

# THE MARKETING REVOLUTION WORKBOOK:

THE  
MARKETING  
REVOLUTION

## UNLEASHING YOUR MARKETING POTENTIAL: YOUR INTERACTIVE 10-STEP WORKBOOK FOR WINNING MORE MARKET SHARE

In the dynamic landscape of business, adapting to constant change requires a keen understanding of innovative marketing strategies and the ability to cultivate a plan that consistently attracts new customers.

**Our goal** with this workbook is to equip your company with the tools for success, empowering you to secure a competitive edge and bolster your market presence. Designed as a companion to “The Marketing Revolution,” this workbook serves as an interactive guide for you and your team, facilitating the creation of a robust marketing plan tailored to your business or medical practice’s unique needs.

*“I’d like to encourage you to cherish the present while chasing your dreams. Life’s beauty is found in the journey, not just in the destination. I applaud your efforts and desire to grow, and my hope is that this workbook and The Marketing Revolution are not only encouraging, but helpful as you plan for your next chapter of success in life.”*

Joshua D. Cates  
The Marketing Revolution

Now let’s jump right in!

## STEP 1: REFLECTION AND GOAL SETTING

First and foremost, I encourage you to look inward and ask yourself these questions:

- Why are you wanting to grow in business?
- Is it purely for the money?
- Have you defined your priorities?
- Have you set clear goals?
- Are you prepared to minimize distractions and naysayers?
- What marketing questions or frustrations do you wrestle with?

## STEP 2: SELF-ASSESSMENT TASK

Let's get into our first self-assessment task.

**If your business is more than 3 years old, are you growing your top-line revenue each year?**

Yes  No

**Do you have deep industry knowledge in your field?**

List out your top 3-5 competitive advantages.

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**List 3 strategic partnerships you could put in place this year.**

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**How much market share do you currently own in your market area?**

• If you don't know how to determine this, I would strongly suggest hiring a marketing agency to conduct a keyword research strategy and assess your current paid media advertising. If your customer isn't finding you, then it's naturally going to be hard to dominate your market.

• For paid media, the term you are wanting to identify is "impression share." For example is there are 1,000 keyword searches in your market each month and your paid media has you showing up for 100 of those, then you have a 10% impression share.

## Are you using data points to drive decisions?

Here are several key areas you should be measuring. Check "yes" or "no" to do a self-assessment.

- **Do you know the number of calls you receive each month?**

Yes  No

- **Do you know the number of website leads you receive each month?**

Yes  No

- **Is your website traffic growing or shrinking?**

Yes  No

- **Do you monitor your paid advertising efforts? And do you understand clearly what is working and not working?**

Yes  No

- **Do you monitor your organic and paid ranking keywords and ranking results?**

Yes  No

- **Are you A/B testing your paid ads? Meaning trying different visual and copy to determine what resonates with a potential customer.**

Yes  No

- **Do you know the LTV (lifetime value) of your customer or patient?**

Yes  No

- **Finally, if you know your LTV, then do you know your Customer Acquisition Cost?**

Yes  No

### STEP 3: WHERE ARE YOU WEAK?

In The Marketing Revolution I talk about the danger of working on your weaknesses. In the area below write down three areas (weaknesses) that are taking up your time. These should be three weaknesses that you know are not your strengths. After writing them down, map out a plan to invest in hiring a marketing agency to take these off your plate immediately, or delegating to a teammate or employee who is strong in these key areas.

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### STEP 4: SWOT ANALYSIS

In the area below let's complete your SWOT Analysis by writing down answers for each area. After writing them down, I would encourage you to share your answers with your team, and also ask them to perform this exercise on their own. Once you have a consensus on your SWOT, you will be well on your way to building solutions and marketing tools to leverage this simple, but impactful business exercise.

#### STRENGTHS

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#### WEAKNESSES

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#### OPPORTUNITIES

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#### THREATS

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## STEP 5: START TO IDENTIFY WHERE CHANGE IS NEEDED

Let's start identifying areas where change is needed. In this exercise, ask yourself these five simple and telling questions:

**1. In what ways do you most often hear compliments and also criticism?**

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**2. Can you name any perks or features that your rivals provide that you don't, and can you match or beat those perks?**

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**3. What is the lifetime value of a new customer or patient?**

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**4. What is your current new customer or patient acquisition cost?**

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**5. Are you meeting your strategic objectives?**

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## STEP 6: TESTING AND ITERATION

### Internal Testing:

Test the values and brand identity internally. Share them with your team and gather feedback. Ensure that they resonate with everyone.

