

# Marketing Maturity Assessment

Test Company

An initial assessment of marketing capabilities, and prescribed next steps

Strategy by Ascendancy  
[www.ascintel.com](http://www.ascintel.com)

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# Business & Marketing Objectives



## Top Business Objectives



Increase Revenue



Grow Profits



Help the Community

## Top Marketing Objectives



Find New Customers



Retain/Expand Existing Customers



Expand Into a New Market



# Existing Web Presence

Overall Web Presence **50%**



An effective web presence is essential for achieving business growth and marketing objectives



Optimized for search terms (SEO) - **0%**

**Next steps:** Know the customers, understand their problems, make a list of terms they use



Clear Calls to action - **75%**

**Next steps:** Create next steps from each page. What is success for each page?



Valuable content for prospects/customers - **50%**

**Next steps:** Evaluate which pieces of content are clicked or downloaded the most. Replicate the good



Optimized for mobile - **25%**

**Next steps:** Fast track upgrades to our site to optimize access for mobile devices



Simple way to collect leads - **100%**

**Next steps:** Congrats! All set here



Web presence effectiveness

**Next steps:** Refine web presence and optimize to achieve business and marketing goals

## Summary:

Web Presence is a critical asset for Marketing. Let's grow our score.



# Existing Email Capabilities

Overall Email Capabilities **50%**



Email is the backbone for efficient customer and prospect communications



**Marketing Automation System - 0%**  
**Next steps:** Do research on marketing automation system options



**Existing Newsletters - 25%**  
**Next steps:** Start small and test a newsletter to help customers



**Automated Nurture Journeys - 50%**  
**Next steps:** Create a sample, time-based email journey and measure customer engagement and results



**Dynamic / personalized content - 75%**  
**Next steps:** Create dynamic & personalized emails, and strive for industry-leading engagement metrics



**Email Testing Plan - 100%**  
**Next steps:** Congrats! All set here



**Capabilities Effectiveness**  
**Next steps:** Segment registrants and create communication schedule to help nurture their interest

## Summary:

Without effective email, our other marketing communication channels will struggle.  
Let's get it right!





## Other Digital Presence

Overall Other Digital Presence **50%**



Inbound marketing requires efficient digitization of all customer interactions to scale.



**Internet Display Ads - 0%**

**Next steps:** Evaluate if there is a need to target customers or prospects based on web behavior



**Paid Social - 50%**

**Next steps:** Test, optimize, and scale. Create multiple campaigns and place your investment according to results



**Customer Online Communities - 100%**

**Next steps:** Congrats! All set here



**Organic Social - 25%**

**Next steps:** Understand customer personas, and most-used social channels, to build corporate presence



**Webinars or Virtual Events - 75%**

**Next steps:** Publish calendar using customers, industry experts, and SME panels and training sessions



**Overall Effective**

**Next steps:** Refine the plan, test and optimize to achieve business and marketing goals

### Summary:

Create a demand generation strategy that adds in digital touchpoints. Test and optimize to maximize ROI.



# Test Company Events

Overall Event Capabilities **50%**



Events offer opportunities to connect with prospects and customers. There is a shift to virtual events, but in-person can still be very valuable.



## Webinars or Webcasts - 0%

**Next steps:** Evaluate if there is a large enough customer/prospect base to make scaled virtual events valuable



## Trade shows - 25%

**Next steps:** Short list events. Ask organizers for event ROI. Test simple and track engagement & impact



## Major Customer Events - 50%

**Next steps:** Good, but could be better. Focus on the customer experience and desired results, and test strategic ideas



## Roadshows (Multiple events, same format) - 75%

**Next steps:** Evaluate total addressable market (TAM) and determine the ROI of expanding. Refine timing and content.



## In-person User Groups - 100%

**Next steps:** Congrats! All set here



## Overall Effective

**Next steps:** Refine the events plan, test and adjust to achieve business and marketing goals

## Summary:

Virtual events are inexpensive and quick to implement. Test creation and expansion of virtual events, and ask customers before planning in-person events.



