Smart Insights

Template

Digital marketing maturity benchmarking templates

Quickly review and improve your digital marketing maturity across platforms with our free benchmarking templates

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Contents

Review your current digital marketing maturity

Whatever the size of your business or client portfolio, '*How do we compare to our competitors?*' is a common question we get asked when companies are looking to get more from their integrated digital marketing. It's a great question! But how do you know which areas to compare and how you can structure your review and recommendations of actions to improve your digital marketing maturity?

These benchmarking templates, first created by Dr. Dave Chaffey, are aimed at small/medium to large businesses and will help you:

☑ Review how well you are currently exploiting the key digital marketing techniques

☑ Identify, and communicate to colleagues, the gap with where you need to be to compete

☑ Create a prioritized plan to plan, manage and optimize improvements to improve your digital marketing maturity

How to use the benchmarking templates

Our benchmark templates use the recognized 5 point scale of the Carnegie Mellon capability maturity model which rates different processes from an unmanaged approach as you start out at Level 1 up to a well-managed process at Level 5. Score your business from Level 1 to Level 5 for the different 'best practice' activities you are using for each of the core processes we have identified as each row.

The templates include overall digital excellence and strategy goals and then go into specific channel benchmarks for core marketing fundamentals.

For 2023 we have created a new benchmark template summarizing how to improve your digital marketing maturity for small/medium businesses (page 5). It uses the 7 pillars of modern marketing across the RACE Growth System to help you quickly review where you are now, and what you need to do to improve your maturity in the future. We've used the RACE Framework to help you easily benchmark the different stages of your integrated customer lifecycle too.

The templates to help you assess your digital marketing maturity include:

• *Digital marketing maturity* - aimed at reviewing digital maturity with business owners in small to medium business or senior leaders in larger businesses who don't have detailed insight about digital channels.

• *Integrated lifecycle marketing* - aimed at reviewing digital marketing maturity with people with detailed knowledge of digital channel tactics for always-on digital marketing across the RACE Framework.

- *Digital marketing excellence* - aimed at reviewing governance of digital marketing in larger brands and international businesses amongst the senior leadership team as part of digital transformation.

- *Digital Analytics*

- *Campaign planning*

- *Content marketing*

- *Customer experience*

- *Email marketing and automation*

- *SEO*

- *Social media marketing*

- *Influencer relationship management*

- *E-commerce marketing*

SMART objectives
Activities to optimize
Defined deliverables

3 Action
1 Opportunity
2 Strategy

Set a target for 12 months

Once you have defined the areas you want to prioritize improvement, you can then put an action plan in place of how you will get to the next level.

For our Business Professional members, we can help support you build these improvements into an annual plan. Take our RACE Practical Digital Marketing Learning Path to learn everything you need to know to create your digital strategy, which comes with complimentary templates to help you at each stage of your marketing optimization.

For Free members you can break down your improvements into 90-day planning cycles using the RACE Growth System. Download the RACE Growth System guide and template to get started on creating your first 90-day plan.

Good luck

As you work your way through the benchmarking templates, don't despair if you feel like you're behind! Digital moves fast and our research shows many businesses are at Levels 1 to 3. You're taking a great step by making the decision to work on your digital marketing maturity.

We wish you all the best for getting to the next level and hope our extensive resource library can help you further.

IMPROVE YOUR DIGITAL MARKETING MATURITY

Use this RACE Growth System maturity assessment to identify priorities to improve across these pillars. Use our visual checklist to audit how well your business or clients are exploiting integrated digital marketing.

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BENCHMARK WITH THE 7 PILLARS OF EFFECTIVE MODERN MARKETING

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
1. Marketing and brand strategy	Outline business and marketing plan.	Detailed annual marketing plan. No brand plan or long-term vision.	Longer-term marketing and brand plans.	Digitally aligned integrated strategy and roadmap.	Agile business and brand strategy.
2. Digital marketing strategy	No dedicated strategy.	Outline digital plan with priority activties.	Defined annual plan and digital initiative roadmap.	90-day optimization approach.	Agile strategic approach.
3. Data and Insight	No digital KPIs or Analytics customization.	Main volume goals defined and analytics customized.	Quality goals defined. Marketing dashboards. Ad hoc customer.	Value goals defined. Use Attribution models.	Lifetime value KPIs. Predictive analytics.
4. Digital media	No plan to increase Reach. No campaign process.	Outline acquisition plan. No search, social media or PR plans or forecasts.	Detailed acquisition plan with targets forecast. Campaign process.	Integrated online and offline media plans.	Media optimized for ROI and customer lifetime value.
5. Content marketing strategy	No strategy to encourage Interactions and leads.	Limited content marketing assets.	Full lifecycle content marketing strategy and assets.	Content marketing ROI define.	Content portfolio optimized.
6. Digital experience	No plan to increase Interactions, Conversion or Engagement.	Personas and journey maps defined. Ad hoc website tests.	Regular simple tests and customer feedback. Simple personalization.	Full structured CRO experiment programme. Advanced personalization.	AI-based personalization and optmization.
7. Digital messaging	Basic email promotions and newsletters.	Simple welcome strategy.	Contact automation plan across RACE.	Full lifecyle automation. Conversational messaging.	AI-optimized contact strategy.
	"Limited planning"	"Basic planning"	"Competitive planning"	"Advanced planning"	"Agile planning"

