



Marketing Assessment Checklist

A Self-Evaluation Tool for Small Businesses

HOW TO USE THIS CHECKLIST

Rate your business on each item from 1-5:

1 = Not implemented at all

2 = Basic implementation with significant gaps

3 = Moderate implementation with some gaps

4 = Strong implementation with minor improvements needed

5 = Excellent implementation

Add your section scores to identify your strongest and weakest marketing areas.

Focus first on improving items scored 1-2 in your weakest sections.

1. BRAND FOUNDATION

Item	1-5 Rating
We have clearly defined our unique value proposition	
Our brand voice is consistent across all platforms	
We have documented brand guidelines (colors, fonts, imagery)	
Our company name, logo, and tagline clearly communicate what we do	
We have a compelling brand story that connects with our audience	
SECTION TOTAL	/25

2.TARGET AUDIENCE CLARITY

Item	1-5 Rating
We have defined detailed customer personas for our primary audiences	
We understand the key pain points our customers face	
We regularly collect and analyze customer feedback	
We know where our ideal customers spend their time online and offline	
We have mapped our customer journey from awareness to advocacy	
SECTION TOTAL	/25

3. DIGITAL PRESENCE

Item	1-5 Rating
Our website is mobile-friendly and loads quickly	
Our website clearly communicates what we do and who we serve	
We have a strategy for driving traffic to our website	
Our digital profiles (Google Business, social media) are complete and current	
We have systems to capture leads from our digital properties	
SECTION TOTAL	/25

4. CONTENT MARKETING

Item	1-5 Rating
We publish valuable content regularly (blog, videos, podcasts, etc.)	
Our content addresses customer questions and pain points	
We have a content calendar for planning and consistency	
We optimize our content for search engines	
We repurpose content across multiple formats and channels	
SECTION TOTAL	/25

5. SOCIAL MEDIA EFFECTIVENESS

Item	1-5 Rating
We have strategically chosen social platforms based on our audience	
We post consistently according to a planned schedule	
We actively engage with followers and respond to comments/messages	
Our social content balances promotion with value-giving posts	
We measure social media effectiveness beyond likes and followers	
SECTION TOTAL	/25

6. EMAIL MARKETING

Item	1-5 Rating
We regularly grow our email list through ethical means	
We segment our email list based on customer behaviors/interests	
Our emails provide genuine value beyond just promotions	
We have automated email sequences for new subscribers/customers	
We analyze email metrics and optimize based on data	
SECTION TOTAL	/25

7. SALES ENABLEMENT

Item	1-5 Rating
Our marketing and sales teams are aligned on messaging	
We have clear processes for qualifying and nurturing leads	
Our sales materials effectively communicate our value proposition	
We use testimonials and case studies to build credibility	
We have systems to track and analyze our sales pipeline	
SECTION TOTAL	/25

8. CUSTOMER RETENTION & ADVOCACY

Item	1-5 Rating
We have a defined onboarding process for new customers	
We regularly communicate with existing customers	
We have systems to gather and implement customer feedback	
We have a strategy for encouraging referrals and testimonials	
We identify and nurture potential brand advocates	
SECTION TOTAL	/25

9. MARKETING MEASUREMENT

Item	1-5 Rating
We have defined clear, measurable marketing objectives	
We track and analyze key performance indicators (KPIs)	
We calculate return on investment for marketing activities	
We use data to make marketing decisions	
We regularly review and adjust our marketing strategy	
SECTION TOTAL	/25

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SECTION TOTAL	/25

OVERALL ASSESSMENT

Section	Rating	Opportunity
1. Brand Foundation	/25	
2. Target Audience Clarity	/25	
3. Digital Presence	/25	
4. Content Marketing	/25	
5. Social Media Effectiveness	/25	
6. Email Marketing	/25	
7. Sales Enablement	/25	
8. Customer Retention & Advocacy	/25	
9. Marketing Measurement	/25	
GRAND TOTAL	/225	

SCORING GUIDE

For Section Scores:

- 20-25: Excellent - Maintain and optimize
- 15-19: Good - Fine-tune and improve
- 10-14: Average - Needs focused attention
- 5-9: Weak - Requires significant development
- 0-4: Critical - Immediate attention required

For Overall Score:

- 180-225: **Marketing Leader** - Your marketing is a competitive advantage
- 135-179: **Marketing Performer** - Solid foundation with room for optimization
- 90-134: **Marketing Developer** - Critical gaps need addressing
- 45-89: **Marketing Beginner** - Significant development needed
- 0-44: **Marketing Emergency** - Comprehensive overhaul required

NEXT STEPS

- **Identify your 3 lowest-scoring sections** - These represent your biggest marketing opportunities.
- **Within those sections, focus on items scored 1-2** - These are your "low-hanging fruit" for quick improvements.
- **Create an action plan** - Prioritize 3-5 specific improvements you can make in the next 30 days.
- **Implement and measure** - Track your progress and the impact of your improvements.
- **Reassess in 90 days** - Use this checklist quarterly to monitor your marketing evolution



Need expert guidance implementing improvements identified in this assessment?

Contact Morgan Marketing Associates for a complimentary 30-minute strategy session.

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