



MARKETING AUDIT

For Corporate Businesses



WILDWOOD
CREATIVE

THE WILDWOOD TRAIL SERIES FOR CORPORATE BUSINESSES

WELCOME TO BASECAMP

Your first step on the trail to smarter, more strategic marketing.

Every great journey starts with a pause—with a moment to assess where you are, what you're carrying, and where you really want to go. This workbook is your Basecamp—a place to catch your breath, check your map, and make sure your marketing strategy is equipped for the path ahead.

Running marketing inside a growing company often means balancing big goals with limited time, shifting priorities, and competing messages. It's easy to lose sight of the bigger picture when you're focused on execution. This audit will help you step back, reconnect with your strategy, and move forward with more clarity and control.

WHO THIS GUIDE IS FOR

This guide is designed for marketing leaders and small teams within:

- ▶ B2B companies (especially in professional services, consulting, AEC, and SaaS).
- ▶ B2C brands with a service-based model or a strong focus on storytelling and customer experience.
- ▶ Companies in a growth phase, navigating a rebrand, or working to align fragmented efforts across departments.
- ▶ Organizations that have a marketing function, but no full-time strategist or those who feel like they're constantly reacting instead of leading.

Whether you're a solo marketer wearing all the hats or a team of three looking to focus your energy, this audit is built to help you stop guessing and start refining.

WHAT YOU'LL GAIN FROM THIS AUDIT

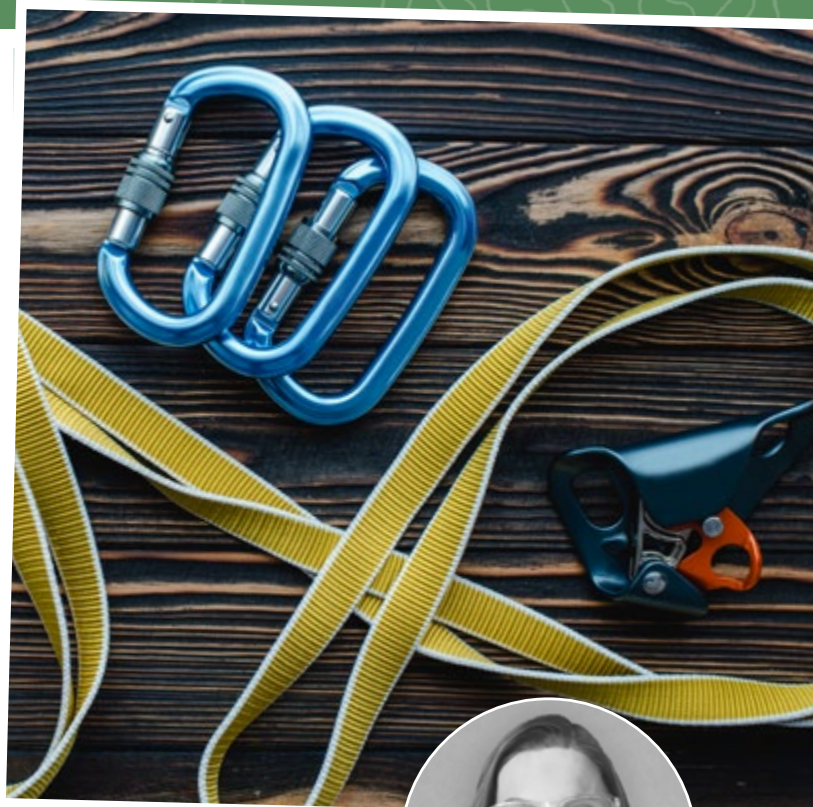
In the pages ahead, you'll evaluate four foundational areas of your corporate marketing strategy:

- ▶ Brand & Positioning
- ▶ Audience Understanding
- ▶ Content & Outreach
- ▶ Measurement & Optimization

Through scorecards, prompts, and reflection exercises, you'll:

- ▶ Identify your current strengths.
- ▶ Spot gaps and inconsistencies.
- ▶ Prioritize where to focus next.
- ▶ Prepare for the next stage of growth.

Basecamp is just the beginning. Once you've completed this audit, you'll be ready to move on to The Ascent, where we'll dive into brand strategy and messaging. From there, you'll climb to The Ridgeline, where we develop content and outreach strategies that amplify your visibility.



WHY I CREATED THIS SERIES

Hi! I'm Shannon, a marketing strategist with over 17 years of experience leading branding, content, and outreach for corporate teams—especially in the corporate B2B services, SaaS, nonprofit, and destination marketing industries.

I've helped brands untangle their messaging, focus their outreach, and build marketing systems that actually support business growth.

