



MARKETING AUDIT CHECKLIST

A Practical Guide for Marketing Managers



In today's fast-paced world, it's crucial to regularly assess your marketing strategies and ensure they align with your business goals. Use this checklist as your personal go-to guide for conducting a comprehensive marketing audit; it will help you identify areas for improvement and opportunities for growth.

STEP 1: SET THE STAGE FOR YOUR MARKETING AUDIT

Objective	Action Items	Completion Date
Clearly Articulate Audit Objectives	Define specific goals such as increasing lead generation, improving conversion rates, or enhancing brand awareness.	
	Ensure objectives are SMART (Specific, Measurable, Achievable, Relevant, Time-bound).	
Align Marketing Goals with Business Goals	Review your company's overall strategic objectives and ensure marketing goals directly contribute to broader business outcomes.	
Select and Prioritize Relevant Metrics	Choose metrics that align with your audit objectives, like website traffic, conversion rates, customer acquisition cost (CAC), and customer lifetime value (CLV).	
	Prioritize the most impactful KPIs based on your business model, marketing objectives, and marketing channels.	

STEP 2: CONDUCT COMPETITIVE ANALYSIS

Objective	Action Items	Completion Date
List Direct and Indirect Competitors	Identify businesses targeting similar audiences or competing for the same keywords.	
	Include traditional and emerging competitors in your industry.	
Analyze Competitors' Marketing Strategies and Positioning	Examine their online presence, content strategy, and social media engagement.	
	Identify unique selling propositions and areas where you can differentiate your brand.	

STEP 3: REVIEW/REFINE IDEAL CUSTOMER PERSONAS

Objective	Action Items	Completion Date
Review and Update Customer Personas	Analyze recent customer data to identify shifts in demographics and preferences.	
	Conduct surveys or interviews to gather updated information directly from your audience.	

Ensure Marketing Messaging Resonates with Ideal Customer Personas	Align your brand messaging with your persona's pain points, values, and preferences.	
	Test messaging through A/B testing on digital ads, social media, or website landing pages to gauge audience response.	

STEP 4: EVALUATE MARKETING CHANNEL PERFORMANCE		
Objective	Action Items	Completion Date
Analyze the Performance of Each Marketing Channel	Review key performance metrics for each channel, such as social media platforms, email marketing, paid advertising, SEO, and your website.	
	Identify channels that contribute most to your overall goals and best align with your persona's content consumption habits.	

STEP 5: ASSESS TECHNOLOGY AND TOOLS		
Objective	Action Items	Completion Date
Assess the Effectiveness of Current Marketing Tools	Evaluate the performance, usability, automation, and integration capabilities of existing tools.	
	Seek feedback from your marketing team on the efficiency of current tools.	
Explore New Tools and Updates in the Marketing Tech Landscape	Stay informed about the latest advancements in marketing technology.	
	Test and pilot new tools that offer new marketing capabilities you might be lacking and are integral to achieving your marketing goals.	

STEP 6: IDENTIFY AND IMPLEMENT STRATEGY ENHANCEMENTS		
Objective	Action Items	Completion Date
Identify Key Insights from the Audit	Summarize key findings related to audience behavior, competitive landscape, and overall marketing performance.	
	Prioritize insights that have the most significant impact on achieving strategic goals.	

Develop a Plan for Refining and Enhancing Your Marketing Strategy	Outline specific action items based on the identified insights and opportunities.	
	Set clear timelines and responsibilities for implementing changes to the marketing strategy.	
	Once the refined strategy is underway, track performance to gain valuable insights and optimize in real-time.	

STEP 7: ALIGN MARKETING BUDGET		
Objective	Action Items	Completion Date
Review and Adjust the Marketing Budget Based on Performance and Strategy Adjustments	Evaluate the ROI for each marketing initiative.	
	Increase the budget for high-performing campaigns and consider scaling back on less effective ones.	
	Allocate additional resources to initiatives that align with strategic objectives.	

Need help getting started or interpreting your audit results?

Not sure where to begin, or feeling overwhelmed by the data? At Waypost Marketing, we understand that diving into the details of a marketing audit can be daunting. Whether you need assistance interpreting the results or creating a plan to implement changes, we're here to help. We can assist you in evaluating the health of your digital marketing strategies, ensuring that you're gathering the right data and making sense of it to enhance your marketing efforts effectively.

Let us help you unlock the full potential of your marketing initiatives and drive significant improvements. Contact us today, and let's ensure your digital marketing is on the path to success.

Visit waypostmarketing.com or give us a call at 864-288-6162 to get started today.



Are you ready to talk directly with a Waypost Sales & Marketing Strategist now?

Schedule a 15-minute free consultation with Sara Gilstrap today.

[Schedule a Consultation](#)