



[Return to Home Page](#)

*Marketing Audit*

- A. Relating to the COMPANY
  - a. Identification
    - i. Name
    - ii. Signature
    - iii. Trademark
    - iv. Colors, Symbols, Logos, etc.
    - v. Slogan
    - vi. Policy regarding reference to parent, divisions, etc.
  - b. Corporate Relationships
  - c. Financial Information (ownership, earnings, etc.)
  - d. Corporate Structure
    - i. Divisions
    - ii. Their contribution to Volume, Profit, etc.
    - iii. Overseas Operations
  - e. Plants, Branches, Warehouses, etc.
  - f. Company History
  - g. Historical Response to changes in economy, fashions, consumer behavior, trends, etc.
  - h. Reputation – and for what
    - i. “What business are you in?”
    - ii. “What business 10 yrs from now?”
    - iii. Image
    - iv. Significant achievements
    - v. Newsworthy facilities
    - vi. Newsworthy employees
  - i. Marketing Approach
    - i. Statement of Marketing Philosophy
    - ii. Formal or informal plan
    - iii. Market research facilities
  - j. Marketing “mix”
    - i. Personal setting
    - ii. Advertising & other communications
  - k. Long-Term Objective
    - l. Plans re: Expansion, Diversification, Decentralization, Acquisitions, etc.
  - m. Status of Industry
    - i. Growth
    - ii. Profits



- n. Legal Considerations in Industry
- o. Organization Chart, Personnel
  - i. Relationship: Production, Marketing, Sales
  - ii. Chains of Authority on Advertising: Budgets, Approvals
- p. Policies
  - i. Company Secrets
  - ii. Classified Information
  - iii. Reciprocity, Entertaining Buyers, etc.
- q. Management Consultants
- r. Association Memberships & Services Received
- s. Awards, Scholarships, etc.

**B. Relating to PRODUCTS**

- a. Identification
  - i. Name
  - ii. Trademark
  - iii. Colors, Symbols, Logos, etc.
  - iv. Product Physical Characteristics
- b. Lines
- c. Types, Styles, Sizes, Price Ranges, Profitability
  - i. Coding
  - ii. Standards, Specials
- d. Uses, Who, When, Methods
- e. Factors in selection of Product Type, including resistances
- f. Factors in Brand Selection, including resistances
- g. Patents, Licenses
- h. Exclusive & Superior processes, ingredients, features
- i. Product Weaknesses?
- j. Packaging, Labeling, Tagging
  - i. Who designs?
  - ii. Cross-Packaging
- k. Packing & Shipping
- l. Accessories, Tools, etc.
- m. Warehousing
- n. Delivery
  - i. Normal
  - ii. Recent Performance
- o. Installation Service
- p. Customer Service
- q. Reconditioning, Repair Parts
- r. Biggest Sales Problem?
- s. New Product Program
  - i. # per Year



- ii. Depts/Personnel Responsible
- iii. Testing Procedures
- iv. Criteria
- v. Success Rate
- t. New Product(s) Planned
- u. Products to be Dropped
- v. Products to Promote & Where
- w. Biggest Sales Problem?

**C. Relating to BUYER/USER**

- a. Sex
- b. Age
- c. Position in Household
- d. Income
- e. Occupation
- f. Education
- g. Ethnic Considerations
- h. Urban, Suburban, Exurban, Rural
- i. Homeownership
- j. Segmentation Characteristics
- k. Shopping Characteristics
  - i. Who
  - ii. When
  - iii. Where
- l. Purchasing Factors
  - i. Seasonality
  - ii. How the Sale Develops
  - iii. Purchase Considerations
  - iv. Importance of Price, Availability, Service
  - v. Average Order
  - vi. Tax Considerations
  - vii. Re-Order Cycle
  - viii. Brand Buying
- m. Motivation
- n. Use
  - i. Who
  - ii. When
  - iii. What, Instead of This Product
- o. Brand Loyalty/Switching
- p. Gift Market



- D. Relating to MERCHANDISING
  - a. Pricing
  - b. Allowances, Deals
  - c. Financing (ip)
    - i. Trade-Ins
    - ii. Financing Plan
    - iii. Leasing
    - iv. Turn-In
    - v. Contract
  - d. Guarantee(s)/Warranties
  - e. Tags, Seals, etc.
  - f. Dispenser, Rack, Merchandiser, etc.
  - g. Sampling
  - h. Trial
  - i. Premium
  - j. Service Policy
    - i. Installation
    - ii. Repair
  - k. Returned Goods Policy
  - l. Couponing
  