+ Take your Marketing to the next level with Smart Insights premium membership.

+ Improve results using our more detailed RACE maturity assessment: Reach > Act > Convert > Engage

+ Join our Premium members who use the RACE Growth System to improve their results from marketing

AIMING FOR INTEGRATED LIFECYCLE MARKETING

#DIGITALBENCHMARKING

Take your digital marketing to the next level with our capability assessment based on our RACE Planning Framework. Use our visual checklist to audit how well your business or clients are exploiting their digital channels to identify and prioritize techniques to improve.

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	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
Plan *Creating a strategic roadmap*	No strategy. Unclear goals or prioritization.	Prioritized activities. Goals not modelled or aligned. MarTech adoption ad-hoc.	'Always-on' omnichannel marketing plan in place. Revenue-based funnel acquisition model.	Retention and LTV model. 90-day planning. MarTech roadmap and structured evaluation.	Digital transformation implemented. Structured testing and optimization programme.
Reach *Build awareness Drive visits*	Limited ad hoc use of paid media. No outreach. SEO not proactive.	Search target keywords defined. Simple use of Google Ads/paid media.	Structured approach to paid, owned and earned media to agreed targets.	Programmatic. Regular improvements to media. New media review ad hoc.	Media fully optimized based on attribution and evaluation of new options.
InterAct *Experience, flow and content*	No insight on personas and customer journeys. No content strategy.	Some hero content and CTAs for lead generation and profiling.	Content marketing and personalized journeys to encourage leads/sales.	Personalization optimized. Ad hoc AB testing of site sections.	Multivariate testing. High quality content marketing. Structured testing.
Convert *Build multi-channel sales*	No paid retargeting. No email welcome or nurture.	Initial media retargeting. Targeted newsletter. Simple welcome emails.	Re-targeting optimized Welcome and abandon emails. Personalization.	Segmented lifecycle emails, personalization & paid media retargeting .	Retargeting and personalization optimized across touchpoints.
Engage *Customer loyalty and retention*	Limited experience research. Email newsletter and social media.	No loyalty programme Targeted newsletter. No personalization.	Customer research informs site improvement. E-mail re-engagement.	Loyalty programme. NPS. RFM-based email and personalization.	Retargeting and personalization optimized. Machine learning applied.
Brand *Building emotional connection*	Basic brand identity, but brand benefits not communicated.	Brand values defined, but not clear on-site. Customer reviews.	Online value prop defined Blog and social media develop brand.	Brand personality and defects researched and acted on promptly.	Fully integrated brand reputation management including PR.
Governance *Managing growth approach*	Analytics in place, not reviewed. No social media governance. Skills gap.	Analytics reviewed ad-hoc Regular performance reviews. Social listening.	Dashboard reviews. Social governance. Minimum digital skills in place.	Value-based KPIs 90-day planning review. Skills improvement.	Lifetime value KPIs. Structured defect reduction programme.
	"Basic lifecycle marketing"	"Improving lifecycle marketing"	"Planned lifecycle marketing"	"Managed lifecycle marketing"	"Optimized lifecycle marketing"

+ Take your digital marketing to the next level with Smart Insights premium resources

+ Check out our Lifecycle Marketing Toolkit page for our advanced resources available to Business-level members

+ Subscribe to our business level membership to download planning templates and best practice guides to improve your integrated customer lifecycle

AIMING FOR DIGITAL MARKETING EXCELLENCE

Take your digital marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their digital marketing and then plan how to take it to the next level.

