

Marketing Environment Audit

Evaluation of Client Marketing Effectiveness

City, State, Country

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Date

Marketing Audit: Evaluation of Client Marketing Effectiveness

Section	#	Points of Evaluation	Y	N	N/A	Quality Rating
MACRO ENVIRONMENTAL IMPACTS	1.1	Demographic: What are the trends, impacts and responses?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	1.2	Economic: What are the trends, impacts and responses?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	1.3	Environmental: What are the trends, impacts and responses?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	1.4	Technological: What are the trends, impacts and responses?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	1.5	Political: What are the trends, impacts and responses?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	1.6	Cultural: What are the trends, impacts and responses?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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INDUSTRY POSITION & INFLUENCES	2.1	Markets: Where are the changes in feeders, size, growth, revenues?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.2	Customers: Who? What's important? How do they rate the company?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.3	Competitors: Who? Strengths? Weaknesses? How do customers rate them?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.4	Intermediaries: What are their capacities for sales volumes?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.5	Suppliers: What's the availability of resources and commitment?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.6	Outside Services: What's the outlook for travel, finance, research, technology, advertising, pr, media and consultants?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.7	Publics: What are the potential opportunities and problems?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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STRATEGIC DIRECTION	3.1	Business Mission: Is it clear and achievable?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.2	Marketing Objectives & Goals: Are they clear? Adequate for planning?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.3	Marketing Strategies: Are they clear?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.4	Marketing Strategies: Are they memorable?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.5	Marketing Strategies: Are they convincing?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.6	Marketing Strategies: Are they appropriate to the product and competition?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.7	Marketing Strategies: Are they segmented and ranked in importance?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.8	Marketing Strategies: Differentiated? Positioned?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.9	Marketing Strategies: Are they sufficient? Resources allocated?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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ORGANIZATION	4.1	Structure: Where is the authority & responsibility for assuring customer satisfaction?				1 2 3 4 5 6 7 8 9 10
	4.2	Functional Efficiency: What is the quality of communications and relationships among headquarters and divisions? Where is the profit responsibility for customer satisfaction?				1 2 3 4 5 6 7 8 9 10
	4.3	Relationships: Where are they problems? What's causing them?				1 2 3 4 5 6 7 8 9 10

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Section	#	Points of Evaluation				Quality Rating
MARKETING SYSTEMS	5.1	Marketing Information System: Is it sufficient? Accurate? Timely?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	5.2	Marketing Planning System: What's the quality for forecasting? Appropriateness of goals and incentives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	5.3	Marketing Control System: What's the adequacy of measurements? Reviews? Continuous quality improvement?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	5.4	New Product Development: How are new ideas screened? Researched? Tested? Launched?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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PRODUCTIVITY	6.1	Profitability Analysis: What are the profits by segments? Geography? Intermediaries? Communication channels? Expanding or shrinking?				1 2 3 4 5 6 7 8 9 10
	6.2	Cost Effectiveness Analysis: Where are the excessive costs?				1 2 3 4 5 6 7 8 9 10

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MARKETING FUNCTIONS	7.1	Products & Services: What are the objectives? Customer awareness? First time trial? Satisfaction? Repeat purchase? Quality? Expansion or reduction?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.2	Price: How are prices set? Does price-setting consider customer perceptions? Competitive pressures? Intermediary incentives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.3	Sales Distribution: What's the adequacy, capacity & effectiveness of the channels?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.4	Advertising: What does customers think? What's the response?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.5	Sales Promotions: Do they build demand? Loyalty? Market share?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.6	Publicity: Is it sound and targeted? What's the current versus desired image?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.7	Salesforce: What are the objectives? Size? Specialization? Compensation? Rewards? Morale? Ability? Effort?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	
	7.8	Salesforce: How is performance evaluated? How does the sales team compare with competitor sales teams?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10	