



MARKETING GUT CHECK WORKBOOK

Get clear on your business,
your goals, and yourself
before diving into a
marketing plan.



USING THIS **WORKBOOK**

YOU WOULDN'T BUILD A HOUSE BEFORE THE FOUNDATION WAS SET, SO WHY WOULD YOU BUILD A MARKETING PLAN BEFORE YOU'VE BUILT A STRONG BASE OF WHO YOU ARE AS A BUSINESS OR AS A MARKETER (AND WE'RE ALL MARKETERS, BELIEVE IT OR NOT)?

IF YOU'RE ONE OF THE THOUSANDS OF RESIDENTIAL SERVICES BUSINESSES OR CONTRACTORS FINDING SUCCESS AND CONSISTENT NEW WORK THROUGH REFERRALS, CONGRATULATIONS—YOUR WORK SPEAKS FOR ITSELF ENOUGH FOR YOUR CUSTOMERS TO DO MUCH OF YOUR MARKETING FOR YOU.

YOU PROBABLY ALSO KNOW THAT THERE'S A LIMIT TO HOW MUCH NEW BUSINESS WORD-OF-MOUTH CAN GENERATE, AND YOU MAY BE HITTING THAT CEILING NOW (OR SEE IT COMING).

NOW WHAT?

BETWEEN WEBSITE DEVELOPMENT, GOOGLE ADS, FACEBOOK, INSTAGRAM, ANGI, PRINT ADVERTISING, SPONSORSHIPS, NETWORKING EVENTS, AND MORE, IT'S EASY TO BECOME OVERWHELMED BY THE SHEER NUMBER OF MARKETING ACTIVITIES AT YOUR DISPOSAL. WHILE IT MAY BE TEMPTING TO TRY A LITTLE OF EVERYTHING TO COVER ALL YOUR BASES, FIRST TAKE A BREATH.

BEFORE YOU START THROWING MARKETING SPAGHETTI AT THE WALL TO SEE WHAT STICKS, TAKE THE TIME TO BUILD THE SOLID FOUNDATION YOU'LL NEED FOR LONG-TERM SUCCESS.

WHEN YOU IDENTIFY YOUR BUSINESS'S STRENGTHS; YOUR BANDWIDTH AND APPETITE FOR LEARNING; WHO YOUR CUSTOMERS REALLY ARE (AND WHO YOU'D LIKE THEM TO BE); AND WHERE, HOW, AND WHEN TO REACH THEM, YOU'LL BE ABLE TO BUILD A MARKETING STRATEGY THAT WILL STAND THE TEST OF TIME.

LET'S GET STARTED.

GUT CHECK

CHECKLIST

AS YOU READ EACH QUESTION, MARK "YES" IF YOU AGREE OR "NO" IF YOU DISAGREE WITH THE STATEMENT.

01	I HAVE SYSTEMS IN PLACE SO THAT MY BUSINESS FEELS ORGANIZED.	YES ☐	NO ☐
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02	I COMMUNICATE WITH PAST CLIENTS AFTER THE JOB IS DONE.	YES ☐	NO ☐
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03	I CAN EXPLAIN WHAT SETS MY BUSINESS APART IN ONE OR TWO SENTENCES.	YES ☐	NO ☐
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04	I UNDERSTAND HOW MY CUSTOMERS MAKE DECISIONS.	YES ☐	NO ☐
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05	I MAKE IT EASY FOR CUSTOMERS TO PAY ME.	YES ☐	NO ☐
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06	I AM WILLING TO INVEST THE TIME AND MONEY IN MY BUSINESS TODAY TO ENSURE ITS FUTURE SUCCESS.	YES ☐	NO ☐
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07	I AM WILLING TO FOREGO QUICK-FIX SOLUTIONS FOR LONG-TERM SUCCESS.	YES ☐	NO ☐
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08	I AM PREPARED TO TAKE THE NEXT STEP IN MY BUSINESS AND BUILD OUT ADDITIONAL SUPPORT IF NEEDED.	YES ☐	NO ☐
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INTERPRETING **ANSWERS**

MOSTLY YES

YOU'RE READY TO START MAKING MARKETING MOVES. WITH THE RIGHT SYSTEMS IN PLACE; THE KNOWLEDGE OF YOURSELF, YOUR BUSINESS, AND YOUR CUSTOMERS; AND A WILLINGNESS TO TAKE CALCULATED RISKS, YOU AND YOUR BUSINESS ARE PRIMED FOR GROWTH AFTER BUILDING A SOLID FOUNDATION.

COMPLETE THE REST OF THIS WORKBOOK THROUGH A LENS OF MARKETING AND GROWTH.