- E. Relating to MARKETS
  - a. Geographic Coverage
  - b. Markets Ranked by Importance
  - c. Market Trends
    - i. Market as a Whole
    - ii. Product in Market
  - d. Criteria for Determining a Market (Prospect)
  - e. Direct Purchasing Influences
  - f. Indirect Purchasing Influences
  - g. Replacement Market
  - h. Second-Hand Market
  - i. Premium Market
  - j. Export Market
  - k. New Markets to Exploit
  - l. Market Studies Available
  - m. Which Markets to Concentrate Promotion
  
- F. Relating to DISTRIBUTION (if not Direct-to-Buyer)
  - a. Present Channels
    - i. Distribution Map
    - ii. % of Sales
    - iii. Trends



- iv. Adequacy of Coverage
- v. Quality
- b. Policies
  - i. Franchise Arrangements
  - ii. Consignment
  - iii. Stocking
  - iv. House Accounts
  - v. Returned Goods
  - vi. Missionary Work
  - vii. Printed Policy
- c. Importance of Line to Distribution
- d. Discount Schedule
- e. Average Stocking Order
- f. Turnover
- g. Shelf Life
- h. Dealer Identification
- i. Deals, Allowances, Incentives
- j. Sales Training of Distributors, Dealers
- k. Sales Aids
  - i. Do they get used?
  - ii. How are they paid for?
- l. Dealer Promotion plan
  - i. Materials
  - ii. How Distributed
  - iii. How Paid For
- m. Co-Op Advertising Plan
- n. Dealer Listings
  - i. National
  - ii. Local
- o. Distributor Cooperation (extent)
- p. Communications with Distribution
- q. Distribution Growth/Reduction
- r. Merger/Acquisition Plan

**G. Relating to POINT-OF-SALE PROMOTION**

- a. Promotion Package
- b. Identification
  - i. Signage
  - ii. Decals
  - iii. Placques/certificates
- c. Sales Training
- d. Incentives
- e. Sales Aids



- i. Catalog
  - ii. Buyer's Guide
  - iii. Selector
- f. Local Media Plan
- g. Outside Store Promotion
  - i. Signage
  - ii. Window Display
- h. In-Store Promotion
  - i. Floor Display
  - ii. Counter Display
  - iii. Wall Display
  - iv. Banners
  - v. Shelf Talkers
  - vi. Racks/Dispensers
  - vii. Demonstrators
  - viii. Kiosks
- i. Co-Operative Advertising Plan
- j. Special Considerations
  - i. How Promotional Material Distributed
  - ii. Who Pays What
  - iii. Promotional Calendar
  - iv. Support

**H. Relating to SALES (\$\$, % of Total, Trends)**

- a. By Divisions/Branches
- b. By Product Lines and/or Products
  - i. Old versus New
  - ii. Private Label
- c. By Markets (Consumer Groups, Institutions, Industrial, etc.)
- d. Geographically
- e. Direct vs. Through Distributors
- f. Repeat vs. New Business
- g. Standard vs. Specials
- h. By Individual Customers
  - i. % of Customer Purchases by Type
  - ii. % of Items Available to Each Customer
  - iii. Heavy Users vs. Light Users
- i. Repair Parts, Reconditioning
- j. Goals
  - i. Performance, Current Year
  - ii. Next Year's Quota
  - iii. Method of Forecasting
- k. Where Will Increased Sales Come From



- i. Expanding Markets
- ii. New Markets
- iii. Broader Line
- iv. Greater Use of Product
- v. Competition
- 1. Are Sales Figures Released?

**I. Relating to COMPETITION (Direct & Indirect)**

- a. By Divisions
- b. By Product Line or Individual Products
  - i. Breadth of Line
  - ii. Comparisons of Construction, Patents, Features, Price, Packaging, Availability, etc.
- c. By Markets
  - i. Sales Coverage
  - ii. Share-Of-Market
- d. Selling Effectiveness
- e. Vs. Store Brand
- f. Vs. Second-Hand Market
- g. Vs. Imports
- h. Price-Cutting?

