



# Your Marketing Report Card

Guidance for business owners who want better results online.

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# INTRODUCTION

## Welcome

This is guidance for owner operators who want better results online. I don't need to convince you that being visible online is essential for business success but perhaps I need to show you that it's about more than a website and some paid advertising or socials.

If you want to succeed online you must be visible to the right people, at the right time, with the right message and offer. That will get the enquiry and then you need to turn that into a sale. I'm sure you've heard this before.

What you might not know is that doing this well requires many small, well-informed and well-considered decisions that add up to a digital presence that attracts multiple new business enquiries every day, from the kind of clients you want to work with. Doing this well makes your life easier because it takes away the worry of where the next client is coming from, leverages your resources and delivers better results.

I know this because I've been setting up and managing the online side of business for owners since the very early days of the World Wide Web and I'm still doing this as we step into the age of AI. So, at the time of writing, that's 27 years hands-on experience plus a formal qualification in marketing informing this guide in which I hope to simply describe the essential elements that add up to success online. I hope this helps anyone who needs to manage or outsource digital marketing understand all the working parts so you can make better decisions. Use this as a guide for DIY (we all start somewhere); or, to understand what your service providers do; or, to help you manage your marketing team.

**Bottom line, I want you to succeed, and I want it to be easy because I know your time is a limited resource. So, let's get straight into it.**

## What exactly is this?

### **Your Digital Marketing Report Card does two things:**

- 1) It asks the right questions to self-assess and uncover where you are now on these essential elements, what you're working with, and what the future could look like for your business (and you). This means later, you can look back and see how far you've come.
- 2) It also means you won't have to hold all that information in your head – you can jump in, see where you're at, choose an element to work on and get things done. This is important because it's too easy to lose focus in small business and lost focus kills momentum. We need to be able to pick up where we left off FAST and make the most of our limited time. As I like to say – don't break your stride.

## How to use this

It's easy. Just grab a pen and shade or tick each element to show the % complete you think you're at. It's OK if you have no clue what something is right now, you can just leave it at 0%. You'll learn. I like to use a different colour each year so I can see what I've achieved.

When you next have time to work on your business, refer to **Your Marketing Report Card** to choose an element to work on. You might learn and DIY or outsource this to get it done.

I aim for best practice but I'm not chasing perfection. I want you to build momentum and keep moving. So, I suggest a quick 'first pass' on all the elements to get a feel for the requirements and the process and then you can circle back for extra rounds. I know this works well for small business because I've been doing this myself for many years.

I wish you all the best. Keep this handy and let me know how you go! Feedback welcome!

## Guided Program

If you're interested in more detail and guidance, visit the website for extra information.  
<https://www.digitalmarketingprogram.com.au>

If you want to send feedback or ask questions, there's a form on that site.



## The Creative Digital Marketing Program (Overview)

### **DISCOVERY**

Mark where you are, where you want to be and what resources are at your disposal to get there.

### **STRATEGY**

Understand your situation more deeply, choose a strategy and make a good plan to get things done.

### **ALIGNMENT**

Ensure all your digital assets are in alignment with the chosen strategy so you're focussed and ready to receive.

### **ATTRACTION**

Get out into the market, communicate, be visible, attract feedback and enquiry.

### **RESULTS**

Review results, reflect, adjust and learn what to do next. The essential step for iteration towards our most desired outcomes.

### **GROWTH**

Implement what we've learned to build a better experience for everyone.

**For more detail visit the Creative Digital Marketing Program website.**

[www.digitalmarketingprogram.com.au](http://www.digitalmarketingprogram.com.au)

# DISCOVERY

Where do we start? Understanding your current business situation. The point of a discovery is to get to know you, your business, and your desired outcomes so we can make a realistic plan.

**What's happening right now.** Describe the business you have.

**What do you want to be happening?** What is your desired business situation.

**What are we working with?** Time | Money | People | Digital Assets | Other

**How will we go about getting this done?** A defined process that keeps you accountable

THINK ABOUT YOUR PAST | PRESENT | FUTURE BUSINESS



## The business you have

**Stop and think.** How are things going right now? What's working? What do you find challenging? If you're reading this then I believe you have a desire to do better and you probably have some ideas already. Understanding where you are now is an important step. It sets the marker to measure progress. There are many ways to approach a goal in business. I have learned to trust an owner's lived experience running their business and their sense of what's going on and what should happen, however I also know to question and test everything. Lived experience from running your business is a good place to start but taking a deeper look can uncover some amazing opportunities for you. Sometimes one small shift in how you see or do something makes all the difference. Owners need to be curious, step out of the silo, have trust, be open to guidance. Are you ready to do that?

