



MARKETING AUDIT CHECKLIST

FOR CONTRACTORS

Whether you're a commercial contractor, subcontractor, or service provider, having a **clear and efficient marketing strategy** is essential to staying competitive in today's digital world.

This checklist will help you assess your current marketing efforts, identify areas for improvement, and create a roadmap for growth—whether you're targeting more commercial contracts, exploring new markets, or looking to enhance your online presence.





EVALUATE YOUR MARKETING TECH STACK

What tools are you currently using?

Are your marketing tools integrated, or are you juggling multiple systems that don't communicate with each other? Make sure your CRM, email marketing software, analytics tools, and other platforms are aligned with your business goals and are streamlining your operations.

Is your tech stack supporting your growth?

Assess whether your current tools help you make data-driven decisions and optimize marketing efforts. Are you tracking ROI effectively?



Minimum Requirements for Success

Having a CRM implemented and Google Analytics configured with goal conversions in place and tracking correctly.



ASSESS YOUR DIGITAL ASSET MANAGEMENT PLATFORM

Do you have a centralized system for storing brand assets?

From project photos and case studies to logos and client testimonials, an organized asset management system ensures your materials are consistent and accessible. Without it, time is wasted searching for files, and branding can become inconsistent.

Are all team members on the same page?

Ensure your team can easily access and utilize up-to-date materials for marketing, RFPs, and outreach—such as the latest project profiles and headshots.



Minimum Requirements for Success

Regular checks of your website's case study and portfolio content for accuracy and needed updates.



REVIEW YOUR WEBSITE'S PERFORMANCE

Is your website user-friendly and mobile-optimized?

An outdated or difficult-to-navigate website can turn away potential clients. Make sure your website is modern, intuitive, and mobile-friendly, reflecting the professionalism of your contracting business.

Does your website convert leads effectively?

Review your landing pages, forms, and calls to action (CTAs). Are your visitors easily turning into qualified leads? Improving conversion rates is key to maximizing your website's potential.



Minimum Requirements for Success

An easy to use backend, a page load time under 3 seconds, an intuitive project portfolio section, and clear calls-to-action in place to convert site visitors.



AUDIT YOUR CONTENT STRATEGY

Is your content attracting your target audience?

Whether it's blog posts, case studies, or social media content, make sure your messaging speaks directly to decision-makers in the construction, engineering, and commercial contracting spaces. Are you showcasing the expertise your potential clients are looking for?

Are you leveraging client testimonials and project success stories?

Client stories are one of the most effective ways to demonstrate your credibility and highlight the value of your work. Make sure you're using testimonials and success stories throughout your marketing materials.



Minimum Requirements for Success

A defined value proposition and uncommon selling points, as well as a content calendar created to align to key differentiators.



MEASURE YOUR DATA-DRIVEN MARKETING

Are you tracking KPIs that matter?

Review key performance indicators (KPIs) such as lead generation, conversion rates, and website traffic. Make sure your decisions are based on real-time data and that you're monitoring performance regularly.

Do you have the necessary analytics in place?

Evaluate if you're using tools like Google Analytics, email marketing metrics, and social media insights to track performance and uncover opportunities for improvement.



Minimum Requirements for Success

A robust analytics setup, defined KPIs, regular performance reviews, and clear attribution models to optimize marketing efforts.



EVALUATE LEAD GENERATION AND NURTURING

Do you have an effective lead generation strategy?

From Google Ads to email marketing campaigns, review your lead generation tactics and ensure they're aligned with your business goals. Are you attracting quality leads from commercial or AEC sectors?

How are you nurturing those leads?

Make sure you have a clear process for following up with prospects, building relationships, and converting leads into long-term clients.



Minimum Requirements for Success

A targeted lead generation strategy, a structured follow-up process, and a nurturing system to convert prospects into long-term clients.



CONSIDER YOUR PAID ADVERTISING ROI

Are you currently running paid ads (Google Ads, Facebook Ads, etc.?)

Paid ads can be a powerful tool for gaining visibility and generating leads quickly. If you're not utilizing paid ads yet, you're likely missing out on a substantial pool of potential clients.

Are your ads targeting the right audience?

Review your ad targeting and keywords. Ensure your paid ads are reaching decision-makers in the commercial contracting or AEC industries—whether that's specific geographic regions or types of commercial projects.

How well are your ads converting?

Evaluate how well your ads are converting leads. If they're not generating quality inquiries, it may be time to refine your ad copy, visuals, or targeting.



Minimum Requirements for Success

Strategic audience targeting, optimized ad copy and visuals, and regular performance tracking to maximize ROI.



REVIEW YOUR SOCIAL MEDIA & ONLINE PRESENCE

Are you visible where your prospects are looking?

Evaluate your presence across platforms like LinkedIn, Instagram, and Google My Business. Is your company getting the visibility it deserves among potential clients in your region or industry?

Is your social media strategy consistent and professional?

Your social media presence should reflect your expertise and appeal to your target audience. Consider diversifying content types—such as project videos or client testimonials—and check if you're posting regularly and consistently.



Minimum Requirements for Success

Strong visual branding on key platforms consistent with the website and a plan for regular, professional content updates.



UNLOCK YOUR FULL MARKETING POTENTIAL

If you answered "no" to any of the questions—or you're unsure where to start—it may be time for a digital marketing strategy overhaul. With over **20 years of experience**, we understand the unique challenges faced by commercial and residential contractors and are committed to your long-term success.

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