### External Testing:

Share the values and brand identity with a select group of customers or stakeholders. Collect feedback to see how well it aligns with external perceptions.

### Iteration:

Based on feedback, be open to refining and iterating on your values and brand identity. It's an evolving process that may need adjustments over time.

By engaging in this comprehensive exercise, you'll gain clarity on your company's values and identity, laying a strong foundation for building a consistent and authentic brand.

## STEP 7: 10 COMMON MARKETING MISTAKES

The goal of this exercise is for you (and your team) to be honest with yourself. Read through our Top 10 most common marketing mistakes and ask yourself how you rank for each one. Be honest with yourself. It's ok – that's the point of going through this exercise.

### Ignoring Target Audience:

Failing to define and understand your target audience can lead to ineffective marketing strategies. Create buyer personas and tailor your marketing efforts to address their specific needs and preferences.

**Rank 1 – 10 – Importance Score 8/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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### NOTES:

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**Inconsistent Branding:**

Inconsistency in branding, including visuals and messaging, can confuse your audience. Develop and adhere to a cohesive brand guide across all channels to build trust and recognition.

**Rank 1 – 10 - Importance Score 6/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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**NOTES:**

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**Overlooking Analytics:**

Neglecting to analyze and interpret marketing analytics can result in missed opportunities. Utilize tools like Google Analytics to track performance, identify trends, and make data-driven decisions.

**Rank 1 – 10 - Importance Score 9/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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**Neglecting Mobile Optimization:**

With the rise of mobile usage, not optimizing your website and CTAs for mobile devices can lead to a significant loss of potential customers. Ensure your website and emails are mobile-friendly.

**Rank 1 – 10 - Importance Score 8/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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**Ignoring Social Media Engagement:**

Simply broadcasting messages on social media without engaging with your audience can be detrimental. Actively participate in conversations, respond to comments, and build relationships on social platforms.

**Rank 1 – 10 - Importance Score 6/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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**Relying Solely on One Marketing Channel:**

Putting all your marketing efforts into one channel can leave you vulnerable to changes in the market. Diversify your marketing mix to reach a broader audience and reduce risk. Follow the 75/15/10 rule discussed in my book The Marketing Revolution.

**Rank 1 – 10 - Importance Score 6/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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**NOTES:**

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**Ignoring Customer Feedback:**

Customer feedback is valuable for improving products and services. Ignoring or dismissing customer feedback can result in a negative reputation. Act on feedback to enhance customer satisfaction.

**Rank 1 – 10 - Importance Score 9/10**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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**NOTES:**

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**Focusing Too Much on Features, Not Benefits:**

Highlighting product features without explaining the benefits to the customer may not resonate. Clearly communicate how your product or service solves the customer’s problems or fulfills their needs.

**Rank 1 – 10 - Importance Score 7/10**

1	2	3	4	5	6	7	8	9	10
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**NOTES:**

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**Neglecting Content Quality:**

Poor-quality content can harm your brand image. Invest in creating high-quality, relevant content that adds value to your audience and positions your brand as an authority in your industry.

**Rank 1 – 10 - Importance Score 9/10**

1	2	3	4	5	6	7	8	9	10
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**Lack of a Clear Call to Action (CTA):**

If your marketing materials lack a clear CTA, potential customers may be unsure about the next steps. Clearly state what you want your audience to do, whether it’s making a purchase, signing up, or contacting you.

**Rank 1 – 10 - Importance Score 8/10**

1	2	3	4	5	6	7	8	9	10
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## CONGRATULATIONS YOU ARE DONE!

Now, let's proceed with creating a scoring system for the 10 questions and their answers using a 1-10 ranking score. The importance score of each question reflects the significance or relevance of the question within the context it's being asked.

- (Q score) represents the score assigned to the answer of a particular question using 1-10.
- (Importance score of Q) represents the importance or weight of that question.
- "X" represents the resulting score when you multiply the score of the answer by the importance of the question.

Calculate using this formula: (Q score) \_\_\_ x (Importance score of Q) \_\_\_ = X

As a reminder your "importance" score for the 10 questions are as follows: 8, 6, 9, 8, 6, 6, 9, 7, 9, 8.

