AdRoll

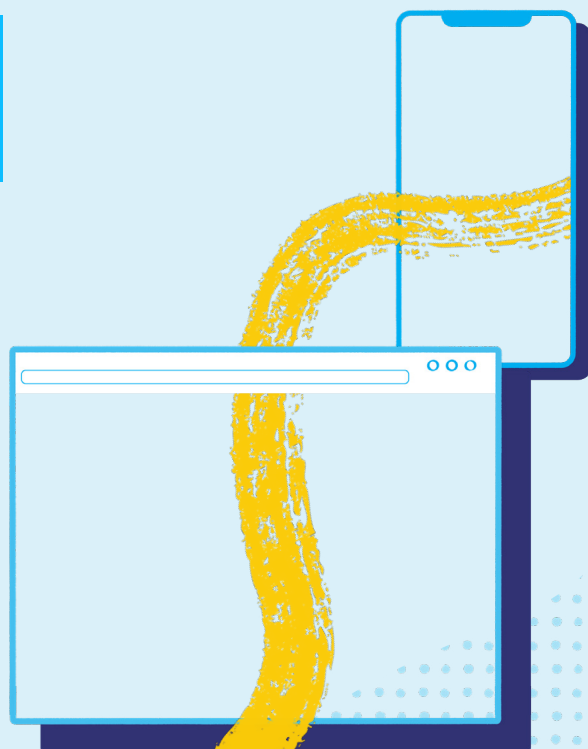# The DIY

Marketing Audit

Workbook

Is your brand living its best digital marketing life?

Getting Started

Behind every great marketing campaign is a well-thought-out strategy. But creating a cohesive plan takes time — and many marketers and brand owners feel overwhelmed at some point during the process. Before a brand can conquer their next marketing challenge, they need a firm understanding of where they are now. But sometimes, that can present a problem for marketers: making data-driven decisions is difficult when the right data doesn't exist. Despite the proliferation of analytics platforms and reporting suites, digging up the numbers you need to figure out what's working and what isn't remains a major obstacle in the marketing world.

Consider this book as the ultimate solution. Inside, find a series of self-assessments and DIY audits that will help you get a read on how your digital marketing efforts stack up:

Site Design and Usability

How well can customers navigate your website to complete goals, purchase products, or retrieve information?

Inbound Marketing

How does your website attract organic traffic from search engines or referral links to generate consistent, low-cost customers?
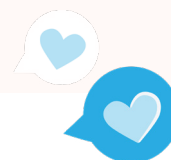
Digital Advertising

How robust, effective, and efficient is your paid media budget, and are you generating meaningful returns from money spent on ads?

Social Media and Community

How effective are you at creating a community that allows new customers to discover your brand and existing customers to reengage?

As a note, don't just use these templates to audit your own marketing activities. Instead, make a list of your main competitors (3-5) and make a copy of these templates for each. As you work through this workbook, audit your main competitors as well. **This will help you figure out what you need to do to stand out from the pack.**

How to Use Marketing Audits in Your Strategy

A marketing strategy is more than a to-do list of ways to promote your brand. It's not just a collection of campaigns or tactics. Instead, it's an all-encompassing document that combines all of these individual pieces towards accomplishing larger business goals.

A good strategy aligns specific tactics into logical campaigns to ultimately achieve a brand's goals. Marketing audits help at every step of this process:

STRATEGY

CAMPAIGNS

TACTICS

Setting goals

To succeed, goals need to be lofty enough that they're a reach but realistic enough to achieve. A marketing audit helps by providing a baseline from which to determine what can and cannot be done. Setting **SMART goals** helps everyone focus on doing what needs to be done without demoralizing team members by challenging them to do the undoable. There's a helpful template for creating SMART goals in the conclusion of this workbook, and an even more fleshed out template in **AdRoll's Ultimate Guide to Building A Digital Brand**.

Creating campaigns

A marketing audit can help companies identify messaging groups, tactics, and themes that work best together. This allows for more intelligent campaign creation by giving marketers an understanding of how the pieces click and what can or can't be combined. Well-thought-out marketing tactics will transform a campaign from functional to exceptional.

