

Comprehensive B2B Marketing Self-Assessment

To identify areas for improvement and help gauge the effectiveness of your company's strategic and tactical marketing capabilities, simply answer the questions below as truthfully and objectively as possible. Remember that true capabilities are consistently-delivered or acted-upon. Therefore, any question that elicits a "maybe" or "sometimes" or "sort of" should be marked as a "No," until such time you can definitively affirm consistent application.

1 MARKET SEGMENTATION & TARGETING	YES	NO
Have you explored multiple ways to segment or group prospects in your market for marketing and sales purposes?	<input type="checkbox"/>	<input type="checkbox"/>
Have you identified the different segments or groups of prospects that share similar needs, problems, and motivations?	<input type="checkbox"/>	<input type="checkbox"/>
Is your segmentation model proprietary to your company and based on your firm's unique understanding of the marketplace?	<input type="checkbox"/>	<input type="checkbox"/>
Was your sales team actively involved in the process of developing your segmentation model and making your targeting decisions?	<input type="checkbox"/>	<input type="checkbox"/>
Have your segmentation hypotheses been tested, validated and refined through research with customers and prospects?	<input type="checkbox"/>	<input type="checkbox"/>
Can you identify the members of different segments by certain firmographic attributes and/or behavioral characteristics?	<input type="checkbox"/>	<input type="checkbox"/>
Have you quantified the relative magnitude of each segment's potential short- and long-term financial value to your business?	<input type="checkbox"/>	<input type="checkbox"/>
Have you realistically evaluated your company's ability to win a disproportionate share of the business in each prospect segment?	<input type="checkbox"/>	<input type="checkbox"/>
Have you proactively selected the segments of the market you're targeting, based on a combination of potential and winnability?	<input type="checkbox"/>	<input type="checkbox"/>
Have you identified the less desirable or winnable segments of your market and taken deliberate steps to avoid engaging with them?	<input type="checkbox"/>	<input type="checkbox"/>
Are the sales and marketing teams both using the same targeting criteria, segment definitions and/or personas?	<input type="checkbox"/>	<input type="checkbox"/>

2 MARKETING RESEARCH & COMPETITIVE ANALYSIS	YES	NO
On a regular basis, do you conduct in-depth interviews with a number of customers and prospects in each of your target segments?	<input type="checkbox"/>	<input type="checkbox"/>
Have you documented each target segment's stated problems, buying motivations, priority value drivers, and selection criteria?	<input type="checkbox"/>	<input type="checkbox"/>
Do you gather internal perspectives on the needs, motivations, and perceptions of prospects to identify and correct misconceptions?	<input type="checkbox"/>	<input type="checkbox"/>
Have you conducted win/loss analysis to understand the real reasons prospects choose you, one of your competitors, or no one at all?	<input type="checkbox"/>	<input type="checkbox"/>
Do you make sales and marketing decisions based on your research rather than internal assumptions, gut feelings, or what's popular?	<input type="checkbox"/>	<input type="checkbox"/>
Have you gone on sales calls with your sales team to gain a better understanding of what actually happens in the field?	<input type="checkbox"/>	<input type="checkbox"/>
Have you identified the major direct and indirect competitors that prospects in each segment are most likely to consider?	<input type="checkbox"/>	<input type="checkbox"/>
Do you treat "stick with the status quo" or "do nothing" as viable competitive alternatives for prospects in your target segments?	<input type="checkbox"/>	<input type="checkbox"/>
Have you studied how your prospects prefer to gather and receive information during their decision-making processes?	<input type="checkbox"/>	<input type="checkbox"/>
On a regular basis, do you conduct audits and assessments of your direct and indirect competitors in each of your target segments?	<input type="checkbox"/>	<input type="checkbox"/>
Is your competitive analysis focused on identifying gaps between what prospects want/need and what competitors deliver?	<input type="checkbox"/>	<input type="checkbox"/>
Do you distribute the findings and analysis of your marketing research and competitive analysis to the rest of your company?	<input type="checkbox"/>	<input type="checkbox"/>
Have you transformed your findings into personas or profiles to make each segment easier to identify and address in the field?	<input type="checkbox"/>	<input type="checkbox"/>
Do you leverage your most recent marketing research findings and analysis to further refine your overall segmentation model?	<input type="checkbox"/>	<input type="checkbox"/>