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Digital Capability	ONE. Initial	TWO. Managed	THREE. Defined	FOUR. Quantified	FIVE. Optimized
A. Strategic Approach	No strategy.	Outline plan with prioritized marketing activities.	Defined vision and integrated strategy for digital transformation and omnichannel marketing.	Business-aligned integrated strategy and roadmap.	Agile strategic approach.
B. Performance Improvement Process	No KPIs.	Volume-based KPIs. No dashboards.	Quality-based KPIs. 'Last click' attribution. Business dashboards.	Value-based KPIs. Weighted attribution. Ad hoc tests / CRO.	Lifetime-value KPIs. Structured experiment programme.
C. Management Buy-in	Limited.	Verbal support, but inadequate resourcing.	Sponsorship and increased investment for Digital Transformation.	Active championing and approriate investment.	Digital is an integral part of strategy development.
D. Resourcing and Structure	No specific digital skills.	Core skills centralized or agencies.	Centralized hub and spoke. Dedicated resources.	Decentralization and re-skilling.	Balanced blend of marketing skills.
E. Data, MarTech and Infrastructure	No or limited customer database.	Separate marketing technology, limited data integration.	Partial integrated MarTech stack and data quality controls.	Integrated systems and 360° view data sources in MarTech stack.	Latest innovations, e.g., AI and Machine Learning can be integrated.
F. Integrated Customer Communications	Not integrated.	Core push activities synchronised.	Integrated inbound approach. Last-click evaluation.	Integrated, personalized, Paid-Owned-Earned media attribution.	Media optimized for ROI and to maximixe customer lifecycle value (CLV).
G. Integrated Customer Experience	Static brochureware website.	Desktop and mobile support, not personalized. Landing pages in place.	Partially personalized desktop and mobile experience.	Integrated, personalized web, mobile, email and social media.	Full contexual personalized experiences and recommendations.
	"Laggard"	"Developing capability"	"Competent average capability"	"Above-sector average capability"	"Market leading capability"

+ Refine your Digital Marketing Strategy with Smart Insights member toolkits.

+ Take our RACE Practical Digital Strategy interactive Learning Path to enhance your digital strategy tactics.

+ Join our premium members to download digital marketing planning templates and our strategy guides

AIMING FOR DIGITAL ANALYTICS EXCELLENCE

#DigitalBenchmarking

Adopt actionable analytics to take your data-driven digital marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are using analytics to review and improve results

Smart Insights

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
A. Management and Resourcing	No engagement. No dedicated resource.	HiPPO engaged. Simple reporting.	Wider use in business. Dedicated analysts (larger businesses).	Dedicated experience and media optimization resources to implement.	Cross-business integration and collaboration.
B. Metrics Selection	None selected.	Marketing outcomes. Last click.	Satisfaction scoring. Financial value or proxy. Simple media attribution.	Customer lifetime value. Media attribution models.	KPI dependencies.
C. Tools (Typical types)	Basic web analytics. Basic social media. Basic email reporting.	Customer feedback. Basic social analytics. Benchmarking tools.	Voice of customer. Personalization. BI visualization.	Real-time social media. Offline report. CRM/Individual tracking.	Predictive analytics. Econometric models (large businesses).
D. Analytics Customisation	'Out-of-box' standard reports.	Goals. Custom reports. Mailed reports.	Segmentation, events. Simple threshhold alerts. RACE dashboards.	Fulll dashboards.	Automated real-time alerts.
E. Data Integration	None.	Campaign source codes defined, e.g., for email and social media integration.	Rules-based personalization system. Marketing Automation.	AI / Machine learning personalization. 360 degree customer view.	Data Lakes or Data warehouse data storage and analysis.
F. Optimization	None / HiPPO-led.	Persona consideration. Simple in-page and visitor path analysis.	Ad hoc A/B Tests. Media testing.	Structured A/B testing programme.	Optimization of personalization. Multivariate testing.
G. Review Process	No structured reviews and WILFING.	Regular (weekly, monthly).	90-day planning defining programme of testing.	Continuous programme.	Increase in number of tests of new techniques.
	"Directionless"	"Reporting"	"Structured testing"	"Customer-centric"	"Optimizing"

+ Check our blog for lots of examples of how to Plan, Manage and Optimize your digital marketing.

+ Take our Google Analytics interactive Learning Path to make better data-driven decisions for your marketing.

+ Join our premium members to learn how to achieve more actionable analytics by improving KPIs, people, process and tools using our templates and guided learning.

AIMING FOR CAMPAIGN PLANNING EXCELLENCE

Take your campaign planning to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are planning and executing campaigns to improve their effectiveness.

