



## Marketing Audit Checklist

### Marketing Effectiveness

- Conduct an overall review of the marketing plan
- List contributing factors that impacted the business
- Conduct a review of satisfaction scores
- Gather market intelligence on customer satisfaction
- Trend comments from consumer satisfaction data
- Trend comments from physician satisfaction data
- Identify aspects of the plan failing to meet objectives with specific recommendations for improving next year's performance.*

### Performance based intended ROI

- Map expense dollars to expected outcomes
- List any variances
- Track performance -advertising and promotional events
- Track performance -sales team activities through volume data
- Track performance-sales team activities through physician referral data
- Review if marketing plan achieve stated financial goals?
- Review if sales plan achieve stated financial goals?
- Evaluate systems in place to calculate ROI? Are they working?
- Review your integration with the service-line leaders, their volumes and revenues within their data capture.
- Determine the percent of revenue that is recurring?
- Map recurring revenue to any marketing or sales activities.
- Evaluate if outcome data is available to the division?
- Determine ways to seek this information on a regular basis.
- Determine if the sales team is executing the sales plan and the supporting marketing plan with measurable objectives and tactics?
- Evaluate how well are you measuring consumer activity?
- Review your current integration with the call center and Web site.
- Evaluate all consumer touch points making sure there are mechanisms in place to successfully monitor.
- Identify aspects of the plan failing to meet objectives with specific recommendations for improving next year's performance.*

### Strategy

- Evaluate how the competition affected performance of planned referral/volume criteria?
- Evaluate if the current value of the brand is in place for each product/service.
- Map out the each product identity your services are portraying before going to market.
- Assess whether customer service is delivering on the promise and create lasting value.
- Test service readiness and operational readiness.
- Audit materials and messages- are they offering benefits to your customers?
- Audit materials and messages – are they providing value for your sales team?

- Assess whether the deployed marketing campaigns are affecting the sales conversion.
- Conduct a cross-functional assessment with service lines to determine if relevant messaging and tools are in place.
- Identify aspects of the plan failing to meet objectives with specific recommendations for improving next year's performance.*

## Department and Staffing

- Evaluate your team's knowledge base and understanding of brand attributes and assets.
- Assess internal buy-in and support -are there positive attitudes toward your efforts and an existing internal satisfaction of service line and leadership involved in the marketing function?
- Assess if they are talking the talk and walking the walk with others in the organization.
- Test processes for consistent crisis, reactive mode.
- Dissolve sacred processes that only cause bottlenecks.
- Identify aspects of the culture failing to meet expectation with specific recommendations for improving next year's performance.*

## Ongoing function

- Build an ongoing process for auditing activity.
- 

**Corporate Health Group** provides expertise in strategy, business development and all aspects of sales and marketing. Exclusive to health care, we partner with clients to provide customer-based solutions for their physician, employer and consumer markets. For more information on how we can help you with your physician sales and service strategies, for newsletters and articles, visit our Web site at [www.corporatehealthgroup.com](http://www.corporatehealthgroup.com) or call 1-888-334-2500.