## The business you want

**What are your goals?** Often when I ask about business goals, clients struggle to answer with any specifics. If you've been running your business focussed mostly on the day-to-day, that makes perfect sense. But now I would like you to take a minute. Stop, think, take stock, and imagine what business and life could be like for you. A simple start and a simple plan is a good beginning so if a general idea is all we have right now that's fine. What we're learning here is a process. Over time, please keep asking yourself this question. Knowing what you want will have impact. If you decide to change your goals later that's OK. You will continually refine your answer to this question as you try things. You might be ruling OUT options – it's all progress. Sometimes you know exactly what you want to achieve but when you get into the detail, realise it's not the direction you want to take after all. Sometimes, the idea of growing your business can create feelings of resistance and hesitation. So, again, the point here to just **stop and think**. Consider your future. Make some 'starter' decisions and set a general direction so we can begin.

**Write it down.** Ultimately this will become weekly/monthly/quarterly/annual goals and tasks, but right now I just want you to get started. This doesn't have to be anything more than a rough list, some notes, maybe a mind map, but it needs to be a format that makes sense to you. I personally use mind maps and Kanban boards as I find that's enough for me. If your business is more complex you may eventually need a document format. Do what feels right but if you start to feel bogged down by the task it's time to simplify so you can move to the next part. Remember we want everything to be easy. We are building momentum. Don't break your stride.

## Your available resources

What are we working with here? What resources do you realistically have available to achieve your goals?

**People.** Who's on your team. Who can help you achieve your business goals and what are their skills. Are there gaps here?

**Time.** What is the timeframe for your goals and how much time do you personally have available to work on them?

**Money.** What is your budget for any digital asset development and advertising. Do you know what you can profitably spend to attract a new client?

**Marketing assets.** List your existing digital assets and anything else that currently promotes your business.

## How you'll make it happen

**Are you ready to get started?** If I told you to spend 30 mins a week thinking about and working ON your business could you / would you do it? When? Commit to this now.

**Your planning.** When will you work on your business? Open your calendar and work out when you can (and will) work on your business. When are you most focussed during the day? When do you have uninterrupted time? Schedule this time in. You might need to rearrange your work schedule to ensure there's regular time for business growth work. 30 mins a week? Please start. I personally do this early in the morning to get some hours in before client work starts. What would work best for you?

**Milestones and rewards.** Set and celebrate milestones. One day it occurred to me that over many years working towards my goals in business, I didn't have a personal reason to achieve them. Personal reward was not necessarily my motivator, it was all about supporting my family and making life easier for other people. Rewards don't need to be major, but's important to mark your progress and do something to acknowledge your personal achievement.

I have defined and documented:	25%	50%	75%	100%
Current business situation				
Goals / Objectives				
Resources available				
When I will work on my business and marketing				
Set up a 90-day plan ready for ideas				
Milestone Celebration				

Grab a coloured pen or pencil and tick or shade what you think is your current % complete for each element. If you don't know what something is just leave it blank.

# STRATEGY

**A goal without a plan is just a wish.** I've always loved that saying. Good strategy is essential for business success. It sounds fancy but let's think simply – strategy is a series of decisions that determine 'how' you will achieve your business mission. As you gain more experience in business, thinking 'strategically' becomes second nature. To create a good strategy, you need a decent understanding of all the parts that influence outcomes and then some creative thinking to work out how to connect everything together for the desired result. Understanding comes in many ways whether that is by theory, trial and error or both, but the more you know and understand every aspect in your business, the better your strategy becomes. This is where it can help to get outside input to fill any gaps in your own knowledge and experience.

## Essential Marketing Fundamentals

**A solid foundation.** This is the place to start. You might not know much about the fundamentals right now but know this: completed marketing fundamentals make all other work more **effective and cost efficient**. What to do becomes obvious when you know this. It's definitely a huge section, I will have more to say on this in future versions.

Defined and documented:	25%	50%	75%	100%
Vision, Mission, Values				
Target Market				
Customer Personas				
Customer Journey				
Products & Services / 'Your Offer'				
Competitor Analysis				
Positioning				
Value Proposition				
Key messaging				
Milestones and rewards				

# ALIGNMENT

**All roads lead to Rome.** At this point, I expect you now have a decent understanding of your goals, resources and business. So, it's time to review and update your digital assets to ensure they align with the strategy and everything we have decided.

## Brand & Identity

To me, the whole point of a 'brand' is to create a signature experience that resonates with your target audience and is recognisably 'yours'. Your brand is built via every touchpoint and interaction with your business (not just digital assets). Developing and documenting the essence of this at the beginning helps your business deliver a consistent experience to build **recognition, trust and value** in your business.

