

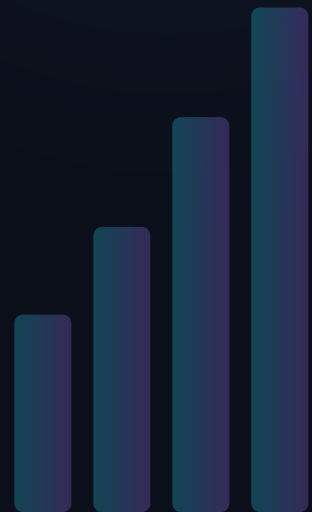
SEOLABS AI

PREMIUM EBOOK · 2026 EDITION

The 90-Day Digital Marketing Growth Blueprint

A Practical System to Build Visibility, Generate Qualified Leads, Optimize Campaigns, and Drive Sustainable Growth

BUILD · PROVE · COMPOUND | 15 chapters · 6 ready-to-use bonus assets



OPTIMIZE. **AUTOMATE.** GROW.

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The 90-Day Digital Marketing Growth Blueprint

A Practical System to Build Visibility, Generate Qualified Leads, Optimize Campaigns, and Drive Sustainable Growth

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How evidence is labeled in this book

Label	Meaning
DOCUMENTED	A statement drawn from official documentation or a published source, cited with a bracketed reference such as [s2].
PRACTICE	A professional recommendation based on widely used marketing practice and reasoning. Reasonable, not guaranteed.
HYPOTHESIS	An idea worth testing in your context. Treat it as a bet, not a rule.
HYPOTHETICAL	Invented numbers used to teach a calculation. Never a benchmark or a real result.

No case studies, client results, testimonials, or personal anecdotes appear in this book. Where an example describes a business, it is a constructed scenario and is labeled as one.

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INTRODUCTION

Why Most Marketing Plans Fail at Execution

The plan was probably fine. The gap is between what the plan assumes and what a small team can actually do, measure, and decide each week.

Most marketing plans do not fail because the strategy was wrong. They fail in the third week, when the tracking turns out to be broken, the landing page still says what it said last year, the person who owned the email sequence is on leave, and nobody remembers which of five simultaneous experiments was supposed to answer which question. The plan survives as a document. The work reverts to whatever feels urgent.

Four failure patterns show up again and again, and this book is organized to prevent each of them.

1. TOO MANY STARTS, NO FINISH

Teams launch SEO, paid ads, a newsletter, and a webinar series in the same fortnight. Each gets a fraction of the attention it needs, and none produces a readable result. The Blueprint caps parallel work and ties every task to a deliverable.

2. ACTIVITY MEASURED AS PROGRESS

Posts published, emails sent, and impressions gained are easy to count. They are also easy to inflate without moving revenue. The Blueprint separates *operational activity* from *business outcomes* and reports both.

3. CONCLUSIONS DRAWN TOO EARLY

Ten days of ad data, one strong week, or a single large lead can look like proof. The Blueprint uses decision gates that specify what evidence is needed, and how much of it, before money or effort is committed.

4. MEASUREMENT BUILT AFTER LAUNCH

If conversion tracking is wrong, every later optimization is a guess with a dashboard on it. The Blueprint places measurement ahead of acquisition and requires tracking validation before spend.

The approach in these pages is deliberately unglamorous: understand the customer, state the offer plainly, measure the right things, launch a small number of well-chosen experiments, and make decisions from evidence rather than enthusiasm. It is more of a discipline than a trick, and it works best for teams willing to say "we do not know yet" when the data does not yet support a conclusion.

WHAT THIS BOOK IS NOT

It is not a collection of hacks or a promise that ninety days will produce a particular result. Some activities, notably organic search growth, often take longer than a quarter to show their full effect. The Blueprint tells you which ones, so that you can judge them by the right leading indicators in the meantime.

How to Use This Blueprint

You can read the book front to back, but it is designed to be worked through with a calendar open. A practical way to proceed:

1. **Read the framework (next section) and Part I first.** Chapters 1–4 produce the decisions everything else depends on: goals, customer understanding, positioning, and measurement.
2. **Skim Part II for the channels you will actually use.** You are unlikely to run every channel in one quarter. Chapter 7 and the budget planner in Bonus C help you choose.
3. **Execute from Part III.** Chapters 11–13 are week-by-week plans, each ending in a decision gate. Bonus A puts the same plan in a 13-week calendar.
4. **Use Part IV as your reference and troubleshooting manual.** Return to Chapter 14 when a metric confuses you, and Chapter 15 when a campaign underperforms.

