

Please answer the following questions to the best of your ability.  
Add your answers to the respective 'Current State' box and then select the rating for yourself in that area.

Current State

Rate How You Think You're Doing In This Area  
(1 - Not great; 10 - Phenomenal)

**Marketing Shared Understanding and Definitions:**

All owners and other stakeholders have a shared understanding of what marketing is for an MSP. Marketing terms and lingo are defined and understood by key members of the team to avoid mis-alignment.

Your Answer Here

4

**Business Vision and Objectives:**

Describe your current vision. Does your marketing strategy align with this vision?  
Are your company business objectives set. Is the marketing strategy aligned, as well?

Your Answer Here

6

**Marketing Math:**

Is your revenue growing compared to historic performance and industry benchmarks?  
What is your profit margin for each product/service? Is it sustainable? Are your growth objectives for each key product/service clear? Is your marketing strategy aligned with these objectives? Does your cost of sales and marketing support your growth objectives and the bottom-line?

Your Answer Here

4

**Marketing Commitment:**

Are the owners committed to building a marketing program the right way, and building it over time ?

Your Answer Here

10

**Marketing Gaps:**

Have you assessed your marketing gaps based on proven MSP strategy and tactics? Have you prioritized which gaps need to be addressed in the next phase of building your marketing program?

Your Answer Here

8

**Marketing Team: Strategic/Managerial/Tactical:**

Have you put together an accountability org chart for the marketing team? Have you hired the people and or partner vendors needed to help you address your gaps and achieve your objectives in the next 12 months? Is your role clear to yourself and others?

Your Answer Here

9

**Marketing Strategy/Tactics/Schedule:**

Have you and your team defines where you are going, how, and what happens when? In the next 90 days? Year?

Your Answer Here

4

**Marketing Brand Elements:**

Have you invested to get your foundational brand elements correct to support your strategy?

Your Answer Here

4

**Net New Client Revenue Team Meeting Rhythm:**

Have you established regular meeting schedule (strategic/planning and operational) for the team? In that meeting are you prepared to measure KPI's, look at short term needs/schedules, discuss and solve issues and hold one another accountable?

Your Answer Here

7

**Marketing Execution:**

Are the gaps being addressed? Are you moving from the commitment zone to the confidence zone to the marketing zone? Are you gaining command of marketing strategy, tactics, schedule and consistently getting new leads and appointments each month?

Your Answer Here

1

**Marketing in the Sales Process:**

Are you leveraging marketing to help in the sales process to increase your close rate?

Your Answer Here

1

**Marketing in Service Delivery:**

Are you leveraging marketing to help in service delivery where there are key areas of opportunity: Account Management, Support, Projects/Professional Services? Both to expand your services and gain trust content that can lead to more new customers and referrals?

Your Answer Here

10

**Marketing Discipline:**

Before taking on advanced tactics and campaigns the foundational tactics and campaigns have matured and are producing desired outcomes.

Your Answer Here

6

**Marketing Celebrations:**

As the leader you are celebrating wins big and small, providing encouragement and sharing accomplishments across the company to insure marketing's value is raised up and understood to other functions and departments in the organization.

Your Answer Here

1