Growth levers audit checklist

**Why this audit matters:**As a new CMO, it’s easy to jump straight into planning mode. But unless you understand *which growth levers are healthy, under-leveraged, or broken*, you risk optimizing the wrong things. This audit gives you a structured way to diagnose the current state of marketing and surface high-impact opportunities.

**When to complete it:**Complete this within your first 30–45 days. It’s best done after you’ve conducted initial stakeholder interviews, reviewed the funnel, and sat in on sales/customer calls — but before you lock in your strategy or budget asks.

**How to use it:**Go section by section (Brand, Demand, Product Marketing, Lifecycle, Ops) and rate each item as:

✅ Working well  
⚠️ Needs attention  
❌ Missing or broken

Add notes or actions for each item. This document isn’t for presentation — it’s for clarity. Share top insights with your CEO or use it to guide prioritization with your team.

## 

## Brand & awareness

| **Item** | **Status** | **Growth opportunity** | **Notes / actions** |
| --- | --- | --- | --- |
| Branded search volume trending up | ⚠️ | Medium | Steady growth over 6 months (+15%), but plateauing recently. No major brand campaigns in-market. Could invest in awareness plays or thought leadership to push next wave of growth. |
| Share of voice vs competitors | - | - |  |
| Messaging consistency across channels | - | - |  |
| PR, earned media presence | - | - |  |
| Social presence and engagement | - | - |  |
| Influencer / thought leadership | - | - |  |
| Brand tracking or awareness survey in place | - | - |  |
| Visual identity consistency | - | - |  |
| Leadership visibility on social / in media | - | - |  |
| Share of voice in key industry events / forums | - | - |  |

## 

## Demand generation

| **Item** | **Status** | **Growth opportunity** | **Notes / actions** |
| --- | --- | --- | --- |
| Paid search performance | ✅ | Medium | High intent campaigns driving qualified leads at acceptable CPL (~$60), but mostly branded. Limited keyword expansion and no testing in new verticals. Potential to scale non-brand campaigns and improve landing page conversion. |
| Paid social ROI | - | - |  |
| SEO strategy + content engine | - | - |  |
| Lead-to-pipeline conversion | - | - |  |
| Gated content / lead magnets | - | - |  |
| Events, webinars, or partnerships | - | - |  |
| Campaign velocity (campaigns launched per month) | - | - |  |
| Lead quality scoring / grading | - | - |  |
| Lead handoff process to sales | - | - |  |
| ABM or named account strategy | - | - |  |
| Attribution model understood and adopted | - | - |  |

## 

## Product marketing

| **Item** | **Status** | **Growth opportunity** | **Notes / actions** |
| --- | --- | --- | --- |
| Clear, differentiated positioning | ❌ | High | Messaging is generic and interchangeable with 3 competitors. Internal teams define the value prop differently. No central source of truth or positioning doc. Urgent need for a messaging workshop and narrative rewrite based on customer insight. |
| Value prop understood by sales | - | - |  |
| Launches are timely + well executed | - | - |  |
| Customer research integrated | - | - |  |
| Competitive messaging up to date | - | - |  |
| Sales enablement is strong | - | - |  |
| Positioning documents maintained and updated | - | - |  |
| Customer segmentation and personas clarity | - | - |  |
| Win/loss analysis process | - | - |  |
| Internal product messaging playbook exists | - | - |  |

## 

## Lifecycle & retention

| **Item** | **Status** | **Growth opportunity** | **Notes / actions** |
| --- | --- | --- | --- |
| Onboarding journey performance | ⚠️ | Medium | Drop-off in product usage after Day 3. Email open rates are decent but lack personalisation or in-app alignment. No triggered onboarding based on persona or plan type. Quick win: rework onboarding sequence using real customer behaviours. |
| Email lifecycle strategy | - | - |  |
| Winback and upsell programs | - | - |  |
| Customer advocacy / referrals | - | - |  |
| NPS / customer feedback loops | - | - |  |
| Churn insights + retention data | - | - |  |
| Welcome/onboarding email open/click performance | - | - |  |
| Customer journey mapping in place | - | - |  |
| Churn reasons tracked and categorized | - | - |  |
| Product usage data leveraged in campaigns | - | - |  |
| Advocacy program (e.g. referrals, reviews) | - | - |  |

## 

## Operations & infrastructure

| **Item** | **Status** | **Growth opportunity** | **Notes / actions** |
| --- | --- | --- | --- |
| Attribution setup + accuracy | ❌ | High | Current reporting is last-touch only and excludes organic + partner influence. Inconsistent UTM tagging and no multi-touch view. High spend, low insight. Need to implement standardised tagging and upgrade from Google Analytics-only setup. |
| Funnel reporting by channel | - | - |  |
| CRM and marketing automation | - | - |  |
| MarTech stack audit | - | - |  |
| Lead scoring and routing | - | - |  |
| Dashboards for key KPIs | - | - |  |
| SLA between marketing and sales documented | - | - |  |
| Revenue/marketing dashboard shared regularly | - | - |  |
| GDPR/consent management in place | - | - |  |
| Campaign tagging and taxonomy standards | - | - |  |
| UTM tracking standardised | - | - |  |

## 

## Internal alignment

| **Item** | **Status** | **Growth opportunity** | **Notes / actions** |
| --- | --- | --- | --- |
| Sales + marketing pipeline alignment | ⚠️ | High | No shared definitions for MQL/SQL. Sales often rejects leads due to poor fit. No regular syncs or SLA. Major pipeline leakage post-MQL. Opportunity to create shared funnel goals and fix lead scoring. |
| PMM collaboration with product team | - | - |  |
| Feedback loops with CS | - | - |  |
| Regular GTM sync between marketing + product | - | - |  |
| Shared planning or roadmap tools across teams | - | - |  |
| Feedback loop from sales on campaign impact | - | - |  |
| Cross-functional OKRs or shared KPIs | - | - |  |

## 

## Summary section

| **Summary type** | **Item** | **Notes / actions** |
| --- | --- | --- |
| Top 3 quick-win opportunities |  |  |
| Top 3 critical gaps to close |  |  |