

The Alexander Hiam & Associates Marketing Audit

This tool enables you to quickly review many aspects of your sales and marketing efforts in order to identify areas most worthy of investment or improvement.

- * It can be used for trouble-shooting, to identify causes of poor performance and help define appropriate corrections.
- * It can also be used as the initial step in a planning process, to identify both broad and specific areas in need of effort in the coming planning period.

Marketing audits, unlike accounting audits, are best performed by those who work within the organization and know it best. An executive or manager, a marketing or sales manager, or their staff are ideal people to perform an audit because they are the ones who can most benefit from the insights it produces!

Instructions

Please review each item and circle **yes** or **no**, and then review your answers to identify areas for possible improvement of your marketing programs.

A formal scoring method is also available. To use it, fill in the Section Summary line at the end of each section. Then see Scoring Form at end of the audit for help in interpreting and plotting your scores.

Activity Area: Customer Acquisition

1. yes no Do you have sufficient exposure to enough customers (through salespeople, store distribution, catalogs, ads, or other channels) to reasonably achieve your sales goals?
2. yes no Do you have sufficient communications with your market to make sure that prospective customers learn about your offerings?
3. yes no Do you have marketing programs designed to recruit customers from the competition?
4. yes no Do you offer incentives to encourage new customers to switch to you?
5. yes no Do you actively generate positive publicity in your market

area?

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| 6. | yes | no | Do you communicate a positive image to your market through multiple channels of communication? |
| 7. | yes | no | Do your front-line telephone and/or field service personnel have sufficient training to identify and help recruit new customers? |
| 8. | yes | no | Do you stimulate positive word of mouth and referrals by providing superior service and generating loyalty? |
| 9. | yes | no | Do you support anyone who is in a position to help sell your product or service with sufficient training, information and materials? |
| 10. | yes | no | Do you support anyone who is in a position to help sell your product or service with a competitive level of compensation and incentives? |
| 11. | yes | no | Do you support anyone who is in a position to help sell your product or service with clear, informative feedback about how their performance affects sales? |
| 12. | yes | no | Do you support anyone who is in a position to help sell your product or service with clear feedback about how their performance affects customer satisfaction and retention? |
| 13. | yes | no | Do you have well-developed, effective strategies for making a sale? |
| 14. | yes | no | Do you have a clear idea of how people representing you or your offerings behave in front of customers? |
| 15. | yes | no | Do you have enough salespeople to reach and serve your target markets? |
| 16. | yes | no | Do you make full use all appropriate channels of distribution (including the World Wide Web)? |
| 17. | yes | no | Do you have an active process for testing and refining your methods of acquiring and retaining customers? |

Section summary: Customer acquisition

Number of **yes** answers: _____

Activity Area: Information Gathering

1. yes no Do you monitor competitive pricing routinely?
2. yes no Are you familiar with the sales methods of your top competitors?
3. yes no Do you know about and track any hot new competitors who are gaining share because of new technologies, products, distribution channels or techniques?
4. yes no Do you monitor the marketing communications of competitors?
5. yes no Do you look for innovative marketing ideas from competitors or other organizations?
6. yes no Do you study competitors' customers to find out what they like and dislike about you and the competitors?
7. yes no Do you study your own customers to find out what they like and dislike about you and the competitors?
8. yes no Do you study customers in general to find out what features they value in selecting an electricity provider?
9. yes no Do you measure and track the satisfaction of your customers?
10. yes no Do you study customer complaints and defections to find out what went wrong?
11. yes no Do you analyze the market to anticipate and forecast future demand?
12. yes no Do you find many informal ways to talk with customers about their feelings and impressions of your company?
13. yes no Do you gather and analyze feedback from customer contacts made by your front-line employees?
14. yes no Do you have a marketing database (a database of customers that includes such details as usage, preferences, complaints, inquiries, receipt of/responses to marketing communications, and customer demographic data)?
15. yes no Do you check with customers before making any decisions that might affect them?
16. yes no Do you have an active process for testing and refining your methods of gathering and interpreting information?

