Marketing Analysis Checklist

1. Using the "Marketing expenses checklist," calculate your total monthly marketing expense per quarter.

Total expense _____

2. From the front desk and sales force, calculate the total quarterly leads received.

 # Leads received_____

2A. Conditional: If possible, break down the leads received by source.

Source:_____   **# Leads _____**

Source:_____   **# Leads _____**

Source:_____   **# Leads _____**

Source:_____   **# Leads _____**

Source:_____   **# Leads _____**

Source:_____   **# Leads _____**

3. Divide your marketing spend (#1) by leads received (#2) to determine Cost/Lead

(#1) _____ / (#2) = Cost/Lead _____

3A. Conditional: if possible, calculate this by source.

Source _____ cost/lead _____

Source _____ cost/lead _____

Source _____ cost/lead _____

Source _____ cost/lead _____

Source _____ cost/lead _____

Source _____ cost/lead _____

4. Calculate the value of your leads by adding the total sales volume for each of your leads for the quarter and dividing it by the number of leads received.

Total sales volume for all leads _____ / # leads = _____ lead value

4A. Conditional: If possible, calculate lead value for each lead source.

Source _____ value/lead _____

Source _____ value/lead _____

Source _____ value/lead _____

Source _____ value/lead _____

Source _____ value/lead _____

Source _____ value/lead _____

5. Determine the viability of your marketing by subtracting the cost/lead from value/lead.

value/lead _____ - cost/lead _____ = lead true value _____

5A. Conditional: If possible, determine viability by marketing source.

Source _____ value/lead _____ - cost/lead _____ = Source true value _____

Source _____ value/lead _____ - cost/lead _____ = Source true value _____

Source _____ value/lead _____ - cost/lead _____ = Source true value _____

Source _____ value/lead _____ - cost/lead _____ = Source true value _____

Source _____ value/lead _____ - cost/lead _____ = Source true value _____

Source _____ value/lead _____ - cost/lead _____ = Source true value _____

6. Determine:

Is your marketing viable?

If not, is there a source for leads that IS viable?

Is there a source that is wasteful and can be eliminated?

Is there a source that is producing poor quality leads?

Are too many leads being lost, resulting in poor sales? What can be done to address this?