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Marketing Audit / Questionnaire

Client Name _____

Total Score _____

Reputation Activities

1. Do you have a proactive system for creating positive content about your practice and disseminating it on the web?

No (0pts) Yes (2pts)

2. Do you have a system for monitoring what is being said about your practice on the web and social media?

No (0pts) Yes (2pts)

3. Do you have a reputation-saving approach to responding to patients that have expressed disappointment in your products/services?

No (0pts) Yes (2pts)

4. Do you have a reliable system of collecting and creating patient testimonials and success stories?

No (0pts) Yes (2pts)

5. Do you effectively and powerfully use your testimonials in all the marketing, advertising and sales efforts you do?

No (0pts) Sometimes (1pt) Yes, always (3pts)

6. Do you have respected colleagues in your field, market or industry who will endorse you and your practice without hesitation?

No (0pts) Yes (2pts)

7. How many endorsements do you currently have?

None (0pts) 1-3 (1pt) 4-9 (2pts) 10+ (3pts)

8. Do you have a continuous system/approach/ program actively in place to continually secure more prominent endorsements?

No (0pts) Yes (2pts)

9. Has your website been effectively optimized for search engine results?

No (0pts) Yes (2pts)

10. Has your website been kept current with news/ awards/changes?

No (0pts) Yes (2pts)

11. Is your practice currently ranking on page 1 of search engine results for competitive keyword phrases?

No (0pts) Yes (2pts)

12. Do you have complete practice listing profiles in the major search engines?

No (0pts) Yes (2pts)

13. Do you have an active social media presence?

No (0pts) Yes (2pts)

14. Do you conduct PR/media relationships/radio/ newspaper/magazine interviews/event participation in your industry and local community?

No (0pts) Yes (2pts)

15. Do you hold or run special events such as educational seminars, new product introductions, end of the year promotions, private sales, meet the management events, meet the manufacturer events, patient appreciation events, etc.?

No (0pts) Yes (2pts)

Reach Activities

16. Do you have a written marketing strategy and tactical implementation plan that you continuously apply and follow?

No (0pts) Yes (2pts)

17. Have you identified the sources where all (or at least most) of your business are coming from and how to stimulate more patients from those specific sources to purchase from you?

No (0pts) Yes (2pts)

18. Do you know your allowable cost of acquiring a new prospect and/or patient?

No (0pts) Yes (2pts)

19. Assuming you know your allowable cost of acquiring a new prospect and/or patient, do you invest up to that amount in your marketing efforts to acquire new buyers?

No (0pts) Yes (2pts)

20. Do you know the average lifetime value of your patients?

No (0pts) Yes (2pts)

21. How many different marketing activities do you have in place to attract prospects/patients/revenue flow?

2 (1pt) 3-5 (2pts) 6-8 (3pts) 9+ (4pts)

22. How much do you invest in marketing activities each month?

\$0 (0pts) <\$1,000 (1pt) \$1,000-2,500 (2pts)
 \$2,500-\$5,000 (3pts) \$5,000+ (4pts)

23. Do you have a direct response-formatted website?

No (0pts) Yes (2pts)

24. Do you perform effective (meaning successful at both attracting and converting) search engine optimization that builds more prospects, patients or business?

No (0pts) Yes (2pts)

25. Do you have a target prospect list of strategic partners? (i.e., companies that either already have a strong relationship with the same people you want to sell, or new, competitive organizations that have more to gain than you do by seeing you sell your service to more people)

No (0pts) Yes (2pts)

26. Do you have any strategic alliances actively in place right now that are generating you new prospects/patients/revenue flow?

No (0pts) Yes (2pts)

Resell Activities

27. Have you identified complementary cross-sell offers for all of your products and services? No (0pts) Yes (2pts)
28. Is your staff trained in identifying and offering up-sell, cross-sell and down-sell opportunities? No (0pts) Yes (2pts)
29. Is your staff compensated for up-sell, cross-sell and down-sell sales success? No (0pts) Yes (2pts)
30. Are you up-selling all patients at the initial point of purchase? No (0pts) Yes (2pts)
31. Are you communicating offers to your existing patients at least once per month? No (0pts) Yes (2pts)
32. How many different media are you using to make your offers (SMS, email, direct mail, etc.)? None (0pts) 1 (1pt) 2-4 (2pts) 5+ (3pts)
33. Do you have a comprehensive database of your prospects and patients that identify everything from names, contact numbers, type of buying, what they buy, where they originated from, quantities or past purchases, etc.? No (0pts) Partial (1pt) Yes on all issues (3pts)
34. Do you have a method to build a continually growing prospect/patient list? No (0pts) Yes (2pts)
35. Do you actively use all of the data above to target different categories of prospects/patients in different ways for different products or services? No (0pts) Yes (3pts)
36. How many complementary (upsell/cross-sell) products/services do you currently add to your practice? None (0pts) 1 (1pt) 2-5 (2pts) 6+ (3pts)
37. Do you currently offer bonuses (either tangible or intangible) as an incentive to purchase your product or your service? No (0pts) Yes (2pts)
38. Do you ethically (but effectively) prepare patients from their very first adjustment experience with you to keep coming back over and over again? No (0pts) Yes (2pts)
39. Do you have an active, systematic, ongoing follow-up system for every prospect and first-time patient you acquire? No (0pts) Yes (2pts)
40. How often do you follow up with past patients by phone, mail, email or in-person? Never (0pts) Once every 6 mos. (1pt)
 Once a qtr. (2pts) More Often (3pts)
41. Do you know what your attrition rate is and why a patient may stop buying from you? No (0pts) Partially (1pts) Yes in both cases (3pts)
42. Do you have attrition reduction or patient conservation program in place to minimize inactive patients? No (0pts) Yes (2pts)

Referral Activities

43. How many formal referral-generating systems do you currently have with prospects or potential partners?

None (0pts) **1** (1pt) **2-5** (2pts) **6+** (4pts)

44. Is your staff trained in identifying referral generation opportunities?

No (0pts) **Yes** (2pts)

45. Is your staff compensated for generating referrals?

No (0pts) **Yes** (2pts)

46. Does at least 25% of your practice growth currently come from referrals?

No (0pts) **Yes** (2pts)

47. Is the average number of referrals you get every month increasing or decreasing?

Decreasing (0pts) **Increasing** (2pts)

48. Do you hold or run special events such as seminars, new product introductions, end of the year promotions, private sales, meet the management events, meet the manufacturer events, meet the creator-type events, etc. to encourage referrals?

No (0pts) **Yes** (2pts)

General Activities

49. Do you have someone working on the marketing of your business that has training in marketing?

No (0pts) **Yes** (2pts)

50. Do you have someone at your business spending at least 50% of their time dedicated to marketing?

No (0pts) **Yes** (2pts)

51. Do you have a growth mindset at your business?

No (0pts) **Yes** (2pts)

52. Do you have a “sales and marketing culture” at your business?

No (0pts) **Yes** (2pts)

53. Do you have a powerful, unique value proposition that you communicate consistently to your market?

No (0pts) **Yes** (2pts)

54. Does your marketing make irresistible offers to your prospects or potential buyers?

No (0pts) **Yes** (2pts)

55. Have you formally surveyed your clients to find out exactly why they buy from you versus the competition?

No (0pts) **Yes** (2pts)

56. Do your marketing, sales approaches and advertising activities focus on benefits or features?

Features (1pts) **Benefits** (2pts)

57. How do you feel after completing this questionnaire?

Same or hopeless (0 pts)

Excited and I know I need help, can you help me? (3 pts)