Smart Insights

#DIGITALBENCHMARKING

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
A. Campaign goals and tracking	General goals. No SMART objectives. No Analytics tracking.	Idea of overall response. No other success criteria. Basic Analytics tracking.	Clear success criteria of response volume, CPA and ROI based on forecast. Standard for analytics campaign tracking.	Specific objectives per channel. Lifetime value assessed in time.	Specific objectives modelled per media platform.
B. Campaign insights and targeting	Limited research. Poorly-defined audience.	Top-level demographics used for targeting.	Audience characteristics and motivation considered in targeting.	Detailed targeting including exclusion and lookalike targeting.	New options included within targeting: 70:20:10 rule.
C. Campaign theme and offers	Known core offer, but secondary offer and messaging not known.	Clear primary and secondary offers. Online brand benefits.	Audience journeys, keywords and competitors reviewed.	Offer testing during campaign, real-time marketing response.	Offer testing before and during campaign. Real-time marketing.
D. REACH: Media plan and budget	Campaign response not modelled. Poor integration.	Top-level media budget created.	Detailed channel budget for campaigns.	Attribution considered during budgeting.	Custom attribution models used. New media options tested.
E. ACT: Audience interaction and participation	Limited use of landing pages or interaction. No editorial plan.	Limited core content assets to support campaign. Top level plan.	Audience journeys and range of content assets considered.	Detailed editorial plan. Outreach built-in to content campaign.	Testing of new interactive content assets.
F. CONVERT: Optimize and test	Limited campaign retargeting follow-up or sales optimization.	Simple retargeting, e.g., in Google Display Network.	More advanced retargeting, e.g., Google RLSA.	Full retargeting through social networks and email.	Retargeting optimized. Offline contact prioritized based on lead-scoring.
G. ENGAGE: Sharing and review	Social sharing and campaign review not considered.	Sharing facilitated through sharing buttons only.	Social proof. Post-campaign review.	Attribution reviewed post campaign. Lifetime value assessed in time.	Detailed campaign review.
	"Unplanned campaigns"	"Starting to plan"	"Integrated campaign plans"	"Integrated plans with real-time response"	"Coninuous optimization of campaigns and media"

+ Take your campaign planning to the next level with Smart Insights member resources.

+ Take our Campaign Planning interactive Learning Path to learn how to optimize your future marketing campaigns.

+ Join our premium members to download planning templates and strategy guides.

AIMING FOR CONTENT MARKETING EXCELLENCE

Take your Content Marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their Content Marketing to prioritize areas to improve.

Smart Insights

DIGITALBENCHMARKING

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
A. Audit and Set goals	No target keywords or content themes.	Outline target keywords. Funnel model with target goals for reach & leads.	Detailed targets and performance review.	Gap analysis linked to SEO and AdWords.	Optimization based on performnce and updates.
B. Audience: Personas and Journeys	No personas. No defined journeys.	Outline personas. Understand main customer journeys.	Detailed personas. Defined content mapping on-site & off-site.	Review content relevance and effectiveness across journeys.	Optimization of retargeting.
C. Content marketing strategy	No strategy or ideation for content types. No outreach or distribution.	New content types defined to meet goals. Initial outreach/distribution.	Focus on high quality 'nuclear' content Structured distribution	Managing gaps and limitations of content marketing strategy.	Ongoing review and optimization to remain competitive.
D. Editorial Management	No style guidance. No content calendar.	Outline style guide. Short-term calendar themes and ad-hoc.	Full style guidance and annual editorial calendar. Detailed themes.	Content relevance reviewed against competitors in detail.	Content archived and refreshed to optimize.
E. Create Content	No hub. Typically text content only or social media updates.	Basic blog hub. Some original image content.	Content hub well integrated. Content curation.	'Resource centre'. Experimentation with full range of content types.	Real-time content creation to follow memes and breaking news.
F. Content Distribution	Sharing mainly via social media updates.	Social media updates. Email newsletter. SEO best practices.	Initial influencer outreach. Experimenting with paid distribution.	Managed influencer outreach. Adv. SEO. Managed paid distribution.	Optimized influencer outreach, SEO and paid distribution.
G. Evaluate and Measure ROI	No goals within analytics. No model for content value.	Some analytics goals, costs and benefits defined, but no ROI models.	Full goals in analytics. ROI model defined.	Detailed content optimization of content types and assets.	Real-time identification of problems and opportunities.
	"Ad hoc content marketing"	"Starting to structure content marketing"	"Structured content marketing"	"Competing with content marketing"	"Optimized content marketing"

+ Take your Content Marketing to the next level with Smart Insights member resources.

+ Take our Content Marketing interactive Learning Path to learn how to optimize all areas of your content strategy.

+ Join our premium members to download Content Marketing planning templates and strategy guides.

DIGITAL CUSTOMER EXPERIENCE EXCELLENCE REVIEW

#DIGITALBENCHMARKING

Improve your desktop website and mobile experience by using our visual checklist to review your capabilities for management, evaluation and personalization.

