Mayank Patel
Marketing Performance Advisory

Can you trust your marketing reports?

A 15-point checklist for definitions, tracking and reporting

Most reporting problems aren't tool problems. They come from unclear definitions, gaps in tracking and numbers nobody owns. Tick off what's true for your business today.

Definitions

- [ ] Each KPI has one written definition.
- [ ] Marketing and sales use the same definition of a lead.
- [ ] Targets are set against those same definitions.
- [ ] Changes to definitions are dated and recorded.
- [ ] Someone owns each KPI.

Tracking

- [ ] Every campaign link is tagged the same way.
- [ ] Website forms record the source of each enquiry.
- [ ] CRM records keep the original source when a lead converts.
- [ ] Offline activity, such as events, is logged in the CRM.
- [ ] Duplicate records are merged regularly.

Reporting

- [ ] Reports start with commercial results, then activity.
- [ ] Each report answers a question someone actually asks.
- [ ] The same measure matches across reports for the same period and filters.
- [ ] Leadership sees a short scorecard on a regular rhythm.
- [ ] Reports lead to a clear decision or next step.

> **Score one point for each tick.**
> Under 8: fix the foundations first. 8 to 12: tighten definitions and tracking. 13 or more: put your effort into testing and decisions.

Want a second pair of eyes? Arrange an introductory call at mayankpatel.uk/contact, or take the 3-minute marketing check at mayankpatel.uk/health-check.