The Wildwood Trail Series reflects the process I use with clients—adapted into DIY-friendly guides to help you grow with clarity, creativity, and purpose.

Grab your gear, our climb to Basecamp starts now!

SECTION ONE: BRAND & POSITIONING

Get grounded before you grow.

Your brand isn't just your logo—it's how people experience your company at every touchpoint. It's your first impression, your reputation, and the story you're telling the market. Before you dive into content, campaigns, or social strategies, you need to be confident that your brand is clear, consistent, and aligned with your business goals.

In this section, we'll take a close look at:

- ▶ How well you define your value
- ▶ Whether your visual identity and voice are aligned
- ▶ How you're positioned in your industry
- ▶ Whether your team and your audience see you the same way

Let's make sure your foundation is strong.

SELF-ASSESSMENT: BRAND FOUNDATION CHECK-IN

STATEMENT	SCORE (1-5)*
We have a clear and compelling value proposition that speaks to our target audience.	
Our visual identity (logo, fonts, colors, etc.) is consistent across all platforms and materials.	
Our messaging reflects not just what we do, but why we do it and why it matters.	
Our internal team could accurately describe our brand in one or two sentences.	
We are positioned distinctly from our competitors, and that difference is obvious to our audience.	
<i>*RATING SCALE: 1 = Needs work, 5 = Totally dialed in.</i>	TOTAL SCORE (OUT OF 25)

REFLECTION PROMPTS

Write a few quick thoughts in response to the following:

What words do you want people to associate with your brand?

What words do you think they're actually using right now?

What do you think might be missing, confusing, or inconsistent in how your brand shows up?

WHAT TO DO WITH YOUR SCORE

SCORE	WHAT IT MEANS	SUGGESTED NEXT STEPS
20 - 25	You have a strong brand foundation and it's working for you.	Expand your brand reach. Create training for internal teams, build out a brand toolkit, or audit third-party materials to ensure your brand travels well.
14 - 19	You've got the basics, but your message may be muddled or your visuals inconsistent.	Re-center on your positioning. Refine your brand voice, sharpen your value proposition, and look at where your brand may be drifting across touchpoints.
BELOW 14	Your brand is likely holding back your marketing efforts.	Time to rebuild. Start with your audience, value, and positioning—then shape a brand that aligns with your business goals and can scale as you grow.

CASE STUDY

OLD SPICE: FROM DAD'S AFTERSHAVE TO MILLENNIAL FAVORITE

Background: Old Spice, originally known for its classic aftershave and deodorant products, was often perceived as a brand for older generations. This image led to declining relevance among younger consumers.

Rebranding Strategy: In 2010, Old Spice launched the “Smell Like a Man, Man” campaign, featuring humorous and surreal advertisements aimed at a younger audience. The campaign starred actor Isaiah Mustafa and was designed to reposition Old Spice as a modern, edgy brand.

Results: The rebranding efforts were highly successful, leading to a significant increase in sales and a revitalized brand image. Old Spice became popular among younger demographics, effectively shedding its outdated reputation.

Key Takeaways:

- ▶ **Understanding the Target Audience:** Old Spice identified the need to appeal to younger consumers and tailored its marketing strategy accordingly.
- ▶ **Bold Marketing Approach:** The use of humor and unconventional advertising helped Old Spice stand out in a crowded market.
- ▶ **Consistency Across Channels:** The rebranding was implemented consistently across various platforms, reinforcing the new brand image.

This case demonstrates how a well-executed rebranding strategy can rejuvenate a legacy brand and capture the attention of new market segments.

NEED HELP TURNING INSIGHT INTO ACTION?

If your score here felt a little shaky—or you realized your brand isn't as clear or consistent as it could be—you're not alone. Many companies grow fast, evolve, or shift focus, and the brand doesn't always keep up.

That's where I come in!

I work with corporate teams to:

- ▶ Clarify their mission and value proposition.
- ▶ Define or refine their brand voice and messaging.
- ▶ Create visual and verbal brand guidelines.
- ▶ Align internal teams around a shared brand identity.

Whether you need a full brand refresh or just a strategy session to tighten things up, I can help you build a stronger foundation that supports every piece of your marketing moving forward.

Let's talk brand.

[View my portfolio >>](#)

[Book a consultation >>](#)

SECTION TWO:

AUDIENCE UNDERSTANDING

Know who you're talking to—and what they need to hear.

You can have the best brand and product in the world, but if you're not connecting with the right people in the right way, your marketing will fall flat.

