The essential media performance audit checklist

A tactical framework for evaluating marketing performance and maximizing your budget

Whether you're exploring a new agency, building an in-house motion or just trying to light a fire under your current AOR, this audit gives you the tools to pressure-test every line of media spend.

Inside, you'll find a step-by-step framework to surface what's working, spot inefficiencies and create a strategy that's tightly linked to your business goals. From aligning on objectives to diagnosing market dynamics, this checklist equips you to take control of your media investments with the data to back it up.

Step 1:

Set your window, spot the signals

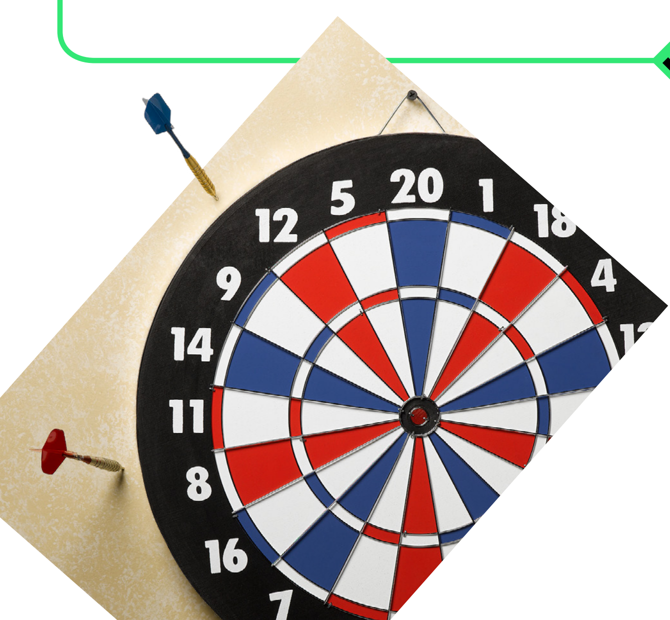
Start with a trailing 12-month window. This creates consistency across channels and metrics.

The audit should include data such as:

- Revenue generated
- Transactions completed
- Media investment
- Funnel performance
- Customer touchpoints

salesforce Google Analytics Demandbase

Grab your data from: Salesforce, Google Analytics, Demandbase, media dashboards, CRM, wherever the truth lives. (If your agency doesn't provide supporting data, that's a dealbreaker.)



Step 2:

Pick your play

Decide what your driving force is: volume or efficiency?

- **If it's volume**, you want to increase market share, cost-per-mille (CPM), revenue, reach and geo/account expansion.
- **If it's efficiency**, you're hoping for lower customer acquisition costs (CAC), higher return on ad spend (ROAS), better close rates and smoother workflows.

Make sure your stakeholders understand the current results are aligned on the driving objective moving forward. (If you're aiming for growth but sales is stretched thin, you're lighting money on fire.)

Step 3:

Create a baseline

What actually happened vs. what could happen in future state? Assess your actual performance with that of what you want your ideal next agency partner to deliver.

Build a side-by-side comparison of:

- Actual results
- Ideal performance (what it should've looked like if things were running tight)

Ask the hard questions:

- Were paid and organic channels doing their job?
- Was the budget strategic or just spent?
- Did the messaging meet the moment?
- How might you have changed your strategy to better align with your goal?

This is where you find the leaks. Patch them before the next cycle starts.

Step 4:

Diagnose your work

This matrix plots your market, segment or geo by two critical variables: brand strength and demand signal. This cuts through guesswork and gives you a clear strategy for each territory.

Don't fix a strategic misfire with a media budget. Get the diagnosis correct first.

High Brand, Low Demand

Diagnosis: Silent Engine
Your next step:
Focus on demand gen: message testing, retargeting and funnel education.

High Brand, High Demand

Diagnosis: Hero Market
Your next step:
Maintain and sustain your current media strategy.

Low Brand, Low Demand

Diagnosis: Cold Zone
Your next step:
Go organic-only unless strategic priorities change.

Low Brand, High Demand

Diagnosis: Opportunity Hotspot
Your next step:
Prioritize brand-building: paid social, events, PR and customer proof.

Brand

Demand

X-axis: Demand signal
This measures active interest in your solution. It reflects how ready your market is to buy right now. In other words: Demand shows who's knocking at your door.