5. Copy the bonus assets. The calendar, dashboard, budget planner, campaign brief, weekly review, and prompt pack are written to be reused.

Adapting the plan to your situation

Situation	What to adjust
Solo marketer or founder	Use the lightweight calendar in Bonus A. Choose one acquisition channel plus SEO foundations, not three channels. Expect to spend roughly 10–12 hours a week on the plan.
Small team (2–5)	Follow the main calendar. Assign the owner roles shown in each task; one person may hold several roles.
Agency or consultant	Run Chapters 1–4 as a paid onboarding audit, then deliver the quarter per client. The review templates double as client reporting.
Ecommerce	Emphasize product-page SEO, feeds, retention (Chapter 9), and profit-based metrics. Sales cycles are short, so evidence arrives faster.
B2B or considered purchase	Emphasize lead quality, sales alignment, and pipeline stages. Evidence arrives slowly; judge early work on leading indicators and sales feedback.
Local or service business	Local SEO, phone and form tracking, and follow-up speed matter most. Geography and capacity limits shape budgets.

OPTIONAL COMPANION RESOURCES

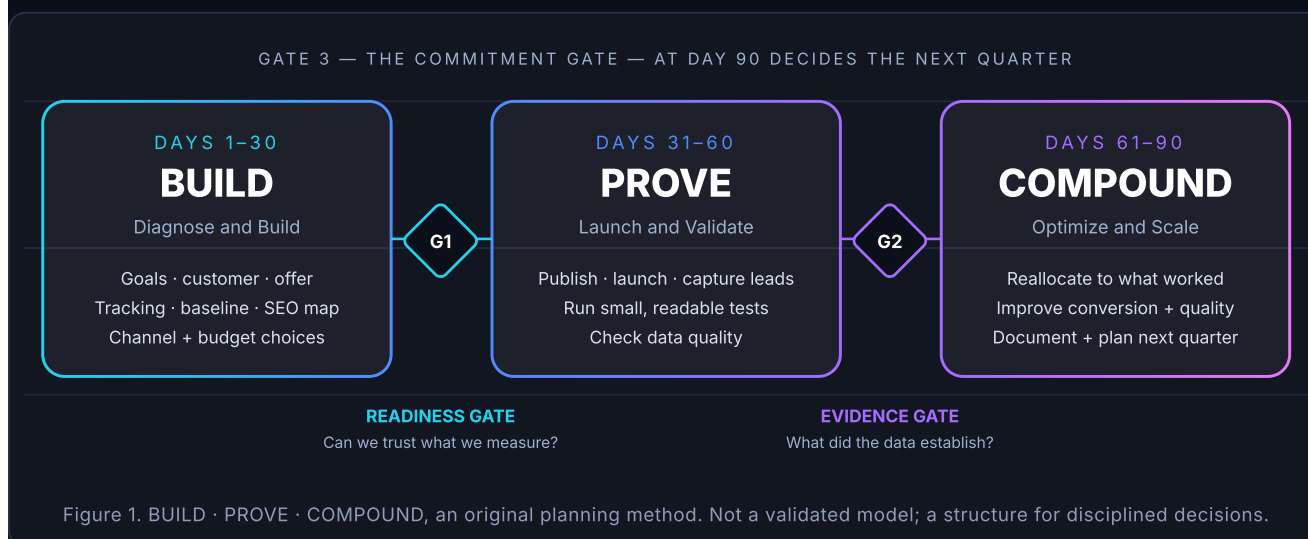
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THE METHOD

The 90-Day Growth Framework

An original planning method with three phases, three decision gates, and one rule: evidence earns the next stage of investment.

This Blueprint is organized around an original planning method called **BUILD · PROVE · COMPOUND**. The name describes the sequence in which a small team can responsibly create growth: first build a foundation you can trust, then prove which ideas deserve more resources, then compound what has been proven.



The logic behind the sequence

Build before you spend. Early in a quarter, the most valuable output is not traffic; it is the ability to tell a good week from a bad one. A team that knows its baseline conversion rate, has validated tracking, and can say who its best customers are will learn more from a small campaign than a team without those things learns from a large one.