Strong marketing starts with strong audience understanding. That means more than just knowing your target industry or job title. It's about understanding your audience's challenges, motivations, goals, and buying

behaviors—and meeting them where they are with empathy, relevance, and clarity.

The deeper your insight, the more effective your messaging, campaigns, and outreach will be.

This section will help you assess whether you're building your marketing around your audience—or simply talking at them.

SELF-ASSESSMENT: AUDIENCE ALIGNMENT

STATEMENT	SCORE (1-5)
We have clearly defined audience segments or buyer personas.	
We understand what drives our audience's decision-making process.	
We know the key pain points and objections our prospects face.	
Our messaging and content address real needs or challenges our audience cares about.	
We know where our audience spends time (online and offline) and tailor outreach accordingly.	
*RATING SCALE: 1 = Needs work, 5 = Totally dialed in.	TOTAL SCORE (OUT OF 25)

REFLECTION PROMPTS

Write a few quick thoughts in response to the following:

Who are your top 2–3 most ideal customer types?

How does your product or service specifically help them?

What's the biggest challenge they're facing right now?

What might be keeping them from saying yes?

WHAT TO DO WITH YOUR SCORE

SCORE	WHAT IT MEANS	SUGGESTED NEXT STEPS
20 - 25	You know your audience—and it shows in your messaging and results.	Go deeper. Try segmenting your audiences by journey stage, and then test tailored messaging or explore tools you can utilize for personalization.
14 - 19	You've got a general sense of who you serve—but may be missing key insights.	Validate assumptions. Interview top customers, run a survey, or ask sales/client teams what they're hearing. Use that input to fine-tune personas and messaging.
BELOW 14	Your marketing may be based on guesswork more than real-world insight.	Start fresh. Define 2–3 ideal customer types (beyond job title), map their needs, and build messaging that speaks directly to their priorities and objections.

CASE STUDY

DUNKIN': MORE THAN JUST DONUTS

Background: Dunkin' Donuts, a brand established in 1950, was renowned for its wide range of donuts and coffee offerings. However, as consumer preferences evolved towards healthier options and on-the-go beverages, the brand recognized the need to adapt to maintain its market position.

The Challenge: The name "Dunkin' Donuts" emphasized donuts, which posed a challenge as the company aimed to highlight its diverse menu, including coffee, sandwiches, and other beverages, to appeal to health-conscious and busy consumers.

The Strategy: In 2019, the company rebranded to "Dunkin'," dropping the "Donuts" from its name. This strategic move was designed to reposition Dunkin' as a beverage-led, on-the-go brand, focusing on its coffee and other offerings while still retaining its heritage. The rebrand included a modernized logo and store designs to enhance the customer experience.

The Outcome: The rebranding efforts were successful, leading to increased sales in coffee and other beverages. Dunkin' effectively broadened its appeal, attracting a wider audience beyond donut enthusiasts and reinforcing its position in the competitive quick-service restaurant market.

Key Takeaways: By understanding shifting consumer preferences and proactively adjusting its brand identity, Dunkin' successfully expanded its market reach and strengthened its relevance in a changing landscape.

NEED HELP TURNING INSIGHT INTO ACTION?

If this section revealed some gaps or made you realize you're not as connected to your audience as you'd like to be you're not alone. Many teams are so busy executing that they don't have time to pause and realign.

That's where I come in!

I offer one-on-one consulting and freelance support to help companies like yours:

- ▶ Develop clear, actionable buyer personas.
- ▶ Create messaging that speaks directly to customer needs.
- ▶ Align marketing efforts with real decision-making behavior.

Whether you need a quick strategy session or a full marketing reset, I can help you focus your efforts where they'll have the most impact.

Let's work together.

[View my services >>](#)

[Book a consultation >>](#)

SECTION THREE:

CONTENT & OUTREACH

Say the right things—where (and when) they matter most.

Great marketing isn't just about having something to say. It's about knowing how to say it, where to say it, and when your audience is most ready to hear it.

This section blends two core content types:

- ▶ **Evergreen content** that lives on your website, in your emails, and in search results—quietly building trust in the background
- ▶ **Engagement content** that happens in real-time: on social media, at events, in campaigns, and through digital ads.

Together, they create a system of visibility, consistency, and connection that builds your brand and moves people toward action.

The goal isn't to be everywhere, it's to be intentional about where you show up and what story you're telling.

Let's find out how well your content and outreach strategy is working.

