



Marketing Assessment Report

for [CLIENT NAME]

Produced by:



[DATE]

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Introduction

The primary purpose of this project was to assess the marketing and market areas of [NAME] to identify areas of opportunities to further expand and brand the company.

The secondary purpose was to determine recommendations for future marketing that could inform a proposed plan of action with outsourced help.

Within is a compilation of findings based on numerous meetings, site visits, and other research modalities, and the resulting recommendations.



Research Methods

Online



Onsite



In-Person



The PTE team took a multifaceted research approach leveraging online resources (primary and secondary research), executive team collaboration via email, phone and in-person, as well as onsite tours to best familiarize ourselves with [NAME] and provide the most complete assessment possible.

Census Findings

All data as of July 2021



Online Reputation Management Standings



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Marketing Assessment

Channel Overviews

Facebook

- Assessment of social media channel audience, frequency and quality of posts, etc.

Instagram

- Assessment of social media channel audience, frequency and quality of posts, etc.

YouTube

- Assessment of social media channel audience, frequency and quality of posts, etc.



The Big Picture

Findings from onsite and
other research

Location

- SWOT Analysis information
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats



“

“Quote from assessment interviews”



“Quote from assessment interviews”

Marketing

- Website
 - Findings
- Marketing Strategy
 - Findings
- Advertising
 - Findings
- Email
 - Findings
- Online reputation management
 - Findings
- Social Media
 - Findings
- Creative
 - Findings



The Future

Recommendations based on the findings, our experience, and stated business goals

Marketing Recommendations

- **Marketing strategy**
 - Detailed recommendations
- **Marketing budget**
 - Detailed recommendations
- **Tracking**
 - Detailed recommendations
- **Branding**
 - Detailed recommendations
- **Website**
 - Detailed recommendations
- **Advertising**
 - Detailed recommendations

Marketing Recommendations

- **Video**
 - Detailed recommendations
- **Social Media**
 - Detailed recommendations
- **Email marketing**
 - Detailed recommendations
- **Public Relations**
 - Detailed recommendations
- **Online reputation management**
 - Detailed recommendations

Recommendations

Synopsis

Main Idea

Explanation

Main Idea

Explanation

Main Idea

Explanation

Main Idea

Explanation

Main Idea

Explanation



The sky is the limit.

Thank you for the opportunity to do this assessment and get to know your business on a deeper level. [NAME] has so much going for it and so much opportunity; it's very exciting.

It was our pleasure, and we would welcome the opportunity to collaborate further. A proposal will be submitted for virtual CMO and marketing services.

Samantha Scott, APR

Samantha@GetPushing.com | 239.221.2858