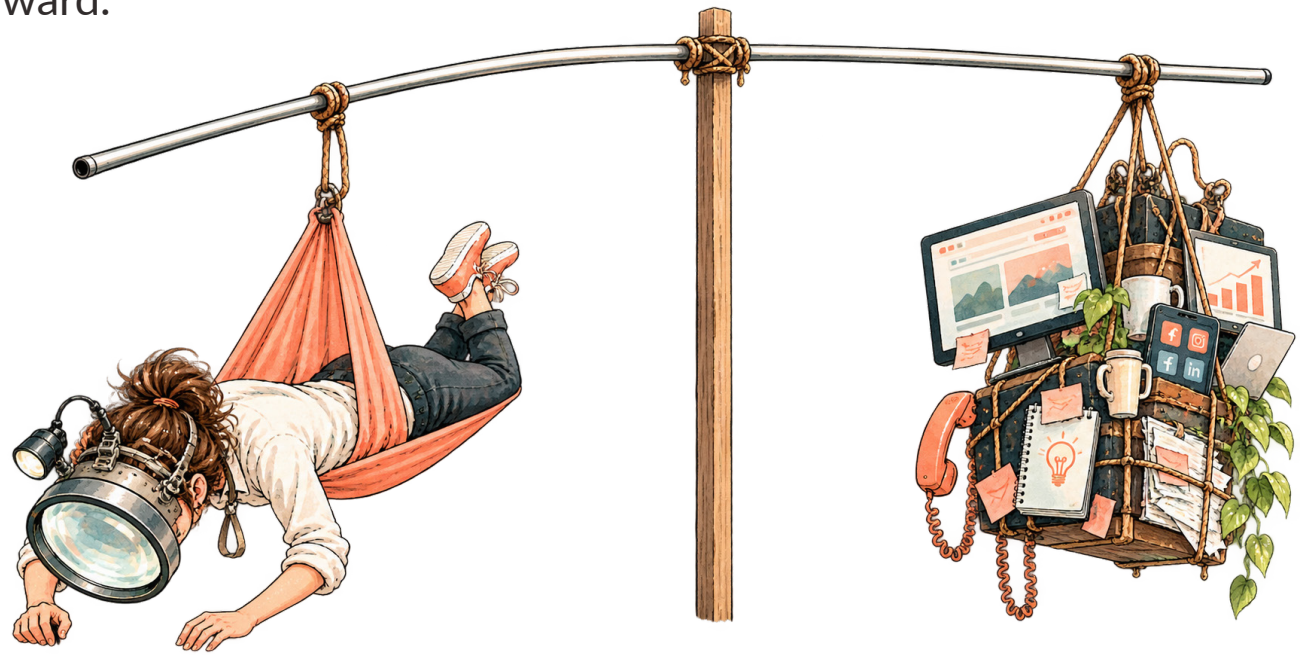
The Marketing Audit

Four checks. One clearer marketing picture.

Find what works. Focus on what matters. Move forward.



More marketing isn't always effective marketing.

Before buying another campaign, platform, or shiny new website, figure out which efforts are helping your business move forward.



THE GOAL?

Less guessing. More purposeful action.

Four checks. One clearer picture.

01	MESSAGING	What are you really saying?
02	EXPERIENCE	Does your experience support the offer?
03	VISIBILITY	Can the right people find you?
04	DATA + SYSTEMS	Does your tech stack support your sales?



Start with what you know.

You don't need perfect data or fancy dashboards. Just a clear business objective, a little evidence, and a willingness to look honestly at what's working.

01 / SET YOUR SIGHTS

Identify what you want to improve. Choose a recent 3-6 month period to review.

02 / GATHER YOUR CLUES

Pull together your website, search, social, ads, inquiries, CRM, and sales information.

03 / KEEP IT HONEST

Separate facts from hunches. Missing information is a finding, too.

04 / KEEP IT MOVING

Don't get stuck chasing perfect data. Find a meaningful next step and get moving.

REMEMBER: The goal isn't to audit everything. It's to discover what deserves your attention.

