



MARKETING AUDIT:

WHAT'S WORKING, WHAT'S MISSING,
AND WHAT TO DO NEXT



Presented by:

Megan Kalbach, Founder & CEO



WELCOME & HOW TO USE THIS WORKBOOK

Name:

Business/Organization:

Website:

Primary goal for the next 90 days:

This workbook goes with the Marketing Audit session and is meant to be used in real time.

This is not about doing more. It is about getting clear on what is working, what is missing, and what needs to be fixed first so your marketing actually produces results.

What you'll leave with:

- A clear, repeatable message for your business or organization
- A quick audit of your website and owned assets
- Your top audience and how to build trust with them
- A realistic ads readiness check
- A simple 90-day action plan you can actually follow

Reminder:

A strong audit checks the system, not just the activity.

MEET MEGAN



Megan Kalbach is the Founder and CEO of K Marketing Co., a full-service marketing agency based in Mountville, Pennsylvania. Since launching the company in January 2024, she has grown it to a team of fifteen, serving small businesses, nonprofits, and first responder organizations across Lancaster County and throughout the country. Her relationship-centered and results-focused approach has helped organizations strengthen their brand presence, increase community engagement, and build sustainable marketing systems that create real impact.

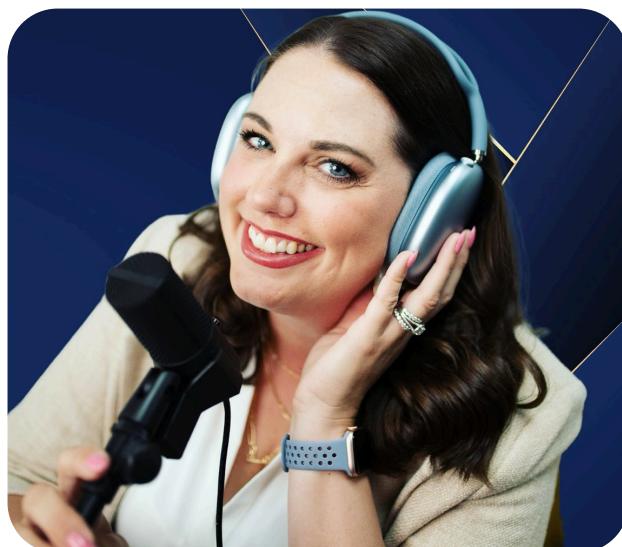
Entrepreneurship is in Megan's DNA. Raised in a family of small business owners, she spent her childhood learning the grit, heart, and responsibility of running a business. She went on to build several ventures of her own and gained national recognition for her ability to develop strong teams, empower others, and lead with clarity and purpose.

Megan founded K Marketing Co. to create a purpose-driven agency rooted

in strategy, excellence, and people. She is known for blending creative vision with thoughtful systems, building a team culture that values accountability and encouragement, and helping business owners grow into confident and effective leaders. Her passion is to guide organizations to thrive by developing solid marketing foundations, elevating their voices, and helping them build businesses that support the lives and communities they care about.

Alongside her agency work, Megan is a frequent speaker for business audiences, community organizations, and professional groups. She shares practical insight on leadership, marketing, systems, and the realities of growing a business, and she also enjoys delivering motivational messages that encourage others to step boldly into their goals.

Megan is also the host of the podcast, The Blueprint, powered by K Marketing Co., which brings business owners behind the scenes of leadership, marketing, and organizational growth.



PRE-MARKETING AUDIT SELF EVALUATION

Is your plan written down, in your head or are you simply ‘winging it’?

Do you know WHO you are, WHAT you do and WHY it matters?

How do people currently discover your business/organization and what helps them understand what you do?

If you put \$500 behind your marketing today, what happens next?

Do you feel you are currently marketing, or simply advertising?

What part of your marketing foundation needs attention first?

Notes:

AUDIT AREA 1: BRAND & STRATEGY FOUNDATION

Who do you serve (and who do you NOT serve)?

What problem do you solve and why should someone choose you?

What do you want to be known for in 6-12 months?

Is your messaging clear enough that someone can repeat it?

What does AI think you do?

One-Sentence Message Builder

Fill this in, then read it out loud. If it feels clunky, simplify.

We help (audience):

with (problem):

by (unique approach):

so they can (result):

The 10-Second Test

Pull up your website's homepage. In 10 seconds, a visitor should instantly understand what you do and what to do next.

In 10 seconds, I can tell you we do:

The next step you want me to take is:

Primary call-to-action (CTA) on your homepage:

What is the biggest confusion or friction point:

Top 3 Conversion Blockers to Fix:

Examples: unclear headline, weak CTA, confusing navigation, missing proof, forms not working, slow mobile load.

- 1.
- 2.
- 3.

Would you want to leave or stay on your site after 10 seconds?

If no, why?

Audit Area 2: Brand Consistency

Consistency builds trust: Use this checklist to spot where your brand looks or sounds like different businesses.

- **Yes/No:** Logo and colors match across website, social, and print
- **Yes/No:** Fonts are consistent (or intentionally paired) across platforms
- **Yes/No:** Photo/video style feels cohesive and aligned to your audience
- **Yes/No:** Messaging is clear, specific, and repeatable
- **Yes/No:** Tone of voice is consistent and matches your audience
- **Yes/No:** Offers and pricing language are consistent across channels
- **Yes/No:** Contact info is correct everywhere (phone, email, address, hours)

Notes: What needs to be standardized first?