Smart Insights

	1. Initial "Brochureware"	2. Managed "Taking control"	3. Defined "Starting to test & personalize"	4. Quantified "Dynamic experiences"	5. Optimized "State-of-the-art"
A. Responsibility	No defined responsibility.	Ad hoc - cross-functional responsibility.	Defined individual responsible.	Dedicated team (larger organization).	Clear responsibilities in each area of business.
B. Evaluation and KPIs	Volume of interactions.	Quality of interactions and short-term engagement.	Value of interactions. Simple satisfaction assessment.	Long-term value. Long-term engagement (Hurdle rates).	Detailed understanding of Loyalty and customer satisfaction drivers. NPS.
C. Journey Analysis Techniques	Limited understanding of journeys.	Path analysis in analytics. Simple funnels. Personas.	Visitor intent surveys. Customer journey and content mapping.	Usability studies. Multi-channel funnels. Content optimization.	Cross-channel analysis e.g., panels.
D. CRO Process	No optimization.	Ad hoc changes. "Suck-it-and-see".	Ad hoc tests. Simple A/B test on key pages.	Multivariate testing.	Continuous structured testing programme.
E. Personalization Techniques	None.	Specific content for personas.	Limited dynamic personalization.	Cross-journey personalization.	Optimizing personalization.
F. Integration	Website not integrated with other channels.	Simple cross-channel signposts and offers. Social media integration.	Mobile responsive design and mobile apps. Remarketing (paid media).	Mobile PWAs and AMPs reviewed for relevance. Social sign-in?	Optimized multi-channel integration. Mobile adaptive.
G. Tools	Web Analytics (not customized).	Simple analytics customisation. Surveys.	Rules-based personalization.	Advanced AI/Machine. Learning personalization.	Real-time feedback tools.

+ Improve your ROI from Online marketing with Smart Insights member resources.

+ Take our Digital Experience Learning Path to learn techniques to optimize your website.

+ Join our premium members to download best practice advice and templates on improving your website effectiveness.

AIMING FOR EMAIL AND MARKETING AUTOMATION EXCELLENCE

#DigitalBenchmarking

Take your Email marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their email marketing and then plan how to take it to the next level.

Smart Insights

	Initial "Pray and spray"	Managed "Targeted emailing"	Defined "Starting to automate"	Quantified "Starting to integrate"	Optimized "Integrated lifecycle targeting"
Email capabilities and evaluation	Simple response tracking.	Regular report of opens/clicks.	'Beyond the click' tracking of marketing outcomes. Segment tracking.	Value reporting. Hurdle rates and activity engagement levels.	Response data > CRM system/warehouse.
List quality	Not managed.	List-building options increased. Privacy law compliance.	List quality improved.	Reactivation and removal.	Preference centres.
Targeting (relevance)	None: 'Pray and Spray'.	Demographics.	Basic triggers.	Full lifecycle sequences. Lead scoring and grading.	Additional sequences added.
Proposition and communications strategy	Newsletter and eblasts.	Increased frequency. Marketing Automation, e.g., welcome email.	More automations, e.g., nurture.	Full lifecycle automation, e.g., reactivation emails.	Optimized automations and frequency.
Creative and templates	Simple headers.	Multiple templates.	Dynamic content insertion.	Video review. Mobile optimized.	Advanced real-time content, e.g., weather, location.
Delivery	Not reviewed.	Reported.	Reported by ESP.	Feedback loops and delivery service.	Continuous monitoring.
Optimization	None.	Experiments with different offers/subjects.	Structured offer/subject testing.	Layout reviews. A/B testing.	Multivariate testing. Use of AI and Machine Learning.
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Take your Email marketing to the next level with Smart Insights member resources.

Take our Email Marketing and Automation Learning Path to learn techniques to optimize your email performance.

Join our premium members to download email marketing planning templates and guides to ehance your email marketing.

SEO CAPABILITY REVIEW

#DIGITALBENCHMARKING

Take your SEO to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients' are exploiting their SEO to identify and prioritize areas to improve.