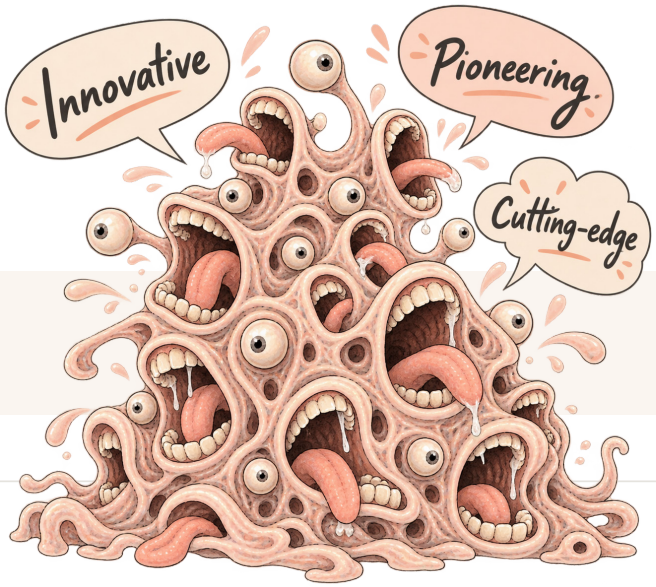
What's being said?

Can people tell who you serve, what you do, and why you are different? What about what you don't do?

A strong brand uses restraint: what you leave out matters as much as what you say.

YOUR QUICK CHECK

- [ ] The audience is clear
- [ ] The offer is easy to understand
- [ ] The messaging is authentic and unique



LOOK FOR: Areas where your brand could trade names with a competitor and nobody would notice.

Does your digital experience make sense?

A successful digital presence communicates value and drives clear next steps. When the user journey is unclear, it creates friction and frustrates potential clients.



YOUR QUICK CHECK

- [ ] Your website works for all devices
- [ ] The offer is easy to find
- [ ] Next steps are obvious
- [ ] Forms and booking links work

LOOK FOR: A polished site that attracts the wrong inquiries or loses good ones.

Can customers find you?

Review organic search results, local presence, your Google Business Profile, referrals, and any other channel that helps the people you want to reach discover you.

YOUR QUICK CHECK

- [ ] Relevant search terms bring visits
- [ ] Local listings are current and accurate
- [ ] Referrals can be identified
- [ ] Priority channels fit our audience



LOOK FOR: Plenty of attention, but not from the people you want to serve.

What happens after the click?

Track inquiries, qualified leads, pipeline leakage, and outcomes where possible. Then follow the journey through forms, CRM, hand-offs, and repeat sales.



YOUR QUICK CHECK

- [ ] Meaningful actions are tracked
- [ ] Inquiry quality is recorded
- [ ] Follow-up has a clear process
- [ ] Tools support the customer journey

ACTIVITY: Role-play yourself as the customer— go through your whole lifecycle. How does it feel?

Pull evidence. Not every tab.

SEARCH CONSOLE

Search queries, clicks, impressions, and pages.

ANALYTICS

Traffic sources, engagement, and meaningful actions.

GOOGLE BUSINESS PROFILE

Local discovery, profile interactions, and accuracy.

ADS + SOCIAL

Spend, audience fit, and campaign response.

CRM + SALES

Qualified inquiries, pipeline, close rates, repeat business.

YOUR TEAM

Questions, objections, friction, and customer feedback.

How healthy are the four areas?

Use this as a conversation starter, not a scientific score.

AREA	WORKING	NEEDS WORK	NOT SURE
01 Messaging	☐	☐	☐
02 Experience	☐	☐	☐
03 Visibility & discovery	☐	☐	☐
04 Data, systems & follow-through	☐	☐	☐

Do not audit yourself into a standstill. An audit should shorten the to-do list, not make it endless. Choose a meaningful next action using three simple filters:

WHAT IS WORKING? **WHAT IS GETTING IN THE WAY?** **WHAT NEEDS VERIFYING?**

Want a second set of eyes?

We like good questions.



Bring your findings to heyZensei.

Our Opportunities Workshop will help you examine what's working, and what's not, so you can choose a thoughtful next move.

Schedule an Opportunities Workshop here.

heyzensei.com

HELLO, POSSIBILITY.