

DIGITAL MARKETING BENCHMARKING TEMPLATES

Quickly review your capabilities for the
key digital marketing techniques!

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Contents

1. Digital Transformation.....	4
2. Integrated Lifecycle Marketing with RACE	5
3. Digital Analytics	6
4. Campaign planning.....	7
5. Email Marketing and Marketing Automation	8
6. Online Customer Experience.....	9
7. SEO Capability.....	10
8. Social Media Strategy	11
9. International marketing.....	12
10 Retail E-commerce Capability.....	13

Health Check 

How does your digital strategy compare?

BENCHMARK 



Introduction

Benchmarking templates for improving your digital marketing

Kickstart your Digital Transformation with our benchmarks

Whatever the size of your business or clients, ‘How do we compare to our competitors?’ is a common question when companies are looking to get more from their digital marketing. Great question! But how do you know what to compare and how can you structure your review and recommendations?

These templates edited by Dr Dave Chaffey and our Expert commentators will help you:

- ✔ Review how well you are currently using the key digital marketing techniques
- ✔ Identify the gap with where you need to be to compete
- ✔ Create a prioritised plan of how you need to improve

How do I use the capability reviews?

Our benchmark templates use the recognized 5 point scale of the [Carnegie Mellon capability maturity model](#) which rates different processes from an unmanaged approach as you start out at Level 1 up to a well-managed process at Level 5.

Score your business from Level 1 to Level 5 for the different ‘best practice’ activities you are using for each of the core processes we have identified as each row.

What next?

Once you have defined the priorities for improvement, you can then put in place an action plan to go to the next level. You may need new resources, but with our do-it-yourself [7 Steps guides and templates for core techniques](#) like SEO, Social Media and Email marketing you can learn and apply the best practices.

Alternatively take our detailed [Digital marketing health check audit](#) for Expert members – this gives an Excel spreadsheet to score your activities for each stage of RACE.

If you’re feeling like you’re way behind don’t despair! Digital moves fast and our research shows many are at an Levels 1 to 3.

All the best for getting to the next level!



ACHIEVING DIGITAL TRANSFORMATION



Take your digital marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their digital marketing and then plan how to take it to the next level.

Digital Capability	ONE. Initial	TWO. Managed	THREE. Defined	FOUR. Quantified	FIVE. Optimised
A. Strategic Approach	No strategy	Prioritised marketing activities	Defined vision and strategy	Business-aligned strategy and roadmap	Agile strategic approach
B. Performance Improvement Process	No KPIs	Volume-based KPIs No dashboards	Quality-based KPIs 'Last click' attribution Business dashboards	Value-based KPIs Weighted attribution Ad hoc CRO	Lifetime-value KPIs Continuous CRO
C. Management Buy-in	Limited	Verbal support, but inadequate resourcing	Sponsorship and increased investment	Active championing and appropriate investment	Integral part of strategy development
D. Resourcing and Structure	No specific skills	Core skills centralised or agencies	Centralised hub and spoke Dedicated resources	Decentralisation and reskilling	Balanced blend of marketing skills
E. Data and Infrastructure	Limited / no customer database	Separate data, tools and IT services	Partially integrated systems and data	Integrated systems and 360° data sources	Flexible approach to optimise resources
F. Integrated Customer Communications	Not integrated	Core push activities synchronised	Integrated inbound approach	Integrated, Personalised, Paid-Owned-Earned media	Media optimised for ROI and to maximise CLV
G. Integrated Customer Experience	Website not integrated	Desktop and mobile support, not personalised	Partially personalised desktop and mobile experience	Integrated, Personalised web, mobile, email and social media	Full contextual personalised experiences and recommendations
	"Laggard"	"Developing capability"	"Competent average capability"	"Above-sector average capability"	"Market leading capability"

+ Refine your Digital Marketing Strategy with Smart Insights member toolkits.

+ Check out our hub page <http://bit.ly/smartstrategy> for our free blog articles and planning template.

+ Join our Expert members to download digital marketing planning templates and our 7 Step guides to digital strategy.

AIMING FOR INTEGRATED LIFECYCLE MARKETING

#DIGITALBENCHMARKING



Take your digital marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their digital channels to identify and prioritise techniques to improve.

