



Monthly Marketing Report Card

Client Name: _____ Coach: _____

Month: _____ Year: _____ Score: _____ out of 10 points

Please see your cover letter with advice for improvement....

1. What is working well with the plan?
2. What needs to improve with the plan?
3. What am I doing well as your coach?
4. What do I need to improve as your coach?

#1: _____ Four proactive weekly phone call updates made to client

Call #1: _____

Call #2: _____

Call #3: _____

Call #4: _____

#2: _____ Email lists are confirmed all up to date in (month)

(month) Upload: _____ (n/a if Zapier)

How many contacts were added in (month)? _____

#3: _____ One completed monthly strategy call with client

Date: _____ Time: _____ AM / PM

Recording URL: _____

#4: _____ One completed video shoot with client (Riverside.fm)

Date: _____ Time: _____ AM / PM

#5: _____ Two video emails sent to email list (with social media clips provided)

Emma Link URL #1: _____

Clip #1 URL: _____

Clip #2 URL: _____

Clip #3 URL: _____

Emma Link URL #2: _____

Clip #1 URL: _____

Clip #2 URL: _____

Clip #3 URL: _____

#6: _____ Two videos posted on all social media sites (hyperlinked below)

Video Topic #1: _____

YouTube | Facebook | LinkedIn | Instagram | Google My Business

Video Topic #2: _____

YouTube | Facebook | LinkedIn | Instagram | Google My Business

#7: _____ Two email “click” engagement reports sent for client lead follow up

Report #1 URL: _____

Total Delivered: _____

Open Rate: _____%

Click Rate: _____%

Report #2 URL: _____

Total Delivered: _____

Open Rate: _____%

Click Rate: _____%

#8: _____ One lead generation email sent to client’s database

Emma Link URL: _____

Web Form URL: _____

Social Media (hyperlinks): [Facebook](#) | [Instagram](#) | [LinkedIn](#) | [GMB](#)

Lead Export URL (CSV): _____

Total Leads Generated: _____

BONUS: ____ **One letter mailed to client's top 150+ contacts** (optional)

Order Receipt URL: _____

Letter PDF Link: _____

BONUS: ____ **\$1 a day social media retargeting advertising running** (optional)

Video #1 FB Preview URL: _____

Video #2 FB Preview URL: _____

Lead-Gen FB Preview URL: _____

Over the past 30 days....

Total Ad Spend: \$_____

Frequency: _____

of Clicks: _____

of Leads: _____

BONUS: ____ **Included a sponsor to pay 50% of the monthly fee** (optional)

Included in Video #1: ____ YES ____ NO

Included in Video #2: ____ YES ____ NO