Identifying tactics

Tactics are all of the individual activities marketers have available to get their brand in front of customers. A marketing audit reviews past tactics to show which ones are worthwhile and which ones aren't. More importantly, a thorough audit shows relative performance between tactics that might not otherwise be obvious, allowing marketers to double down on the most effective ones and ditch the others that underperform or have lower ROIs.

Tying It All Together: Audits and the Marketing Flywheel

The **marketing flywheel** is an evolution of the funnel most marketers are familiar with. Instead of a one-and-done process, the flywheel follows the customer journey from awareness to purchase to engagement and beyond, picking up steam as new customers are added. It connects otherwise disparate activities and organizational units into a cohesive whole, allowing an entire organization to focus on a unified goal.
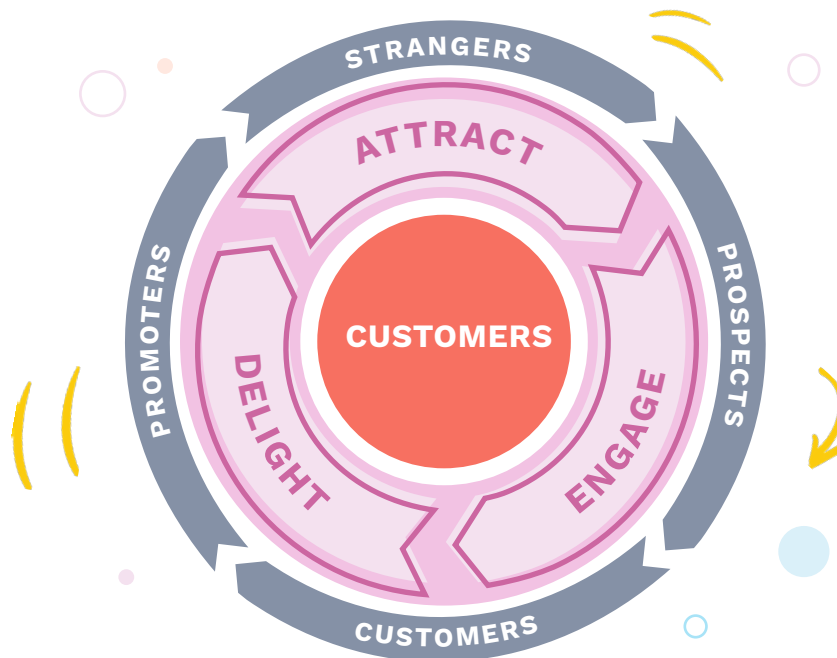
But what's the connection between this and a marketing audit? Think about it: Getting every department on the same page will give you the ability to clearly and effectively communicate what is happening right now. That, in turn, means having a clear understanding of how your marketing is performing, which brings us back around to the audit.

Regularly auditing the performance of your individual digital pillars helps brands understand how these activities plug into the larger whole. By taking an objective, process-driven look, you can monitor performance over a period of time and identify what's working well compared to where customers may be dropping off — even if that drop-off is happening outside marketing's sphere of influence. In short, regular, formal marketing audits can improve entire organizations, not just the marketing department.

When working through these audits, think about how this information can improve more than just marketing — these audits have the power to transform a customer's entire experience with a brand.

Site Design and Usability

A broken website isn't just a mild annoyance. It can make or break a brand — **79% of online shoppers who experience a dissatisfying visit are less likely to buy from the same site again**. Users will not hesitate to leave, or "bounce," from a website that doesn't work. And keep in mind: "doesn't work" can mean many things:

Broken pages, links, images, media, and other elements

Images might not load, links might take users to missing pages, or scripts might not execute properly. Broken site behavior like this is obvious and decreases trust and conversions.

Unclear or misleading navigation

If users can't easily find what they're looking for on a website, the site is likely broken.