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimised
Plan <i>Creating a strategic roadmap</i>	No strategy. Unclear goals or prioritisation.	Prioritised activities. Goals not modelled or aligned. Martech adoption ad-hoc.	Multichannel marketing plan in place. Revenue-based funnel acquisition model.	Retention and LTV model. 90 day planning. Martech roadmap and structured evaluation.	Digital transformation implemented. Structured testing and optimisation programme.
Reach <i>Build awareness Drive visits</i>	Limited ad hoc use of paid media. SEO not proactive.	Search target keywords defined. Simple use of AdWords/online media.	Structured approach to paid, owned and earned media to agreed targets.	Programmatic. Regular improvements to media. New media review ad hoc.	Media fully optimised based on attribution and evaluation of new options.
InterAct <i>Experience, flow and content</i>	No insight on personas and customer journeys. Limited insight on sections	Footfall to different site sections and CTAs for lead generation and profiling	Content marketing and personalised journeys to encourage purchase.	Personalisation optimised. AB testing of different site sections.	Multivariate testing. High quality content marketing.
Convert <i>Build multichannel sales</i>	No paid remarketing. Simple broadcast newsletter.	Initial media retargeting. Targeted newsletter. Simple welcome emails.	Re-targeting optimised Welcome and abandon emails. Personalisation.	Segmented lifecycle emails, personalisation & paid media retargeting .	Retargeting and personalisation optimised across touchpoints.
Engage <i>Customer loyalty and retention</i>	Limited experience research Customer newsletter	No loyalty programme Targeted newsletter. No personalisation	Customer research informs site improvement. E-mail re-engagement	Loyalty programme. NPS. RFM-based email and personalisation	Retargeting and personalisation optimised. Machine Learning applied.
Brand <i>Building emotional connection</i>	Basic brand identity, but brand benefits not communicated.	Brand values defined, but not clear on-site. Customer reviews.	Online value prop defined Blog and social media develop brand.	Brand personality and defects researched and acted on promptly.	Fully integrated brand reputation management including PR.
Governance <i>Managing growth approach</i>	Analytics in place, not reviewed. Ad hoc performance reviews	Analytics reviewed ad-hoc Regular performance reviews. Skills lacking.	Dashboards for regular weekly performance reviews. Digital Skills.	Value-based KPIs 90-day planning review. Skills improvement.	Lifetime value KPIs Structured defect reduction problem
	“Basic Lifecycle Marketing”	“Improving Lifecycle marketing”	“Planned Lifecycle marketing”	“Managed Lifecycle marketing”	“Optimised Lifecycle marketing”

+ Take your digital marketing to the next level with Smart Insights member resources

+ Check out our Lifecycle Marketing Toolkit page for our advanced resources available to Business-level members

+ Subscribe to our business-level Expert membership to download planning templates and best practice guides to improve lifecycle

AIMING FOR DIGITAL ANALYTICS EXCELLENCE

#ActionableAnalytics



Take your digital marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are using analytics to review and improve results from digital marketing.

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimised
A. Management and Resourcing	No engagement No dedicated resource	HIPPO engaged Simple reporting	Wider use in business Dedicated analysts (larger businesses)	Dedicated experience and media optimisation resources to implement	Cross-business integration and collaboration
B. Metrics Selection	None selected	Marketing outcomes Last click	Satisfaction scoring Financial value or proxy Simple media attribution	Customer Lifetime value Media attribution models	KPI dependencies
C. Tools (Typical types)	Basic web analytics Basic Social media Basic Email reporting	+ Customer-feedback + Basic social analytics + Benchmarking tools	+ Voice of customer + Personalisation + BI visualisation	+ Real-time social media + Offline report + CRM/Individual tracking	+ Predictive analytics + Econometric models (large businesses)
D. Analytics Customisation	'Out-of-box' standard reports	Goals Custom reports Mailed reports	Segmentation Events Simple threshold alerts	Full dashboards	Automated real-time alerts
E. Integration	None	Email integration	Personalisation system Marketing Automation	Social media integration	360 degree customer view
F. Optimisation	None / HIPPO-led	Persona consideration Simple in-page and visitor path analysis	AB Tests Media testing	Multivariate Testing	Optimisation of Personalisation
G. Review Process	No structured reviews and WILFING	Regular (weekly, monthly)	90-day planning defining programme of testing	Continuous programme	Increase in number of tests of new techniques
	"Directionless"	"Reporting"	"Structured testing"	"Customer-centric"	"Optimising"

+ Check our blog for lots of examples of how to Plan, Manage and Optimize your digital marketing

+ Visit our hub page www.smartinsights.com/actionableanalytics for our free blog articles, fast start checklist.

