

AGENCY AND IN-HOUSE TEMPLATE

Marketing Audit Worksheet

A seven-part audit that ends in a ranked list of what to fix, not a slide deck of observations nobody acts on.

Most marketing audits produce a hundred findings and no decisions. This worksheet forces the opposite: every section ends in a scored judgement, and the last page turns the whole thing into three things to do next quarter. Run it on a client, or run it on yourself.

WHAT'S INSIDE

- | | |
|------------------------------------|--------------------------------------|
| 01 How to use this worksheet | 06 Part 5 - content and search |
| 02 Part 1 - positioning and offer | 07 Part 6 - measurement |
| 03 Part 2 - audience and demand | 08 Part 7 - budget and return |
| 04 Part 3 - channels and traffic | 09 The scorecard and what to do next |
| 05 Part 4 - website and conversion | |

How to use this worksheet

An audit is only useful if it changes what someone does on Monday. Score honestly, and resist the urge to soften a low number.

- 1 **Score each part out of 10** using the guidance in that section. A 5 means adequate, not good.
- 2 **Write evidence, not impressions.** 'Homepage does not state who it is for' beats 'messaging could be stronger'.
- 3 **Do parts 1 and 2 first.** Positioning problems masquerade as channel problems, and fixing the channel never works.
- 4 **Finish the scorecard in one sitting.** An audit spread over three weeks scores the first sections harshly and the last ones generously.
- 5 **End with three actions, not thirty.** The ranked list on the last page is the deliverable. Everything before it is working.

THE HONEST-SCORING TRICK

Before scoring a section, write the single worst thing you found in it. Score after that, not before. Scoring first and justifying second produces sevens for everything.

Positioning and offer

- ☐ A visitor can tell what the business does within five seconds of landing
- ☐ The positioning names a specific buyer, not 'businesses of all sizes'
- ☐ There is a stated reason to choose this over the obvious alternative
- ☐ The offer is described in outcomes, not features or process
- ☐ Pricing is either public or the reason it is not is deliberate
- ☐ The same positioning appears on the site, in sales calls, and in proposals

Evidence

WHAT YOU ACTUALLY FOUND, WITH URLS OR QUOTES

QUESTION	FINDING
Who is this explicitly for?	
What do they win by choosing it?	
Who do they lose deals to, and why?	

SCORE OUT OF 10

BIGGEST SINGLE GAP

10 means a stranger could repeat the positioning back correctly

PART 2

Audience and demand

- ☐ There is a written definition of the ideal customer, based on data not opinion
- ☐ Someone has spoken to a customer in the last 90 days
- ☐ The buying trigger is understood, not just the buyer's job title
- ☐ Demand is measured, not assumed. Search volume, enquiry sources, or pipeline data exist
- ☐ Objections are documented and answered somewhere in the funnel

SCORE OUT OF 10

BIGGEST SINGLE GAP

PART 3

Channels and traffic

CHANNEL	TRAFFIC	ENQUIRIES	COST	COST PER ENQUIRY	KEEP?
Organic search					
Paid search					
Social					
Email					
Referral and word of mouth					
Direct					

SCORE OUT OF 10

CHANNEL TO CUT FIRST

10 means every channel has a known cost per enquiry

Website and conversion

- ☐ Homepage states who it is for and what happens next
- ☐ Forms ask for the minimum needed to start a conversation
- ☐ Pricing or a pricing signal exists
- ☐ Core Web Vitals pass on the key templates
- ☐ One clear primary action per page
- ☐ Proof appears near the decision, not only on a testimonials page
- ☐ Mobile experience is equivalent, not merely functional
- ☐ Enquiries are acknowledged automatically and followed up within a day

Conversion path

STAGE	METRIC	CURRENT	BENCHMARK OR TARGET
Landing	Bounce or engagement rate		
Interest	Key page views per session		
Enquiry	Form or call conversion rate		
Qualified	Percentage of enquiries worth quoting		
Won	Proposal to close rate		

SCORE OUT OF 10

WEAKEST STAGE

PART 5

Content and search

- ☐ Content targets questions buyers actually ask, not topics the team finds interesting
- ☐ There is a published page for each core service or product
- ☐ Existing content is updated on a schedule, not just added to
- ☐ Internal linking connects related pages deliberately
- ☐ Someone owns publishing, and the cadence has survived a busy month

SCORE OUT OF 10

BEST PERFORMING ASSET

BIGGEST CONTENT GAP

PART 6

Measurement

- ☐ Analytics is installed correctly and someone has verified it recently
- ☐ Enquiries and sales are tracked back to a source
- ☐ There is one agreed definition of a lead
- ☐ A named person looks at the numbers on a schedule
- ☐ Reporting shows decisions taken, not just metrics moved

WHERE AUDITS USUALLY FIND THE REAL PROBLEM

If part 6 scores below 5, treat every number elsewhere in this audit as an estimate. Broken measurement makes good channels look bad and bad channels look fine, and it is almost always the cheapest thing on the list to fix.

SCORE OUT OF 10

BIGGEST MEASUREMENT GAP

Budget and return

LINE	MONTHLY SPEND	ATTRIBUTED REVENUE	RETURN	VERDICT
Paid media				
Agency or contractor fees				
Tools and software				
Content production				
In-house time at cost				
Total				

The two numbers to know

METRIC	CURRENT	TARGET
Cost to acquire a customer		
Average customer lifetime value		
Ratio of value to acquisition cost		

SCORE OUT OF 10

LARGEST UNJUSTIFIED LINE

Scorecard and what to do next

PART	SCORE	BIGGEST GAP	EFFORT TO FIX	IMPACT IF FIXED
1 Positioning and offer				
2 Audience and demand				
3 Channels and traffic				
4 Website and conversion				
5 Content and search				
6 Measurement				
7 Budget and return				
Total out of 70				

The three things to do next quarter

HIGHEST IMPACT, LOWEST EFFORT FIRST. NAME AN OWNER AND A DATE FOR EACH

RANK BY IMPACT OVER EFFORT, NOT BY SCORE

The lowest-scoring section is not automatically the first thing to fix. Repositioning a business is a six-month project; fixing broken conversion tracking is an afternoon and makes everything else measurable.

We build the systems behind the paperwork

Gatilab is an independent WordPress and search agency. We build sites, rank them, and stay long enough to prove the work moved something.

2014 Founded	850+ Clients served	2,000+ Projects completed	10,000+ Plugin installs
------------------------	-------------------------------	-------------------------------------	-----------------------------------

What we do

WordPress engineering

Custom themes, blocks, plugins, and migrations built to stay fast and maintainable after handoff.

SEO strategy

Technical fixes, topical coverage, and search visibility work measured against clicks, not scores.

Content marketing

Research-led articles and editorial systems your team can keep publishing without us.

Conversion design

Landing pages, service pages, and forms designed around the decision the reader is actually making.

Need this handled instead of templated?

Send the problem, not a brief. We will tell you whether it is worth building, what it depends on, and what we would deliberately skip. If the honest answer is that you do not need us, you will get that too.

[Start a project](#)

gatilab.com/connect

USE IT FREELY

Free to use, edit, and adapt for your own business and your own clients. No attribution required, no sign-up. The one thing we ask: do not resell it as your own product.