3 PRODUCT OFFERINGS & PRICING STRUCTURES	YES	NO
Have your offerings been developed through in-depth research into the problems, frustrations, and needs of market members?	<input type="checkbox"/>	<input type="checkbox"/>
Are your offerings innovative and/or distinctive in ways that align to prospects' top priorities, value drivers, and selection criteria?	<input type="checkbox"/>	<input type="checkbox"/>
Have you taken proactive steps to estimate and quantify the value your offerings deliver to customers, along multiple dimensions?	<input type="checkbox"/>	<input type="checkbox"/>
Are your prices based on perceived value and/or willingness-to-pay, rather than being markups over cost or competitive matches?	<input type="checkbox"/>	<input type="checkbox"/>
Does your pricing structure enable and encourage tradeoffs between the discounts being sought and the value being delivered?	<input type="checkbox"/>	<input type="checkbox"/>
Do your product lines or offerings contain "good, better, best" options to leverage choice dynamics and promote price/value tradeoffs?	<input type="checkbox"/>	<input type="checkbox"/>
Have those who are setting and/or negotiating prices in your company received training in sound pricing principles and practices?	<input type="checkbox"/>	<input type="checkbox"/>
Does your pricing and discounting structure have rigid and difficult-to-cross "fences" between the different offerings and price levels?	<input type="checkbox"/>	<input type="checkbox"/>
Are strategic and tactical pricing considerations an integral part of your product development process, rather than an afterthought?	<input type="checkbox"/>	<input type="checkbox"/>
Have you translated your offerings' key features into meaningful benefits that prospects will recognize as important and valuable?	<input type="checkbox"/>	<input type="checkbox"/>
Does your product training teach salespeople about each segment's problems/priorities and how to differentiate from alternatives?	<input type="checkbox"/>	<input type="checkbox"/>
Do your product managers regularly engage with current customers to understand how your offerings perform in real-world settings?	<input type="checkbox"/>	<input type="checkbox"/>
Are salespeople expected to adhere to defined pricing structures and discounting policies, rather than having broad discretion?	<input type="checkbox"/>	<input type="checkbox"/>
Have you defined which specific offering/segment combinations are most profitable and advantageous to prioritize and pursue?	<input type="checkbox"/>	<input type="checkbox"/>

4 GO-TO-MARKET & CHANNEL MANAGEMENT	YES	NO
Were different sales models and go-to-market approaches considered and evaluated before arriving at the model you're using now?	<input type="checkbox"/>	<input type="checkbox"/>
Do you regularly reassess your routes to market as your business evolves and the competitive environment changes?	<input type="checkbox"/>	<input type="checkbox"/>
Are your direct sales territories determined through thoughtful analysis of the geographic distribution of your target prospects?	<input type="checkbox"/>	<input type="checkbox"/>
Have your channel partners been selected according to strategic fit with your targeting decisions and overall positioning?	<input type="checkbox"/>	<input type="checkbox"/>
Do you market to your channel partners on an ongoing basis to maximize share of mind and influence at the point of sale?	<input type="checkbox"/>	<input type="checkbox"/>
Are your go-to-market decisions based on what's really best for your marketing strategy, rather than following "industry standards"?	<input type="checkbox"/>	<input type="checkbox"/>
Have you architected and designed your go-to-market approach to minimize channel conflict and potential cannibalization?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a solid understanding as to the relative profitability of the various direct and indirect sales channels you are using?	<input type="checkbox"/>	<input type="checkbox"/>
Are your channel partners viewed as extensions of your own team, rather than being viewed solely as customers themselves?	<input type="checkbox"/>	<input type="checkbox"/>
Have you assessed the viability of an e-commerce channel in your business for direct sales as well as improved channel control?	<input type="checkbox"/>	<input type="checkbox"/>
Do you market to prospective end-users and customers to create pull-through demand and drive purchasing preference?	<input type="checkbox"/>	<input type="checkbox"/>
Has in-depth analysis of untapped prospect potential been used to determine your direct sales coverage and sales headcount?	<input type="checkbox"/>	<input type="checkbox"/>
Is the time, effort, and resource you're investing in enablement and support aligned to the performance of your channels?	<input type="checkbox"/>	<input type="checkbox"/>
Have you considered using referral partners as a way to reach your target segments without shifting the resulting transactions?	<input type="checkbox"/>	<input type="checkbox"/>

