

Marketing Foundation Check

Your 5-Minute Diagnostic Scorecard

Marketing that works consistently requires foundation. This diagnostic reveals where your systems, messaging, and capacity need attention before you scale. 5 minutes now saves months of frustration later.

I. YOUR ENGINE:

Systems that capture, nurture & convert customers

1. How clear and aligned are your business and marketing goals to guide decisions? [4] Clear, shared, used to guide marketing decisions | [3] Generally known but not referenced often | [2] Unclear connection between business and marketing | [1] No shared goals or visibility

2. How self-sustaining is your marketing when you step away?

[4] Runs automatically | [3] Manual but reliable | [2] Needs oversight | [1] Stops without me

3. When a customer shows interest, how consistent and trackable is your follow-up process?

[4] Very, automated | [3] Consistent, within 24 hrs | [2] Fairly consistent, not always tracked | [1] No set process

4. When you launch a campaign, how connected are your systems and messaging across channels?

[4] Feels seamless, tools & story align | [3] Mostly aligned, minor manual gaps | [2] Feels confusing internally | [1] Feels disconnected, hard to execute

Section Score: _____ / 16

ENGINE | 10 or below:

Your marketing systems may be running in silos — too dependent on manual effort or disconnected from your larger business goals. This often shows up as delayed follow-up, campaigns that feel disjointed, or a team unsure how marketing connects to results. It doesn't mean your marketing isn't working — it means it's working harder than it should.

II. YOUR CLARITY:

Messaging & positioning that reflects how you actually work

5. How clearly could someone describe what you do and who you serve?

[4] Very easily & consistently | [3] Probably, but it varies | [2] Unlikely | [1] Even I struggle to explain it

6. How well do you verify that your marketing reflects your customer experience?

[4] Very well, seek regular feedback to improve | [3] Fairly well, we check informally | [2] Only if there's a complaint | [1] Poorly, no process to measure

II. YOUR CLARITY (contd)

7. When did you last update your website or core marketing materials?

[4] Within 6 months | [3] 6-12 months ago | [2] Over a year ago | [1] Can't remember

8. How consistent is your brand voice across platforms?

[4] Very consistent – clear guidelines | [3] Somewhat consistent | [2] Inconsistent – depends who's posting | [1] No defined brand voice

Section Score: _____ / 16

CLARITY | 10 or below:

Marketing touches every corner of your business. When clarity slips, sales, service, and operations all start to feel it. Customers and even team members may interpret your brand differently, and your materials might not reflect your current offerings or priorities. This usually signals growth that has outpaced communication — your marketing isn't working as hard as it could.

III. YOUR CAPACITY:

Execution capability, bandwidth & decision-making

9. Do you have the right people in the right roles to execute your marketing? [4] Yes, clear roles & expertise | [3] Mostly, some roles unclear | [2] Winging it with whoever has time | [1] Marketing falls entirely on me

10. How proactive vs. reactive is your marketing execution? Think: do campaigns run from a calendar vs. urgency?

[4] Proactive, guided by a plan and data | [3] Mostly planned, occasional pivots | [2] Reactive to when pressure rises | [1] No marketing plan in place

11. How well do your day-to-day marketing activities tie back to your business goals? (Efforts that increase revenue, improve relationships or meaningful growth.)

[4] Very clear – we measure impact regularly | [3] Aligned but not tracked | [2] Hard to see what moves the needle | [1] No clear connection between marketing and results

12. If your busiest season started tomorrow, would your marketing execution hold up? (Campaigns, content, email, and partner activity.)

[4] Yes, nothing should drop | [3] Likely, but with some strain | [2] Quality or consistency would slip | [1] We'd have to pause other activities or cut corners

Section Score: _____ / 16

CAPACITY SCORE | 10 or below:

Your marketing likely runs on short bursts of effort instead of a steady rhythm that supports growth. When plans aren't tied to business goals, activity replaces strategy and progress stalls under pressure. This often shows up as reactive campaigns, unclear ownership, or work that stops when bandwidth runs out. A strong foundation means knowing which efforts truly move the business — and giving those the structure and support to keep going.

Your Results

Engine: ____ | **Clarity:** ____ | **Capacity:** ____

Total Score = ____ / 48

33–48 STRONG FOUNDATION: Optimize what's working

Systems are in place and the daily work gets done, but there may still be opportunities to better understand which efforts are moving the needle

What's possible: We'll identify what's actually driving results, eliminate what's not, and focus your energy on the highest-impact efforts. Faster growth with less work is possible.

21-32 BUILDING MOMENTUM: Structure before scale

You've got resources in place, but follow-up might lag, messaging feels scattered, or campaigns rely too heavily on manual effort. You're not yet building the connections between marketing activity and business goals or priorities. Identifying which gaps drain the most time or revenue takes an outside eye.

What's possible: Clarity and momentum. We'll identify what's leaking revenue or time, align your systems with your story, and build the structure that lets you scale without scrambling.

12-20 REACTIVE STAGE: Build systems that last

Marketing happens in bursts when urgency hits. Your essentials—consistent follow-up, current messaging, clear ownership—aren't fully in place yet. There's little connection between systems, story, and execution, and results depend on your oversight. This is an important signal to pause and build an integrated foundation that shows clear ROI and makes future growth sustainable.

What's possible: A strong foundation that informs strategy. We'll create the marketing essentials that keep your business steady, connect your systems, integrate your story, and power your growth.

Next Steps:

Foundational marketing creates the kind of momentum that lasts. Every business has gaps. The cost of ignoring them scales with your business. Discover yours now before the pressure reveals them.

Book a 30 min Discovery Call

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