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THE WORKSHEETS FROM

The Theory and Practice of Marketing

Seven tools, one for each part of a revenue operating system. Print them or fill them in on screen. Every one uses numbers you already have, or can get from your team in an afternoon.

01	The one-page math	Revenue strategy
02	Your brand on one page	Brand strategy
03	The four-lever check	Marketing strategy
04	The channel audit	Channel strategy
05	The account inventory	Execution
06	Five questions for your marketing report	RevOps and reporting
07	Is your system running?	The system, running

CHAPTER 1 · REVENUE STRATEGY

The one-page math

Work backward from the number you want, then work out what you can afford to spend to get there. Fill in your own figures, and round freely.

01 Work backward from the goal

Revenue today	
Where you want to be, and by when	
Revenue you lose in a typical year Customers who leave or stop buying	
Total gap `= goal − today + what you lose`	
What a new customer is worth in year one	
New customers needed `= gap ÷ what a new customer is worth`	
Of every 10 real leads, how many you win	
Real leads needed `= new customers ÷ (wins per 10 ÷ 10)`	
Of every 10 inquiries, how many are real	
Inquiries needed `= real leads ÷ (real per 10 ÷ 10)`	
Inquiries you get today Count a normal year, not your best one	
The gap between what you need and what you get `= inquiries needed − inquiries you get today`	

READ IT THIS WAY

The shortfall isn't a request for "more marketing." It's more inquiries, a better win rate, or bigger customers. **Those are three different plans with three different price tags.**

CHAPTER 1 · REVENUE STRATEGY · CONTINUED

The one-page math

02 How much to spend

Everything it takes to win a customer, not just ads.

How many years a customer usually stays	
Your gross margin What's left of each dollar after the direct cost of the work	
Gross profit from one customer `= year-one value × years × margin`	
Most you should pay to win one `= gross profit ÷ 3`	
What you'll plan to pay to win one At or below the line above. Start low while you learn.	
Months to earn it back `= what you'll pay ÷ one month of year-one gross profit`	
Budget for the year `= new customers needed × what you'll pay`	
What you can pay per inquiry `= budget ÷ inquiries needed`	

EXAMPLE: A $40,000 CUSTOMER WHO STAYS 3 YEARS	20% MARGIN	40% MARGIN	60% MARGIN
Gross profit over 3 years	$24,000	$48,000	$72,000
Most you should pay to win one	$8,000	$16,000	$24,000

THE 3-TO-1 RULE

A customer should bring in at least three times what it cost to win them, in gross profit, and pay it back within about a year. **If your margin is thin, raise what each customer is worth before you buy more ads.**

CHAPTER 1 · REVENUE STRATEGY · CONTINUED

The one-page math

03 Ask why twice

A real second answer names who, how many, and what it's worth.

YOUR THREE BIGGEST MARKETING EXPENSES	WHY DO WE DO IT?	WHY, AGAIN? WHO, HOW MANY, AND WHAT IT'S WORTH	KEEP, CUT, OR REBUILD?
			☐ Keep ☐ Cut ☐ Rebuild
			☐ Keep ☐ Cut ☐ Rebuild
			☐ Keep ☐ Cut ☐ Rebuild

Example of a second answer that holds up: "Our best customers search for these three things before they buy. Showing up there should bring about 10 more real leads a quarter. At our close rate that's two new customers, or about $80,000."

04 What you're losing, in plain numbers

Revenue that walks out the door each year From line 3 on the first page	
That's how many customers you have to win just to stay even What you lose ÷ what a new customer is worth	
Biggest reason customers leave, as far as you know	

THE TEST

If the second answer can't name who, how many, and what it's worth, **that expense is a candidate to cut, or to rebuild around a reason you can check.**

CHAPTER 2 · BRAND STRATEGY

Your brand on one page

Four decisions the rest of your marketing reads from: who you're for, why they pick you, what you stand for, and how you show up. Start with your real customers, not your assumptions.

01 Your last 20 new customers

Sort by profit, not size.

#	CUSTOMER	PROFIT	#	CUSTOMER	PROFIT
01			11		
02			12		
03			13		
04			14		
05			15		
06			16		
07			17		
08			18		
09			19		
10			20		

Study the top quarter

CUSTOMER	WHAT MADE THEM ACT NOW	WHO DECIDED	WHO DID THE LOOKING	WHAT ELSE THEY CONSIDERED

"What else they considered" includes "keep doing what we're doing." Circle what shows up more than twice. That's who you're for.