Prove before you scale. Money and attention are scarce. The PROVE phase deliberately runs a small number of experiments with predefined questions, so that the COMPOUND phase can allocate resources to evidence rather than hope. Many marketing disappointments come from scaling something that was never actually shown to work.

Compound what survives. Growth that lasts tends to come from systems: a content engine, a tested offer, a reliable follow-up process, a dashboard the team trusts. COMPOUND turns the quarter's winners into repeatable processes, and ends by writing the next quarter's plan from what was learned.

The three decision gates

Gate	When	Question it answers	Evidence to examine
G1 Readiness	End of Phase 1 (around Day 30)	Is the foundation sound enough to launch spend and publish at volume?	Validated tracking on every primary conversion; documented baseline; ICP and offer drafted; prioritized SEO and channel plan; approved budget.
G2 Evidence	End of Phase 2 (around Day 60)	Which activities show enough signal to receive more resources, and which should be revised or stopped?	Lead volume and quality, cost per qualified lead, early organic indicators, test results with sample-size caveats, data-quality checks.
G3 Commitment	End of Phase 3 (around Day 90)	What should the next quarter fund, maintain, revise, or stop?	Results versus baseline with confidence labels, unit economics, process documentation, team capacity.

Each gate ends in one of four outcomes: **proceed**, **proceed with conditions**, **extend the current phase**, or **stop and rethink**. "Extend" is a legitimate answer. Moving forward on schedule with broken tracking is worse than taking

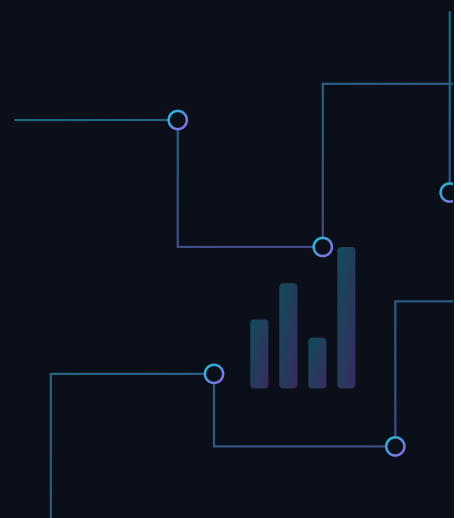
another week to fix it.

A NOTE ON CALENDAR WEEKS

Ninety days is roughly thirteen weeks. In this book, Phase 1 runs through Week 4, Phase 2 through Week 8, and Phase 3 through Week 13. Gate reviews are scheduled in the last session of Weeks 4, 8, and 13. The "Day 30/60/90" labels are approximations; the gates matter more than the exact day.

Four rules that apply throughout

- **One primary question per experiment.** If you cannot state what result would change your decision, you are not testing, you are just spending.
- **Every task has an owner, a deliverable, and a done-measure.** Work without those three is a wish.
- **Confidence is reported alongside results.** "Cost per lead fell 20% (low confidence: 31 leads)" is honest. "Cost per lead fell 20%" is not.
- **Stopping is a result.** Ending an activity with a clear rationale is a successful outcome of a good test.



PART I

Establish the Foundation

Define growth in terms your business can verify. Understand the customer well enough to say something specific. Position the offer. Build measurement that you can trust before a single dollar is spent on acquisition.

Chapters 1–4 · Phase 1: BUILD

Define What Growth Actually Means

Traffic, leads, and revenue are different things. Pick the number that tells you the truth about your business, then work backward to what marketing must deliver.

Revenue, traffic, and leads are not interchangeable

Most marketing reports lead with the metric that looks best. Sessions are up, impressions are up, follower counts are up. None of these is growth in the sense a business owner cares about: more profitable customers, more reliably acquired. Three layers are worth keeping apart.

Layer	What it tells you	How it misleads
Attention traffic, impressions, reach	Whether people can find and notice you.	Can rise through irrelevant queries, curiosity clicks, or low-intent audiences. Volume says nothing about fit.
Intent leads, sign-ups, enquiries	Whether people raised their hand.	A discounted download or a vague offer produces many hands and few buyers. Lead counts reward low-friction forms regardless of quality.
Value customers, revenue, profit	Whether the business gained something.	Arrives late, after sales cycles and refunds; harder to attribute to a single channel; may be driven by factors outside marketing.