5 STRATEGY ARTICULATION & DIFFERENTIATION	YES	NO
Have you documented a comprehensive "master story" or "stadium pitch" for each of the segments that you are targeting?	<input type="checkbox"/>	<input type="checkbox"/>
Was your strategy articulation and messaging developed AFTER conducting customer research and competitive analysis?	<input type="checkbox"/>	<input type="checkbox"/>
Do your messages talk mostly about the problems and priorities of your prospects, rather than your company and solutions?	<input type="checkbox"/>	<input type="checkbox"/>
When you do talk about your company and solutions, is what you say only true for you, rather than applying to your competitors, too?	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide credible proof and evidence that your sales and marketing claims are accurate and not just puffery?	<input type="checkbox"/>	<input type="checkbox"/>
Do your sales and marketing messages always speak to the potential alternatives and expose why they are inadequate or insufficient?	<input type="checkbox"/>	<input type="checkbox"/>
Are your messages focused on what prospects already believe to be important, rather than what you think they should care about?	<input type="checkbox"/>	<input type="checkbox"/>
Have you run your messaging platform by your current customers to gauge their reactions and solicit their input/feedback?	<input type="checkbox"/>	<input type="checkbox"/>
Is your sales and marketing messaging clear and specific, rather than being full of meaningless platitudes and "corporate speak"?	<input type="checkbox"/>	<input type="checkbox"/>
Would your prospects say that you are "dramatically different" than your competitors, rather than being fairly similar?	<input type="checkbox"/>	<input type="checkbox"/>
Does your messaging speak to the costs, risks, and/or insufficiencies associated with "doing nothing" or sticking with the status quo?	<input type="checkbox"/>	<input type="checkbox"/>
Does your messaging speak to the multiple dimensions of differential value that your company and/or solutions provide?	<input type="checkbox"/>	<input type="checkbox"/>
If your target prospects were to read your comprehensive strategy articulation, would they be convinced that you're the only choice?	<input type="checkbox"/>	<input type="checkbox"/>
Does your messaging educate prospects about the problem itself to reach target prospects that aren't yet looking for a solution?	<input type="checkbox"/>	<input type="checkbox"/>

6 DEMAND GENERATION & CULTIVATION	YES	NO
Do your lead generation and cultivation mechanisms align to the research-confirmed preferences of your targeted segments?	<input type="checkbox"/>	<input type="checkbox"/>
Are your cultivation efforts designed to provide standalone value by educating your prospects toward making a sound decision?	<input type="checkbox"/>	<input type="checkbox"/>
Have you determined the primary type of demand (explicit vs. latent) your demand generation efforts should be designed to address?	<input type="checkbox"/>	<input type="checkbox"/>
In your cultivation systems and processes, is the frequency of your communications tied to prospect engagement and recency?	<input type="checkbox"/>	<input type="checkbox"/>
Have you assessed the nature of your market (defined vs. undefined) and designed your demand generation programs accordingly?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect to cultivate the majority of the leads you generate for some period of time before turning them over to a salesperson?	<input type="checkbox"/>	<input type="checkbox"/>
Are your efforts designed to engage all of the various influencers, specifiers, and decision-makers at your targeted accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Does your team utilize outbound methods to reach your prospects directly, versus relying solely on inbound leads and prospects?	<input type="checkbox"/>	<input type="checkbox"/>
Rather than engaging in generic "branding" exercises, do your demand generation activities all have specific, measurable objectives?	<input type="checkbox"/>	<input type="checkbox"/>
Do you use web analytics or marketing automation tools to measure the level of engagement and purchase intent of each prospect?	<input type="checkbox"/>	<input type="checkbox"/>
Do your cultivation messages align to the different stages of the prospects' information-gathering and decision-making processes?	<input type="checkbox"/>	<input type="checkbox"/>
Do your marketing-originated cultivation systems and processes continue to run even after a salesperson has gotten involved?	<input type="checkbox"/>	<input type="checkbox"/>
Are you leveraging non-electronic channels and mechanisms to reach your prospects directly---postal mail, telemarketing, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
Can you objectively characterize your overall demand generation efforts as being focused on quality, rather than quantity?	<input type="checkbox"/>	<input type="checkbox"/>