+ Join our Expert members to learn how to achieve more actionable analytics by improving KPIs, people, process and tools using our templates and guided learning

AIMING FOR CAMPAIGN PLANNING EXCELLENCE

#DIGITALBENCHMARKING

Take your campaign planning to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are planning and executing campaigns to improve their effectiveness.



	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimised
A. Campaign goals and tracking	General goals No SMART objectives No analytics tracking	Idea of overall response No other success criteria Basic analytics tracking	Clear success criteria: Response volume, CPA and ROI	Specific objectives per channel Lifetime value assessed in time	Specific objectives modelled per media platform
B. Campaign insights and targeting	Limited research Poorly-defined audience	Top-level demographics used for targeting	Audience characteristics and motivation considered in targeting	Detailed targeting	New options included within targeting: 70:20:10 rule
C. Campaign theme and offers	Known core offer, but secondary offer and messaging not known	Clear primary and secondary offers Online brand benefits	Audience journeys and Keywords considered	Offer testing during campaign and competitor review	Offer testing before and during campaign
D. REACH: Media plan and budget	Campaign response not modelled. Poor integration	Top-level media budget created	Detailed channel budget for campaigns	Attribution considered during budgeting	Custom attribution models used. New media options tested.
E. ACT: Audience interaction and participation	Limited use of tailored Landing Pages or campaign interaction	Limited core content assets to support campaign	Audience journeys and range of content assets considered	Outreach built-in to content campaign	Testing of new interactive content assets
F. CONVERT: Optimise and test	Limited campaign retargeting follow-up or Sales optimisation	Simple retargeting, e.g. in Google Display Network	More advanced retargeting, e.g. Google RLSA	Full retargeting through social networks and Email	Retargeting optimised Offline contact prioritised based on lead-scoring
G. ENGAGE: Sharing and review	Social sharing and campaign review not considered	Sharing facilitated through sharing buttons only	Social proof Post-campaign review	Attribution reviewed post campaign. Lifetime value assessed in time.	Detailed campaign review
	“Unplanned campaigns”	“Starting to plan”	“Integrated campaign plans”	“Integrated plans with real-time response”	“Continuous optimisation of campaigns and media”

+ Take your campaign planning to the next level with Smart Insights member resources.

+ Check out our hub page <http://bit.ly/smartrace> for our templated download.

+ Join our Expert members to download planning templates and our 7 Step guides to Campaign Planning.

AIMING FOR EMAIL MARKETING EXCELLENCE

Take your Email marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their email marketing and then plan how to take it to the next level.



Optimised
"Integrated lifecycle targeting"

Quantified
"Starting to integrate"

Defined
"Starting to automate"

Managed
"Targeted emailing"

Initial
"Pray and spray"

	Initial "Pray and spray"	Managed "Targeted emailing"	Defined "Starting to automate"	Quantified "Starting to integrate"	Optimised "Integrated lifecycle targeting"
Email capabilities and evaluation	Simple ESP response tracking	Regular report of opens/clicks	'Beyond the click' tracking Segment tracking	Value reporting Hurdle rates and activity levels	Response data > CRM system/warehouse
List quality	Not managed	List-building options increased	List quality improved	Reactivation and removal	Preference centres
Targeting (relevance)	None: 'Pray and Spray'	Demographics	Basic triggers	Full lifecycle sequences	Additional sequences added
Proposition and communications strategy	Newsletter and Eblasts	Increased frequency	Content marketing integration	Social integration	Optimised frequency
Creative and templates	Simple headers	Multiple template	Dynamic content	Fully mobile optimised	Advanced techniques
Delivery	Not reviewed	Bounce rates reported	Inbox delivery reported	Feedback loops and delivery service	Continuous monitoring
Optimisation	None	Experiments with different offers/subjects	Structured offer / subject testing	Layout reviews AB testing	Multivariate testing



Take your Email marketing to the next level with Smart Insights member resources.