Smart Insights

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
A. Targets, Audit and Resourcing	No proactive use of SEO. No dedicated resources for SEO.	Target keyword lists. Basic audit completed. Dedicated SEO resource Top-level goals to improve.	Keyword gap analysis incl. mobile-specific. SMART objectives and KPIs. Segments in Analytics.	Integrated responsibilities and teams in larger organization. SEO activitis prioritized.	Skills and capacity to respond immediately to most issues.
B. Indexing and Crawling	Not audited and no exclusions. Duplicate content likely.	Using Google Search Console (GSC) to monitor. Some exclusions set up.	Mobile optimized. Using geo-targeting, Schema markup as relevant.	Site section/content specific reporting and improvements incl. mobile.	Site section/content specific reporting and optimizations.
C. On-page Optimization	Not proactive. Usually an afterthought.	Page Titles, headings and copy used to support SEO.	Page Titles, headings and copy engineered to support SEO.	Structured testing of Title/ Description/Keyword use.	Continuous optimization of key content types.
D. Content Marketing	No content marketing strategy.	Cornerstone or Skyscraper content created to support SEO.	Content types and formats selected for SEO (and marketing goals).	Integrated Content/PR and SEO campaigns. Content optimization matrix.	Use of community and UGC supports growth.
E. Link building	No record of external links.	Links mainly organic, plus from some partners. Link re-configuration as need.	More use of outreach. Backlink profile reviewed for balance. Disavowing.	Structured outreach or IRM programme linked to campaigns.	Consistent quality of content limits need for outreach.
F. Internal Linking	Not assessed.	Some use of internal links to support SEO.	Navigation designed to support SEO.	Some testing of internal link methods along with usability.	Internal linking optimized.
G. Measurement and reporting	Top-level target keywords defined.	Contribution of SEO known and tracked through time at top level.	Segments to assess value (VQVC). GSC APIs. Detailed keyword/content	Good knowledge/ performance across site. Keyword Deltas monitored.	Capacity to immediately identify problems compared to competitors.
	"Not proactive"	"Reviewing effectiveness"	"Applying best practices"	"Improving"	"Best-in-class"

+ Take your SEO to the next level with Smart Insights member resources.

+ Check out our Search Engine Optimization toolkit for guides and templates to help you create success with your SEO strategies.

+ Join our premium members to access our search planning templates and interactive SEO Learning Path.

AIMING FOR SOCIAL MEDIA EXCELLENCE

Take your Social Media Marketing to the next level with our capability assessment. Use our visual checklist to audit your business or clients' use of Social Media Marketing and then create an action plan with our social media resources.

Smart Insights

#DIGITALBENCHMARKING

	Initial "Starting out with Social"	Managed "Using Social"	Defined "Starting to Plan"	Quantified "Starting to integrate"	Optimized "Fully-integrated Social strategy"
1. Goals and Channel Integration	No goals beyond 'doing social media'.	General goals defined. Social buttons on website.	SMART objectives defined Social media integrated into website. Automated Email integration.	Attribution using analytics. Social integrated into offline campaigns.	ROI reviewed. Goals agreed throughout the business Social a key part of integrated multi-channel strategy.
2. Social Listening and Governance	No Social Media Monitoring.	Monitoring of brand mentions. Reputation Management.	Defined process for customers reporting issues via social and crisis.	Proactive PR - Influencer outreach and employees. Social Media care.	Proactive outreach to customers. Inputting into New Product Dvlpt.
3. Content Planning	No planned content creation. Page updates only - not linking to hub.	Social hub/blog with content being created and shared in social updates.	Monthly content plan with key content themes and engaging assets.	Longer-term 90-day content plan themes, ToV for different audiences.	90-day content plan with themes which are announced and integrated.
4. Interaction and community management	Limited, reactive interaction on social media.	Monitoring and replying to comments.	Proactive interaction with fans, influencers company pages. Social care.	Community management resource for facilitating discussions. Localized.	Team in place for personalized replies and to facilitate discussion 24/7.
5. Company Page Optimization	Pages set up, but not well branded.	Branded pages on priority social channels (e.g., Twitter, Facebook).	Branded pages set up on common and newer social channels (e.g., Pinterest).	Branded pages set up on channels requiring non-text content e.g.,YouTube	Additional page features such as integrated videos and apps utilised.
6. Paid advertising	Not using paid advertising.	Experimenting with promoting updates without targeting .	Targeted ads to boost page fans, site visits or leads.	Remarketing for leads or sales. Audience targeting.	Optimized investment based on attribution and ROI review.
7. Evaluation	Not analyzing page statistics.	Reporting basic stats of page growth. Using tracking codes.	Benchmarking reach, interaction rates. Tracking site outcomes.	Using analytics tools to evaluate behaviour of audience. Attribution.	Integrated dashboard of Social media performance and alerts on key issues.

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Take your Social Media marketing to the next level with Smart Insights member resources.

Check out our social media toolkit for guides and templates for social media strategy and practical guides for all the main social networks.

Join our premium members to access our Social Media marketing planning templates and interactive Learning Path.

INFLUENCER RELATIONSHIP MANAGEMENT EXCELLENCE

Take your IRM to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their influencer outreach to identify and prioritise areas to improve.

