

# SMALL BUSINESS MARKETING ASSESSMENT

## Let's start with YTD sales:

Last Year YTD Sales: \$

This Year YTD Sales Goal: \$

This year YTD Sales: \$

Did you meet your sales goals?

**YES.** Congratulations! How do you replicate and exceed that going forward?

**NO.** What do you have to do differently to change the outcome going forward?

## Your customers

Customers are the foundation of any business' success.

- Who were your ideal customers last year? (Most businesses have several targeted/ideal customers with different problems and needs.)
- What marketing tactics did you use to reach them? Online ads, direct mail, social media, PR, etc.
- How successful were you in targeting them?
- How did you meet or exceed their needs, wants and expectations?
- What services do your clients want that you could but do not currently offer?
- Did your ideal customer(s) change or are they different in any way?
- Do you have client testimonials? How do you capture them?

## Your competition

- Who were your toughest competitors? Why?
- What is your Unique Selling Point (USP)? What makes you better than your competition?
- How do you communicate this distinction?

## Your products or services

Did you introduce new products and/or services and how did this impact your product mix?

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## Pricing

Based on customer demand and competition, is it time to change your prices?

## How are you promoting your products or services?

### Website

Do you know that 89% of your potential customers will go online to choose between your company and the competition?

- Do you have a responsive website? Having a mobile friendly website makes it easy for your ideal customer to search and find your business from their mobile phone or handheld devices such as the iPad.
- Is your homepage in need of an update?
- Do you have analytics installed? Using analytics you can determine which pages get the most traffic and which do not, as well as track where your web traffic comes from.
- Do you have a blog?
- Do you have calls to action on your site?
- Do you have a special landing page on your site to track efficacy of your ads?
- If yes, how effective have they been?
- Are you doing podcasts or videos?
- How is your search optimization doing? Are you keeping up with the changes?

### Social Media

- Why did you jump on the social media bandwagon?
  - What social media networks are you using as part of your marketing strategy?
- Facebook    Twitter    LinkedIn    Pinterest    Instagram    Google+    YouTube
- Other:
- Who was in charge of posting content?
  - Do you regularly update your social media networks with fresh content?
  - Did you use a content calendar?
  - What types of posts (text, photo, video, etc.) did you use?
  - Did you gain more followers/subscribers/users?
  - Did that result fit your goal(s) for that channel?

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## Email

- Do you use email marketing?
- How many contacts do you have in your database? How often are you in touch with them?
- Have you implemented analysis to determine bounces/unsubscribes?

## Networking and Trade Shows

- What meaningful connections did you make?
- Did those translate into new business for you?
- Did you connect others in good will?

## What other form of marketing did you use?

Direct mail (ex: postcards, sales letters)  Newspaper ads  Groupon/daily deal  Paid search ads  F/B ads  Twitter ads  LinkedIn ads  Pinterest ads  Other:

## What has been your most successful marketing effort to date?

Social media  Email  Networking  Direct mail  Newspaper ads  Groupon/daily deal  Paid search ads  F/B ads  Twitter ads  LinkedIn ads  Pinterest ads  Other:

## What was your least successful marketing effort to date?

Social media  Email  Networking  Direct mail  Newspaper ads  Groupon/daily deal  Paid search ads  F/B ads  Twitter ads  LinkedIn ads  Pinterest ads  Other:

Make a note of missed opportunities or marketing ideas that you did not implement, for example:

- Trade shows that you wanted to attend but learned about too late.
- Mailers that you received (not necessarily from a competitor), thought it was a good idea and wanted to use the concept for your business.
- Sponsorship opportunities that you heard about at a chamber meeting.

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## Branding

No matter how small your business is, you have a brand. Your company name, logo, colors, tagline or slogan help identify and differentiate your company from other businesses. Is your branding consistent? Can your customers recognize your company in all your communication platforms?

**Below are some of the questions to ask:**

Did you change or update your logo but are still handing out brochures or business cards with the old logo?

Is your online presence consistent on all platforms such as website, email and social media? And is it consistent with your offline brand such as location, printed material, posters, newspaper ads, etc.?

Do you have a dress code for your employees? Are you providing uniforms? Are your employees following the company dress code?

Are you using your brand colors and logo for your premium items such as bags, t-shirts, and pens?

Because branding helps your target audience recognize and trust you, it is important that your message remains consistent across all Medias.

## Evaluate Your Marketing Department

- Do you have the right people in place?
- Do you provide the support they need to succeed?
- Do you need additional help (in-house or outsourced) to carry forth your plan?

## Marketing Budget

Was your marketing budget on track or did you need to revise it?

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What changes happen in your business the past year that you did not or could not have foreseen?

Weather, staff, economy, new competition, new regulations, suppliers, etc.

Now put your findings to work with an action plan.

- What needs to be eliminated from your marketing plan?
- What was your most significant discovery?
- How can you apply it to your marketing efforts?
- What needs to be added to your marketing plan?
- What marketing strategy will help you reach your ideal customer?