Check out our hub page <http://bit.ly/smarteremail> for our free blog articles, fast start checklist.



Join our Expert members to download email marketing planning templates and our 7 Step guides to email marketing.

ONLINE CUSTOMER EXPERIENCE EXCELLENCE REVIEW

Improve your online customer experience by using our visual checklist to review your capabilities for management, evaluation and personalisation.



	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimised
A. Responsibility	No defined responsibility	Ad hoc - cross-functional responsibility	Defined individual responsible	Dedicated team (larger organisation)	Clear responsibilities in each area of business
B. Evaluation and KPIs	Volume of interactions	Quality of interactions and short-term engagement	Value of interactions Simple satisfaction assessment	Long-term value Long-term engagement (Hurdle rates)	Detailed understanding of Loyalty and satisfaction drivers
C. Journey Analysis Techniques	Limited understanding of journeys	Path analysis in analytics Simple funnels	Visitor intent surveys	Usability studies	Cross-channel analysis e.g. panels
D. CRO Process	No optimisation	Ad hoc changes "Suck-it-and-see"	Ad hoc tests Simple AB test on key pages	Multivariate testing	Continuous structured testing programme
E. Personalisation Techniques	None	Specific content for Personas	Limited dynamic personalisation	Cross-journey personalisation	Optimising personalisation
F. Integration	Website not integrated with other channels	Simple cross-channel signposts and offers	Mobile support Remarketing (paid media)	Full range of cross-channel services	Optimised multichannel integration
G. Tools	Web Analytics (not customised)	Simple analytics customisation. Surveys.	Personalisation	Advanced Personalisation	Real-time feedback tools
	<i>"Hope for the best"</i>	<i>"Taking control"</i>	<i>"Pulling all main levers"</i>	<i>"Long-term perspective"</i>	<i>"State-of-the-art"</i>

+ Improve your ROI from Online marketing with Smart Insights member resources.

+ Check out our hub page <http://bit.ly/smartexperience> for our free blog articles and Ecommerce "Bible".

+ Join our Expert members to download best practice advice and templates on improving Ecommerce Marketing.

SEO CAPABILITY REVIEW



Take your SEO to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their SEO to identify and prioritise areas to improve.

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimised
A. Targets, Audit and Resourcing	No proactive use of SEO No dedicated resources for SEO	Dedicated SEO resource Audit completed. Top-level goals to improve.	SEO activities prioritised each quarter. More specific objectives	Integrated responsibilities and teams in larger organisation.	Skills and capacity to respond immediately to most issues
B. Indexing and Crawling	Not audited and no exclusions. Duplicate content likely.	Using Google Webmaster Tools to monitor. Some exclusions set up.	Mobile optimised. Using Geographical markup, Schema if relevant	Site section/content specific reporting and improvements	Site section/content specific reporting and optimisations
C. On-page Optimization	Not proactive. Usually an afterthought	Page Titles, headings and copies used to support SEO	Page Titles, headings and copy engineered to support SEO	Structured testing of Title/Description/Keyword Use	Continuous optimization of key content types.
D. Content Marketing	No content marketing strategy 'Organic'	Content created to support SEO goals	Content types and formats selected for SEO (and marketing goals)	Integrated Content/PR and SEO campaigns	Use of community and UGC supports growth
E. Link building	No record of external links	Links mainly organic, plus from some partners. Link re-configuration as need.	More use of outreach Backlink profile reviewed for balance. Disavowing.	Structured outreach programme linked to campaigns	Consistent quality of content limits need for outreach.
F. Internal Linking	Not assessed	Some use of internal links to support SEO	Navigation designed to support SEO	Some testing of internal link methods along with usability	Internal linking optimised
G. Measurement	Top-level target keywords defined	Contribution of SEO known and tracked through time at top level.	Using Segments to assess value (VQVC). Detailed keyword/content tracking.	Good knowledge or performance across site. Keyword Deltas monitored	Capacity to immediately identify problems compared to competitors
	"Not Proactive"	"Reviewing effectiveness"	"Applying best practices"	"Improving"	"Best-in-class"

+ Take your SEO to the next level with Smart Insights member resources.