To receive your final analysis and free marketing audit report, please upload your results online at [www.MarketingRevolution.store/results](http://www.MarketingRevolution.store/results)

## STEP 8: HOW'S YOUR WEBSITE PERFORMING?

Instructions:

1. Rate each aspect of your website performance and SEO efforts on a scale of 1- 10, with 1 being the lowest and 10 being the highest.
2. Provide comments/notes for each rating to explain your assessment and any specific observations.
3. After completing the ratings, identify the top priority areas for improvement based on your scores.
4. Develop action plans with your team for each priority area, including steps to improve and timelines for implementation.
5. Use the additional notes section to jot down any recommendations or insights from your analysis.
6. Note: It's important to periodically review and update this workbook to track progress and adjust strategies as needed.

## WEBSITE METRICS

Website Page Speed Insights (Record Report Score):

### USE THIS TOOL TO PERFORM THIS TEST

<https://pagespeed.web.dev/>

Mobile

Desktop

Performance:

Accessibility:

Best Practices:

SEO:

**Comments/Notes:**

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Mobile Responsiveness (1-10):

Score:

Don't Know:

**Comments/Notes:**

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User Experience (1-10):

Score:

Don't Know:

**Comments/Notes:**

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Website Design and Navigation (1-10):

Score:  Don't Know:

**Comments/Notes:**

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Clear Calls to Action for the User (1-10):

Score:  Don't Know:

**Comments/Notes:**

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## SEO ANALYSIS

Clear Calls to Action for the User (1-10):

Score:  Don't Know:

**Comments/Notes:**

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On-Page SEO (Title tags, meta descriptions, headings) (1-10):

Score:  Don't Know:

**Comments/Notes:**

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Content Quality and Relevance (1-10):

Score:  Don't Know:

**Comments/Notes:**

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Backlink Profile (Quality and Quantity) (1-10):

Score:  Don't Know:

**Comments/Notes:**

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Consistent Blogs and Online Educational Resources (1-10):

Score:  Don't Know:

**Comments/Notes:**

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**ACTION PLAN FOR IMPROVEMENT**

Using the Answers Above, Write Down Your Top Priority Areas for Improvement:

**Action 1:**

Steps to Improve:

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What is Your Timeline to Improve These Areas:

**Action 2:**

Steps to Improve:

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Are You Able to Remedy These Areas for Improvement, or Will You Need Outside Help:

**Action 3:**

Steps to Improve:

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Based on Question 1 from Section 2, Do You Know What Keywords You're Ranking for and Your Keyword Ranking:

Yes  No

Additional Notes and Recommendations:

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**STEP 9: 20 COMMON KPIS. WHAT ARE YOU MEASURING?**

In this exercise I want you review 20 common KPIs that companies measure. How do you stack up? What are you measuring and what do you need to improve on?

**Revenue Growth:** Are you measuring the increase in overall revenue over a specific period?

Yes  No

**Profit Margin:** Do you know the percentage of profit your company makes from its revenue?

Yes  No

**Customer Satisfaction:** Do you have satisfied customers and are they leaving consistent positive reviews for your business?

Yes  No

**Customer Satisfaction:** Do you have satisfied customers and are they leaving consistent positive reviews for your business?

Yes  No

**Customer Acquisition Cost (CAC):** Do you know the cost of acquiring a new customer?

Yes  No

**Customer Lifetime Value (CLV):** Do you know the total value a customer brings to your company over their entire relationship?

Yes  No

**Churn Rate:** Are you able to identify the number of customers who stop using your product or service over a given period?

Yes  No

**Net Promoter Score (NPS):** Do you know your customer loyalty and satisfaction based on the likelihood of customers recommending your company?

Yes  No

**Employee Satisfaction/Engagement:** Assesses the satisfaction and engagement levels of employees.

Great  Good  Bad  Don't Know

**Cost of Goods Sold (COGS):** Do you know the direct costs of your goods or services?

Yes  No

**Return on Investment (ROI):** Do you know the ROI on your organic and paid marketing efforts?

Yes  No

**Market Share:** Do you know your current percentage of market share you're your company controls?

Yes  No

**Conversion Rate:** Do you know the percentage of visitors who take a desired action, such as making a purchase, or using your contact form, and how many you are converting online with your website and also with your paid marketing efforts?

Yes  No

**Inventory Turnover:** Do you know how quickly your company sells its inventory?

Yes  No  Not Applicable

**Cash Flow:** Are you tracking the movement of cash into and out of the business?

Yes  No

**Website Traffic and Conversion:** Do you (or your marketing agency) monitor website visitors and the percentage that convert into customers?

Yes  No

**Employee Productivity:** Do you know the output of employees relative to their input?

Yes  No

**Social Media Metrics:** Are you (or your marketing agency) monitoring likes, shares, and comments on social media platforms, assessing which are most effective and driving new leads?