Smart Insights

#DIGITALBENCHMARKING

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
A. Audit IRM process	Limited activity. No process.	Ad hoc activity. Repeatable process. 'Insufficient' resource.	Good campaign-based process. 'Sufficient' resource.	Good continuous 'always-on' and campaign processes.	Optimization based on annual and end of campaign reviews.
B. Set goals	No targets.	Targets for number of influencers.	Detailed funnel targets and performance review.	Influencer activity targets by segment.	Influencer pogramme. ROI targets.
C. Select technology	No tools.	Spreadsheets.	Dedicated influencer outreach and tracking tools.	Process for using tools effectively.	Process for optimizing using tools.
D. Segment influencers	Market influencers not known.	Influencers better known, not categorized.	Influencers categorized and prioritized.	Appropriate tactics suitable to types of influencers.	Programme for refreshing influencers as needed.
E. Content strategy	No / unsuitable assets. No hub. No strategy.	Basic assets. Ad hoc blogging. Campaign plans.	Some quality assets. Influencer-generated. Basic strategy and plan.	More segmented content. Full 12-month plans.	Refined strategy process.
F. Manage outreach	No process. Organic sharing.	Limited influencer involvement with content. No paid deals.	Mainly content-based outreach. Paid deals.	More continuous outreach.	Fully-managed process including crisis management.
G. Evaluate and measure ROI	No measurement.	Basic tracking of total visits.	Influence on leads and sales known from URL PDF and social tracking.	Impact of influencers and ROI known.	Comparison to competitor programmes known.
	"Limited outreach"	"Ad hoc outreach"	"Structured IRM programme"	"Optimizing IRM programme"	"Optimized IRM programme"

+ Take your IRM to the next level with Smart Insights premium member resources.

+ Check out our influencer outreach guides and editorial calendars to improve your approach

+ Join our premium members to download our templates and guides to campaign and content marketing strategy.

AIMING FOR E-COMMERCE MARKETING EXCELLENCE

#DIGITALBENCHMARKING

Take your e-commerce marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their digital channels to identify and prioritize areas to improve.

Smart Insights

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimized
Plan *Creating a strategic roadmap*	No strategy. Unclear goals.	Pritoritized activities. Sales goals, not modelled. MarTech adoption ad-hoc.	Multichannel marketing plan in place. Profit-based funnel acquisition model.	Retention and LTV model. 90 day planning. MarTech roadmap and structured evaluation.	Digital transformation implemented. Structured testing and optimization programme.
Reach *Build awareness Drive visits*	Limited ad hoc use of paid media. SEO not proactive.	Search target keywords defined. Simple use of AdWords/online media.	Structured approach to paid, owned and earned media to agreed targets.	Programmatic. Regular improvements to media. New media review ad hoc.	Media fully optimized based on attribution and evaluation of new options.
Interact *Experience, flow and content*	No insight on customer journeys. Limited insight on product popularity	Footfall to different site sections and product categories understood.	Content marketing and merchandised journeys to encourage purchase.	Merchandising optimized AB testing of differet site sections.	Multivariate testing. High quality content marketing.
Convert *Build multi-channel sales*	No paid remarketing. Simple broadcast newsletter.	Initial media retargeting. Targeted newsletter. Simple welcome emails.	Re-targeting optimized Welcome and abandon emails. Personalization.	Segmented lifecycle emails, personalization & paid media retargeting.	Retargeting and personalization optimized across touchpoints. AI.
Engage *Customer loyalty and retention*	Limited experience research Customer newsletter	No loyalty programme Targeted newsletter. No personalization	Customer research informs site improvement email re-engagement.	Loyalty programme. NPS. RFM-based email and personalization.	Retargeting and personalization optimized across touchpoints. AI.
Brand *Building emotional connection*	Basic brand identity, but brand benefits not communicated.	Brand values defined, but not clear on-site. Customer reviews.	Online value prop defined Blog and social media develop brand.	Brand personality and defects researched and acted on promptly.	Fully integrated brand reputation management including PR.
Governance *Managing growth approach*	Analytics in place, not reviewed. Ad hoc trading reviews	Analytics reviewed ad-hoc Regular trading reviews.	Dashboards for regular weekly trading reviews.	Value-based KPIs 90-day planning review.	Lifetime value KPIs Structured defect reduction problem.
	"Basic e-commerce marketing"	"Improving e-commerce marketing"	"Planned e-commerce marketing"	"Managed e-commerce marketing"	"Optimised e-commerce marketing"

+ Take your e-commerce marketing to the next level with Smart Insights member resources

+ Check out our e-commerce Toolkit page for our free E-commerce mistakes checklist

+ Join our premium members to download planning templates and best practice guides to improve retail e-commerce

Continue building your skills, upskilling your team or growing your business

You now know how to use benchmarks to measure your marketing tactics across channels to develop your digital marketing maturity. Are you ready to optimize your marketing one step further? At Smart Insights we offer guides, templates, and e-learning modules across all channels of digital marketing.

