

## How Healthy is Your Marketing Program?: Why an Audit Should Be an Integral Part of Your Strategy

By Carolyn Merriman and Laurie Slater

As more and more companies are demanding a return on investment, marketing leaders are finding themselves in the hot seat. And while brand recognition still exists as a top priority, validating your marketing plan in terms of referral volume conversion to the bottom line is quickly becoming the *main* priority.

Despite your best intentions, you may be sabotaging your brand, losing market share, and gradually achieving fewer of your desired financial goals. Budgets are requiring programs to do more with less and, in some cases, face uncomfortable decision-making. For those who haven't succeeded at proving value or ROI, cutbacks are inevitable.

Sure, you can stay status quo and not proactively or strategically address changes in your environment. Be forewarned, however: This is the very thing keeping your CEO awake at night. As a busy executive, you may be missing something if you're always solving or addressing the marketing crisis of the day. What's more, you might only be at the symptom level and nowhere near the diagnosis—and, moreover, even further from the treatment.

To find the true source of any ailment affecting your program, you need to take a hard look at the things you may have been ignoring, or avoiding. Once you define the symptoms, your treatment should include a thorough audit. This is an independent evaluation that includes both quantitative and qualitative analysis to reveal strengths and weaknesses, and recommendations for the current and future plans.

### ***Identify signs and symptoms of an ailing program.***

Are you experiencing any changes in your customer's perceptions?

- Decrease in patient satisfaction scores
- Decrease in physician satisfaction scores
- Stymied satisfaction scores within a division
- Anecdotal customer service issues
- A gap between customer perceptions and the intended message or result

Have you experienced a sudden or gradual change in your position?

- Loss of market share
- Market strategies from the competition encroaching on your primary service area
- Ineffective marketing tactics
- A loss of internal credibility

- Internal behaviors not modeling brand promise

Are you experiencing an unprecedented trend in the financial figures?

- Lack of positive outcome measures linked to the marketing and sales planning goals
- Lack of reportable bottom-line ROI measures for marketing tactics

If your organization has any of these symptoms, realize that you can no longer rely on traditional fixes that have maintained your division in the past. If you do, you may be risking more than you realize: Your position (and your very existence) within the organization could be in jeopardy—with your role seen as an afterthought, or viewed simply as “one of the PR-flyer-and-brochure-people.”

Beyond your standing, if left alone to traditional marketing ways, you could be fostering a dysfunctional team, a staff embroiled in poor morale or engaged in brand sabotage behaviors. Together, it all translates in the field to ineffective messaging and, ultimately, a situation that affects both work production and delivery.

*Don't let this be your legacy.* You and your team need to be seen as strategic within Leadership, as part of a leading-edge group that's willing to adopt new methods, regardless of what's happening in the industry.

#### **4 Key Components of a Marketing Audit**

Begin with what keeps your CEO up at night. Conduct a phased audit—tackling the hard-hitting topics first, including your division's tie-in to overall strategic goals, marketing and sales effectiveness, and look at how these complementary tactics convert to bottom-line contributions. Then review how the department is regarded within your organization. Understanding how the team delivers on its internal strategy is just as crucial to external delivery.

##### **1. Audit your marketing efforts for effectiveness.**

Is what you and the team wrote in the marketing plan actually focused on the right results? Look at all of the contributing factors that impacted the business for both the good and the bad over a certain time period, and link these back to the original plan.

Is your customer's satisfaction positive and are they pleased? Review satisfaction based on both anecdotal market intelligence shared by the sales team, as well as detailed comments from your customer groups—both consumers and physicians. Be honest, survey the team and answer the questions with facts not feelings. Make adjustments to your tactics if you find the satisfaction not ideal.

##### **2. Audit your performance based on intended ROI.**

Are the expense dollars you're allocating meeting the expected outcomes? Track performance of your advertising and promotional events, sales team activities and other programs through actual calculated volume or referral data.

Did marketing and sales plans achieve stated financial and non-financial goals and objectives? Identify aspects of the plan failing to meet objectives with specific recommendations for improving next year's performance. Do you have the right systems in place to calculate ROI? Review your integration with the service-line leaders, their volumes and revenues within their data capture. What percent of revenue is recurring? Determine if you can attribute this event to any marketing or sales activities.

Is this outcome information finding its way back to your division? Determine ways to seek this information on a regular basis. Is the sales team executing the sales plan and the supporting marketing plan with measurable objectives and tactics? Seek to understand the sales plan tactics and how marketing fits best as a supportive effort.

How well are you measuring consumer activity? Review your integration with the call center and Web site. Evaluate all the consumer touch points, making sure there are mechanisms in place to successfully monitor them. Determine where the marketing plan failed to meet objectives and how these can be translated into next year's expected performance.

### **3. Audit your strategy.**

To what extent has the competition affected performance of planned referral/volume criteria? Understanding what the competition is doing may involve more than your team. You may call on the sales team to provide you with market intelligence updates. Is the current value of brand in place for each product/service? Map out the identity that your services are portraying before going to market. Does the customer service you offer deliver on the promise and create lasting value? Brand management begins with the internal team and how they position their service and operational readiness.

Do your materials and messages offer benefits to your customers and provide value for your sales team? Audit all material in the market for effectiveness and consistency. This can be done by using an assessment of the audience reached, its main message, brand and benefit language and the call to action. Are your marketing campaigns affecting the sales conversion? Conduct a cross-functional assessment to determine if relevant messaging and tools are in place.

### **4. Audit your department and staffing.**

Is there a team understanding of brand attributes and assets? Informally review your own team's attitude toward the brand and tactics. At what level do you find your team with internal buy-in? Assess if they are talking the talk and walking the walk with others in the organization. If you find that team members aren't customer friendly when working with other departments or internal constituents, you may need to modify expectations first within your own group.

Is your marketing team living in a consistent crisis, reactive mode? Regroup and dissolve sacred processes that only cause bottlenecks. Is there an understanding of

overall marketing, are there positive attitudes toward your efforts and an existing internal satisfaction of service line and Leadership involved in the marketing function? Find time to regularly discuss the perception of your team with the executives. Getting your executives on board is important to your continued success.

### ***Keep Evaluating Your Program***

Auditing your program should become a constant process. An effective marketing leader should always scan for new approaches, assess what is working well and what would benefit from improvement, and continue to find ways to prove the program's effectiveness.

The best leaders stay ahead of the curve by:

- Taking an ongoing, objective snapshot of their department, function, strategy, structure, staff, performance/results
- Measuring outside and inside the industry snapshots to stay leading edge
- Creating a culture and a department that people want to work for and within
- Raising the bar of their performance and deliverables for the organization

*Seek to audit your division objectively.* Look at your people, your objectives, your processes and your output with fresh eyes. If it's tough for you to be objective, don't hesitate to get an outside perspective. Performing an ongoing audit is the linchpin in achieving long-term marketing viability. For a step-by-step plan to evaluating your organization, download Corporate Health Group's audit checklist:  
<http://www.corporatehealthgroup.com/services/marketing.html#checklist>