CHAPTER 2 · BRAND STRATEGY · CONTINUED

Your brand on one page

02 Why they pick you

Get, Who, To, Buy

Get
Who you want: the customer from your review

Who
The situation that sends them looking

To
What you want them to do

Buy
What they're really buying, and why you win

Put your top competitor's name on the Buy line. Does it still work?
If it does, it isn't a value proposition yet. Keep going.

☐ Still works ☐ Only fits us

03 Say it one level higher

FEATURE	FUNCTION	FEELING	IDENTITY
What it is	What it does for them	How it feels	Who it makes them

Your homepage headline today

Which level is it on?

☐ Feature ☐ Function ☐ Feeling ☐ Identity

The same idea, one level higher

REMEMBER

Build your marketing to win the choice your buyer was actually making, **not an argument with the market leader they were never having.**

CHAPTER 2 · BRAND STRATEGY · CONTINUED

Your brand on one page

04 What you stand for

Mission
Why you exist, in one sentence. It should turn some customers away.

Vision
The company in five years, in a few lines. Not just a revenue number.

THREE VALUES	ONE DECISION EACH WOULD MAKE (A CUSTOMER MOMENT, A HIRE, OR A JOB YOU'D TURN DOWN)

If you can't think of a decision, it isn't a value yet.

05 How you show up

The visual tests

Cover the names on your homepage and two competitors'. Could a customer tell which one is yours?	☐ Yes	☐ No
Ask three good customers what a company that looks like yours would charge. Is it what you charge?	☐ Yes	☐ No
Pull the last twenty things your company made. Do they look and sound like one company?	☐ Yes	☐ No
Do you look like the company your best customer would pay more to hire?	☐ Yes	☐ No

CHAPTER 2 · BRAND STRATEGY · CONTINUED

Your brand on one page

Your voice

Three examples of your best writing A page, an email, a proposal: where to find them	
Five words or claims you never use	

06 Being known

Ask your last ten new customers

How many had heard of you before they reached out?	
How fast those customers said yes Compare with the ones who came in cold	
How fast the cold ones said yes	

Your brand, in one place

Who you're for	
Why they pick you	
What you stand for	

EVERY CHAPTER READS FROM THIS

Your ads aim at who you're for. Your headline and replies come from why they pick you. **Put all of it on one page, and keep it where your whole team can find it.**

CHAPTER 3 · MARKETING STRATEGY

The four-lever check

There are only four places the next dollar of growth can come from, and they multiply. Put a realistic number on each before you decide where the budget goes, then look at your company from the buyer's side.

01 The four levers

LEVER	TODAY	REALISTIC IMPROVEMENT	WHAT THAT'S WORTH IN DOLLARS
Real leads a year			
Of every 10 real leads, how many you win			
What a new customer is worth			
Revenue you keep year to year			

Most budgets go to the first lever. It's the most visible, and usually the most expensive.

02 The four groups you already own

GROUP	ROUGHLY HOW MANY	WHAT YOU'LL SEND THEM, AND WHEN
Past customers who haven't bought in a year or more		
Quotes that went quiet without a no		
People who asked, downloaded or signed up and never heard back		
Customers who buy one thing and qualify for a second		

03 Leaks to fix right away

Broken tracking, ad spend going to the wrong place, a step where good leads go cold.

IF NOBODY CAN SAY — If nobody can tell you how many people are in each group, **that's your first project.**

CHAPTER 3 · MARKETING STRATEGY · CONTINUED

The four-lever check

04 Your journey map

Fill it in from five recent customers, not from memory.

STEP	WHAT THEY'RE DOING	WHAT THEY'RE THINKING	WHERE IT BREAKS
01 They notice the problem			
02 They look for help			
03 They check you out			
04 They reach out			
05 They decide			
06 They become a customer			
07 The first 90 days			
08 They tell a friend			

Rename the steps to fit how your customers really buy. If you sell to two very different buyers, make two maps.

CHAPTER 3 · MARKETING STRATEGY · CONTINUED

The four-lever check

05 Walk it yourself

On your phone, as a stranger.