Slow load times

40% of shoppers abandon a website that takes longer than three seconds to load. Slow load times kill site engagement.

Poor structure or bad design

An unappealing design or a convoluted structure can immediately make the site a turn-off for customers.

These are just a few examples of what it means for a website to be broken. These issues cause usability problems for shoppers and may result in them abandoning the site for a competitor instead. Case in point: **a brand that engages in heavy marketing with a broken or poorly performing website is wasting money**. Why bring potential customers to a website if they're just going to leave as soon as they get there?

Keep in mind that this doesn't just apply to your standard desktop site. Mobile makes up between **30% and 90% of all web traffic**, depending on the type of website. This number has grown rapidly over the last few years. Today, mobile traffic makes up the majority of all traffic on the web. Websites must work on a traditional computer as well as various phones, tablets, and other gadgets.

Design and Usability
Audit Tools

Before starting a technical audit, it's critical to gather a few tools to make the process easier and smoother. Some of our favorites are:

Screaming Frog

Consider this as the king of SEO and website crawler tools. It can create sitemaps, check for broken links and images, and give you an idea of how well your site's structure works.

Xenu's Link Sleuth

Similar to Screaming Frog, this tool will go through your site page by page to find links that don't work.

Pingdom

Pingdom tests site speed in an easy to understand way and presents a list of opportunities for improvement.

Google PageSpeed Insights

This feature measures page speed and provides suggestions on how to fix issues.

Wappalyzer

This plugin for browsers identifies technologies used on a website and can help marketers compare their stack to that of their competitors.

Google Analytics

One of the many analytics suites available, choose your favorite and make sure to use it religiously.

The Design and Usability Audit Checklist

The first step is to gather all of the baseline numbers you'll need. Many of these will come from the tools in the previous section. If you don't have an answer for one of the checklists, don't worry — you can leave it blank and come back to it, but remember to make a point of addressing that lack of data in the near future.

Technical

- My site loads on a computer and on a mobile device.
- My page load time is _____ on a computer, and _____ on a phone.
- The biggest issues slowing down my site are _____ , _____ , and _____ .
- Is my site optimized for mobile devices of varying screen sizes?

Phones	Tablets
Phablets	Small laptops

- My website has:
  - Broken links (make sure all links go to the right pages)
  - Broken images
  - Broken scripts
  - Broken CSS or other display formatting
  - Other broken or non-supported elements
- My website works and looks the same across all major browsers, including older browsers.

Google Chrome Note: this includes the latest version of Microsoft Edge, which is now Chrome-based.	Chrome Mobile
	Apple Safari
Mozilla Firefox	Apple Safari Mobile

- All forms work:
  - Users can enter information into fields
  - Forms submit and show confirmation of submission to users
  - Forms validate information to ensure only correct info is submitted

- All e-commerce elements work:
  - Can add items to shopping cart
  - Can view shopping cart
  - Can check out without issues
- All technologies and platforms used are up to date and function:
  - Server backend
  - Content management system
  - Plugins
  - E-commerce
- Tracking and analytics tools are installed correctly and return clean data.
- The site is served over HTTPS rather than HTTP by default.

Design & Usability

- Main menu is clear, easy to navigate, and contains all the most important pages.
  - Submenus are organized and clear
- User flow is clear, and users know where they need to go next.
- Contact information is accurate.
- Privacy and GDPR compliance are accurate, updated, and clearly linked.
- Colors are consistent with branding, easy to read, and don't clash.
- Text is readable and not part of images. (Search engines can't read text that's part of an image, which may break readability on some devices.)
- Links and navigation buttons are distinguished and easy to see.
- The site structure makes sense and is easy to understand — users should not have to guess where a button will take them or how to get back to where they were.
- Clear calls to action exist on every relevant page.
- All links and calls to action take users to the page they are expecting. (The "Contact Us" link should not send users to a sales page.)

7

Inbound Marketing

There are two main ways to grow visits to your website: organic (free!) and paid. Paid traffic certainly has advantages. After all, it can be incredibly effective in bringing new users to your site. As for organic, the best part is that it's free! Who can argue with that?