7 SALES EFFECTIVENESS & ENABLEMENT	YES	NO
Beyond product training, do you provide your sales reps with training on segment-specific value drivers and decision criteria?	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide salespeople with competitive "kill sheets" for each targeted combination of customer segment and product?	<input type="checkbox"/>	<input type="checkbox"/>
Have you armed salespeople with strategies or playbooks to help prevent "no decision" losses to "do nothing" or the "status quo"?	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide materials and collateral aligned to specific stages of prospects' decision-making and information-gathering processes?	<input type="checkbox"/>	<input type="checkbox"/>
Have you provided your salespeople with training specific to price negotiation and countering professional procurement tactics?	<input type="checkbox"/>	<input type="checkbox"/>
Have your sales and marketing functions reached agreement as to what constitutes a sales qualified lead or opportunity?	<input type="checkbox"/>	<input type="checkbox"/>
Are your sales and marketing groups in alignment around which segments will be targeted and which segments will be avoided?	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide your salespeople with data-driven insights into potential revenue retention issues occurring within their accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Are you analyzing your reps' books-of-business to identify wallet-share expansion opportunities---i.e. cross-sells and up-sells?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an online portal where salespeople and channel partners can access on-demand training and marketing materials?	<input type="checkbox"/>	<input type="checkbox"/>
Are sales territories established and assigned based on the untapped opportunities that exist, versus simple geographic boundaries?	<input type="checkbox"/>	<input type="checkbox"/>
Do you strive to develop data-driven account plans for each and every customer you currently do business with, regardless of size?	<input type="checkbox"/>	<input type="checkbox"/>
Have you implemented a structured training and coaching regime for onboarding new salespeople and making them productive?	<input type="checkbox"/>	<input type="checkbox"/>
Do you regularly identify positive performance outliers, investigate what's being done differently, and share those best practices?	<input type="checkbox"/>	<input type="checkbox"/>

8 CUSTOMER REMARKETING & RETENTION	YES	NO
Have you calculated or estimated the potential (or actual) lifetime value of a typical target customer to your particular business?	<input type="checkbox"/>	<input type="checkbox"/>
Do you view customer retention in terms of the revenue and profits retained, rather than simply whether the customer is still buying?	<input type="checkbox"/>	<input type="checkbox"/>
Have you proactively determined the proper balance of your efforts between growing existing customers and acquiring new ones?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have ongoing remarketing programs, specifically designed to engage, retain, and grow your existing customers?	<input type="checkbox"/>	<input type="checkbox"/>
Have you stratified or segmented your existing customer base in terms of "retention accounts" versus "growth accounts"?	<input type="checkbox"/>	<input type="checkbox"/>
Does your perspective encompass your entire customer base, versus just focusing on the customers who are currently the largest?	<input type="checkbox"/>	<input type="checkbox"/>
Have you used comparative analysis or other means to estimate the untapped wallet-share available in each customer account?	<input type="checkbox"/>	<input type="checkbox"/>
Are you monitoring and analyzing your customers' buying patterns to anticipate upcoming sales or replenishment opportunities?	<input type="checkbox"/>	<input type="checkbox"/>
Is marketing actively involved in, and responsible for, customer retention, versus it just being left to the individual sales reps?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have data-driven mechanisms in-place to alert your sales team to the early signs of customer defection or attrition?	<input type="checkbox"/>	<input type="checkbox"/>
Do you conduct regular interviews with your existing customers to assess their defection risk and understand retention drivers?	<input type="checkbox"/>	<input type="checkbox"/>
Are you developing data-driven and growth-oriented account plans for every customer, versus just the top accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Have you established a "customer advisory board" or something similar to promote greater engagement and understanding?	<input type="checkbox"/>	<input type="checkbox"/>
Is the management team updated on a regular basis about retention issues and the overall "health" of the existing customer base?	<input type="checkbox"/>	<input type="checkbox"/>

