

Marketing Scorecard.

NAME:

DATE:

Marketing can be a significant driver of growth. Complete the scorecard below to understand if you have what you need to succeed. Any question that is not a confident “Yes” is an opportunity to develop your approach.

		YES	NO	IF “NO”...
ARE YOU READY	Do you have a formal, documented marketing plan?			Proceed to Step 2: Marketing Plan Builder For Advisors utilizing SEI solutions, contact your business development professional
	Do you have clear and aligned marketing objectives (e.g. support/retain clients, awareness, or generating leads)?			
	Have you discussed your desired outcomes, timeline, and budget?			
	Do you have a clear target audience, who you understand & speak to their specific needs?			Build an ideal client persona Develop effective messaging that resonates
	Are you able to consistently convert leads to clients?			Define your sales process
	Do you have a strong website that is optimized for leads?			Take the Snappy Kraken website assessment Get ‘Marketing Basics’ on the Strategy & Tactics guide
IS YOUR PLAN READY	Do you have defined strategies (i.e. your approach) and tactics to try (i.e. your specific actions)?			Learn how to choose what’s right for you Find strategies that fit on the Strategy & Tactics guide
	Do you have the right resources (human and/or technology), skills, and/or partnerships to manage the marketing plan?			Gain marketing capacity & competency View vetted vendors on the Strategy & Tactics guide
	Do you have a call-to action, a way for your audience to take a next step (e.g. book a meeting, join a webinar, visit a website)?			Hear 6 reasons why your marketing may not be working Seek expertise from a marketing professional
	Is your promotion effective (i.e. you are reaching your target audience)?			Look into where your target clients are showing up Hear 6 reasons why your marketing may not be working
	Do you track, review, and make decisions based on key metrics?			Use marketing metrics like a pro
	If you’re actively using marketing to grow, are you happy with the results?			Hear 6 reasons why your marketing may not be working