Section summary: Information gathering

Number of **yes** answers: _____

Activity Area: Marketing Planning

1. yes no Do you have marketing objectives for increasing sales to existing customers?
2. yes no Do you have marketing objectives for obtaining new customers?
3. yes no Do you routinely consider adding new product/service options for existing customers?
4. yes no Do you make plenty of opportunities for insight into future plans through planning and analysis?
5. yes no Do you make plenty of opportunities for insight into future plans through creativity?
6. yes no Do you have a clear positioning strategy and statement that drives all marketing communications?
7. yes no Do you have a clear idea of the personality you wish to project for your organization?
8. yes no Have you identified specific target market segments -- subgroups with specific servable needs or preferences?
9. yes no Do you relate differently to different segments?
10. yes no Do you have a clear conception of what makes you different from and better than competitors? (Your “competitive advantage” or “Unique Selling Proposition”)?
11. yes no Do any of your people use competing products or services in order to stay in touch with competitive practices?
12. yes no Do you perform a periodic marketing audit of all your operations?
13. yes no Do you have clear ideas and measures of how customers view the quality of your offerings?
14. yes no Do you have plans to improve the quality of products, services and processes?
15. yes no Do you incorporate information about the relative quality of your offerings into your sales forecasts?
16. yes no Do you incorporate information about customer preferences and attitudes into your sales forecasts?

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| 17. | yes | no | Do you incorporate information about the reach of your sales and marketing efforts into your sales forecasts? |
| 18. | yes | no | Do you have an active process for testing and refining your approach to marketing planning? |

Section summary: Marketing planning

Number of **yes** answers: _____

Activity Area: Communications

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| 1. | yes | no | Are all communications with customers designed based on a clear marketing plan or set of objectives? |
| 2. | yes | no | Is your advertising integrated with sales activities? |
| 3. | yes | no | Do you have measured objectives for all your communications? |
| 4. | yes | no | Do you have a well-designed and appropriate company name and logo that enhances your image? |
| 5. | yes | no | Is your name and logo properly presented in all communications? |
| 6. | yes | no | Do you have an informative, interactive, interesting Web site for customers to visit? |
| 7. | yes | no | Have you linked your Web site to other Web sites to build traffic? |
| 8. | yes | no | Do you let people in your market know about your Web site on a regular basis? |
| 9. | yes | no | Do you include an on-line store in your Web site? |
| 10. | yes | no | Do you provide current, useful information on your Web site? |
| 11. | yes | no | Do you change your Web site by introducing interesting new features on a regular basis? |
| 12. | yes | no | Can customers contact you by e-mail or through your Web site and actually get a human response? |
| 13. | yes | no | Can customers research their questions and concerns and get useful, detailed information on your Web site? |
| 14. | yes | no | Do your marketing communications explain who you are |

and what makes you different and special?

15. yes no Do you have an on-going public relations program?
16. yes no Are you getting significant favorable publicity (unpaid editorial or news coverage)?
17. yes no Do you participate actively in community events, groups and causes?
18. yes no Do you inform your customers about community events, groups and causes through media such as a newsletter, Web site, public service announcements or spot advertising?
19. yes no Do you produce a newsletter (or electronic newsletter) that customers say is useful and interesting to them?
20. yes no Do your mailings actively build customer loyalty?
21. yes no Are collection communications polite?
22. yes no Do you cross sell other products/services in your regular mailings?
23. yes no Do your regular mailings help surface customer concerns and/or complaints so they may be dealt with constructively?
24. yes no Do your mailings build, recognize and reward customer loyalty?
25. yes no Do your mailings position your brand favorably?
26. yes no Do your mailings educate consumers about your offerings?
27. yes no Do your mailings give a human, personal touch to your products or services?
28. yes no Do your mailings project an appropriately professional image for your company?
29. yes no Do you use multiple advertising media effectively to reinforce positive customer attitudes?
30. yes no Do you have a clear, effective communications plan to follow whenever there is a problem effecting groups of customers or the community?
31. yes no Does this plan emphasize early, open and honest sharing of information with the public?
32. yes no Do you make an effort to be at least as visible as your

