

# Marketing Health Check

A practical review for small businesses

Use this checklist to identify gaps in your marketing and enquiry process. Set aside 30 minutes, open your website on a phone, and review a few recent enquiry records.

## How to complete it

For each question, mark Yes, No, or Unsure. Add a short note with evidence. A No suggests an improvement to investigate. Unsure suggests something to check. This is a prioritisation worksheet, not an industry benchmark or validated score.

Business: \_\_\_\_\_ Date: \_\_\_\_\_

Main service: \_\_\_\_\_

Outcome you want to improve: \_\_\_\_\_

## Positioning and offer

| Question                                            | Yes / No / Unsure |
|-----------------------------------------------------|-------------------|
| Can you name the customer you want to serve?        | _____             |
| Can you explain their main problem in one sentence? | _____             |
| Does your service page explain what is included?    | _____             |
| Do you have evidence for the claims you make?       | _____             |

## Website and enquiry route

| Question                                            | Yes / No / Unsure |
|-----------------------------------------------------|-------------------|
| Is your main service clear when viewed on a phone?  | _____             |
| Is the next step easy to find?                      | _____             |
| Have you tested your actual contact links or forms? | _____             |
| Does the enquiry reach the person responsible?      | _____             |

# Find the gaps

## Discovery and content

| Question                                            | Yes / No / Unsure |
|-----------------------------------------------------|-------------------|
| Do you know which channels bring suitable visitors? | _____             |
| Does your content answer real customer questions?   | _____             |
| Do relevant articles link to useful service pages?  | _____             |
| Have you checked for broken links or missing pages? | _____             |

## Sales follow-up

| Question                                                 | Yes / No / Unsure |
|----------------------------------------------------------|-------------------|
| Does each new enquiry have an owner?                     | _____             |
| Do you record a specific next action and due date?       | _____             |
| Does your team agree what counts as a qualified enquiry? | _____             |
| Do you close inactive opportunities with a reason?       | _____             |

## Measurement and improvement

| Question                                                         | Yes / No / Unsure |
|------------------------------------------------------------------|-------------------|
| Do your reports separate contact clicks from received enquiries? | _____             |
| Do you record enquiry sources where known?                       | _____             |
| Do you track bookings or sales as separate outcomes?             | _____             |
| Do you review one improvement against evidence?                  | _____             |

# Choose your next action

Review the No and Unsure answers. Choose one issue that affects your intended customer and one action you can realistically complete. Avoid changing every channel at once.

## Completed example - fictional business

| Field              | Example                                                        |
|--------------------|----------------------------------------------------------------|
| Business           | A local service consultancy                                    |
| Observation        | Three recent enquiries had no named follow-up owner.           |
| Evidence           | Review of the team enquiry log.                                |
| Action             | Assign an owner and next action to each active enquiry.        |
| Owner and deadline | Operations lead; next Friday.                                  |
| Review             | Check the next ten enquiries for ownership and follow-up gaps. |

## Your main gap and supporting evidence

Your notes

## One action, owner, and deadline

Your notes

## What you will review, and when

Your notes

Bring your completed worksheet to a **1-on-1 session with Abhilash**. Share your main question and preferred time. Scope and fees are agreed before booking.

Original worksheet by Abhilash E. Version 1.0 - 3 October 2026.