

Marketing Audit Checklist



Review Your Practice Messaging, Content, Distribution and Client Experience

Keeping Your Story Current, Consistent & Coordinated

Review and complete at least annually



Practice Planning	Create Date	Review Date	Team Lead
Marketing Plan			
Mission Statement			
Value Proposition			
Branding/Brand Awareness			
Team Biographies & Job Descriptions			
Marketing Calendar			
Marketing Content Inventory			

Notes



Printed Content

- Client Brochures
- Business Cards & Stationery
- Cards (Life Events, Blank)
- Newsletters
- Folders/Binders
- Booths
- Signage (External)
- Signage (Internal)
- Photography
- Add Logo: OneView
- Add Logo: Pershing

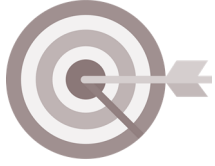
Notes



Digital Platforms & Content

- Digital Content Library
- Website
- Social Media
- eMail Distributions
- eMail Signatures
- Newsletters
- Video Communication
- Texting
- SEO & Analytics
- Online Scheduling
- Press Releases
- Subscribe/Unsubscribe from Mailing Lists

Notes



Advertising

- Promotional Materials (Clients)
- Promotional Materials (Internal)
- Media Opportunities
- Networking
- Community Involvement
- Speaking Engagements
- Thought Leadership Content

Notes



3rd Party Vendors

- Evaluate Relationships/Opportunities
- Cost Analysis
- Design Refresh
- Copy Editors
- Integration and Ease of Use
- Response Times

Notes



Client Engagement

- Client Events
- Client Experience (internal process)
- Client Experience (external process)
- Life Events Acknowledgment
- Surveys, Feedback
- Referrals

Notes