## Content Creation

Overall Content Capabilities

50%



A robust content creation and promotion strategy helps tell our key value proposition story in terms customers will understand.



Blogs - 0%

**Next steps:** Create a list of topics, contributors, and customer terms. Train on elements of an effective blog



Customer Checklists - 50%

**Next steps:** Test and optimize. Try different subjects, formats, and distribution methods. Evaluate results and optimize



Infographics - 100%

**Next steps:** Congrats! All set here



Whitepapers or Large Content - 25%

**Next steps:** Take your prospects' view on what would be helpful, and identify trusted subject matter experts



ROI Calculators - 75%

**Next steps:** Ask customers what they need and co-create with industry leaders and analysts. Promote via digital channels



Customer Testimonials - 50%

**Next steps:** Try different formats for the topics and channels used to promote. Consider multiple versions applied to unique channels

### Summary:

Determine the parts of the marketing and sales funnel that can be replicated and scaled using compelling content. Test and optimize!





## Advocacy & Referrals

Overall Advocacy Capabilities **50%**



**Referral Incentives / Bonus - 25%**

**Next steps:** Design a plan with legal consultation and customer input



**Product / Service Discounts - 50%**

**Next steps:** Publish a time-limited plan and encourage existing customers to take advantage of the discounts



**Other / (Speaking Engagements, etc) - 75%**

**Next steps:** Publish full customer benefits of advocacy and referrals and use it as part of the pre-sale process. Test and Optimize

### Summary:

Consider creating more testimonials, event speaking, and opportunities for customers to benefit by telling our story.





# Customer & Prospect Data

Overall Data Capabilities **50%**



Managing customer and prospect contactability data is a challenge for many organizations. Progress is key.



Customer Account List - **25%**

**Next steps:** Create simple, consolidated databases for marketing purposes



Customer Contact List - **50%**

**Next steps:** Link customer data to the CRM & marketing automation system. Cleanse and append data with validated contacts



Prospect List - **75%**

**Next steps:** Test and optimize 3rd party sources for prospects, collect throughout all marketing, and score leads for sales

## Summary:

Realistically assess the current state of data cleanliness, accuracy and storage, and plan incremental steps for improvement.



# Summary Scores

Overall Marketing Maturity **50%**



An effective web presence is essential for achieving business growth and marketing objectives



Web Presence - 50%



Email Capabilities - 50%



Other Digital Presence - 50%



Events - 50%



Content Creation - 50%



Advocacy & Referrals - 50%



Customer & Prospect Data - 50%

## Notes:

- The different categories have different weights
- It may be fine to score low in areas if the intended strategic focus is elsewhere.
- Prioritization is good.
- Contact Ascendance for your next level assessment



# Additional Resources



## Web Presence

1. [Entrepreneur: How to Make Your Small Business Website Really, Really Effective](#)
2. [Feeling Peaky: 9 Fundamentals of good web design](#)



## Email Capabilities

1. [HubSpot: 17 Email Marketing Best Practices that Actually Drive Results](#)
2. [Constant Contact: Email Marketing Best Practices](#)



## Other Digital Presence

1. [HubSpot: What is Inbound Marketing?](#)
2. [Digital Marketing: What is Social Media Marketing](#)



## Events

1. [Cvent: Event Marketing Guide: Strategies, Ideas, and Examples](#)
2. [SpotMe: 14 Best Practices for Hosting Virtual Events](#)



## Content Creation

1. [Hubspot: The Ultimate Guide to Content Creation](#)
2. [Forbes: 15 Best Practices for Producing Quality, Engaging Content](#)



## Advocacy & Referrals

1. [Ambassador: The Referral Marketing Handbook](#)
2. [Advos: Best Practices for Starting an Advocacy Program](#)



## Customer & Prospect Data

1. [Ontraport: The Do's and Don'ts for Handling Customer Data](#)
2. [Zendesk: 8 Ways to Effectively Manage and Protect Your Customer Data](#)

