

Marketing Audit Template for the First 100 Days

Use this template to keep track of the steps needed to successfully complete your first marketing strategy.

CRITICAL ITEMS

	Understand overall company's business performance: revenue goals, new
	business vs. upsell ratio, net revenue retention, net dollar retention, CAC
	Understand customer base: how they're using the products, how they describe the values and pain points the products solve for, etc. (Listen to recorded calls, meet with customers)
	Understand competitive landscape: where we fit, competitors' positioning and differentiators, their GTM strategy
	Understand product: get familiarized with product (if you can use it, even better), understand product roadmap and release schedule
	Understand sales motion, playbook, how marketing should align with each step
lu	ıdit
	Review marketing contribution and performance metrics by channel
	Review existing assets, how and where are they used, systems Obtain feedback from your team and stakeholders on marketing SWOT and
	key needs Identify any gaps between the audits and what you learned from the
	Fundamental steps
	Understand sales motion, playbook, how marketing should align with each step
io	als & Budget
	Define key assumptions (Average Deal Size, Sales Cycle Duration, Conversion of MQL to Opportunity,, Conversion of Opportuinity to Close, Revenue by Channel/Source)
	Enter sales/revenue goals to calculate Marketing goals. Model out the next 18 months.
	Determine budget for Marketing people and programs. (Optional: budget for Account Development reps and prospecting tools)
	Define marketing org, roles & responsiblities & hiring needs
r	oduct Marketing
	Identify target persona and buying committee (i.e. who is your buyer, champion influencers, etc.)
	Identify ideal customer profile (ICP), i.e. type of company that has the highest win rate and generates the most revenue
	Identify their top 3 pain points your product can solve
	Develop positioning and messaging document: pain points, how your product solves these, your differentiators, customer quotes
	Review and align with all key stakeholders Enable sales team with training and sales assets reflecting the new messaging
	(e.g. sales pitch, demo script, battle cards, etc.) Identify and prioritize other sales assets (e.g. persona training, product training,
	competitive landscape, etc.)
/la	arketing Systems
	Purchase and implement a marketing automation tool that matches your marketing strategy
	Evaluate and purchase contact databases (if none exists)
	Evaluate lead / account scoring and align with sales
	Integrate everything to sales' CRM (if they're on a different CRM)
	Set up dashboards to measure marketing contribution to pipeline and revenue
O	ntent, SEO, & Social
	Review website: messaging, clarity, CTA optimization, SEO optimization, traffic & conversion measurement, on-brand design
	Review and define brand's tone of voice
	Identify what the target persona wants to consume, how, and where
	Build content strategy and calendar to reflect our positioning, messaging, differentiations
	Identify relevant distribution strategy Build social strategy
	Define CTA strategy for content and social (e.g. email capture, demo request, social following)
'a	id Advertising
	Identify and prioritize ad strategy and paid media channels
	Analyze competitive keywords
	Develop campaign strategy based on buyer's journey
	Experiment with copy and design, on each channel. Test, measure, and iterate
	Experiment with copy and design, on each chainles, rest, measure, and iterate

	Setup the email nurture sequences, e.g. content subscription, webinar attendees, Closed Lost nurture, etc.
	Build email calendar
	Setup operations to automate handoffs
	Setup operations to automate handoffs
V	ents
	Determine which events are most relevant
	Build an event calendar and checklists
	Purchase or evaluate renting booth materials
	Define staffing plan, enable staff with training, talk track, guidelines
	Post-event follow ups, measure, and post-mortem
Ve	ebinars
	Build a webinar calendar
	Identify customers and partners that would be a good fit to co-present
	Collaborate with Content team to develop a list of topics that are relevant to the target persona
Lu	stomer Marketing
	Setup Customer Newsletters template and cadence. Align with Customer Success, Product, Content teams
	Determine strategy to obtain online reviews
	Determine strategy for Customer Advisory Board, community

Evaluate and implement sales engagement software and auto-dialer

Develop headcount plan and quota

Hiring, onboarding, coaching

DEPENDS ON OVERALL MARKETING STRATEGY