Defined and documented:	25%	50%	75%	100%
Brand story / Your story				
Logo + guidelines for use				
Colour guide				
Typography guide				
'On brand' image guide				
Copy tone of voice guide				
Content themes				
Team understands brand use				
Team has skills to implement				
Team are collating content to shared folders				
Appointed brand protector (who is doing their job)				

## Website

It's likely your website is the place that potential new clients 'convert' with either an enquiry form, a phone call or a purchase. At the very least it's where they go to check your credibility and assess your ability to deliver the outcomes they seek. I have a lot more experience to share on this topic but this list is a good start.

Reviewed and achieved	25%	50%	75%	100%
Standout compelling offer				
Clear calls to action				
Effective navigation structure				
Brand elements correct				
Optimised for visibility online				
Design matches desired market				
Content matches customer journey				
Fast loading				
Mobile Friendly				
Forms collecting enquiry data				
Regular site updates and reviews				



## Analytics & Data

**Setting up analytics is an absolute essential.** We need to know what's working. This is how we know. It helps for search plus any advertising you do relies on data to understand who to attract. If this is *not* set up then you are wasting a lot of money, but also, probably getting a lot of dud leads that waste your time. Did you know ads respond to this data? Put the effort in to get this happening right at the start. Even if you don't understand your data now it will be there when you have someone on your team who does. Data has great value. Data is key to success. I can assure you that anyone doing well online understands this and is working with their data.

Planned and completed	25%	50%	75%	100%
Google Tag Manager installed				
Google Analytics installed				
Google Search Console installed				
Goal tracking set up				
Enquiry > Conversion reporting set up				
Meta Pixel installed (Data source) and set up				
Reporting Dashboard Setup (Journey Aware KPI)				
CRM Setup				

## Team

**Your team is key.** An overlooked area in small business marketing. If all the work goes in but there is disconnect between the reality of the business and the online world you will fail on the finish line. Your team are on the front line, and they hold critical information about your business. They know. Connecting them with the plan and the results is a good idea. If your team are not onboard with your marketing plan or goals, then you have a problem. You can get as many new leads as you like but your ability to convert them into customers will be significantly limited. Team collaboration is key in digital marketing. As an owner, you are responsible for communicating this with your team and creating a collaborative working environment.

Trained and happening	25%	50%	75%	100%
Team understands goals				
Team understands brand				
Team gathers appropriate content				
Team knows how to 'close a deal'				
Team regularly shares feedback				
Owner fosters collaboration and task ownership				
Team works collaboratively				



# ATTRACTION

**OK we now have a solid foundation. Let's get the word out!** It's time to plan communications for each stage of the buyer journey, create content and run campaigns to attract our target market.

## Your Marketing Communications Plan

Planning communications based on business objectives and what people need gets better results. So let's get set up for easy content creation and put together a plan. We go in with the expectation that this will be fluid. Why? Because in small business a lot depends on the availability of the owner, or your team, and whether you understand the requirements and can create the required content.

### **Question:**

What are we going to say to your audience over the next 90 days?

### **Answer:**

What do they need to know at each stage of the journey from awareness to purchase?

What do you want to communicate at each stage of the journey?

How will we establish trust, position your offer and demonstrate your value?

How will we hold their attention and be remembered long enough to get the conversion?

I have some channel specific guidance on this as a separate training. When it's available to the public you'll find this on my website.

## Content Setup

**Get set up for success.** Your future communications and content rely on you and your team having easy access to your brand and content assets and a flow of new raw content to work with. Make your life easy by getting set up for success as soon as possible. If you don't do this, people will be wasting time looking for things instead of using that time to create content. Be smart, be organised and leverage your time and money.

Defined, set up and accessible	25%	50%	75%	100%
Brand asset library				
Messaging library (copy)				
Visual image library				
Journey aware content 'buckets'				
Content calendar setup and access				
Raw content drop zone				
Process for approvals, engagement management etc				
Sharing set up for ease				
Team trained and aware				

## Content Purpose

Content is the attractor that creates visibility, activates interest, builds trust, encourages loyalty and ensures recall of your business when it's time to buy.

Content is important work. In my experience most people are spending a lot of time creating content without understanding how the chosen channel works or what their audience needs. Sometimes the content is hurting more than helping.

If your customer personas are defined and customer journey maps completed, we'll know the messaging requirements for each stage of the buyer journey for each persona across all 'touchpoints'. This informs decisions around which channels will be most effective to deliver content and when content needs to be tailored for a specific persona or audience.

If you haven't done that work, the table below will get you thinking about the purpose of your content and where it sits in the buyer journey.