A healthy plan tracks all three layers but *manages* to the deepest layer it can measure reliably. A business with a two-day sales cycle can manage to revenue. A business with a nine-month enterprise cycle must manage to a mid-funnel proxy, such as sales-accepted opportunities, and verify periodically that the proxy still correlates with revenue.

Business goals versus marketing objectives

A **business goal** is an outcome for the company: "Add \$90,000 of new recurring revenue this quarter." A **marketing objective** is the portion of that outcome that marketing is accountable for, expressed in numbers marketing can influence: "Generate 200 qualified leads at or below a cost the business can afford, converting to 60 sales opportunities."

The difference matters because marketing rarely controls the whole chain. Pricing, sales conversations, product quality, and delivery capacity all affect revenue. If marketing is held accountable for revenue alone, a slow sales team looks like a marketing failure; if marketing is held accountable for leads alone, junk leads look like a success. The practical fix is a **shared funnel definition** with a named owner at each stage (Chapter 8).

Leading and lagging indicators

Lagging indicators report outcomes after they happen: revenue, customers won, retention. They are trustworthy and slow. **Leading indicators** are earlier signals thought to predict those outcomes: qualified leads, booked meetings, branded search growth, email reply rate. They are fast and imperfect.

PRACTICE

Choose leading indicators by testing whether they have moved before outcomes in your own history. If your records show that booked demos converted at a stable rate in past quarters, demos are a reasonable leading indicator. If you have no history, treat the indicator as a hypothesis and verify it against closed deals at the Day 60 and Day 90 gates.

Leading indicators fail in predictable ways. They can be gamed (a flood of cheap leads), they can drift (a form change alters lead quality), and they can be coincidental. Pair each leading indicator with a *quality check*: leads with a qualification rate, meetings with a show rate, traffic with an engagement or conversion signal.

Choosing a North Star metric

A North Star metric is a single measure that best captures the value customers receive and the business captures in return. It is not a replacement for the dashboard; it is the number the team returns to when priorities conflict. A useful one is **tied to revenue, influenced by marketing, measurable weekly, and hard to inflate**.

Business model	Candidate North Star	Why, and the trap to avoid
B2B services or SaaS with sales team	Sales-qualified opportunities created per month	Close to revenue and measured weekly. Trap: opportunities that sales creates itself get credited to marketing.
Self-serve SaaS	New activated accounts (completed a defined first-value action)	Sign-ups alone overstate growth. Activation separates curiosity from use.
Ecommerce	Contribution profit from new customers (revenue minus product, shipping, and ad cost)	Revenue-based measures hide unprofitable acquisition. Trap: discount-driven orders that never repeat.
Local or appointment-based service	Booked appointments that attended	Calls and form fills include spam and mismatched enquiries. Attendance filters them.
Consultant or agency	Qualified discovery calls per month	Fast feedback loop. Trap: calls with prospects who cannot afford the work.
Content or subscription business	Paying subscribers added, net of cancellations	Net adds expose churn that gross adds hide.

Two tests help. First, **if this metric doubled while everything else stayed flat, would the business clearly be better off?** Second, **what is the cheapest way to make it go up without helping customers?** If the second answer is easy, tighten the definition.

Translating a business goal into marketing targets

The method is arithmetic run backward from revenue through each funnel stage. You need four inputs: the revenue target, the average value of a new customer, and the conversion rate at each stage. Where you lack conversion rates, use your own history, even rough; where you have none, use clearly labeled assumptions and replace them with real data at the Day 30 gate.

Worked example HYPOTHETICAL FIGURES

Imagine a B2B consultancy with a goal of **\$90,000 in new first-year contract value** over the next quarter. All figures below are invented to show the method.