It's important to note that free isn't completely free when it comes to inbound marketing. Organic traffic requires money, time, and other resources to both grow and maintain. However, compared to paid traffic, the costs of organic, inbound marketing are fixed. Most paid traffic strategies involve paying for each unique visitor, whether through an ad on Google or Facebook. Organic requires some work upfront — but that work becomes a permanent driver of traffic for the foreseeable future: each investment builds on previous investments, snowballing growth without the need to constantly invest in new marketing initiatives. Some examples of inbound marketing include:

Search Engine Optimization (SEO)

By optimizing your site, you ensure it ranks highly when people use Google or another engine to search for a product or service you sell. SEO further breaks down into:

Technical SEO

Is your website built to take the right ranking signals and amplify them or pass them to more valuable pages?

On-Page SEO

Do all pages on your site include the right ranking signals in order to show up in search results for certain keywords?

Off-Page SEO

Do you have enough external ranking factors, such as links from other sites, for search engines to place you higher in results?

Content Marketing

Content marketing is all about producing and creating useful information to help drive visitors to your site. This includes blog posts, articles, videos, podcasts — any kind of content.

Inbound marketing helps brands win in the digital world in two ways: it helps with discovery by allowing sites to rank higher in search results. It also helps drive the right kind of traffic by focusing on which keywords drive which users to which pages. When done well, inbound marketing allows brands to create a powerful funnel that transforms qualified users into loyal customers.

Inbound Marketing Audit Tools

A manual SEO and content audit can certainly be performed, but take heed: it will require a serious amount of time and some very big spreadsheets. Fortunately, a small industry has cropped up to provide tools and support for people diving into SEO. Most of these tools run on subscription models, but many also include free trials or limited freemium offerings to help brands get started:

- **Screaming Frog** and **Xenu's Link Sleuth**
  Both are invaluable for inbound marketing audits since they can help webmasters identify how ranking signals are passed around internally, and both are mostly free.

- **AHREFS**
  One of the first SEO software suites on the market (and still one of the best), AHREFS allows you to quickly analyze your site across a variety of metrics.

- **MOZ**
  Another early entrant into the SEO game, Moz can automate many of the tasks included in an SEO audit and present results in an easy-to-use and easy-to-improve format.

- **Google Search Console**
  Similar to Google analytics but for search. The search console presents all (or most) of the information you need to diagnose and fix ranking issues on Google.

- **BuzzSumo**
  BuzzSumo helps discover trending topics and identifies the best-performing content on a site.
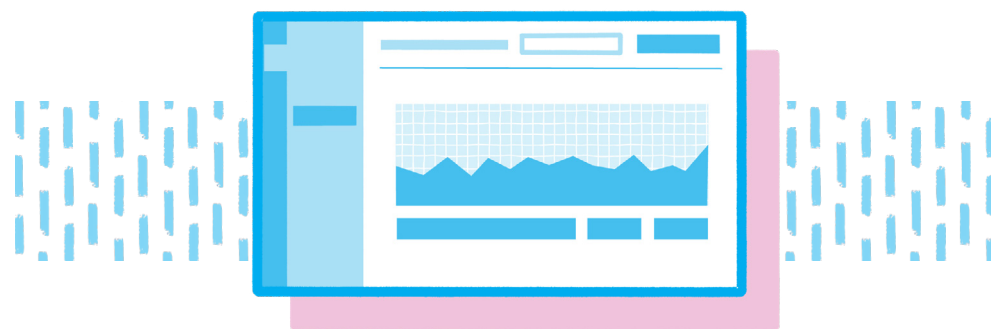
The Inbound Marketing Audit

Auditing your inbound efforts can be very straightforward and quick if your brand doesn't do a lot of content marketing, or time-consuming and complicated if it does. In either case, these templates will help you get the most out of this audit to fit the needs of any sized company.

