



CONFIDENTIAL MARKETING AUDIT

This audit identifies specific areas in your business with immediate revenue potential. The questions are structured to reveal operational and marketing gaps where small adjustments, often requiring minimal spend, can generate measurable improvements.

Marketing Opportunity Audit – Client Workbook

Welcome to Your Marketing Opportunity Audit. This short questionnaire helps us identify the fastest and easiest ways to grow your business. You do not need exact numbers — reasonable estimates are perfectly fine.

Our goal is to get a clear picture of:

- where your best customers come from
- which marketing efforts are performing
- where revenue is being left on the table
- how often customers buy
- your top opportunities for immediate improvement

Most businesses discover several areas where small adjustments can create big results.

Take your time, answer honestly, and remember — this is designed to help you uncover clarity, opportunities, and growth potential.

Your Top Marketing & Growth Goals

(Check all that apply)

- ☐ Get more leads
- ☐ Improve the quality of leads
- ☐ Increase sales or revenue
- ☐ Improve online presence
- ☐ Strengthen branding
- ☐ Increase customer retention
- ☐ Improve Google/online reviews
- ☐ Improve conversion rates
- ☐ Build better offers or pricing
- ☐ Improve social media performance
- ☐ Build a more effective website
- ☐ Create automated follow-up systems
- ☐ Streamline marketing strategy
- ☐ Increase average transaction value
- ☐ Create a referral system
- ☐ Other (please describe): _____

Marketing Audit Questions (28-Point Review)

A. Your Market Position

- Approximately what percentage of your potential market do you currently serve? _____
- How much additional business could you handle right now without straining your operations or capacity? _____%
- What are your current annual gross revenues (estimate is fine)? _____
- Are you committed to implementing strategies that could significantly increase revenue over the next 12 months? If yes, what revenue goal would you like to reach? _____
- About how many active customers/clients do you currently have? _____

B. Where Your New Business Comes From

Paid Advertising & Lead Generation

- About what percentage of your new business comes from paid ads (Google, Facebook, Instagram, print, etc.)? _____
- How much do you currently invest per year in advertising and marketing? _____
- Do you test different versions of your ads (headlines, images, audiences, offers)? ☐ Yes ☐ No

Referrals & Word-of-Mouth

- What percentage of your new business comes from referrals? _____
- Do you have a referral system or program in place? _____

Sales Team / Sales Activities

- What percentage of your sales are generated by your sales team or reps? _____
- Out of 10 quotes or proposals, how many typically become sales? _____

Inbound Leads

- How many inbound inquiries (from any channel) do you receive per week? _____
- Out of 10 inquiries, how many usually become customers? _____

Outbound Prospecting

- How much of your new business comes from outbound outreach (calling, emailing, DMing prospects)? _____
- Out of 20 outbound contacts, how many typically convert into a sale? _____

Events, Partnerships & Networking

- What percentage of your business comes from events, trade shows, networking, or partnerships? _____
- Out of 20 event-generated leads, about how many become customers? _____

Offers & Sales Optimization

- Do you test and improve your sales offers, bundles, bonuses, or value propositions? ☐ Yes ☐ No
- Do you currently have a customer retention or loyalty system in place? ☐ Yes ☐ No
- Do you have a clear and compelling Unique Selling Proposition (why someone should choose you)? ☐ Yes ☐ No

C. Value of Each Sale

- What is the average dollar value of a typical sale? ☐ Yes ☐ No
- Do you feel you may be undercharging for the value you provide? ☐ Yes ☐ No
- Do you use any systems for cross-selling or upselling? ☐ Yes ☐ No
- Do your team members receive regular training on sales, service, or communication? ☐ Yes ☐ No

D. Purchase Frequency & Retention

- On average, how many times per year does a customer purchase from you? ☐ Yes ☐ No
- How often do you reach out to your customer base (email, SMS, social, phone, mail)? ☐ Yes ☐ No
- Do you offer any rewards, loyalty perks, VIP benefits, or special privileges to repeat customers? ☐ Yes ☐ No

4. Next Steps: Reviewing Your Opportunities

Thank you for completing your Marketing Opportunity Audit. Your answers help us quickly identify:

- Fast wins
- Untapped revenue
- Missed opportunities
- Underperforming areas
- Strengths to build on
- Priority action steps for growth

Your Complimentary Strategy Session

Once you submit this audit, we will:

- Review your answers in detail
- Map out your top 3–5 immediate growth opportunities
- Identify revenue areas that can improve with small changes
- Recommend specific marketing strategies based on your goals
- Answer your questions and provide a clear, actionable plan

You'll walk away with a clearer picture of where you are today — and a roadmap for where your business can go next.

Marketing Needs & Priorities Checklist

A. Planning & Strategy

- ☐ Develop a clear, structured marketing plan
- ☐ Identify weaknesses or gaps in current marketing efforts
- ☐ Prioritize the most profitable target markets or industries
- ☐ Create strategies that work even on a limited budget
- ☐ Build a recession-proof or slow-economy marketing strategy

B. Advertising Performance & Optimization

- ☐ Improve results from digital or print advertising
- ☐ Evaluate current campaigns for wasted spending
- ☐ Strengthen creative concepts and messaging
- ☐ Build trackable, measurable advertising systems
- ☐ Increase direct mail response rates
- ☐ Generate more qualified leads at a lower cost

C. Communication & Messaging

- ☐ Improve clarity and consistency across all marketing
- ☐ Strengthen brand identity and positioning
- ☐ Make messaging more targeted and effective
- ☐ Ensure communication speaks to the right audience

D. Customer Acquisition, Retention & Reactivation

- ☐ Acquire new customers more efficiently
- ☐ Improve retention and follow-up with existing customers
- ☐ Reactivate past or inactive customers
- ☐ Build or improve a loyalty or rewards program

E. Lead Handling & Follow-Up Systems

- ☐ Improve how inquiries are handled and responded to
- ☐ Create or refine inquiry/fulfillment packages
- ☐ Build structured follow-up workflows
- ☐ Increase conversion of inquiries into paying clients

F. Marketing Materials & Content Creation

- ☐ Update or redesign brochures, catalogs, or sales materials
- ☐ Create a company overview or capabilities brochure
- ☐ Develop newsletters, white papers, guides, or reports
- ☐ Review and improve existing marketing copy (ads, mailers, etc.)

- ☐ Plan and execute targeted direct mail campaigns
- ☐ Develop radio, podcast, or TV advertising concepts
- ☐ Create targeted outreach campaigns for specific audiences

H. Promotional Tools

- ☐ Select effective promotional giveaways or incentives
- ☐ Align promotions with measurable outcomes
- ☐ Create offers that increase response rates

I. General Estimate Of Budget

Provide a general estimate of the budget or investment you're prepared to allocate to the solutions selected.

- | | | |
|---|---|--|
| ☐ under \$1,000 | ☐ under \$2,500 | ☐ under \$5,000 |
| ☐ under \$10,000 | ☐ under \$20,000 | ☐ over \$25,000 |

Fill in Your Name, Company, and Email Address Below.

Name: _____

Title: _____

Company: _____

Phone: _____

Email: _____

Save the completed form to your device or computer and then email it to us at the address below.

email to: luke@lukedesignstudio.com

You may email your current ads, brochures, mailers, press releases, or other marketing materials. After reviewing your audit and materials, we'll provide a free 20-minute phone consultation with specific recommendations.

Please list your preferred date and time for the consultation below:

Preferred date and time: _____

Alternate date and time: _____

LUKE
DESIGN STUDIO

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