9 PERFORMANCE MEASUREMENT & OPTIMIZATION	YES	NO
Does your marketing function have a "by the numbers" orientation, where financial performance is the primary consideration?	<input type="checkbox"/>	<input type="checkbox"/>
Are your marketing people paying at least as much attention to sales funnel metrics as they are paying to marketing funnel metrics?	<input type="checkbox"/>	<input type="checkbox"/>
Is your team in the habit of testing new treatments and approaches against a "control" to empirically determine relative efficacy?	<input type="checkbox"/>	<input type="checkbox"/>
Are your marketing people expected to model, in advance, the level of performance that is necessary to make new investments pay off?	<input type="checkbox"/>	<input type="checkbox"/>
Does your team follow a structured optimization process or method to identify, prioritize, and diagnose improvement opportunities?	<input type="checkbox"/>	<input type="checkbox"/>
Do you track and/or attribute your tactical marketing investments and activities all the way through to net profit contribution?	<input type="checkbox"/>	<input type="checkbox"/>
Does your marketing function measure and project the long-term effects and impacts of your overall sales and marketing efforts?	<input type="checkbox"/>	<input type="checkbox"/>
Are you regularly re-adjusting your tactical marketing and sales investments according to relative short- and long-term ROI?	<input type="checkbox"/>	<input type="checkbox"/>
Have you used near-term (YR1 or YR2) customer lifetime values to establish acceptable acquisition-cost thresholds and targets?	<input type="checkbox"/>	<input type="checkbox"/>
Do you measure and attribute the impacts of your post-acquisition investments on average customer lifetime values?	<input type="checkbox"/>	<input type="checkbox"/>
Are all of your marketing leaders and managers expected to have a working knowledge of performance and financial analysis?	<input type="checkbox"/>	<input type="checkbox"/>
Does your team measure and monitor customer-level metrics such as revenue retention, portfolio penetration, and profit contribution?	<input type="checkbox"/>	<input type="checkbox"/>
Are you measuring the conversion ratios and durations between all of the major stages of your overall marketing and sales process?	<input type="checkbox"/>	<input type="checkbox"/>
Does your marketing team strive to get beyond lead-generation and work to improve post-handoff sales funnel performance?	<input type="checkbox"/>	<input type="checkbox"/>

10 TEAM DEVELOPMENT & ALIGNMENT	YES	NO
Have your marketing people been trained to understand the critical differences between strategic and tactical marketing?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have ongoing training programs and educational resources that are specific to marketing in B2B environments (vs. B2C)?	<input type="checkbox"/>	<input type="checkbox"/>
Has your marketing team been through your company's sales training programs and been exposed to the defined sales processes?	<input type="checkbox"/>	<input type="checkbox"/>
Do your marketing people make decisions based on facts, data, and evidence, versus going with their gut or intuition?	<input type="checkbox"/>	<input type="checkbox"/>
Can everyone on your marketing team do a proper ROI calculation after the fact, and a proper breakeven calculation in advance?	<input type="checkbox"/>	<input type="checkbox"/>
Is your marketing team focused on "meaty" objectives like increasing close-rates, reducing cycle times, improving customer LTVs, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
Does your marketing team formulate their strategic and tactical plans in close collaboration with your sales management team?	<input type="checkbox"/>	<input type="checkbox"/>
Do your marketing people test new things in a smaller and less risky way before placing bigger bets on unproven programs?	<input type="checkbox"/>	<input type="checkbox"/>
Are your marketing leaders/managers "generalists" who understand the broader practice of marketing, versus tactical specialists?	<input type="checkbox"/>	<input type="checkbox"/>
Do you take steps to ensure that your marketing people fully understand the business/financial drivers and market dynamics?	<input type="checkbox"/>	<input type="checkbox"/>
Does your marketing team strive to provide strategic direction for the company, versus merely providing tactical sales support?	<input type="checkbox"/>	<input type="checkbox"/>

Of course, questions with negative responses indicate improvement potential. However, you first want to look at the assessment overall and determine which of the ten sections have the greatest percentage of negative responses. These areas likely represent the weakest links in your overall approach and should be prioritized.

Pay particular attention to deficiencies that are concentrated in any of first five areas. The first five areas are highly strategic in nature and can have a dampening effect on every other area or aspect of your marketing.