SEO and Competitor Analysis

Keyword	Rank	Competitor 1	Competitor 2	Competitor 3
SEO Guide	6	4, www.competitor1.com. SEOGuide	1, www.competitor1.com. SEOGuide	3, www.competitor1.com. SEOGuide

Making sure to note which specific pages from competitors are ranking for each keyword is important in understanding why they may be outranking your brand's pages. Once you have the pages, you can use one of the mentioned tools to analyze that page and identify key ranking factors. These might include:

- **Keyword use:** How often the keyword appears on each page.

- **Word count:** How many words appear on each page, which is especially useful when combined with keyword count to formulate a ratio.

- **Outside backlinks:** How many links that specific page has received from other domains, and from where. Knowing where links come from allows you to potentially replace their links with your own by reaching out to the link source.

- **Internal backlinks:** How many links that specific page has from other pages on the same domain.

- **Page ranking score:** Various SEO tools compile these metrics into a page-level score, like SEO Moz's Page Authority, and knowing this can give you an idea of how much work needs to be done.

The Inbound Marketing Checklist

Technical SEO

- Google Search Console and Bing Webmaster tools are set up and work correctly for my site.
- I have a sitemap and a robots.txt file that is accessible to search engines.
- Search engines aren't running into any crawl errors when indexing my site.
- My site uses structured data like **schema.org** to highlight important information, such as addresses or products.
- Internal links aid with page crawling and discovery — all pages are linked internally from the most logical place.

On-Page SEO

Go through each page on your website and make sure that:

- Each page of content uses one focus keyword
- Heading tags are used correctly and incorporate the focus keyword
- Focus keyword is used in the body copy of each page
- Pages have relevant and useful high-value outbound links (e.g., linking to Wikipedia)
- Canonical tags that are configured correctly to minimize duplicate content
- Meta descriptions are filled in and optimized to increase clicks
- Pages have accurate and SEO-friendly title tags
- Images that use ALT tags to describe the image in an SEO-friendly way

Off-Page SEO

- Does your brand show up on the first page of search results for branded searches?

- Audit all backlinks pointing to your site. (This requires a tool like Search Console or one of the SEO tools.) Are all backlinks legitimate and from valuable external pages?
- We have a master keyword list that is checked regularly for rankings.
- We know where our competitors' links are coming from and have a plan to get links from those sources.
- We own and have optimized our profiles on Google My Business and other major directories.