Customers needed = revenue target ÷ average first-year value = $\$90,000 \div \$6,000 = 15$ Opportunities needed = customers ÷ close rate (25%) = $15 \div 0.25 = 60$ Qualified leads needed = opportunities ÷ lead-to-opportunity rate (30%) = $60 \div 0.30 = 200$ All leads needed = qualified leads ÷ qualification rate (40%) = $200 \div 0.40 = 500$ Visits needed = leads ÷ landing conversion rate (2.5%) = $500 \div 0.025 = 20,000$

Funnel stage	Required volume	Assumed rate to next stage	Who influences it most
Website visits	20,000	2.5%	SEO, paid, content, page quality
Leads (all form fills)	500	40%	Offer, targeting, form design
Qualified leads	200	30%	Follow-up speed, sales alignment
Sales opportunities	60	25%	Sales process, proposal quality
New customers	15	—	Product fit, pricing, trust
Check	15 customers × \$6,000 = \$90,000		

WHAT THIS ARITHMETIC DOES NOT TELL YOU

- It gives a **requirement**, not a **forecast**. Whether 20,000 qualified visits are attainable in a quarter depends on budget and channels. If the number looks impossible, the answer is to revisit the target, the conversion assumptions, or the offer's economics, not to hope.
- A 90-day program does not deliver at full run-rate on day one. Paid channels ramp in weeks; SEO often takes longer. Count the target's timing against the sales cycle: leads generated in month three may close next quarter.
- Small changes in an assumed rate swing the result. Run the model at pessimistic, expected, and optimistic rates to see the range.

You can also run it in reverse with a budget: if only \$6,000 is available and paid leads cost an assumed \$60 each, you can afford roughly 100 leads, which at the same downstream rates yield about 40 qualified leads, 12 opportunities, and 3 customers. If that falls short of the goal, the model has told you something valuable before spending: either the target, the budget, or the funnel economics must change.

Establishing a realistic baseline

A baseline is what your marketing produces *now*, measured consistently over a defined period. Without it, "improvement" is an opinion. Collect at least 90 days of history where available, and note seasonality: a quarter that includes a holiday peak is not a fair comparison for one that does not.

WORKSHEET 1.1 — BASELINE SNAPSHOT

Metric	Source	Last 90 days	Prior 90 days	Notes / data issues
Website sessions (all / organic)	Analytics	_____	_____	
Organic clicks and impressions	Search Console	_____	_____	
Leads, and qualified leads	CRM	_____	_____	
Lead-to-opportunity / opportunity-to-customer	CRM	_____	_____	
Customers and revenue (new)	CRM / billing	_____	_____	
Paid spend and cost per lead	Ad platforms	_____	_____	
Average first-year value; gross margin	Finance	_____	_____	
Email list size; engagement	Email platform	_____	_____	

If a number does not exist, write "not measured," not an estimate. Gaps in the baseline are a finding: they define what Chapter 4 must fix. New businesses with no history should say so plainly and treat the first 60 days as baseline creation, setting provisional targets that are revised at Gate 2.

CHAPTER 1 DELIVERABLE

A one-page goal sheet containing: the business goal, the North Star metric, three to five marketing objectives with numeric targets, the funnel arithmetic above filled with your inputs, and a completed baseline snapshot with data-quality notes.

Audience Research and Customer Understanding

Specific beats broad. The aim is to learn what people are trying to get done, what pushes them to act, and what stops them, in their own words.

Start with an ideal customer profile, not a persona

An **ideal customer profile (ICP)** describes the kinds of customers for whom your offer works unusually well, defined by observable, verifiable traits. For B2B: industry, company size, role of the buyer, tools in use, triggering events. For B2C: situation, need, budget, and the circumstances in which they buy.

A **buyer persona** is a narrative composite: a named, imagined person with a backstory. Personas can help a team keep a human in mind when writing, but they have well-known limits. They invite invented detail ("Marketing Mary loves podcasts"), they blur differences between real segments, and they are rarely updated. A reasonable position is: **build the ICP from evidence, and use personas only to summarize what the evidence supports.**

	ICP	Persona
Built from	Customer data, sales records, interviews	Often assumptions plus fragments of research
Answers	Who should we target and ignore?	How should we speak to someone like this?
Risk	Too narrow, if drawn from few customers	Stereotype; false precision
Use for	Targeting, qualification, prioritization	Tone, creative direction, empathy

Customer interviews: the highest-value hour of the quarter

Interviews with recent customers are usually the fastest way to learn why people buy. Aim for six to ten conversations in Weeks 1–2, mixing best customers, ordinary customers, and, if you can reach them, people who evaluated you and chose someone else or did nothing. Thirty to forty-five minutes each is enough.

