Marketing Assessment Example

Preliminary Assessment

In order to best determine the value Yoko Co can be to you, we must have an understanding of the impact we can help you achieve. In scenarios where this information isn't readily available, we perform a marketing assessment to collect this information. The assessment itself is very thorough, walking from the very top of the engagement funnel through to measuring return on investment of your efforts.

While the effort invested in this assessment is greater than what we charge, we provide it at a low rate as our investment in the relationship. We'll each obtain a much clearer understanding of your business, and ultimately we'll be able to provide more precise recommendations for how you should proceed with your marketing efforts to achieve optimal returns. We'll also be able to determine if we're the best ones to help you do that.

An example of our full funnel visualization report is showcased below. While your assessment will be customized for your organization, the following provides a representation of the simplicity and clarity you'll receive from this report.

Please know, in order to create this report we will need a wealth of information or access from you. All information gleaned during this assessment is strictly confidential and will *never* be shared outside of our organization.

Your Engagement Conversion Funnel

The following funnel showcases the numeric data we aim to provide you with, structured in a way that allows you to quickly and easily visualize your engagement at each step from top to bottom. Your version of the report will be customized to you – i.e. contacts may be split into categories, phases of the sales process will be customized, etc.

Period:	Year to Date
Total Search Impressions	**XX,000**
Impression to Visit Rate	XX.xx%
Total Website Users	**XX,000**
Users to Engaged User Rate	XX.xx%
Total Engaged Users	**X,000**
Engaged User to Contact Rate	XX.xx%
Total Contacts	**XXX**
Contact to MQL Rate	XX.xx%
Marketing Qualified Leads	**XX**
MQL to SQL Rate	XX.xx%
Sales Qualified Leads	**X**
Introductions	X
Introduction to Questionnaire Rate	XX.xx%
Questionnaires	X
Questionnaire to Proposal Rate	XX.xx%
Proposals	X
Proposal to Negotiation Rate	XX.xx%
Negotiations	X
Negotiation to Contract Rate	XX.xx%
Contracts	X
SQL to New Relationship Rate	XX.xx%
New Clients	**X**
Average Revenue per Client	$XXX,000
New Revenue Generated	**$XXX,000**
Primary Impact Metric	XXX
Avg. Profit Margin	XX%
Total Profit	$XX,000
Total Yoko Expenses	$XX,000
Return on Investment (Revenue)	$X.xx : 1
Return on Investment (Profit)	**$X.xx : 1**

Future Engagement Conversion Funnel Reports

Should we determine we're a good fit to work together on an ongoing basis after this assessment, we will provide you with an updated version of this report regularly. Future versions will show period to period comparisons allowing you to not only track progress, but easily determine what stage of the process can be improved upon to provide the maximum benefit.

Period:	Q1		Q2
Total Search Impressions	**73,492**	⬆	**75,000**
Impression to Visit Rate	9.45%		9.79%
Total Website Users	**6,952**	⬆	**7,341**
Users to Engaged User Rate	32.85%		30.15%
Total Engaged Users	**2,284**	⬇	**2,213**
Engaged User to Contact Rate	5.16%		6.73%
Total Contacts	**118**	⬆	**149**
Contact to MQL Rate	15.25%		12.08%
Marketing Qualified Leads	**18**	▬	**18**
MQL to SQL Rate	38.88%		33.33%
Sales Qualified Leads	**7**	⬇	**6**
Introductions	7	⬇	6
Introduction to Questionnaire Rate	71.42%		83.33%
Questionnaires	5	▬	5
Questionnaire to Proposal Rate	80%		100%
Proposals	4	⬆	5
Proposal to Negotiation Rate	75%		80%
Negotiations	3	⬆	4
Negotiation to Contract Rate	33.33%		50%
Contracts	1	⬆	2
SQL to New Relationship Rate	14.28%		33.33%
New Clients	**1**	⬆	**2**
Average Revenue per Client	$38,000	⬇	$27,300
New Revenue Generated	**$38,000**	⬆	**$54,600**
Primary Impact Metric	260	⬆	594
Avg. Profit Margin	25%	▬	25%
Total Profit	$9,500	⬆	$13,650
Total Yoko Expenses	$5,250	▬	$5,250
Return on Investment (Revenue)	$7.24 : 1	⬆	$10.40 : 1
Return on Investment (Profit)	**$1.81 : 1**	⬆	**$2.60 : 1**