

**IGM
PROFESSIONAL**

Marketing without blind spots

A practical owner's guide to auditing advertising, website, SEO, analytics, and marketing operations.

Based on the 5-minute marketing effectiveness checklist

Why this guide matters

Most businesses do not lose money because advertising simply "does not work." More often, leads are not counted, sources are mixed up, the website does not explain value, the CRM is disconnected, and reports decorate the problem instead of solving it.

Owner note

What is true today? What must change first?

How to use the audit

Answer each statement honestly. Mark every statement that is true today. Do not aim for a perfect score; aim for a clear picture of where money, attention, and demand are leaking.

- 30+ checks: the system is broadly under control. Keep improving the weak links.
- 10-29 checks: there is a meaningful risk of leakage in advertising, website, or analytics.
- Fewer than 10 checks: start with a full audit of traffic sources, CRM, forms, reporting, and the sales funnel.

Owner note

What is true today? What must change first?

1. Advertising: total spend is known

You can see every expense in one place: channel, campaign, month, contractor, software, fees, taxes, and actual payment. The register is reconciled with the CRM.

■ I know exactly how much marketing costs each month.

■ Spend is separated by channel and campaign.

■ I can tie marketing spend to sales data.

Owner note

What is true today? What must change first?

Advertising: data in the CRM matches marketing data

A report is useful only when it agrees with the CRM. If leads, meetings, and sales do not match, decisions are being made on a story rather than on evidence.

■ Lead counts match between advertising platforms and the CRM.

■ Each lead has a source and an owner.

■ Lost leads and duplicate leads are visible.

Owner note

What is true today? What must change first?

Advertising: profitable channels are identified

The best channel is not the one with the lowest CPL. It is the one that creates the strongest contribution to profit after cost and client quality are considered.

■ I compare channels by signed clients and profit, not just leads.

■ I know the cost of a qualified lead and a meeting.

■ I can stop weak campaigns without guesswork.

Owner note

What is true today? What must change first?

Advertising: CPL is measured at useful detail

CPL should be visible by channel, campaign, audience, keyword group, region, and device. Price without quality is not a decision metric.

■ CPL is monitored by campaign and segment.

■ Lead quality is reviewed together with CPL.

■ There are clear limits for acceptable CPL.

Owner note

What is true today? What must change first?

Advertising: the cost of a meeting is known

A meeting is closer to revenue than a form submission. Tracking it shows whether the issue is in demand, qualification, speed of response, or sales work.

- ☐ I know the cost of a scheduled meeting.
- ☐ I know the show rate.
- ☐ I know why qualified leads do not become meetings.

Owner note

What is true today? What must change first?

Advertising: ROI and margin are visible

Revenue alone can make a weak channel look healthy. Include margin, discounts, contractor costs, and tools before calling a channel profitable.

- Marketing ROI is calculated with margin in mind.
- Reports include signed clients and payments.
- I can explain why a campaign should scale or stop.

Owner note

What is true today? What must change first?

Advertising: decisions have thresholds

Set limits for CPL, cost per meeting, CAC, conversion rate, test period, and minimum data volume. Without thresholds, budgets drift into weak combinations.

- Campaigns have documented decision rules.
- Tests have a planned duration and budget.
- Weak combinations are paused on evidence.

Owner note

What is true today? What must change first?

2. Website: value is clear in five seconds

The first screen should answer: what you offer, for whom, why it matters, and what a visitor should do next.

- A new visitor understands the offer immediately.
- The page has a clear primary action.
- The website reflects the real level of the business.

Owner note

What is true today? What must change first?

Website: the offer is specific

Generic claims such as "high quality" or "an individual approach" do not help a buyer choose. Explain the result, context, proof, and next step.

■ Each key service has a clear outcome and audience.

■ The offer answers common objections.

■ Important details are easy to find.

Owner note

What is true today? What must change first?

Website: proof is real and useful

Cases, reviews, numbers, credentials, and process evidence reduce uncertainty. A testimonial without context is decoration, not proof.

■ Cases describe the starting point, work, and outcome.

■ Reviews are credible and relevant.

■ Proof appears near the decision points.

Owner note

What is true today? What must change first?

Website: every inquiry reaches the team

Test forms and contact scenarios weekly: desktop, mobile, messaging apps, CRM, email, notifications, and a backup route.

- All forms have been tested recently.
- Every inquiry enters the CRM with a source and page.
- The team receives an immediate notification.

Owner note

What is true today? What must change first?

Website: the mobile experience works

For many businesses, the phone is the main entrance. Text, buttons, forms, speed, and navigation must work without a desktop.

■ The key pages are easy to use on a phone.

■ Forms are short and readable on mobile.

■ No essential content is hidden or broken.

Owner note

What is true today? What must change first?

3. SEO and Maps: commercial demand is covered

Organic growth comes from useful service pages, local visibility, cases, expert content, reviews, and a clear keyword strategy.

- I know which commercial searches matter.
- Important services and locations have dedicated pages.
- Search growth is connected to leads, not traffic alone.

Owner note

What is true today? What must change first?

SEO and Maps: business profiles are complete

A complete profile answers a buyer before they visit the site: services, hours, contacts, links, categories, attributes, images, and FAQs.

- Profiles are complete and up to date.
- Contact details match across platforms.
- The profiles link to the right landing pages.

Owner note

What is true today? What must change first?

SEO and Maps: reviews are part of the process

Collect reviews at natural points in the client journey: after a result, transaction, or repeat purchase. Respond to every review.

■ There is a repeatable review-request process.

■ New reviews receive a timely response.

■ Review quality is monitored, not left to chance.

Owner note

What is true today? What must change first?

SEO and Maps: map inquiries are measured

Maps should generate calls, route requests, website visits, and messages that can be measured and compared over time.

- Map actions are tracked.
- I know which profiles generate leads.
- Map data is reviewed with CRM outcomes.

Owner note

What is true today? What must change first?

SEO: traffic quality is understood

Organic traffic should grow with relevance, rankings for commercial demand, and lead quality. A traffic chart alone does not prove business value.

■ Search traffic is split by intent and page type.

■ Rankings are monitored for priority demand.

■ Organic leads are reviewed through to sales.

Owner note

What is true today? What must change first?

4. Analytics: the owner can see the funnel

The core monthly view should include leads, qualified leads, meetings, proposals, signed clients, payments, and reasons for loss.

- There is one agreed funnel definition.
- The report uses the same numbers as the CRM.
- The team can identify the biggest conversion leak.

Owner note

What is true today? What must change first?

Analytics: metrics lead to decisions

Every metric should have a definition, calculation, owner, and decision attached to it. Otherwise, a report creates the appearance of control.

- I know what each key metric means.
- Each metric has a source of truth.
- The report clearly states the next management action.

Owner note

What is true today? What must change first?

Marketing management: there is a 90-day plan

A plan should connect analytics, website, advertising, SEO, content, CRM, and sales. Reactive work keeps teams busy without fixing the system.

- The next 90 days have priorities and owners.
- The plan includes measurable outcomes.
- The team reviews progress on a regular cadence.

Owner note

What is true today? What must change first?

What to do with the result

If leads exist but sales are weak, examine qualification, response speed, scripts, pricing, and loss reasons. If advertising gets more expensive, inspect the offer, website, landing pages, and organic demand. If the site brings no inquiries without paid traffic, develop SEO, maps, cases, reviews, and commercial content.

Owner note

What is true today? What must change first?

Build a marketing system you can trust

A score below 30 is not a reason to change everything overnight. It is a reason to run a focused audit and build a system where numbers match, inquiries are not lost, the website helps sell, and each channel proves its role in profit.



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