





SALES THROUGH SERVICE EXCELLENCE



THE COMPLETE BROKER MARKETING AUDIT

YES: LOOKS GOOD!

NO: MISSING OR BROKEN

SORT OF: NEEDS WORK

BUSINESS STRATEGY

- 1. Do you have a 5 and 10 year plan in writing?
- 2. Do you have a mission statement in writing?
- 3. Do your staff know your mission statement?
- 4. Do you have clear monthly goals?
- 5. Do you have 3 and 12 months goals?
- 6. Do you have a company values charter?
- 7. Is your charter visible to staff and clients?
- 8. Have you completed a yearly SWOT analysis?
- 9. Your business has a clear customer avatar?
- 10. Are you clear on the problem you solve?

YES	NO	SORT OF

YOUR BRAND IDENTITY	YES	NO	SORT OF
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?	ш	ш	
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?		Ш	
25. Do you have a corporate wardrobe?			
26. You have a clear brands story?			
27. Is your brand story on your website?	Ш	Ш	
28. Do you identify with your brand?	ш	ш	
COMMUNICATION	YES	NO	SORT OF
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?			

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?	ш		
47. Do you ask clients their comms preference?	ш		
48. Are all of your communications recorded?			
49. Do you track the effectiveness of your comms?	ш	ш	
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	YES	NO	SORT OF
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.		\blacksquare	
65. You have high quality images on all pages?		\blacksquare	
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			
FACEBOOK	YES	NO	SORT OF
79. You have a personal Facebook page			
80. The brokerage as Facebook page			
81. You can support enquires via FB Messanger			
82. You have 100 Facebook 5 star reviews			
83. You are posting daily			
84. Your post useful content and stories			

FACEBOOK	YES	NO	SORT OF
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?			
GOOGLE	YES	NO	SORT OF
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			

OTHER SOCIAL MEDIA	YES	NO	SORT OF
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			
ADDTIONAL MARKETING	YES	NO	SORT OF
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			

YOUR SALES PROCESS	YES	NO	SORT OF
127. You have a set sales process			
128. You use a roadmap (CRR) when selling			
129. You have a professional sign up process			
130. You have approval/settlement gifts			
131. You have an education system for new clients			
132. You have a post settlement process			
133. You have a process to ask for referrals			
134. You have a process for asking for Testimonials			
135. You send a note/gift for referrals			
TESTING & MEASURING	YES	NO	SORT OF
136. You measure leads and conversion			
137. You know the cost per lead			
138. You ask every customer 'how did you find us?'			
139. You measure lead number and by sources?			
140. You know your cost per lead per source.			
141. You measure sales weekly and monthly			
142. You know your conversion rates and ratios			
143. You know your average loan size.			
144. You have a weekly marketing report			
145. You have a up to date results dashboard			
146. You have clear marketing goal each quarterly			
147. You have a dedicated marketing manger			
148. You use your aggregators marketing			
149. You use an external marketing agency			
150. You use a centralised marketing hub tool			

#YE

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. <u>Call us now!</u>

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.