+ Check out our hub page <http://bit.ly/smarterseo> for our free blog articles and Fast Start checklist.

+ Join our Expert members to download search planning templates and our 7 Step guide to SEO.

AIMING FOR SOCIAL MEDIA EXCELLENCE

Take your Social Media Marketing to the next level with our capability assessment. Use our visual checklist to audit your business or clients' use of Social Media Marketing and then create an action plan with our social media resources.



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	Initial "Starting out with Social"	Managed "Using Social"	Defined "Starting to Plan"	Quantified "Starting to integrate"	Optimised "Fully-integrated Social strategy"
1. Goals and Channel Integration	No goals beyond 'doing social media'.	General goals defined. Social buttons on website.	SMART objectives defined. Social media integrated into website. Automated Email integration.	Attribution using analytics. Social integrated into offline campaigns.	ROI reviewed. Goals agreed throughout the business. Social a key part of integrated multi-channel strategy
2. Social Listening and Governance	No Social Media Monitoring	Monitoring of brand mentions. Reputation Management	Defined process for customers reporting issues via social	Proactive PR - Influencer outreach. Social Media care	Proactive outreach to customers. Inputting into New Product Dvlp.
3. Content Planning	No planned content creation. Page updates only - not linking to hub.	Social hub/blog with content being created and shared in social updates	Monthly content plan with key content themes and engaging assets.	Longer-term 90 day content plan with themes for different audiences.	90 day content plan with themes which are announced and integrated.
4. Interaction and community management	Limited, reactive interaction on social media.	Monitoring and replying to comments.	Proactive interaction with fans, influencers company pages. Social care.	Community management resource for facilitating discussions. Localised.	Team in place for personalised replies and to facilitate discussion 24/7.
5. Company Page Optimisation	Pages set up, but not well branded.	Branded pages on priority social channels (e.g. Twitter, Facebook)	Branded pages set up on common and newer social channels (e.g. Pinterest)	Branded pages set up on channels requiring non-text content e.g. YouTube	Additional page features such as integrated videos and apps utilised.
6. Paid advertising	Not using paid advertising.	Experimenting with promoting updates without targeting	Targeted ads to boost page fans, site visits or leads	Remarketing for leads or sales. Power Editor in Facebook.	Optimised investment based on attribution and ROI review.
7. Evaluation	Not analysing page statistics.	Recording basic stats of growth (e.g. Page Followers, Likes).	Benchmarking reach, interaction rates. Tracking site outcomes.	Using analytics tools to evaluate behaviour of audience. Attribution.	Integrated dashboard of Social media performance and alerts on key issues.



Take your Social Media marketing to the next level with Smart Insights member resources.



Check out our hub page <http://www.smartinsights.com/social-media-marketing/> and our free blog articles, and Fast Start checklist.



Join our Expert members to download Social Media marketing planning templates and social network guides.

INTERNATIONAL LOCALISATION BEST PRACTICES

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Take your International Marketing to the next level with our capability assessment. Use our visual checklist to audit your business or clients' use of Localisation for International Marketing



Optimised
"Fully-localised"

Quantified
"Starting to optimise"

Defined
"Localisation managed"

Managed
"Starting to localise"

Initial
"Limited localisation"

1. Roles and responsibilities

No defined roles or responsibilities

Ad-hoc responsibility for international websites

Defined roles and responsibilities for each region but online activity siloed

IT/marketing/sales department integration & collaboration

Region-specific cross-business & cross-disciplinary integration and collaboration

2. Strategy and planning

No localisation strategy or plan

Single localisation strategy for all territories

Separate localisation strategy for each territory

Data-driven localisation strategy with clearly defined SMART objectives

Regular situation review + agile strategic approach to localisation

3. Infrastructure and data

Single language site hosted in home territory

Separate multi-language websites hosted in target regions with ccTLD or

Defined approach to infrastructure in different regions

Infrastructure decided on a case-by-case basis to support users in target

Optimised infrastructure – CDNs, page speed analysis & optimisation

4. Content

No local content created

Content created is not well tailored to local market needs

Content is 'culturally customised' to local needs

Additional static content developed to increase local relevance

All forms of content such as interactive tools and video are localised where effective

