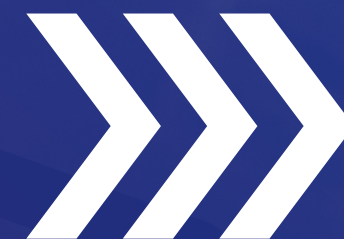# Marketing Audit
# ABC Insurance

Let's make marketing easy.

goma
MARKETING

# Introduction

Marketing audits are a crucial tool for insurance agencies to evaluate the effectiveness of their current strategies and identify growth opportunities.

By thoroughly analyzing key areas like lead generation, website performance, and digital outreach, agencies can ensure they're maximizing their marketing efforts.

Regular audits help uncover gaps and inefficiencies and provide actionable insights to improve ROI, attract more qualified leads, and stay competitive in a rapidly evolving marketplace.

goma
MARKETING

# Table of Contents

—— Let's make marketing easy.

**goma** MARKETING

# Marketing Strategy

goma
MARKETING
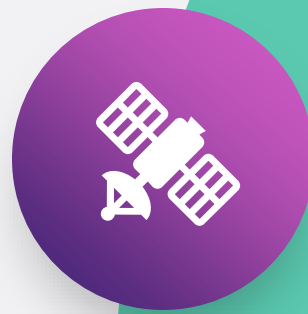
# Business Objectives Alignment

This section focuses on evaluating whether your marketing strategy directly supports your broader goals, such as increasing revenue or expanding your customer base.

## Clear Business Goals

- Are the overall business objectives clearly defined?

  **Average**

- Do marketing goals align with short-term and long-term business objectives?

  **Average**

## Unique Value Proposition (UVP)

- The agency has identified clear differentiators from its competitors (unique services, customer experience)?

  **Excellent**

- Is the UVP clearly communicated across all marketing channels?

  **Average**

- Is there a brand promise that resonates with the target audience?

  **Excellent**

- Is the promise consistent with the agency's capabilities and services?

  **Needs Improvement**

goma MARKETING

# Lead Generation

Effective lead generation is the cornerstone of business growth, and this section explores how well you understand your lead sources, conversion rates, and overall cost-effectiveness in attracting potential clients.

## Lead Sources

- What are the main sources of leads (website, referrals, social media)?

  **Excellent**

- Are all lead sources being tracked and attributed correctly?

  **Average**

## Lead Nurturing

- Is there a system for nurturing leads through drip campaigns or personalized follow-ups?

  **Average**

- Are different nurture sequences in place for different buyer personas?

  **Average**

- Are leads scored based on their interaction and engagement?

  **Needs Improvement**

goma MARKETING

## 01

# Customer Personas

Understanding your target audience is crucial to effective marketing, and this section assesses whether your customer personas are well-defined, accurate, and aligned with your marketing strategy.

### Target Audience Identification

- Has the target audience been identified with demographic and psychographic details?

  **Average**

- Are there different personas for various segments of the customer base (e.g., age, location, industry)?

  **Average**

### Buyer's Journey

- Are the stages of the buyer's journey mapped out (awareness, consideration, decision)?

  **Excellent**

- Is there targeted content or outreach for each stage?

  **Excellent**

### Behavioral Insights

- Have customer pain points, motivations, and triggers been identified?

  **Needs Improvement**

- Are there insights into customer behaviors, preferences, and decision-making processes?

  **Average**

goma MARKETING

# 01

## Competitive Analysis

Analyzing your competitors provides valuable insights into market positioning, and this section evaluates how well you understand your competition and how your agency differentiates itself.

### Competitor Identification

- Who are the primary competitors in the industry?
- Are competitors in both direct and indirect categories being tracked?

**Excellent**

**Needs Improvement**
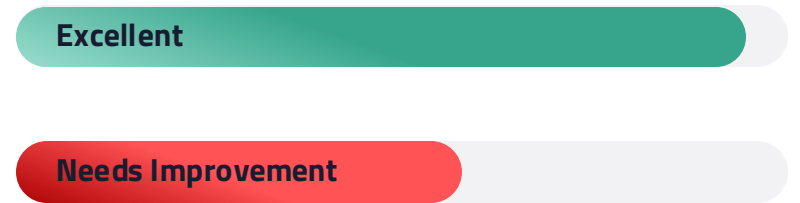
### SWOT Analysis

- What are the agency's strengths, weaknesses, opportunities, and threats compared to competitors?
- Are the competitors' strengths and weaknesses documented?

**Average**

**Needs Improvement**
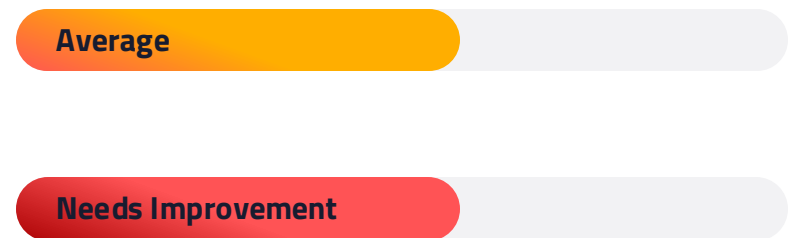
### Market Share

- What is the agency's market share and positioning relative to competitors?
- Is there a clear understanding of where the agency stands in the market?

