

YOUR BRAND IDENTITY

11. Your Company logo is modern and clear
12. Is your Company logo trademarked?
13. Do you have access to your master logos?
14. Do you have a tagline?
15. Do you know your brands personality?
16. Do you know your colour code?
17. Does your font reflect your brand personality?
18. Are your fonts the same on all collateral?
19. Your colours are all the same on collateral?
20. Are you using consistent visual elements?
21. Are you using high resolution images?
22. Is your business location clear in all areas
23. Do you have branding on your car?
24. All Social icons are consistent and linked?
25. Do you have a corporate wardrobe?
26. You have a clear brands story?
27. Is your brand story on your website?
28. Do you identify with your brand?

YES

NO

SORT
OF

COMMUNICATION

29. Do you communicate through your CRM?
30. Is your marketing platform in your CRM?
31. Do you answer all your calls first time?
32. Do all email enquiries get answered same day?
33. Do emails get instant replies?
34. Does your CRM have campaign capabilities?
35. Do you have FAQs on your website?

YES

NO

SORT
OF

COMMUNICATION

YES

NO

SORT
OF

36. Are you sending marketing emails monthly?
37. Do you have a content calendar?
38. Do you have a Social media calendar?
39. Do you have a communication strategy?
40. Do you have a lead contact strategy?
41. Do you have an AIP contact strategy?
42. Do you have simple Brochures?
43. Do you have detailed company collateral?
44. Do you send birthday cards or texts?
45. Do you send special dates gifts/notes?
46. Do you have a regular newsletter?
47. Do you ask clients their comms preference?
48. Are all of your communications recorded?
49. Do you track the effectiveness of your comms?
50. Do you survey your clients satisfaction?

WEBSITE

YES

NO

SORT
OF

51. Your website loads in under 3 seconds
52. Your home page panel is clear on what you do.
53. Your welcome panel explains user benefits
54. Your welcome panel says why you are unique.
55. Your welcome pages has a strong clear image
56. There is a clear call to action on home page
57. Your home page is mobile friendly
58. Your home page is SEO optimised
59. Your home pages shows products and services

WEBSITE

- 60. Is there dynamic content on the home page?
- 61. Is there credibility on the home page?
- 62. Is your lead magnet linked to your CRM?
- 63. Your navigation has no more than 5 options
- 64. Your 'About page' is about the user not you.
- 65. You have high quality images on all pages?
- 66. Your product pages are SEO optimised?
- 67. There is a call to action on every page?
- 68. Do you have a dedicated landing page?
- 69. Your website has video content min 5
- 70. You have 10 written & Video testimonials
- 71. You have updated blogs
- 72. Your website is connected to Hotjar
- 73. Your Facebook Pixel is installed and working
- 74. Your Google Pixel is installed and working
- 75. Do you know who hosts your website?
- 76. Can you edit your website yourself?
- 77. Your website has your Privacy policy
- 78. Your AFCA and Licence details on the site

YES

NO

SORT
OF

FACEBOOK

- 79. You have a personal Facebook page
- 80. The brokerage as Facebook page
- 81. You can support enquires via FB Messenger
- 82. You have 100 Facebook 5 star reviews
- 83. You are posting daily
- 84. Your post useful content and stories

YES

NO

SORT
OF

FACEBOOK

- 85. Do you boost your high performing posts?
- 86. Do you have a FB ad account?
- 87. Do you use FB Remarketing?
- 88. Do you generate leads via FB?
- 89. Do you measure your FB results?
- 90. Do you run split testing on images and ads?
- 91. You run the same as for your Instagram?
- 92. Do you understand the FB Algorithm?
- 93. Have set a Social media budget?

YES

NO

SORT
OF

GOOGLE

- 94. Your business Name ranks No 1 pg on google
- 95. You know the top 10 keyword searches
- 96. You have a Google My Business Page
- 97. You have quality photos on your Google page
- 98. You have 150, 5 Star Google Reviews
- 99. You review your Google analytics weekly
- 100. You use Google Goals to measure conversion
- 101. You use Google optimise to split test pages
- 102. You use Google Tag manager on website
- 103. You have Google Remarketing display ads on
- 104. You have Google search ads running
- 105. Your display & search ads are converting

YES

NO

SORT
OF

OTHER SOCIAL MEDIA

- 106. You have a LinkedIn/Instagram page
- 107. You have a Personal LinkedIn/Instagram Pg
- 108. All staff have a LinkedIn/Insta Page.
- 109. Your LinkedIn/Insta pages are up to date
- 110. You post in your feeds 3-5 times per week
- 111. You have a dedicated YouTube Channel
- 112. Your YouTube Channel is SEO optimized
- 113. You have at least 5 videos on your channel
- 114. You have a company Podcast

YES

NO

SORT
OF

ADDITIONAL MARKETING

- 115. You are sent regular referrals
- 116. You attend 1 networking function p/month
- 117. You send content to industry media p/month
- 118. You are featured in media once p/quarter
- 119. You write articles for relevant blogs/mags
- 120. You send direct mail to qualified leads
- 121. You submit to business awards
- 122. You have won 3 or more awards
- 123. You run leveraged sales events for leads
- 124. You have tested sponsoring an event or award
- 125. You have Tested print ads in your area
- 126. You have a marketing budget

YES

NO

SORT
OF

TOTALS

#YES
S

#NO

SORT
OF

Total number of Yes, No's or Sort of's? _____

of Yes / 150 then times (X) by 100

Divide your score by 150, then times by 100 and that is your percentage

= Your Final Score : %

Your Score

0-50% - Ok we have some work to do! You are maybe new to broking or have always thought it was too hard and you don't have the time to do marketing. You maybe have been too 'busy' to worry about it before, but know times are changing. We can help!

50-100% - Not bad! You have some of the principles in place that have provide you with success in marketing and lead generation. You are doing more than most brokers but there is still room to improve and increase your revenue. Call us now!

100 - 150% - Outstanding! You have a clear knowledge of what is takes to get your brand and message out to market and of course make it convert. Well done, keep up the good work.

This audit was create by **Broker Essentials** and inspired by experts from all around the world on the best practices to get your brand out to the market and attract, engage and convert more clients. Use this tool to identify the gaps in your business marketing plan take action today. To find out how we can support you through these changes and to make sure it sticks, visit www.brokeressentials.com.au or call **Jason on 0401 429 435** now and we can map out your business plan to create the business you always wanted.