Y-axis: Brand strength
This gauges how well your brand is known, trusted and recalled in your market. Brand shows how loud your name echoes in the room, even when you're not speaking.

Together, these axes give you a momentum map:

- **Where you're strong.**
- **Where you're slipping.**
- **Where you're simply not resonating yet.**

Step 5:
Build your market map

Each area represents a distinct market condition — each with its own set of best practices. After you've diagnosed your market, here are recommendations for each area:

- **Diagnosis:** Hero Market
  Your next step: Maintain and sustain your current media strategy. Your tactics are working, and this spend is easily defended. This is a safe place to test new products, ad types and audiences.

- **Diagnosis:** Silent Engine
  Your next step: Reignite interest in your brand. Focus on demand gen: message testing, retargeting and funnel education.

- **Diagnosis:** Opportunity Hotspot
  Your next step: Turn up your media volume. Prioritize brand-building: paid social, events, PR and customer proof. There's momentum here. Don't let competitors own it.

- **Diagnosis:** Cold Zone
  Your next step: Protect your budget. Go organic-only unless strategic priorities change. Maintain presence, but deprioritize spend. Wait for your moment. Alternatively, this is a safe place to test new products, ad types and audiences.

Step 6:
Document, defend, deploy

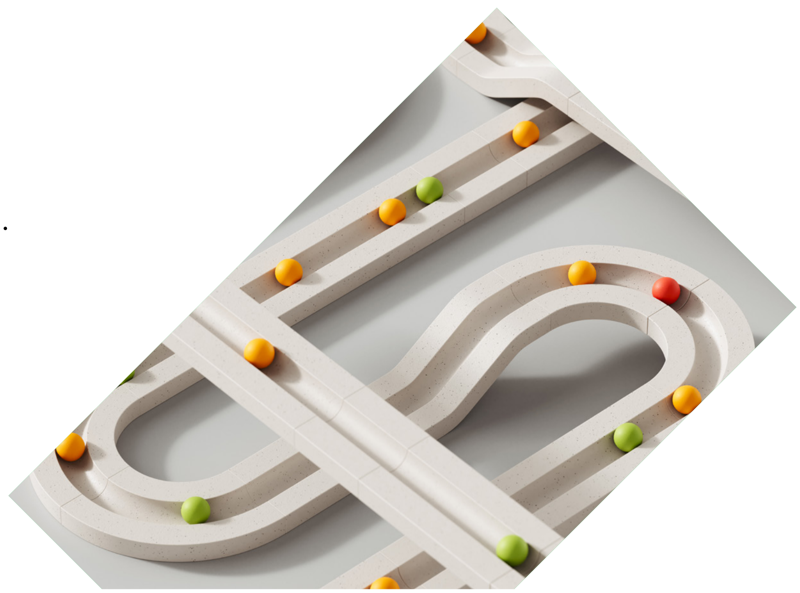
Of course, every brand and market has its nuances. A cold zone might still be worth the investment. A silent engine may need to be deprioritized. No matter how you classify your markets, the key is to assign a clear status: invest, maintain or cut. This keeps your team aligned and your budget tight.

- **Invest:** You're going for growth in this market. Prioritize headcount, media spend and program expansion here. These markets are ready and worth it.
- **Maintain:** You're involved, but not over-extended. Maintain visibility with minimal spend. Perfect for nurturing
  emerging potential or holding steady in strategic zones.
- **Cut:** You're scaling back or deprioritizing. Paid isn't pulling its weight in these markets. Instead of investing heavily, consider low-risk channels like organic content, influencer seeding or earned media. Keep a pulse here while refocusing spend where it's driving stronger returns.

Document your rationale. What you're doing, why you're doing it and how success will be measured.

This is your insurance policy for budget defense and future planning. Think: fewer surprises in QBRs, more clarity in board decks.

Bring in sales and leadership. Get cross-functional buy-in. When everyone's aligned on your strategy (and why), that's when budgets stick and performance scales.



Rise
a Quad agency

Now what?
Savvy marketers can use this tool in uncertain economic times to diagnose and deploy smarter media plans with justified spend. For marketers ready to take a closer look at their media buying strategy and make every dollar work harder, Rise helps you maximize your working media, starting now.