5. International search marketing

No search marketing strategy / SEO limited to on page content in source language

Source keywords identified and translated for target language

Localised keyword research, target keywords & onsite optimisation

Structured on page TDK testing, tracking across languages and territories

Dedicated outreach programmes, PR, content marketing on local sites

6. Customer experience

Limited customer support and little understanding of customer journey

Basic understanding of the customer journey but no action taken

Site structure and content optimised for customer journey – but not localised

Usability studies for localised user journeys, key markets optimised

Fully personalised for user preferences in each territory

7. Analytics, optimisation and reporting

Analytics installed but not customised for local reporting or KPIs

Reporting based on traffic volumes, measurement of traffic per territory

Simple page, visitor path analysis and AB tests of content per territory

Localised dashboards per region, multi-variate testing & segment/region

Dynamic optimisation of personalised content and competitor benchmarking



Take your International marketing to the next level with Smart Insights member resources



Check out our hub page <http://www.smartinsights.com/international-marketing/> and our free blog articles



Join our Expert members to download Digital Transformation templates and guides

Join our Expert members to download Digital Transformation

AIMING FOR E-COMMERCE MARKETING EXCELLENCE

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Take your E-commerce marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their digital channels to identify and prioritise areas to improve.

	1. Initial	2. Managed	3. Defined	4. Quantified	5. Optimised
Plan <i>Creating a strategic roadmap</i>	No strategy. Unclear goals.	Prioritised activities. Sales goals, not modelled. Martech adoption ad-hoc.	Multichannel marketing plan in place. Profit-based funnel acquisition model.	Retention and LTV model. 90 day planning. Martech roadmap and structured evaluation	Digital transformation implemented. Structured testing and optimisation programme.
Reach <i>Build awareness Drive visits</i>	Limited ad hoc use of paid media. SEO not proactive.	Search target keywords defined. Simple use of AdWords/online media.	Structured approach to paid, owned and earned media to agreed targets.	Programmatic. Regular improvements to media. New media review ad hoc.	Media fully optimised based on attribution and evaluation of new options.
Interact <i>Experience, flow and content</i>	No insight on customer journeys. Limited insight on product popularity	Footfall to different site sections and product categories understood.	Content marketing and merchandised journeys to encourage purchase.	Merchandising optimised AB testing of different site sections.	Multivariate testing. High quality content marketing.
Convert <i>Build multichannel sales</i>	No paid remarketing. Simple broadcast newsletter.	Initial media retargeting. Targeted newsletter. Simple welcome emails.	Re-targeting optimised Welcome and abandon emails. Personalisation.	Segmented lifecycle emails, personalisation & paid media retargeting .	Retargeting and personalisation optimised across touchpoints.
Engage <i>Customer loyalty and retention</i>	Limited experience research Customer newsletter	No loyalty programme Targeted newsletter. No personalisation	Customer research informs site improvement email re-engagement	Loyalty programme. NPS. RFM-based email and personalisation	Retargeting and personalisation optimised across touchpoints.
Brand <i>Building emotional connection</i>	Basic brand identity, but brand benefits not communicated.	Brand values defined, but not clear on-site. Customer reviews.	Online value prop defined Blog and social media develop brand.	Brand personality and defects researched and acted on promptly.	Fully integrated brand reputation management including PR.
Governance <i>Managing growth approach</i>	Analytics in place, not reviewed. Ad hoc trading reviews	Analytics reviewed ad-hoc Regular trading reviews.	Dashboards for regular weekly trading reviews.	Value-based KPIs 90-day planning review.	Lifetime value KPIs Structured defect reduction problem
	“Basic E-commerce Marketing”	“Improving E-commerce marketing”	“Planned E-commerce marketing”	“Managed E-commerce marketing”	“Optimised E-commerce marketing”

+ Take your E-commerce marketing to the next level with Smart Insights member resources

+ Check out our E-commerce Toolkit page for our free E-commerce mistakes checklist

+ Join our Expert members to download planning templates and best practice guides to improve retail E-commerce