



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.

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