SELF-ASSESSMENT: AUDIENCE ALIGNMENT

STATEMENT	SCORE (1-5)
Our website content is clear, helpful, and aligned with our brand voice.	
We regularly share useful, audience-focused content (blogs, resources, guides, etc.).	
We're active on the right social media platforms for our audience—and post consistently.	
We engage with our audience (respond to comments, share stories, participate in conversations).	
We run campaigns or promotions (organic or paid) that drive measurable results.	
<i>*RATING SCALE: 1 = Needs work, 5 = Totally dialed in.</i>	TOTAL SCORE (OUT OF 25)

REFLECTION PROMPTS

Write a few quick thoughts in response to the following:

What content feels the most aligned with your brand—and what feels like filler?

Which channels actually drive engagement or traffic?

If you had to pause everything but one type of content, what would you keep—and why?

WHAT TO DO WITH YOUR SCORE

SCORE	WHAT IT MEANS	SUGGESTED NEXT STEPS
20 - 25	Your content is clear, strategic, and consistent across channels.	Scale what works. Repurpose top-performing content, add new formats (video, webinars, downloadable tools), or test cross-channel campaigns.
14 - 19	You're producing good content, but may lack a clear rhythm or strategy.	Refocus your efforts. Build a lean content calendar based on key customer questions, and clean up old content that's off-brand or outdated.
BELOW 14	Your content likely feels scattered or invisible.	Start with one high-impact channel. Clarify your brand voice, focus on value-driven content, and commit to showing up consistently for 30 days.

CASE STUDY

MAILCHIMP: A SHIFT IN CONTENT STRATEGY

Background: Mailchimp started as a scrappy, DIY email tool for small businesses, but over time, their audience evolved. As larger companies began exploring Mailchimp for more sophisticated marketing automation, the brand saw an opportunity to grow—but only if they could meet these new users where they were.

The Challenge: Mailchimp's quirky, fun personality helped them stand out—but it also limited them. Their content and brand voice, while memorable, weren't always taken seriously by larger B2B audiences who needed robust features, support, and integration options.

The Strategy: Mailchimp shifted its messaging to focus on business outcomes while maintaining its approachable voice. They created tailored content for different audiences, invested in resources like guides and podcasts, and unified their messaging across channels to build trust and support growth.

The Outcome: Mailchimp positioned itself as more than just an email platform—it became a full-service marketing partner. As a result, they grew their user base, retained their personality, and successfully expanded into new customer segments—all by aligning their content and outreach strategy with their evolving audience.

Key Takeaways: Mailchimp didn't just create more content—they created the right content for the right people at the right stage. That kind of clarity is what turns communication into conversion.

NEED HELP MAKING YOUR CONTENT WORK HARDER?

If your content feels scattered—or worse, invisible—you're not alone. Many corporate teams are creating blogs, social posts, and emails simply because they think they should, not because there's a clear strategy behind it.

But content shouldn't be a guessing game. When it's aligned with your audience, your brand voice, and your goals, it becomes one of the most powerful tools in your marketing toolkit.

Here's how I can help:

- Build a simple but strategic content plan that's realistic for your team
- Identify the best channels and formats for reaching your audience
- Develop brand-aligned messaging for your website, social media, email, and campaigns
- Audit your current content to highlight what's working—and cut what's not

Let's make sure the time and energy you spend creating content actually moves the needle.

Let's talk strategy.

[Book a consultation >>](#)

SECTION FOUR: ANALYSIS & OPTIMIZATION

If you're not measuring, you're just guessing.

You've done the work to clarify your brand, define your audience, and create content that connects. But without a system to measure what's actually working, it's nearly impossible to know where to focus—or where to scale back.

Data isn't just for analysts or spreadsheets. It's your trail marker. It shows you where you've been, helps you stay on course, and gives you the confidence to adjust your route when needed.

Whether you're looking at website traffic, email open rates, social engagement, or lead conversions, your marketing metrics should do more than sit in a dashboard—they should inform what you do next.

This section will help you assess whether you're using data as a decision-making tool—or simply collecting it out of habit.

SELF-ASSESSMENT: IS IT WORKING?

STATEMENT	SCORE (1-5)
We've defined key marketing goals and metrics for each channel or campaign.	
We regularly review marketing performance and use it to guide decisions.	
We know which tactics are driving leads, conversions, or sales.	
Our marketing data is accessible, accurate, and easy to interpret.	
We adapt our strategy based on performance—not just instinct or deadlines.	
<i>*RATING SCALE: 1 = Needs work, 5 = Totally dialed in.</i>	TOTAL SCORE (OUT OF 25)

REFLECTION PROMPTS

Write a few quick thoughts in response to the following:

What are you tracking regularly—and what are you ignoring?

What would your team do differently if you had clearer insight into performance?

Do you feel confident using data to back your decisions in meetings?