Create purposeful content that will:	25%	50%	75%	100%
Increase exposure and build <b>awareness</b> so you are known and viewed favourably in the category.				
Ensure you're found at the right time with the right information when prospects are in the market so you make the consideration set during their <b>exploration</b> phase.				
Position your offer during <b>evaluation</b> , building credibility and trust to improve lead conversion rates.				
Ensure you remain top of mind and build a relationship (sometimes over a long buying cycle) so you're remembered, favoured and get the <b>conversion</b> when it's time to buy.				
Provide a positive experience across the entire journey, encouraging <b>advocacy</b> with word of mouth, reviews, referrals and repeat business.				

## Channel setup and roll out

Now we have content ready to go (or an idea of what we will create at least) it's time to schedule everything into your content calendar, get it done and roll it out.

Completed and documented	25%	50%	75%	100%
Goals statement summary				
90-day communication plan				
Channel(s) setup				
Communication plan schedule				
Reporting and measures for success setup				





# RESULTS

Reflect on what worked and decide what to adjust and/or do next. The word of the day here is ***iteration***. The key to continuous improvement. Things change and the sooner we notice and adapt the better. If you're not looking at your results, I can assure you your competitors are! We use this to understand how to do better.

## Your Reporting Dashboard

Created and documented	25%	50%	75%	100%
Regularly looking at analytics reports				
Reflect on what worked				
Measure against goals				
Use your data and feedback to improve				
Note future improvements to make for growth				



# GROWTH

## What to work on next

Created and documented	25%	50%	75%	100%
Plan mini projects				
Build on success				
Improve the customer experience				
Draw on the knowledge and experience of others				
Get training for yourself or your team				

# CONCLUSION

## I hope this helped

I hope this 'report card' gave you a good overview of the essentials, simply made sense and got you a little excited about improving.

Business can be hard at times. Having guidance can clear your head, ease the burden and give you a bit more space. For me, having a process for growth keeps me thinking and improving to the point that the business I run today is quite different to the one I started with. My business suits my life right now. That did not come without working through a lot of challenges since 1997 when my career online kicked off.

As small business owners, we carve out our own kind of freedom. I can choose who I work with for a rewarding and fulfilling experience. I decide the hours I work. I see every day as full of opportunities to improve, problems to solve and people to learn from by helping and from that approach I have over time crafted a business I truly love that I enjoy working on and in even after 25+ years.

I hope that you also find that joy working for yourself and that this process helps you to uncover your own version of a good business and the sort of success online that happens when business and life align, and it feels easy.

## Thanks

Before I leave you with some final ideas, thanks go to my Dad who was my first client back in 1997 (and his website is still online) and my Mum who provided the space I needed to take a break to reflect and get started again recently.

Thanks for this process and program must also go to my clients who are my teachers every day. The most difficult clients have taught me valuable lessons, but the good ones have taught me to be grateful for the opportunity to work with wonderful people who love business as much as I do. You know who you are! Thank you.

## Key ideas for business

When things are great: notice, celebrate and have gratitude.

When things are not working or not feeling good: stop and think. Be thankful for the challenge that forces change. Why is this happening? What can you do to change this? Does this need to be happening again?

Whatever you decide – it's possible – if you are prepared to make the changes, put in consistent effort and experience the initial discomfort needed to shift out of your groove and get started on achieving it.

Knowing is one thing, doing and reflecting are more important. Mantra: I will do the things.

Hone your focus to what matters most to YOU and the people you serve.

You really don't need anyone to tell you what to do. What you need is within you and you'll figure that out with curiosity and a willingness to back yourself to do what is necessary.

Everything you learn is for 'cherry picking' the bits that align with your own vision and what you think might work for your specific situation. You're basically building a toolset of knowledge. The key driver in your business is you. If you don't know what to do at any point, the only thing to do is just start something. Do... something. You'll get feedback and one step closer to knowing.

It's in the process of doing that we start to uncover what matters (and what doesn't matter) and move to a place where we are confident in our ability and being in business feels good every day, even when it's challenging.

## A process for progress

**Your process.** At every stage in this program, there are specific tasks to complete. I like to break tasks down so there are mini achievements. I like to work in 'stages' that capture progress and make it easy to see where you're at or pick up where you left off.

A process for getting things done:

**Stop and think** about the task/problem/ and list requirements

**Plan** by scheduling these tasks into your calendar (using your planning cycle)

**Draft** version creation

**Final** version creation

**Review**, reflect, update

**What's next?** Let's get started. We're going to make it happen.

What would work for you?

You're welcome to join me and learn.

Just look me up online.

All the best!

**Alicia Laing**

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