Content Marketing

- Do you regularly produce and publish content?
- Does your website have a blog?
- Is your blog easy to navigate?
- Does your brand have a defined voice and tone?
- Is your content organized and planned in advance?
- Is your content built around keywords and optimized for search engines?
- Do you have a distribution plan for your content once it's published?
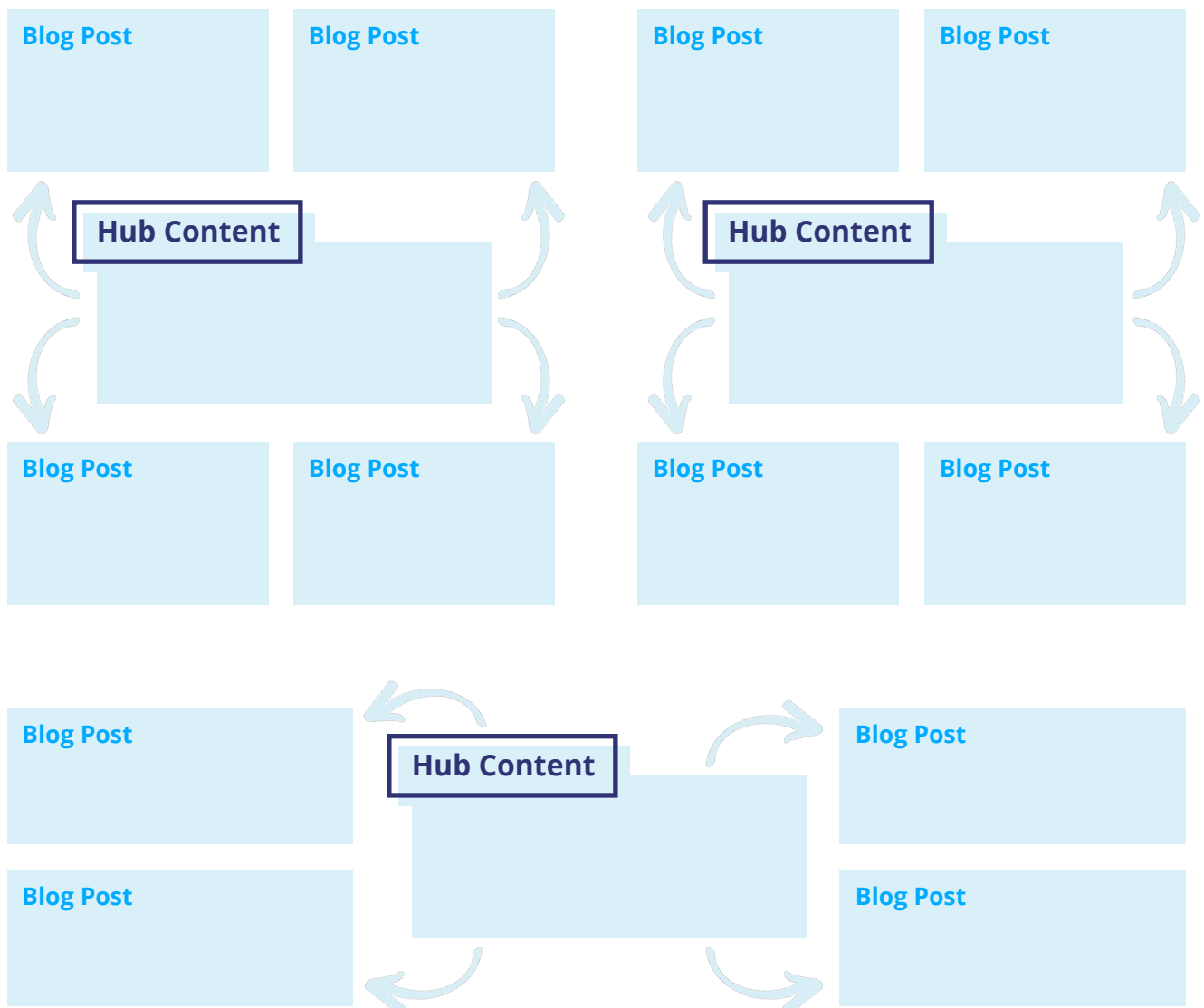
Ongoing Content

- Do you review content metrics on a regular basis to identify which content performs best?
  - Do you identify the types of content that consistently perform well (i.e., interviews, how-to blogs, etc.)
- Do you regularly update old content on your website/blog?
- Do you optimize existing high-traffic content pages?

Content Topic Brainstorming

The easiest way to build a cohesive content strategy is using the hub-and-spoke model: a centralized piece of anchor content acts as a hub for a topic, and smaller individual pieces of content are attached to each hub. This makes content organization easy, creates a more cohesive and simple site structure, and streamlines new topic ideation.

Using the hub-and-spoke model for planning content can be useful because it allows you to develop content in a strategic way that links and supports other pieces of content. This can help website visitors easily find other related content on your site and decrease bounce rate.

To get started with the hub-and-spoke content model, fill out the diagram below, and then replicate it for additional hub topics.

Blog Post	Blog Post	Blog Post	Blog Post
Hub Content		**Hub Content**	
Blog Post	Blog Post	Blog Post	Blog Post

Blog Post	**Hub Content**	Blog Post
Blog Post		Blog Post

Digital Advertising

Free might be great, but nothing supercharges a site more than putting a budget behind some advertising. Of course, if those ads aren't performing well, that budget might feel like burning money. Even worse, if the tools to measure success (attribution tracking) aren't set up, it might feel like tossing money into a black void with who-knows-what results.

