherwise – without prior written permission from *Hey CMO*. This content is intended for personal use only and may not be resold, repackaged, or used for commercial distribution. Brief quotations may be used with proper attribution.

For licensing inquiries or permission requests, please contact [hey@heycmo.com](mailto:hey@heycmo.com).

**Disclaimer:** This playbook offers strategic frameworks and actionable templates but does not guarantee specific results. Your success will depend on your execution, commitment, and market dynamics.