



Marketing Self-Assessment Tool

Instructions: For each topic below how do you rate your current marketing capabilities?
Please complete circles below using this guideline.

“This is a gap or a weakness for us” “We do this adequately” “This is a strength”

Goals and Strategy

- Revenue goals are clear
- Brand goals are clear
- A strategic plan is in place
- TAM/SAM are defined
- KPIs are in place

Offering and Messaging

- Problem/solution is clear
- Value proposition is clear
- ROI defined
- Benefits are clear
- Point of differentiation is strong
- Positioning statement is strong
- Messaging framework is clear
- Tagline is compelling

Technology and Data

- CRM is used
- Marketing Automation is used
- Customer Data is complete
- Intent Data is in use
- Prospect Data is complete
- Analytics are in use
- Digital publishing tools in use
- Other marketing technology in use

Customers and Targets

- Ideal Customer Profile defined
- Target Account List in place
- Have strong customer insights
- Best-fit customers identified
- Customer journey mapped
- Personas are well-defined

Tactics

- Advertising
- Demand Generation
- ABM
- Social Media
- Digital Marketing
- Events
- PR
- SEO/SEM
- Content Marketing
- Website

People and Process

- Sales & marketing are aligned
- Sales and marketing stages defined
- Pipeline management is effective
- Lead qualification is clear
- Strategic skills are strong
- Tactical skills are strong
- Inhouse capabilities are extensive
- Agencies are effective partners
- Freelancers are used productively