How to run them

- **Recruit people who bought recently** (ideally the last six months); memory of the decision fades quickly.
- **Ask about the past, not the future.** "Walk me through the day you decided to look for a solution" yields facts. "Would you pay for a feature that...?" yields politeness.
- **Let silence work.** Follow with "What happened next?" and "What else did you consider?"
- **Record with permission** and transcribe. Quote directly in your messaging work, but strip identifying detail unless you have consent to use it.
- **Avoid leading the witness.** Do not pitch during the interview. If you find yourself defending your product, stop and listen.

INTERVIEW QUESTION BANK (PICK 10–12)

CONTEXT AND TRIGGER

- What was going on in your business or life just before you started looking?
- When did you first think "I need to do something about this"? What made it urgent then?
- What had you tried before? What happened?
- Who else was involved in the decision?

SEARCH AND EVALUATION

- Where did you look first? What did you type, or who did you ask?
- What other options did you consider? What made you rule them out?
- What nearly stopped you from choosing us?
- What did you need to see or hear to feel confident?

DECISION AND OUTCOME

- What was the deciding factor?
- How did you compare the price with the value you expected?
- What were you worried might go wrong?
- What was different after you started? What are you able to do now?

LANGUAGE AND IMPROVEMENT

- How would you describe what we do to a colleague or friend?
- What nearly didn't work, or what do you wish had been clearer?
- What would you tell someone in your position who is deciding now?
- Is there something we should be explaining that we are not?

Jobs to Be Done: the progress customers want

The Jobs to Be Done lens treats a purchase as "hiring" a product to make progress in a particular circumstance. A person does not buy a drill; they want a hole, or a hung shelf, or the feeling of having finished a home project. The job is rarely only functional. It often has an emotional dimension (feeling confident, avoiding embarrassment) and a social dimension (looking competent to a colleague or client).

A useful statement format is: **When [situation], I want to [motivation], so I can [expected outcome]**. Each interview usually produces one or two. Cluster them; the clusters are your candidate segments and message themes.

Business	Job statement (illustrative)
Accounting software HYPOTHETICAL	When tax season approaches and my records are scattered, I want to see everything in one place, so I can file without panic and without paying an accountant to sort receipts.
Dental clinic HYPOTHETICAL	When a tooth suddenly hurts, I want to book someone nearby tonight, so I can stop worrying that it will get worse over the weekend.
Running shoes (ecommerce) HYPOTHETICAL	When my old pair wears out before a race, I want a pair I can trust at once, so I can train without risking injury.

Buying triggers and objections

People rarely start looking without a trigger: a missed target, a new hire, a competitor's move, a regulatory change, a bad experience, a season. **Triggers tell you when to be visible.** Objections tell you what to say once you are. Collect both in the customer's words, grouped by frequency.

WORKSHEET 2.1 — CUSTOMER RESEARCH SUMMARY

Theme	What we heard (verbatim phrases)	Count	Implication for marketing
Triggers			
Desired progress (jobs)			
Alternatives considered			
Objections and anxieties			
Words customers use for the problem			
Deciding factors			

Treat counts with care. Eight interviews are a small sample; a theme mentioned by five of them is a strong lead, not a statistic. Mark these findings as **HYPOTHESIS** until sales data or test results corroborate them.

Competitor positioning

Competitors are not only companies selling the same product. Customers also consider doing nothing, hiring someone, using a spreadsheet, or buying something cheaper that partly works. List **direct competitors, indirect alternatives, and the status quo**, then capture for each: who they say they serve, their central promise, price signals, proof they offer, and what they do not say. Review their websites, pricing pages, review sites, ad libraries, and public job postings. Record observations, not judgments.

ETHICAL BOUNDARY

Use only public information. Do not misrepresent yourself to extract private details, and do not copy competitors' copy or creative. The goal is to find a position that is true for you and distinct in the market, not to imitate.

Mapping the customer journey

A journey map lists the stages a customer passes through and what they think, do, and need at each. Keep it simple: **Trigger → Explore → Evaluate → Decide → Start → Continue**. For each stage, note the questions they ask, where they look, who influences them, and what content or action would help. Combine the map with your analytics to see where visitors leave.