First Impression Audit

Rate each item 1-5 (1 = needs work, 5 = strong). Anything rated 1-2 is a priority fix.

Item	Scale 1-5	Notes/Fix
Website: clear headline & primary CTA		
Website: mobile-friendly and fast		
Website: easy navigation (no confusion)		
Website: proof (reviews, photos, results, trust badges)		
Basic SEO (titles, meta, indexing, local keywords)		
Google Business Profile (complete, updated, reviews)		
Email domain & professional signature		
Find-ability (are you easy to find in search/maps?)		

Notes: What needs to be improved first?

AUDIT AREA 3: AUDIENCE, POSITIONING, AND CHANNEL FIT

Most businesses do not need to be everywhere. They need consistency in the right places.

Pick your primary 1-2 audiences. Get specific. Then decide where you will show up consistently.

- 1.
- 2.

What do they care about most? (time, price, trust, impact, speed, quality):

What makes you different? (one clear differentiator):

Where do they actually look? (Google/search, Facebook, referrals, email, events):

Pick 1-2 Channels You Can Be Consistent On	Pick Your Top 2 & Secondary 2
Search/Google Business	
Email	
Facebook	
Instagram	
LinkedIn	
YouTube	
Events/Community	
Referral Partners	

On a scale of 1-5, how confident are you that you know where your audience discovers and decides?

TRUST-BUILDING AUDIT

Your marketing should make sales easier, not create more explaining.

Trust builders: Are you focused on	Yes/No
Community presence that supports credibility	
Content that answers real questions people ask before buying or donating	
Partnerships that are intentional and aligned	
Simple tools for your team like scripts, one pagers, and decks	

List three places you will commit to showing up consistently:

- 1.
- 2.
- 3.

Notes:

Dig Deeper: Need more reviews? Simple review request script for after the sale/service:

1. Hi [Name], thank you again for choosing us. If you have a minute, would you be willing to leave a quick review about your experience? It helps more people find us. Here's the link: [GMB Google Review Link]

BUDGET AUDIT: WHAT NEEDS INVESTMENT FIRST

If you're spending money, make sure you've built a solid foundation - not just making noise.

Where Your Budget Should Go First:

Foundation Spend	Needs attention?
Clear messaging and target client	
Current website and a clear call-to-action	
SEO basics completed	
Local search is setup and accurate	
Credibility Assets	Needs attention?
Professional photo/video for strong visuals	
Testimonials	
Case studies	
Reviews (Google, etc.)	
Content System	Needs attention?
A clear content and follow-up system	
Use of automations and support staff	
Measurement	Needs attention?
Measurement and tracking that tells you what is working	

If anything needs attention, what are your most important three next steps?

- 1.
- 2.
- 3.

ADVERTISING AUDIT: ARE YOU READY TO SPEND MONEY?

Ads Readiness Checklist	Yes/No
I know exactly what I'm promoting (one clear offer/campaign)	
Traffic goes to a relevant landing page (not just the homepage)	
There is a follow-up system (email, call, form confirmation, CRM)	
I can track outcomes (leads, calls, forms, purchases, donations)	

If you checked “no” for any of these, what needs to be built before you spend more on advertising campaigns?

Dig Deeper: Answer these as clearly as you can.

What are you promoting?:

Where does traffic go?:

What follow-up happens after someone clicks on a campaign?:

What outcome are you tracking?:

SMART BUDGET CHOICES: GOOD VS. POOR MARKETING INVESTMENTS

Spend Smarter, Not Louder

Good Budget Uses	Poor Budget Uses
Clear positioning & messaging	Paying for “pretty” without clarity
Website/landing pages with one clear call-to-action	Ads to a homepage with no next step
Google Business setup and management	Ignoring local search presence
Professional photography and video that build trust	Stock photos that feel generic or inauthentic
Social media management for consistency	Boosting random posts because “it felt important”
Community sponsorships and events that connect you locally	Overpaying for broad ads that reach the wrong audience

What are some good marketing budget choices you have made in the last 90-days?

What are some possibly poor marketing budget choices you have made in the last 90-days?

HOW STRONG IS YOUR PLAN?

This helps you self-identify where you are. No judgment, just clarity.

1

Level 1: Activity (Reactive)

Posting “when we can” no clear goals, no tracking

2

Level 2: Consistency (Basic Plan)

Some routine, basic brand consistency, still unclear on ROI

3

Level 3: System (Measurable)

Clear goals, a funnel, consistent content, monthly reporting

4

Level 4: Optimized (Scalable)

Testing, refining, documented playbooks, predictable lead flow

What is your current level?:

What are your next steps to move up to the next level in the next 90-days?:
(write 1-3 actions)

Quick self-check:

- We know our cost per lead, cost per acquisition, or cost per donor
- We have 1-2 primary audiences clearly defined
- We can point to what drives results, not just what we are busy doing
- We are confident our spending is producing measurable outcomes

CLOSING

Keep building momentum. Your next step is not to do more marketing. Your next step is to fix the one biggest gap the audit reveals.

What one thing will you commit to consistently doing in the next 30 days?

Closing Notes & Key Take-Aways:



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Need help building a clear plan and actually putting it into action?

K Marketing Co. can help you identify your biggest gap, build the foundation, and execute a simple 90-day roadmap that drives results.

Book a strategy call with Megan

kmarketingco.com/megan-kalbach



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