So, whether you need to refine your personas, start using a new social media platform or stay up to date with the best SEO practices, we've got you covered. We offer in-depth actionable advice within our premium member resources to help you take the action points in this guide even further.

What are you looking to achieve?

Individual Progress

Online learning for all ability levels so you can excel in marketing and develop practical knowledge of key marketing channels.

ENHANCE MY SKILLS

Team Development

Track learning and give your team the freedom to learn anytime and anywhere, by combining training with application.

UPSKILL MY TEAM

Business Growth

Grow your business by learning and applying up-to-date best practice and the latest marketing techniques.

GROW MY BUSINESS

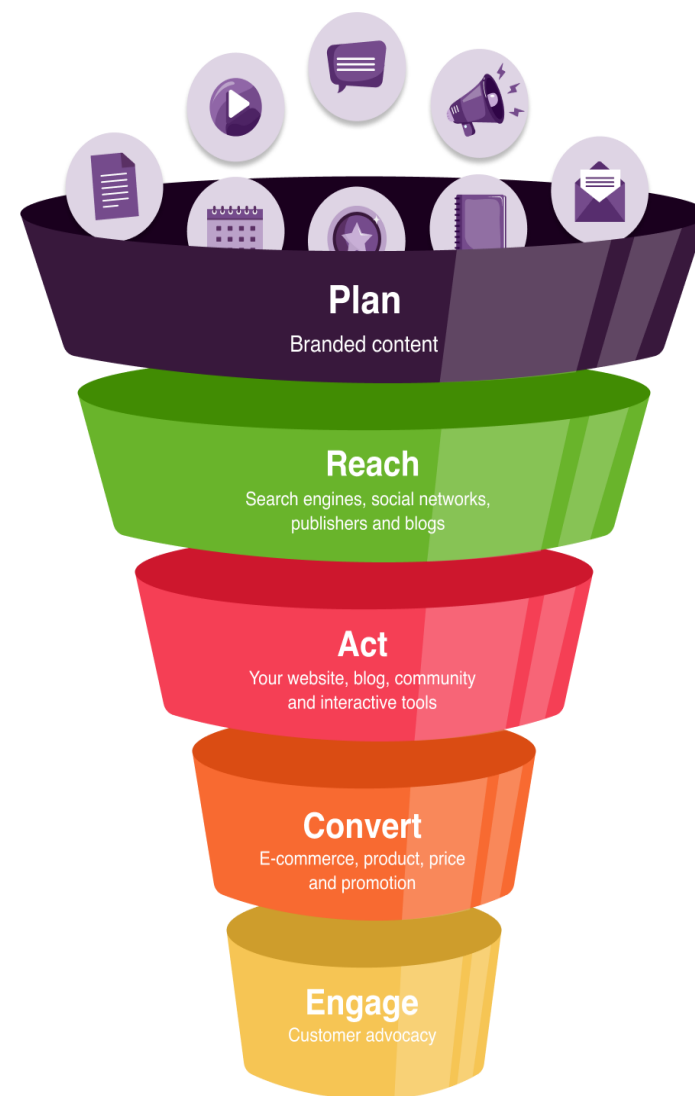# The Smart Insights Difference - how we help members plan, manage and optimize

At Smart Insights, we reach over 500,000 unique visitors each month. We have over 165,000 members, who subscribe to improve their marketing processes and ROI by applying the Smart Insights Growth System.

ENQUIRE NOW

There are many blogs and training courses that will advise you on digital marketing tactics like search, social media and email marketing in isolation. Rightly so, since if you're creative and follow the best practices to optimize them, these can give you great results.

Naturally, Smart Insights advise on these key channels. However, it's our belief that, to be effective in modern marketing, you need to develop integrated strategies and data-driven plans based on the marketing fundamentals such as segmentation, targeting and brand positioning.

You need to develop the skills and put in place the processes to Plan, Manage AND Optimize your activities.

Plan
Branded content

Reach
Search engines, social networks, publishers and blogs

Act
Your website, blog, community and interactive tools

Convert
E-commerce, product, price and promotion

Engage
Customer advocacy

Any questions? Contact us on **info@smartinsights.com**

Smart Insights