MOSTLY NO

YOU'VE GOT SOME WORK TO DO. TAKE SOME TIME GOING THROUGH THE REST OF THIS WORKBOOK TO IDENTIFY WHERE YOU MAY NEED TO ADJUST YOUR THINKING, BUSINESS PROCESSES, OR EXPECTATIONS. MARKETING DOESN'T HAVE TO BE COMPLICATED, BUT IT DOES HAVE TO BE CONSISTENT TO BE EFFECTIVE.

SPLIT IN HALF

INTERESTING, VERY INTERESTING. IT'S HARD TO SAY WHERE YOU'LL WIND UP AFTER DIGGING DEEP AND COMPLETING THE REST OF THESE EXERCISES.

YOU MAY REALIZE YOU NEED TO STREAMLINE A FEW THINGS BEFORE YOU'RE ABLE TO TACKLE A MARKETING PLAN. YOU MAY DISCOVER THAT YOU'RE MORE READY THAN YOU REALIZE AND JUST NEED TO TAKE THE LEAP. EITHER WAY, LET'S GET GOING.

SMART GOALS

WHEN SETTING A GOAL, FOLLOW THE SMART STRUCTURE OUTLINED BELOW.
USE THESE QUESTIONS TO IDENTIFY AND DEVELOP YOUR HIGHEST-PRIORITY
BUSINESS GOAL.

S	<u>SPECIFIC</u> WHAT DO I WANT TO ACCOMPLISH?	
M	<u>MEASURABLE</u> HOW WILL I KNOW WHEN IT IS ACCOMPLISHED?	
A	<u>ACHIEVABLE</u> HOW CAN THE GOAL BE ACCOMPLISHED?	
R	<u>RELEVANT</u> DOES THIS SEEM WORTHWHILE?	
T	<u>TIME BOUND</u> WHEN CAN I ACCOMPLISH THIS GOAL?	

ACTION

BRAINSTORMING

ACTION BRAINSTORMING CAN HELP IDENTIFY WHAT THINGS ARE HELPING OR STOPPING YOU FROM ACHIEVING YOUR GOALS. USING THE GOAL YOU DEVELOPED IN THE SMART EXERCISE ON THE PRIOR PAGE, CONSIDER THESE PROMPTS FOR YOUR NEXT ACTIONS TOWARD THAT GOAL.

MY GOAL:

**STOP
DOING**

**DO
LESS OF**

**KEEP
DOING**

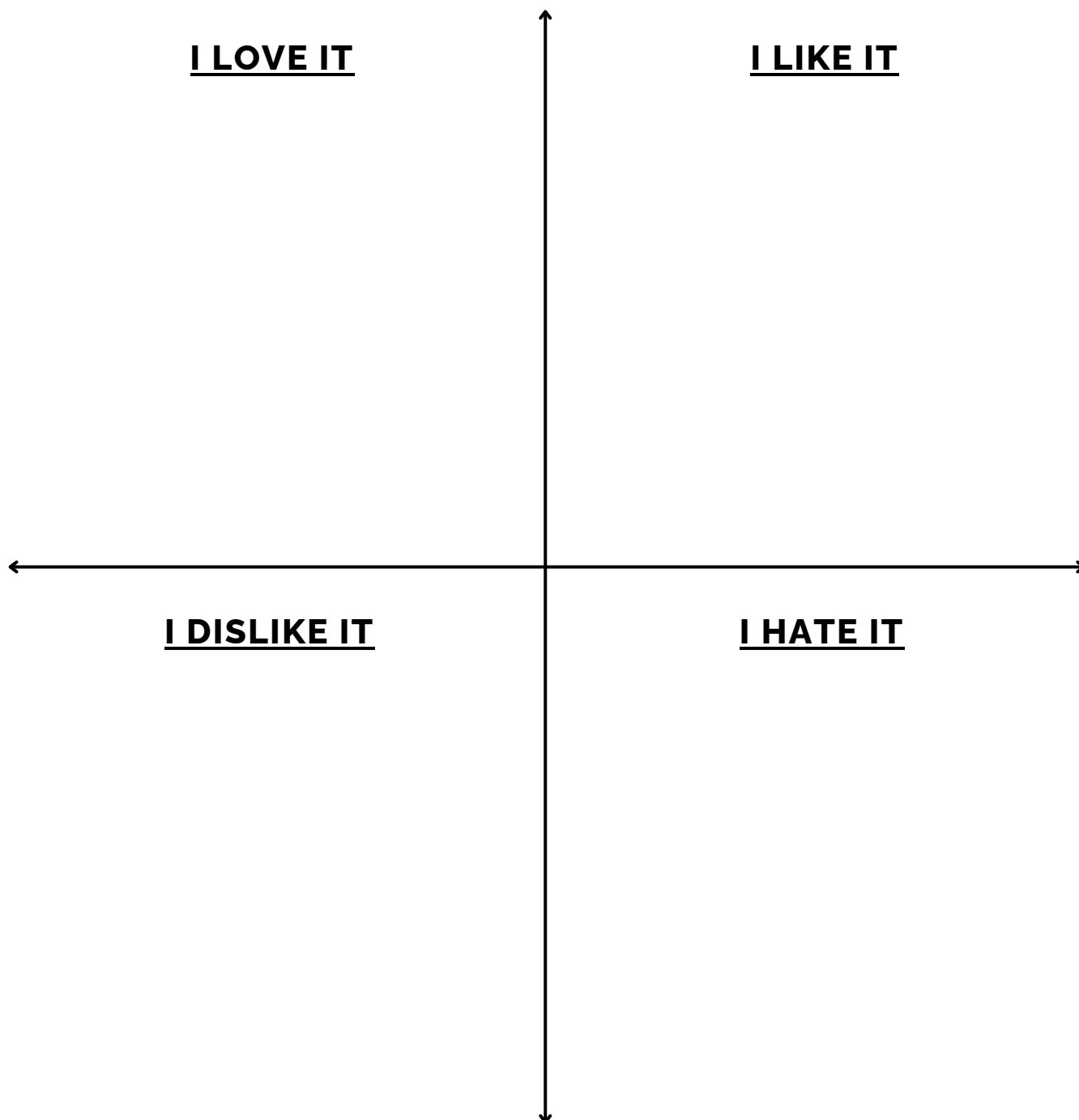
**DO
MORE OF**

**START
DOING**

SELF-KNOWLEDGE

MATRIX

THE SECOND LAW OF HABIT-BUILDING IN JAMES CLEAR'S BOOK "ATOMIC HABITS" IS "MAKE IT ATTRACTIVE." IDENTIFY WHAT ACTIVITIES YOU ENJOY (OR NOT) TO HELP CLARIFY WHAT TYPES OF MARKETING HABITS WILL LIKELY STICK. EXAMPLES: WRITING, MAKING JOKES, TAKING PICTURES, SETTING UP SYSTEMS, TALKING TO PEOPLE, ETC.



BUSINESS OWNER

ASSESSMENT

READ THE PROMPTS BELOW AND THINK ABOUT THE FIRST THING THAT COMES TO MIND. FILL YOUR ANSWERS OUT IN THE BLANK BOXES.

I AM A BUSINESS OWNER WHO...

LOVES	
WANTS TO	
IS DRIVEN BY	
IS INSPIRED BY	
HAS A HABIT OF	
IS HAPPIEST WHEN	
BELIEVES IN	
WOULD GIVE	
WILL ONE DAY	
HAS THE GOAL OF	
WHO NOTICES	
IS AFRAID OF	

QUESTIONS, COMMENTS, CONCERNS

BRINGING IT ALL **TOGETHER**

LET'S GO.

SURE, YOU MAY HAVE HAD ENOUGH GROWTH IN YOUR BUSINESS DOING WHAT YOU'VE DONE SO FAR, BUT YOU'RE NOT READING THIS GUIDE AND GOING THROUGH THE EXERCISES AS SOMEONE READY TO LET THAT BE THE END OF IT.

YOU CAN START GOOGLING ALL THE THINGS YOU NEED TO DO TO CREATE A MARKETING PLAN. YOU'LL LIKELY WIND UP BOGGED DOWN IN THE DETAILS, OPTIONS, PROS AND CONS, AND CONFLICTING INFORMATION IF THIS IS UNCHARTED TERRITORY.

OR YOU CAN SKIP THE WANDERING AND JUMP STRAIGHT INTO THE GOOD STUFF. BUILD THE FOUNDATION ON LEVEL, SOLID GROUND, THEN JUMP INTO MARKETING YOUR BUSINESS AND GROWING TO THE NEXT LEVEL IN A SUSTAINABLE WAY THAT WON'T SEE YOU BURNING OUT IN THE PROCESS.

FOLLOW @PLACIDMARKETING ON FACEBOOK, INSTAGRAM, AND LINKEDIN FOR MORE MARKETING AND SMALL BUSINESS CONTENT, PLUS EARLY ACCESS TO NEW OFFERINGS AND SERVICES.

READY TO JUMP IN WITH TWO FEET? EMAIL ME AT
LEAH@PLACID.MARKETING TO GET STARTED.

