MARKETING PERFORMANCE WORKSHEET

The Three-Stage Marketing Funnel Audit

A short self-assessment to help you uncover whether your marketing is driving growth or just generating noise.

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The Growth Engine Design Firm for Financial Services

HOW TO USE THIS WORKSHEET

Before You Start

This worksheet mirrors a simple framework: your marketing works in three stages, audience, engagement, and action. Pull whatever data you have on hand (dashboard, CRM, platform analytics) and fill in your best estimate for each question below. You don't need exact numbers. A directional answer is enough to see where your funnel is strong and where it's leaking.

SECTION 1

Audience Fit

1. What is your firm's Ideal Client Profile (ICP)?

Describe who you're trying to reach. Be as specific as possible.

2. What percentage of your current audience matches that profile?

Estimate across followers, subscribers, and website visitors, or pull the number if you track it.

KEY METRIC: ICP-FIT GROWTH RATE

3. Has that percentage grown, stayed flat, or declined over the past quarter?

4. Where does most of your non-ICP audience come from?

Referral traffic, paid ads, organic search, etc.

SECTION 2

Engagement

1. List your top 3 engagement actions.

Downloads, webinar registrations, email opens, likes, comments, shares.

2. What percentage of your ICP-qualified audience took at least one of those actions last quarter?

KEY METRIC: ENGAGEMENT RATE AMONG ICP-QUALIFIED AUDIENCE

3. Which piece of content or channel drove the most engagement from ICP-qualified prospects?

4. Is engagement trending up, flat, or down compared to last quarter?

SECTION 3

Conversion

1. Of the prospects who engaged, how many requested a meeting, consultation, or demo?

KEY METRIC: MEETING CONVERSION RATE AMONG ENGAGED AUDIENCE

2. Are your marketing platform, CRM, and scheduling tools connected enough to track this accurately?

Yes / No, and note any gaps.

3. Where does the process break down most often between engagement and a booked meeting?

An unclear call to action, a difficult scheduling process, a gap in the sales handoff.

SECTION 4

Diagnosis

Match your answers above to the patterns below. This tells you where to focus first.

Growing audience, declining ICP fit	You're attracting the wrong people. Revisit targeting before you invest further in reach.
Strong ICP growth, weak engagement	Your messaging isn't resonating. Revisit the problems your content is speaking to.
High engagement, few meeting requests	There's friction between interest and action. Look at your call to action, scheduling process, and sales handoff.

SECTION 5

Your Next Steps

Based on where you landed above, check off the actions worth prioritizing this quarter.

- [ ] Refine or document our Ideal Client Profile so the whole team is targeting the same audience.
- [ ] Audit our top-performing content to understand what's resonating with ICP-qualified prospects.
- [ ] Review our calls to action across channels for clarity and consistency.
- [ ] Simplify or test our meeting scheduling process for friction points.
- [ ] Connect our marketing platform, CRM, and scheduling tools so we can track the full funnel.
- [ ] Set a quarterly cadence to revisit these three metrics and track trends over time.
- [ ] Benchmark our numbers against peer firms competing for similar clients.

Want help closing the gaps?

Intention.ly is the growth engine design firm for financial services,
helping RIAs, fintechs, and wealth management firms turn marketing into a measurable growth engine.

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