WHAT TO DO WITH YOUR SCORE

SCORE	WHAT IT MEANS	SUGGESTED NEXT STEPS
20 - 25	You're using data to make smart, strategic decisions.	Level up. Add conversion benchmarks, explore attribution models, or share insights in leadership updates to elevate marketing's strategic role.
14 - 19	You're collecting data, but not always using it to its full potential.	Build a regular review habit. Choose 3–5 KPIs that align directly with business goals and use them to assess campaign performance. Focus on spotting patterns, not just reporting numbers.
BELOW 14	You're likely reporting out of habit—or not at all.	Start with one goal and one campaign. Define what success looks like, and track 2–3 meaningful metrics tied to outcomes (not just activity). Use what you learn to adjust your next effort and build a simple dashboard to track over time.

CASE STUDY

JLL: DATA-DRIVEN TRANSFORMATION

Background: JLL (Jones Lang LaSalle Incorporated), a Fortune 500 company, is a leading global commercial real estate and investment management firm that helps clients buy, build, occupy, manage, and invest in various property types.

The Challenge: Amidst the evolving market conditions, JLL aimed to strengthen brand trust, attract new clients, and demonstrate the tangible impact of its marketing efforts on revenue and profitability.

The Strategy: JLL introduced a focused measurement system built around 16 key marketing KPIs—tracking everything from pipeline and revenue impact to campaign engagement and ROI. This allowed their marketing team to make smarter decisions, allocate resources more effectively, and ensure every initiative supported broader business goals.

The Outcome: Since 2022, JLL's marketing initiatives have led to a threefold increase in pipeline contribution and a fourfold increase in revenue contribution, all while utilizing 11% fewer resources and improving overall effectiveness by over 20%. The ability to track and measure various marketing campaigns has been instrumental in driving brand awareness and evaluating marketing ROI, showcasing a substantial, measurable impact on JLL's overall performance.

Key Takeaways: By establishing a robust measurement framework and leveraging data-driven insights, JLL successfully enhanced its marketing performance, demonstrating the critical role of metrics in optimizing marketing strategies and achieving business objectives.

NEED HELP TURNING NUMBERS INTO STRATEGY?

Data shouldn't be overwhelming—or ignored. But too often, it ends up in a dashboard no one checks, or a report that gets skimmed once and forgotten.

Many teams collect data out of habit, not with intention. The magic happens when you use it to guide your next move.

I help marketing teams:

- ▶ Identify meaningful KPIs tied to real goals.
- ▶ Build simple, usable dashboards or reporting rhythms.
- ▶ Audit past performance to uncover hidden opportunities.
- ▶ Translate metrics into action plans that actually move the needle.

Whether you're trying to prove ROI to leadership, optimize a campaign, or just make smarter decisions faster, I can help you turn your data into clarity—and your clarity into momentum.

Let's talk metrics.

[View my portfolio >>](#)

[Book a consultation >>](#)

YOU MADE IT!

You've made it to Basecamp—and that's a big deal.

Most companies don't take the time to step back and evaluate their marketing from the ground up. But you did. You paused, you asked the tough questions, and you took the first step toward a more intentional, effective, and aligned marketing strategy.

You've now looked at:

- ▶ How clearly and consistently your **brand** is showing up
- ▶ How well you understand and speak to your **audience**
- ▶ How strategically you're approaching your **content and outreach**
- ▶ Whether you're using **data and measurement** to guide smart decisions

That's no small thing. The insights you've uncovered in these pages can help you refocus your energy, strengthen your foundation, and stop wasting time on marketing that doesn't move the needle.

Now it's time to decide what comes next.



CHOOSE YOUR NEXT STEP

- ▶ Ready to implement what you've uncovered? Great—start with one section at a time. Set small goals and take focused action.
- ▶ Need a partner to help carry the load? That's what I'm here for. Whether you need strategic guidance, content development, or a full marketing refresh, I offer fractional, freelance, and project-based support to meet you where you are.
- ▶ Want to keep learning? Watch for future guides in the Wildwood Trail Series, including The Ascent (brand messaging) and The Ridgeline (content & campaign strategy).

LET'S STAY CONNECTED

If this audit sparked some ideas—or exposed a few gaps—I'd love to help you build what comes next.

- ▶ [Reach out for a free consultation.](#)
- ▶ [Connect with me on LinkedIn.](#)
- ▶ [Sign-up for my newsletter to be the first to know when new guides are released.](#)

Thanks for making time to explore your marketing with fresh eyes. I hope this was the first step of many on a smarter, clearer path forward.

See you on the trail!