People who visit your website in a month	
How many of them reach out If nobody can tell you, put that on the list too	
Your homepage's mobile score Google PageSpeed Insights	
How long your test inquiry took to get a reply	
What you noticed as a stranger Searching, reading the site, reading the reply	

06 Call three customers who left

In the last year

CUSTOMER	WHAT HAPPENED	THE STEP WHERE IT WENT WRONG

YOUR FIX LIST

Add each broken step to your map. **Those are the first rows of your fix list,** and most of them cost less than another campaign.

CHAPTER 4 · CHANNEL STRATEGY

The channel audit

List every channel you use today. A channel can work great for someone else and still be wrong for you, so start with whether your buyer is even there.

01 Every channel you run

One job each: get found, stay remembered, or help buyers choose you.

CHANNEL	ITS ONE JOB	MONTHLY COST MONEY + TEAM HOURS	NEW CUSTOMERS LAST YEAR	ARE YOUR BEST BUYERS THERE WHEN THEY'RE DECIDING?	EVER RUN AT FULL EFFORT THREE MONTHS STRAIGHT?
	☐ Found ☐ Remembered ☐ Chosen			☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No
	☐ Found ☐ Remembered ☐ Chosen			☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No
	☐ Found ☐ Remembered ☐ Chosen			☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No
	☐ Found ☐ Remembered ☐ Chosen			☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No
	☐ Found ☐ Remembered ☐ Chosen			☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No
	☐ Found ☐ Remembered ☐ Chosen			☐ Yes ☐ No ☐ Not sure	☐ Yes ☐ No

Not sure where your buyers look? Ask the last five customers you won.

02 Ask an AI assistant what your best customers ask

THE QUESTION YOUR BEST CUSTOMERS ASK BEFORE THEY BUY	WHO IT RECOMMENDED

THEN

Cut or shrink any channel your buyer doesn't use. Run the rest at full effort before you add a new one. **If the AI answer isn't you, that's part of your channel plan.**

CHAPTER 5 · EXECUTION

The account inventory

Every account your marketing runs on should be in your company's name, with your own people holding the admin logins. Here's where to check.

01 Where everything lives

ACCOUNT	WHERE IT LIVES	WHOSE NAME IT'S IN	WHO ON YOUR TEAM HAS THE ADMIN LOGIN	FIX THIS MONTH
Domain and DNS				☐ Yes
Website and hosting				☐ Yes
Google Ads, and any other ad accounts				☐ Yes
Google Analytics and Search Console				☐ Yes
Google Business Profile and review sites				☐ Yes
CRM				☐ Yes
Email platform and your list				☐ Yes
Social accounts				☐ Yes
Call and form tracking				☐ Yes

02 Who owns what

Who owns the number
Sets priorities, says no, answers for the result

CHANNEL YOU RUN	WHO DOES THE WORK

FIX THIS MONTH

Any line where the answer is "the agency" or "I'm not sure" is something to fix this month, whether or not you change anything else. **A blank anywhere on this page is your biggest execution risk.**

CHAPTER 6 · REVOPS AND REPORTING

Five questions for your marketing report

Every month, your marketing report should answer these in plain words. Fill this in from your own report and see which ones it can't answer.

Month

01 What did marketing bring in?

New customers and revenue, not clicks.

02 What did it cost?

Ad spend plus people, so you can see the return.

03 Where did the new customers come from?

04 What didn't work, and what are we doing about it?

05 What are we changing next month, and what do we expect it to produce?

Give it as a range with a date.

START HERE

If your report can't answer the first question, start with the three things in Chapter 6: every lead tracked, every lead in one place, and what happened next. **Nothing else works as well without them.**

CHAPTER 7 · THE SYSTEM, RUNNING

Is your system running?

Six yes-or-no questions. Answer them honestly, then pick one "no" to fix first.

01	Could someone new on the work find your number, your buyer and your plan in one place on their first day?	☐ Yes	☐ No
02	Could you see last month's marketing revenue right now, without asking anyone to build a report?	☐ Yes	☐ No
03	Did a monthly review happen last month, on schedule?	☐ Yes	☐ No
04	Do you know whether last quarter's forecast was right?	☐ Yes	☐ No
05	Could you list the last three things you tried and what each one taught you?	☐ Yes	☐ No
06	If you handed an AI tool everything it needs to know about your business, is it written down anywhere?	☐ Yes	☐ No

The "no" you'll fix first

Which one, and who owns it

Fixed by

WHAT A "NO" MEANS

Every "no" is a part of the system that isn't connected yet. **None of this needs special software.** It needs one owner, one place, and the habit of running it every month.