The biggest mistake any brand can make when dealing with digital ads is to take a "set it and forget it" attitude. In the best-case scenario, that approach makes it difficult to improve and optimize. In the worst-case scenario, the ad spend ends up bigger than the revenue it generates, leading a company to lose money month over month. Neither situation is ideal, and the best way to avoid both is to regularly review digital advertising, which can consist of:

Banner/Display Ads

Previously manually purchased from websites, most display ads are bought and sold programmatically on automated exchanges.

Search Ads

Search ads are what allowed Google to become the behemoth it is today. These ads show up next to search results and are placed by selecting appropriate keywords.

Social Ads

Whether Facebook, Instagram, Snapchat, or something new and wild, social ads are becoming a bigger part of brands' success strategy.

Ensuring that digital ads work well is made more difficult because each platform requires a different optimization approach. Just as important, the ads rely on a functional website infrastructure, including landing pages, analytics, and solid attribution tools and processes. But when it all comes together, it can electrify sales like nothing else.

Digital Advertising Audit Tools

As with inbound, it's possible to conduct a digital ad audit by hand, using nothing more complex than a calculator, some spreadsheets, and pluck. It's not recommended for brands with complex ad strategies or high ad spend, though. And even for smaller brands, the availability of cheap, easy-to-use tools makes doing things by hand unnecessary.

- ### SEM Rush
  One of the oldest and most respected tools for evaluating ad performance, SEM Rush can give insights relative to competitors.

- ### Google Keyword Planner
  The first, and still often best, source of high-level information on keywords and web properties.

- ### Google Analytics
  To really get a good handle on how well ads are performing, you'll need some way of tracking them to the final purchase. As before, most analytics platforms will work, but GA is the most common.

- ### Facebook Insights
  Every social ad provider will have its own audience insights and analytics tool, but Facebook's is the largest and best place to start.

- ### AdRoll
  AdRoll gives brands a single source of truth in digital, allowing marketers to bring together data from email, search, e-commerce, social, and more in one place — and then turn that data into insights and actionable cross-channel campaigns.

Digital Advertising Audit

Auditing ads is slightly different than the other audits in this workbook. Think of it as a more interconnected process. Site design and content, for example, all live in one place and have a unified interface for evaluating effectiveness. Ads, on the other hand, are a broad group of tightly interlinked platforms that require everything to work to get meaningful information.

On-Page

- Clear landing pages exist for each ad, campaign, or ad group.

  Each landing page should have:
  - A single, clear focus
  - Continuity with the ads that send traffic there, including reusing keywords, offers, and visual cues
  - A clear and straightforward call to action or next step

- The site matches the overall tone and design of all ads — the customer is never surprised after clicking on an advertisement.

- All landing pages work across a variety of devices.

- Tracking is installed and enabled on all pages and connected to all ad platforms.

- Tagging is enabled on ads and pages, allowing site owners to track users in analytics platforms.

- Landing pages are regularly reviewed and tested for optimization.

Off-Page

- Ads are targeted appropriately, including:
  - Location and geofencing
  - Keyword targeting that is accurate and matches the keywords used on your site
  - Demographics and audiences are set correctly
  - Ads are displayed on channels that match target audiences (e.g., not trying to sell industrial equipment on Facebook ads)
  - Ads are targeted to specific devices

- Ad creative is optimized and regularly reviewed.

- A testing and improvement plan exists, and ads are tested regularly.

- Ads are grouped by the customer buying journey segment so that each segment sees the right ad at the right time.

- The ads don't max out their budget.

- Ads are linked to conversions, allowing for easy review of return on ad spend (ROAS).

- Ads don't violate ad platform standards or guidelines.

- There is a plan for testing out new ad platforms and technologies, such as:
  - Video ads
  - Retargeting
  - Social ads
  - Dynamic ad creation

Our best performing platform is _____ , and our best performing campaign is _____ . Our worst performing campaign is _____ .

Our target ROAS is _____ based on our target customer acquisition cost. _____ % of our ads meet or beat our target ROAS.

