

Portfolio Paid Media Audit Template

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Performance Marketing for VC Portfolios

Instructions: Score each area 1-5 (1 = Critical Gap, 5 = Best-in-Class). A score below 25 signals an immediate need for paid media intervention.

Company: _____

Date: _____

Assessed by: _____

#	AREA	DIAGNOSTIC QUESTION	SCORE
1	Attribution Clarity	Can the team trace ad spend to closed revenue (not just leads)?	☐ /5
2	CAC Trend	Is customer acquisition cost stable or declining over the last 2 quarters?	☐ /5
3	Channel Diversification	Is the company running on 2+ paid channels, or dependent on one?	☐ /5
4	Creative Testing Velocity	Are they testing 3+ ad variations per channel per month?	☐ /5
5	Landing Page Conversion	Are paid traffic landing pages converting above 3% (B2B) or 5% (DTC)?	☐ /5
6	Budget Allocation Logic	Is spend allocated based on marginal CAC data, or gut feel?	☐ /5
7	Reporting Cadence	Does leadership receive weekly performance reports tied to revenue?	☐ /5
8	Agency/Vendor Accountability	Are current partners on performance-based or month-to-month terms?	☐ /5
9	Funnel Leak Identification	Has the team identified and quantified their biggest funnel drop-off?	☐ /5
10	Competitive Awareness	Does the team monitor competitor ad strategies and auction dynamics?	☐ /5
TOTAL SCORE			/50

Scoring Guide

40-50

Strong Foundation

Optimize and scale

25-39

Gaps Present

Strategic intervention recommended

Below 25

Critical

Immediate paid media audit needed

Need help interpreting results? Book 15 minutes with Jer at adsbyjer.com

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