**J. Relating to SELLING**

- a. Sales Management
- b. Sales Force – Number, Type, Qualifications, Ages, etc.
- c. General Line or Specialists
- d. Compensation and Incentives
- e. Training
- f. Sales Meetings
- g. Communication
- h. The Sales Call
  - i. Whom Called On
  - ii. Frequency, Cost, etc.
  - iii. Team Selling
- i. Number of Accounts Per Person
- j. Prospecting vs. Servicing Accounts
- k. Time Period, # of Calls, to Make Sale
- l. Quotas? How are They Set?
- m. Sales Aids
- n. Seasonal Factors in Buying
- o. Typical Resistance Factors
- p. Team Spirit



**K. Relating to ADVERTISING**

- a. Ad Dept., Personnel, Division of Work
- b. Agency Responsibilities
- c. Company Policies Regarding Role of Advertising and Relationship to Sales
- d. Management's Attitude Toward Advertising
- e. Sales Force Attitude Toward Advertising
- f. Themes
- g. Slogans
- h. "Sacred Cows"
- i. Colors, Typography, etc.
- j. References to Subsidiaries, Divisions, Addresses, etc.
- k. Patent, Trade Mark, Service Mark, Copyright Registration Notice
- l. Legal Factors
- m. Method of Setting Budget
  - i. What is Included
  - ii. % of Sales, Per Unit, "Zero-Based", "Task"
  - iii. How is Corporate Advertising Paid For?
  - iv. Budget Year
  - v. When Presented
- n. Media Used
  - i. Print
    1. Magazines (Consumer, Trade)
      - a. Local
      - b. Regional
      - c. National
    2. Newspapers
      - a. Local
      - b. Regional
      - c. National
  - ii. Out-Of-Home
    1. Billboards
    2. Transit
  - iii. Television
    1. Local
    2. National
    3. Cable
    4. Dayparts
  - iv. Radio
    1. Local
    2. National
    3. Format
    4. AM/FM





- 5. Dayparts
- v. Direct Mail
  - 1. (See Separate Audit)
- vi. Internet
  - 1. Web Page
  - 2. Email
  - 3. Newsletter
- vii. Trade Shows
- viii. Directories
- ix. Special Events
  - 1. Sports
  - 2. Concerts
  - 3. Fairs
  - 4. Other
- o. Distribution of Budget by Medium
- p. Significant Changes in Emphasis Over Recent Years
- q. Existing Contracts
- r. Seasonal Factors
- s. Merchandising to Sales Force, Distribution, etc.
- t. Inquiry-Handling System
- u. CRM Program
- v. Method of Media Evaluation
- w. Competitive Advertising
  - i. Recent & Current Advertising Performance
  - ii. Samples
- x. Recruitment Advertising
- y. Statement of Marketing Objective
  - i. Long-Term
  - ii. Short-Term
- z. Statement of Advertising Objective
- aa. Measurement, in Terms of:
  - i. Sales Increase
  - ii. Share-Of-Market
  - iii. Awareness
  - iv. Preference
  - v. Sales Leads
  - vi. Conversions
  - vii. New Customers Created
  - viii. Change-Of-Mind
  - ix. Cost Per Incremental Unit Moved
  - x. Syndicated Service Ratings



**L. Relating to CUSTOMER RELATIONS**

- a. Order Acknowledgement
- b. Installation Service
- c. Instruction Manual or Directions
- d. Complaint Handling
- e. Repair Parts
- f. Repair/Reconditioning Service
- g. Repeat Business Solicitation (CRM)

**M. Relating to PUBLIC RELATIONS & PUBLICITY**

- a. How Handled
- b. Management Attitude
- c. Company Policies
- d. General public Relations
  - i. Environment
  - ii. Consumerism
  - iii. Governmental
- e. Programs by Markets
- f. Customer
- g. Distributors
- h. Internal
  - i. Policies
  - ii. Newsletters
  - iii. EMail
  - iv. Other
- i. Plant(s), Manufacturing Location
- j. Supplier
- k. Shareholder
  - i. Legal
  - ii. Spontaneous
- l. Financial Community
- m. Investors
- n. Press
- o. Government
- p. Military
- q. Educators
- r. International
- s. Writers
  - i. Policy on By-Lines
  - ii. Policy on Articles Written Internal/External
- t. Speakers Bureau
- u. Clipping Service
- v. Merchandising of Performance



- w. Archives, Museums, etc.
- x. Industry PR Program

**N. Relating to RESEARCH**

- a. Types of Research Used
  - i. Primary
    - 1. Perceptual
    - 2. Product
    - 3. Performance
    - 4. Positioning
    - 5. Package
    - 6. Advertising
  - ii. Secondary
- b. Archive of Previous Research
- c. Benchmarks & Trends, by Type

[Return to Home Page](#)