



The SME Marketing Self-Audit



*A practical audit to bring
focus, structure, and
direction to your
marketing.*

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The SME marketing self-audit

This short audit is designed to help SME leaders assess how well their marketing is set up to support growth, and to identify if or where gaps in clarity, structure or leadership might be holding things back.

It's split into key marketing areas to help pinpoint where things are working well and where there may be room for improvement. Depending on your score, Your Marketing Partner UK can point you towards useful information, guides, or if you're feeling stuck or at the stages where senior marketing expertise would help - more hands-on support.

This audit isn't about judgement. It's about understanding where clarity, focus, or leadership would make the biggest difference, and helping you to decide on the next step that makes sense for your business.

How to use this audit

For each statement in the following table, score yourself **1-3**:

- 1. No, or not at all**
- 2. Somewhat / inconsistent**
- 3. Yes, this is in place and working**

Be honest with yourself - this is about understanding where you are now.

And don't forget, a lower score isn't a failure or telling you you're doing things wrong, just where the opportunity lies. It often reflects a business that has grown faster than its marketing structure, which is a very common SME challenge.

Your audit

1. Strategy, direction and planning			
We have a clear marketing strategy that supports our business goals	1	2	3
We have defined marketing objectives we can measure	1	2	3
We work to a clear marketing plan (not just ad hoc activity)	1	2	3
We know which activities are priorities – and which aren't	1	2	3
Sub-total	/12		
2. Budget and investment approach			
We have a clearly defined marketing budget	1	2	3
Our budget is linked to objectives, not just last year's spend	1	2	3
We consciously invest in long-term brand building	1	2	3
We also invest in short-term sales activation	1	2	3
We understand the balance between the two	1	2	3
Sub-total	/15		
3. Customers, insight and targeting			
We know who our ideal customer is	1	2	3
We understand why customers choose us	1	2	3
We understand how customers typically convert	1	2	3
We regularly communicate with customers	1	2	3
We actively seek customer feedback	1	2	3
Customer insight informs marketing decisions	1	2	3
Sub-total	/18		

4. Market and positioning clarity			
We understand the market(s) we operate in	1	2	3
We have clearly defined customer segments	1	2	3
We know which segments we actively target – and which we don't	1	2	3
We have a clear positioning statement for our target customers	1	2	3
Our messaging reflects that positioning consistently	1	2	3
Sub-total	/15		
5. Offer, pricing and value			
Our products/services are clearly defined and easy to understand	1	2	3
We review pricing regularly	1	2	3
Pricing reflects the value we deliver	1	2	3
We have evolved or innovated our offering in the last 12–24 months	1	2	3
Sub-total	/12		
6. Channels, content and visibility			
We know which marketing channels matter most to our business	1	2	3
We regularly review channel performance	1	2	3
We create useful, relevant content for our audience	1	2	3
Our brand identity and assets are consistent and professional	1	2	3
We are visible where our ideal customers actually look	1	2	3
Sub-total	/15		

7. Resource and ways of working			
We have sufficient internal or external resource to support marketing	1	2	3
Roles and responsibilities are clear	1	2	3
Marketing information and feedback are shared across the business	1	2	3
Decisions aren't dependent on one person juggling everything	1	2	3
Sub-total	/12		
8. Measurement, performance and efficiency			
We track meaningful marketing metrics	1	2	3
We review performance regularly	1	2	3
We use insight to adjust activity	1	2	3
We use tools or automation to improve efficiency	1	2	3
Sub-total	/12		
TOTAL	/111		

Your score – and what it means

60 or below

Gaps in focus and direction

If your score falls here, don't panic. This is a common position for growing SMEs. Marketing effort is usually there, but it's often reactive, inconsistent, or lacking clear ownership – which makes progress feel harder than it needs to be.

The good news? This is also where relatively small changes can unlock meaningful improvements. Suggested next actions:

- Pause new activity and refocus on the fundamentals: target audience, positioning, objectives, and priorities.
- Consider senior marketing input to help reset direction, build confidence in decision-making, and create a more sustainable approach going forward.

This is typically the point where marketing leadership adds the most value – helping turn effort into momentum.

61 – 85 Mixed picture

Some areas are working well, but others are inconsistent or underdeveloped. Marketing is happening, but it may feel fragmented or overly tactical at times.

Suggested next actions:

- Step back and review priorities. Clarify where to focus effort and what to stop doing.
- Use a structured framework or strategy guide to bring greater clarity and alignment before investing more time or budget.

This is often the point where a short, focused strategy review can drive momentum.

86 – 111 Strong foundations

Your marketing foundations are in good shape. You have clarity across most areas, and marketing is likely supporting the business more intentionally than reactively.

Suggested next actions:

- Focus on consistency and discipline. Keep doing what's working and resist unnecessary distractions.
- Sense-check priorities periodically to ensure marketing remains aligned with business goals as the business evolves.

At this stage, occasional strategic reviews or targeted support are often more valuable than ongoing senior involvement.

Next steps

If this audit raised more questions than answers, that's usually a sign you're ready to step back and look at marketing more strategically.

You may decide to prioritise certain areas and work through them internally, and **Your Marketing Partner UK** has a range of practical guides and resources to support that journey.

If you reach a point where senior input would help, that's where I come in. I work with SMEs to bring clarity, focus, and leadership to marketing – whether through structured strategy work, ongoing support, or helping teams make better decisions.

If that feels like the right next step, let's have a friendly conversation. No commitment – just practical advice.



If you'd like to talk it through or sense-check your next steps, I'd be very happy to help.

You can contact me at yourmarketingpartneruk@gmail.com or find out more at yourmarketingpartner.co.uk.

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