



MARKETING CLARITY AND ACCOUNTABILITY REVIEW

Independent marketing analysis for business owners who need clear decisions, trustworthy information, and better accountability.

\$4,500 to \$6,500

Three to four weeks

What this review does

A focused assessment that leads to decisions, not another pile of marketing observations.

THE OUTCOME

At the end of the review, you will know what the evidence supports, where information is missing, what deserves your budget and attention, and what your team should do next.

BEST FIT

- You spend money on marketing but still lack clear answers.
- Several people, vendors, platforms, or subscriptions are involved.
- Reports describe activity without helping you make decisions.
- You are considering a new hire, agency, campaign, website, or major expense.
- You want an independent opinion from someone who is not trying to sell the implementation.

The questions this review answers

01 What is helping the business move forward?

02 What is costing money without producing useful evidence?

03 Which reports and numbers can you trust?

04 Where are leads or customers getting lost?

05 What should your team stop, continue, change, or investigate?

06 What should happen during the next 90 days?

Business and customer foundation

The review starts with the business itself so the recommendations fit its economics, capacity, and customers.

BUSINESS AND REVENUE

- Business goals and current priorities
- Revenue model, offers, pricing, and sales process
- Available profit margin and customer value information
- Capacity and operational limitations
- Marketing budget and current resource allocation

CUSTOMER AND POSITIONING

- Priority audiences and existing customer research
- Brand positioning, messaging, and offer clarity
- Reasons customers choose the business
- Consistency across major customer facing channels

Customer journey and marketing activity

CUSTOMER JOURNEY

I review how people move from discovery to purchase, onboarding, retention, and referral. The assessment identifies broken handoffs, unnecessary friction, missing follow-up, and places where leads or customers may be lost.

ACTIVE MARKETING

The review covers the channels the business actively uses. Each channel must have a clear purpose, support a business goal, and justify the money or time assigned to it.

- Website and search visibility
- Email marketing and customer follow-up
- Paid advertising and organic social media
- Content, referrals, partnerships, public relations, events, and direct outreach

Measurement and spending

DATA AND REPORTING

- Analytics, conversion tracking, and lead source tracking
- Platform reporting and attribution limitations
- Conflicting numbers between systems
- Missing data and reporting gaps
- Whether current reports support business decisions

MARKETING EXPENSES

- Agency, contractor, and advertising costs
- Software subscriptions and overlapping tools
- Underused platforms or expenses without a clear purpose
- Spending that should continue, pause, or wait

Accountability and marketing risk

TEAM AND VENDOR ACCOUNTABILITY

- Ownership of each marketing responsibility
- Vendor scopes, deliverables, and reporting
- Incomplete, duplicated, or disconnected work
- Questions the owner should ask current providers
- Areas requiring outside technical, legal, or financial expertise

VISIBLE MARKETING RISKS

- Unsupported claims and platform policy exposure
- Customer privacy, accessibility, and reputation concerns
- Regulated or restricted marketing issues
- Dependence on one channel, vendor, account, or platform

This is a marketing risk review. It does not replace legal, financial, cybersecurity, or regulatory advice.

The three to four week process

WEEK 1

Discovery and evidence

Kickoff, access collection, stakeholder interviews, and an inventory of expenses, vendors, and active channels.

WEEK 2

Review and analysis

I assess the foundation, customer journey, marketing activity, reporting, spending, responsibilities, and visible risks.

WEEK 3

Findings and priorities

I organize the evidence, develop recommendations, classify current activities, and establish the first 90 day priorities.

WEEK 4

Presentation and planning

When the scope requires a fourth week, I present the findings, answer questions, and review the implementation plan.

What you receive

The deliverables turn the review into clear decisions and assigned next steps.

01 **Executive findings report**

What the evidence supports, what remains unknown, and the decisions that need attention.

02 **Stop Continue Change Investigate plan**

A direct recommendation for every major marketing activity reviewed.

03 **Marketing spending review**

Known expenses, potential waste, overlapping tools, protected spending, and spending that should wait.

04 **Measurement assessment**

Trustworthy information, reporting conflicts, missing tracking, and required corrections.

Decision support after the analysis

05 Responsibility and accountability map

Who owns each activity, what result it should support, and what the decision maker needs to see.

06 Prioritized 90 day action plan

The correct order of work, assigned ownership, dependencies, and what should not start yet.

07 Final findings presentation

A 90 minute meeting covering the findings, recommendations, risks, priorities, and questions.

08 One implementation plan review

I review the plan created by your team or vendor and flag gaps before the work begins.

What participation looks like

MEETINGS INCLUDED

- One 90 minute kickoff meeting
- Up to three 30 minute stakeholder interviews
- One 30 minute factual clarification meeting when needed
- One 90 minute findings presentation
- One 45 minute implementation plan review

WHAT THE CLIENT PROVIDES

- Timely access to relevant accounts, reports, agreements, and research
- Revenue, sales, customer, and expense information
- One primary decision maker and consolidated feedback
- Availability for interviews and follow-up questions

Missing access or delayed information may extend the timeline or limit the conclusions.

Exclusions

Implementation can be scoped separately when it falls within Ad Creations Marketing's limited implementation services.

- Campaign management, ad creation, or ongoing optimization
- Routine content production or social media management
- Email creation, automation building, or platform management
- Website changes, development, or technical analytics implementation
- A complete rebrand or original customer and market research
- Daily vendor management or project management
- Legal, financial, cybersecurity, or regulatory advice
- Unlimited meetings, revisions, or support

One consolidated round of factual corrections is included. A difference of opinion does not create a revision unless new evidence changes the findings.

Investment and scope level

\$4,500

Focused review

One primary offer or location, a small team, up to three active channels, one primary vendor, and relatively organized records.

\$5,500

Standard review

Several offers, four to six active channels, multiple providers, several reporting platforms, or moderate tracking concerns.

\$6,500

Complex review

Multiple locations or business lines, more than six active channels, several stakeholders, major measurement problems, or regulated marketing.

PAYMENT TERMS

Fifty percent is due at signing. The remaining balance is due before the final findings presentation. Work begins after the agreement, first payment, and access checklist are complete.



Your marketing decisions should have evidence behind them.

The first step is a fit conversation to confirm your business, available records, review complexity, and final investment.

Dr. Sam Dean

Ad Creations Marketing

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