Yes  No

**Quality Metrics:** Have you had an audit of the quality of products or services and how they compare to the competition?

Great  Good  Bad  Don't Know

**Time to Market:** Do you know the time it takes to bring a product from concept to market?

Yes  No  Not Applicable

**Brand Awareness:** Do you know how well your brand is recognized and remembered by the target audience?

Yes  No

**Market Share:** Do you know your current percentage of market share you're your company controls?

Yes  No

## STEP 10: BUILDING YOUR SOCIAL MEDIA PERSONAS

Your capacity to connect with and interact with the appropriate audience is crucial to the success of your social media marketing campaigns. You must first define your target market and ascertain the social media channels where they are most engaged.

### 1. What are the demographics of your customer?

- a. Age
- b. Gender
- c. Income range
- d. Education
- e. Occupation

### 2. Do you know the psychographics of your customer?

- a. Personality
- b. Values
- c. Interests
- d. Hobbies

### 3. Where are your customers located?

- a. Geographic location
- b. Zip Codes

### 4. What platform do you find the most success on?

- a. Facebook
- b. Instagram
- c. X (formerly Twitter)
- d. LinkedIn

## PUTTING THIS ALL TOGETHER: MARKETING PLAN IMPLEMENTATION STEPS

Implementing your marketing plan is the crucial step where you bring your well-crafted strategies and tactics into action using the information you've learned through this Workbook. This is the phase where you execute your marketing activities to reach your target audience and achieve your marketing objectives.

**Remember: I cover this step in great detail throughout chapter 6 of The Marketing Revolution.**

Here's a closer look at the key aspects of implementing your marketing plan:

**Execute Your Tactics:** Start by executing the specific tactics outlined in your marketing plan. This may involve launching advertising campaigns, creating content, implementing SEO strategies, engaging in social media activities, or conducting email marketing, among other tactics. Each tactic should align with your overall marketing strategies and target the identified audience segments.

**Assign Responsibilities:** Clearly define roles and responsibilities for each marketing activity. Assign tasks to the appropriate team members or departments, or your marketing agency to ensure smooth execution. Having a well-organized structure and clear communication channels will help keep everyone accountable and ensure that tasks are completed in a timely manner.

**Set Timelines and Milestones:** Establish timelines and milestones for each marketing activity to keep the implementation on track. This will help you monitor progress, identify any potential delays or issues, and make adjustments as needed. Breaking down your marketing plan into smaller, manageable tasks with specific deadlines will enhance efficiency and productivity.

**Monitor and Track Performance:** Continuously monitor and track the performance of your marketing activities. Utilize key performance indicators (KPIs) relevant to each tactic and align them with your marketing objectives. This will enable you to evaluate the effectiveness of your strategies, identify areas of improvement, and make data-driven decisions.

**Adapt and Adjust:** As you implement your marketing plan, be open to adjustments and adaptations based on the insights and feedback you receive. Market dynamics and customer preferences may change, so be prepared to refine your strategies and tactics accordingly. Regularly evaluate the outcomes of your marketing efforts and make necessary modifications to optimize results.

**Measure Return on Investment (ROI):** Assess the return on investment of your marketing activities by analyzing the impact they have on your business goals. Track metrics such as sales revenue, customer acquisition, website traffic, engagement rates, or conversion rates. This will help you gauge the effectiveness of your marketing efforts and allocate resources to the most profitable activities.

**Communication and Collaboration:** Foster effective communication and collaboration within your marketing team and across other departments. Regularly share progress updates, insights, and results to keep everyone informed and aligned with the overall marketing objectives. Encourage open communication channels for feedback, ideas, and suggestions to continuously improve your marketing implementation.

**Adapt to Feedback:** Actively seek feedback from customers, target audience, and internal stakeholders. Analyze their responses and adjust your marketing tactics accordingly. Pay attention to customer preferences, market trends, and industry insights to stay relevant and responsive to changing needs.

## GLOSSARY OF TERMS

A/B testing	H1
Ad Groups	H2
Backlinks	Impressions
Click-through rate (CTR)	Meta Data
Conversion	Net Profit Margin
Conversion Rate	On-page optimization
Cost per acquisition (CPA)	Quality website content
Customer Acquisition Cost (CAC)	Reach
Customer Lifetime Value (CLV or CLTV)	Return on Investment (ROI)
Engagement	Revenue Growth
Engagement rate	Sales Revenue
Geo-targeting	SERP Descriptions
Gross Profit Margin	Website Traffic