**Average**

**Average**

goma MARKETING

## 01

# Content Strategy

A robust content strategy is vital for engaging your audience and driving conversions. This section examines whether your content aligns with your marketing goals and resonates with your target customers.

## Key Messages

- Are the agency's key messages aligned with the UVP?

  **Excellent**

- Is the messaging consistent across all platforms (website, email, social media)?

  **Needs Improvement**
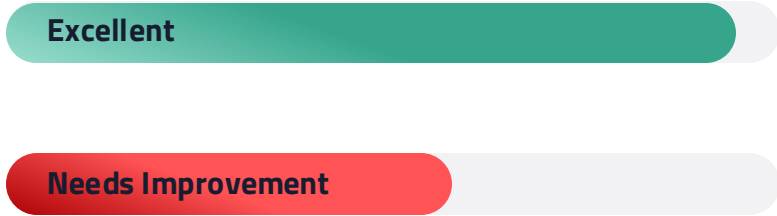
## Tone & Voice

- Is the brand's tone and voice appropriate for the audience (professional, friendly, etc.)?

  **Excellent**

- Is the tone consistently applied in all communications?

  **Excellent**

## Content Types

- Are there a variety of content types being produced (blogs, videos, case studies, infographics)?

  **Average**

- Does the content strategy align with audience preferences?

  **Needs Improvement**
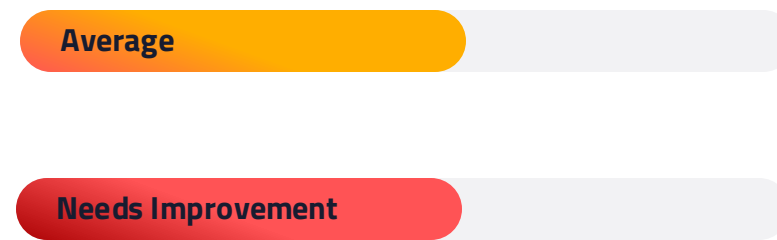
## Content Personalization

- Is content personalized based on customer personas or audience segments?

  **Average**

- Are personalized email campaigns and targeted ads being used?

  **Average**

goma
MARKETING

# Action Items

### 1. Define Clear Business Objectives

Schedule a strategy session with key stakeholders to clarify short-term and long-term business objectives, ensuring they are specific, measurable, achievable, relevant, and time-bound (SMART).

### 2. Align Marketing

Review current marketing goals to ensure they support the defined business objectives, adjusting metrics and targets where necessary to improve alignment

### 3. Enhance Unique Value Proposition (UVP)

Conduct a workshop to refine the unique value proposition, ensuring it effectively communicates what sets the agency apart and resonates with potential clients.

### 4. Identify and Define the Target Audience

Conduct market research or surveys to better understand the ideal customer profiles, focusing on demographics, preferences, and behaviors to refine targeting efforts.

### 4. Identify and Define the Target Audience

Conduct market research or surveys to better understand the ideal customer profiles, focusing on demographics, preferences, and behaviors to refine targeting efforts.

goma
MARKETING

# Website



Full-Service Insurance Agency

Our agency helps protect families with an array of insurance coverages.

GET A QUOTE

Mountain Insurance

Let's make marketing easy.

goma MARKETING

# Designer & User Experience

A positive user experience and intuitive design are crucial for engaging visitors and driving conversions, and this section assesses how effectively your website meets user needs and facilitates seamless navigation.

## Responsive Design

- Is the website fully responsive on all devices (desktop, tablet, mobile)?

  **Excellent**

- Is there consistency in design elements across all screen sizes?

  **Excellent**

## Mobile Optimization

- Is the mobile version of the site user-friendly and fast?

  **Average**

- Are mobile users able to easily navigate, fill out forms, and view content?

  **Excellent**

## Navigation

- Is the site's navigation intuitive, with a clear menu structure?

  **Needs Improvement**

- Are important pages no more than 2-3 clicks away from the homepage?

  **Average**

Let's make marketing easy.

goma MARKETING

## Designer & User Experience (cont.)

A positive user experience and intuitive design are crucial for engaging visitors and driving conversions, and this section assesses how effectively your website meets user needs and facilitates seamless navigation.

### Visual Appeal

- Is the design clean and visually engaging without being cluttered?
- Are images, videos, and animations high-quality and relevant?

Average

Excellent

### Brand Consistency

- Is the branding consistent across the entire website (logo, colors, fonts)?
- Does the site reflect the company's core values and tone?

Needs Improvement

Average

# Unlock the Full Audit

To order an audit for your agency, please visit gomamarketing.com/get-started/.

Let's make marketing easy.

goma MARKETING