

# The Sales and Marketing Audit Checklist



You can develop a path to a more successful business!



**chakra**

A Marketing Services Company

# Welcome to the Chakra Sales and Marketing Checklist

## A Comprehensive Assessment for Organizational Growth

- Revisit your sales and marketing function with an eye toward improvement
- Organize your sales and marketing thinking
- Determine your "as is" state of marketing & sales
- Identify the gap between where you are and where you want to be
- Determine the strengths and uncover the weaknesses of your inbound and outbound sales and marketing activities
- Determine your sales and marketing priorities
- Identify what you need to do to grow your business

Client: \_\_\_\_\_

### Inbound – "Helping Your Customers Find You"

Product	Yes, we are using this and are getting good results	Yes, we use this, but it needs to be improved upon	No, we do not have this in place
Direct Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPC (pay-per-click)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Generation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print Ads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Press Releases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copywriting (Inbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate Merchandise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Writing (Inbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stationery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Graphic Design (Inbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade Shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fulfillment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market Research (Inbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Texting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Branding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Outbound – “Helping You Find Your Customers”

Product	Yes, we are using this and are getting good results	Yes, we use this, but it needs to be improved upon	No, we do not have this in place
SEO (Search Engine Optimization)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content Writing (Outbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile App Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copywriting (Outbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market Research (Outbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blogs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Large Format Printing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Graphic Design (Outbound)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Magnets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Domains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hosting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Animation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logo Design	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Illustrations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Signs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
eBooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Flip Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reputation Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trademark Protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public Relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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