

SOURCE: STRATEGIC AUDIT & BASELINE ALIGNMENT

Overview

Source is Merlin Strategies' comprehensive marketing audit service designed to establish a clear and accurate understanding of a business's current marketing landscape. Through a detailed intake and evaluation of existing marketing systems, campaigns, channels, and strategies, we identify inefficiencies, performance gaps, and opportunities for optimization. This service provides organizations with a strong strategic baseline, enabling informed decision-making and alignment before investing further in growth initiatives.

Key Components

- Review of existing marketing strategy and objectives
- Evaluation of active campaigns and channel performance
- Assessment of brand positioning and messaging consistency
- Analysis of customer journey and funnel effectiveness
- Identification of inefficiencies, gaps, and growth opportunities
- Documentation of findings and strategic recommendations

Our Process

The Source engagement follows a structured audit methodology focused on comprehensive data collection and objective analysis. We begin by gathering all relevant marketing documentation, assets, performance data, and platform access to gain full visibility into current efforts. This information is then analyzed to assess alignment, effectiveness, and efficiency across channels and initiatives. Our findings are synthesized into a clear, actionable assessment that highlights strengths, uncovers constraints, and outlines opportunities for improvement, providing a strong foundation for future marketing strategy and execution.



Deliverables

- Systems & Channel Report
- Campaign & Performance Summary
- Branding & Messaging Assessment
- Customer Journey Diagnostic
- Executive Marketing Debrief

Pricing

Pricing for the Source marketing audit is determined based on the scope and complexity of the organization's marketing environment.

OUTCOMES

Leadership gains a clear, evidence-based understanding of what is and is not driving marketing performance. Key inefficiencies are eliminated, high-impact opportunities are surfaced, and strategic blind spots are removed. As a result, marketing investments become more targeted, decision-making becomes more confident, and future initiatives are grounded in validated insight rather than assumption.