- competitors through point-of-purchase promotions, location, or media promotions?
33. yes no Do you place advertisements in unique places--places where the ads are unlikely to be overshadowed by a large volume of competitive advertising?
 34. yes no Do you reinvest at least as big a portion of revenues into marketing communications as the leaders in your industry do?
 35. yes no Do you know what reach and frequency your marketing communications achieve within your target markets?
 36. yes no Do you know what you are spending on marketing communications to reach each individual (or organization) within your target market(s)?
 37. yes no Do you have an active process for testing and refining your methods of communicating to customers, prospects and the market in general?

Section summary: Communications

Number of **yes** answers: _____

Activity Area: Customer Service

1. yes no Are your customer contact people trained to be customer oriented?
2. yes no Do your customer contact people identify unhappy customers and follow up to try to win them back?
3. yes no Do you track customers who complain and defect so that you can follow up with them later?
4. yes no Do your people project a positive, professional and friendly image for your services?
5. yes no Do your facilities and equipment project a positive image?
6. yes no Do your vehicles project a positive image?
7. yes no Do your employees dress neatly and in a manner that is appropriate to the image or personality you wish your organization to have?
8. yes no Do your drivers behave in a polite, courteous manner on

the road?

9. yes no Do your customers like your billing procedures?
10. yes no Do your customers see your service as highly reliable?
11. yes no Do your employees (and/or distributors pr resellers) make it easy and convenient for customers to do business with you?
12. yes no Do your phone systems make it easy and convenient for customers to do business with you?
13. yes no Do your people sound polite and happy on the telephone?
14. yes no Do you have an active process for testing and refining approaches to customer service?

Section summary: Customer service

Number of **yes** answers: ____

Activity Area: Organization and Management

1. yes no Do senior managers believe in marketing planning?
2. yes no Is a focus on sales and marketing ingrained in the business culture?
3. yes no Does marketing planning include participatory input from salespeople, service people and/or other front-line employees?
4. yes no Do you implement your marketing programs by measuring performance against a plan and adjusting for deviation from the plan?
5. yes no Is there centralized oversight of all sales and marketing functions, including all communications with customers or prospects?
6. yes no Is there frequent, open and honest communication among all who are active in developing and delivering products or services to customers?
7. yes no Do salespeople, distributors, or others in customer contact positions have all the information and support they need to excel in their work?

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| 8. | yes | no | Are employees treated with sufficient respect that they are able to show respect to customers and prospects? |
| 9. | yes | no | Do employees have a sufficiently positive work environment that they can easily project a positive, friendly attitude to customers and others outside of the business? |
| 10. | yes | no | Do employees feel highly motivated to do better and better work? |
| 11. | yes | no | Do employees find their work fulfilling and meaningful? |
| 12. | yes | no | Do you have an active process for testing and refining your approach to organization and management? |

Section summary: Organization and Management

Number of **yes** answers: _____

Activity Area: Creativity

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|-----|-----|----|---|
| 1. | yes | no | Do you take a creative approach to marketing and sales? |
| 2. | yes | no | Do you invest in creative thinking about how to better acquire and service customers? |
| 3. | yes | no | Do you invest in creative thinking about what products or services to offer? |
| 4. | yes | no | Do you invest in creative thinking about the image you project to customers and the marketplace in general? |
| 5. | yes | no | Do you invest in creative thinking about how you distribute your offerings, including consideration of new distribution channels? |
| 6. | yes | no | Do you solicit creative input from your employees? |
| 7. | yes | no | Do you solicit creative input from your business partners? |
| 8. | yes | no | Do you solicit creative input from people representing your target market(s)? |
| 9. | yes | no | Do you and your people have sufficient access to creativity training and facilitation to be more creative than competitors? |
| 10. | yes | no | Do you have an active process for testing and refining your methods for generating creative marketing ideas, |

materials and practices?

Section summary: Creativity

Number of **yes** answers: _____

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