Social Media and Community

Short of the internet itself, nothing has disrupted marketing like the advent of social media. The ability for brands to engage directly with consumers in real-time threw a monkey wrench into classical ideas of what marketing communications could be. The entire theory of marketing suddenly shifted from yelling at people to talking with people. A whole new channel opened up — one that served as a fantastic mechanism for the discovery of brands and products and pushed customers along their buying journey, dramatically increasing customer lifetime value (CLTV) with post-purchase engagement.

When social communities are done well, the effect can be magical — users suddenly transform from customers into valuable partners who offer feedback, share news and updates with friends, and help sell the brand to others around them. When they're done poorly, however, these same communities can be ghost towns. Or worse, they can amplify negative coverage and create a downward spiral that might be difficult to break. While there are hundreds of **social media platforms**, each with their own rules and mores, the core of running a successful community is largely similar for all of them:

Audience Match

Brands need to be on the platforms where their audiences are. That doesn't mean they can ignore every other platform — only that they should focus first on the right ones.

Engaging Content

Social feeds off content, but only if that content is engaging to the people on that platform. Matching the content to the audience is critical to a positive reception.

Dialogue

Community is about letting brands speak with users, not to or at them. That means having a meaningful exchange that's driven by the community itself.

Social media platforms come and go. The basics of what it takes to be successful on social media, however, has stayed largely the same since the days of Friendster and MySpace. A solid foundation, developed through regular auditing, can ensure that brands stay relevant and engaging for years to come.

Social and Community Audit Tools

Social Media Checklist

- Social media platform audiences align with your brand's target audience.

- Social pages are set up properly on each channel (i.e., Facebook, LinkedIn, Twitter, and Instagram). Even if you don't plan to use a specific platform, you should claim your page to prevent anyone else from claiming it.

- Each social profile is consistent with branding guidelines. (Logo is properly formatted, and company blurbs and "about" sections are consistent across multiple channels.)

- Social pages are updated regularly and consistently.

- Brand has developed communication guidelines for engaging with customers (i.e., how to respond to questions or handle customer service complaints).

- User-generated content guidelines are in place to help quickly approve and share UGC content on social channels and in brand communities.

- User comments and posts are responded to appropriately and within a timely manner.

- There is a plan in place to test content across various channels.

- You have a brand-appropriate list of hashtags and guidelines for which to use with each post.

Social Planning Template

Getting the most out of every channel requires knowing what you want to accomplish and having some ideas on how to get there. This simplified planning tool can help get you thinking about what your goals are for each platform you're on.

Channel	Audience	Content Type	Goal	Metrics	Current Results
Facebook	Stay-at-home-moms	Cute photos/ Wholesome memes	Generate an audience for ad targeting	Total likes, follows, shares, engagement	125 likes, 12 follows, 1 share per post

Be Audit You Can Be

This quick audit is not the be-all and end-all for gauging marketing effectiveness or building out a marketing strategy. Instead, this will help you figure out immediate problem areas that might need to be addressed sooner rather than later. For brands looking to take the next step, take a look at our **Ultimate Guide to Going Digital**.

That longer guide also includes a goals worksheet, included here. The worksheet utilizes the SMART Goals framework to help create real, meaningful change within an organization. Once you're done going through this audit, take a minute to convert your findings into actionable goals that you can track and accomplish. This step is critical towards making the kind of real progress that improves sales year after year.

Objective	Goal	KPI	Due Date	Responsibility	Reporting Period	Reported To	Notes
Increase Organic Traffic	Move 10 keywords into top 10 positions on Google	Search Rankings	6 Months	SEO and Content team	Weekly	SEO Director	Focus on top converting keywords

Digital is a critical part of the sales flywheel, and the goal is to always reduce friction — eliminating obstacles from users converting into customers and customers converting into champions. That's where this audit will really shine: in helping you figure out the low-hanging fruit that can be addressed in your next marketing strategy to make sure that the flywheel is spinning as fast as it can. Do that, and growth won't be far behind.

AdRoll

Follow us for more!