Stage	Customer question	Where they look	Marketing asset that helps
Trigger	"Is this a problem I should fix?"	Search, peers, social, news	Educational articles, diagnostic checklists
Explore	"What are my options?"	Search, communities, comparison pages	Guides, comparison content, short explainers
Evaluate	"Which one is right for us?"	Your site, reviews, sales calls	Proof pages, pricing clarity, demos, case studies
Decide	"Can I trust this? What if it fails?"	Contract, references, FAQ	Guarantees, onboarding detail, security and policy pages
Start	"What happens next?"	Onboarding emails, support	Welcome sequence, quick-start guide
Continue	"Is it working? Should I recommend it?"	Account, email, community	Retention emails, check-ins, referral prompts

Search behavior and intent

Search queries reveal what people want. A practical classification groups them into four types of intent, which will matter again in Chapter 5.

Intent	Typical query shape	Content that fits
Informational	how to..., what is..., why does...	Guides, explainers, definitions
Commercial investigation	best..., X vs Y, alternatives to...	Comparisons, buyer's guides, reviews
Transactional	buy..., pricing, quote, book...	Product, service, and pricing pages; landing pages
Navigational / local	brand name, near me, opening hours	Brand pages, location pages, business profile

Use customer interviews to validate that your keyword assumptions match how real people describe the problem. The vocabulary of experts and the vocabulary of buyers often differ.

Segmenting and prioritizing the audience

You will usually find several segments. You cannot serve them all well in one quarter. Score each against criteria that reflect business value and your ability to win them.

AUDIENCE PRIORITIZATION MATRIX — SCORE EACH 1 (LOW) TO 5 (HIGH), THEN WEIGHT

Criterion (suggested weight)	Segment A	Segment B	Segment C
Revenue potential / margin (×3)			
Strength of problem and urgency (×3)			
Fit with our strengths / differentiation (×2)			
Reachability through channels we can afford (×2)			
Speed to evidence (short sales cycle) (×1)			
Weighted total (max 55)			

The weights are suggestions; adjust them to your priorities. The matrix is a conversation aid, not an oracle. If the winning segment surprises the team, examine why before overruling it. Choose a **primary segment** for the quarter and, at most, one secondary. Everything in Chapters 3–8 is aimed at them.

CHAPTER 2 DELIVERABLE

An evidence-based ICP (one page), six to ten interview notes, a completed research summary, a competitor and alternatives grid, a journey map, and a scored audience matrix naming the primary segment.

Positioning, Offers, and Messaging

Customers decide within seconds whether a page is for them. Positioning decides what they see; the offer decides whether they act.

Value proposition: say what you do, for whom, and why it matters

A value proposition is a clear statement of the benefit you provide to a specific customer, and why it is better than the alternative they are considering. It is a decision, not a slogan. It should be specific enough that a competitor could not plausibly say the same thing.

For [target customer] who [situation or problem], [brand] is a [category] that [primary benefit], unlike [alternative], because [reason to believe].

The final clause, the **reason to believe**, is where credibility lives: a method, a guarantee, a specific capability, a verified credential, or evidence you can show. A claim without a reason is an assertion.

Differentiation you can defend

Differences that matter are those customers care about, that you can deliver consistently, and that competitors find hard to copy quickly. Common sources include:

- **Specialization:** serving one type of customer deeply (for example, one industry or one use case).
- **Method or process:** a distinctive way of delivering the result, explained clearly.
- **Risk reduction:** trial periods, guarantees, transparent pricing, fixed scopes.
- **Speed or convenience:** measurable time-to-value, where true.
- **Proof:** documented results with permission, certifications, recognized affiliations.

Avoid differentiators that everyone claims ("quality," "customer-first," "innovative") or that cannot be verified. If the strongest difference is price, make sure the business model supports it; otherwise it becomes a race you cannot win.

WORKSHEET 3.1 — POSITIONING

Question	Our answer (draft)
Primary segment (from Chapter 2)	
The job they are trying to get done	
What they do today instead (including nothing)	
Why that alternative falls short	
Our category (how customers will file us mentally)	
Primary benefit (in the customer's words)	
Reasons to believe (proof we can show now)	
Who we are <i>not</i> for	
One-sentence value proposition	

Offer design

An offer is what a person gets in exchange for what they give: money, time, or personal information. The same product can be offered in ways that produce very different results. Elements to design deliberately:

- **Scope:** exactly what is included and excluded.
- **Price and structure:** one-time, subscription, tiered, project-based; payment terms.
- **Risk reversal:** trial, refund policy, money-back terms. Only offer what you will honor.
- **Next step:** low-friction and appropriate for the buyer's stage (see below).
- **Urgency, when real:** a limited cohort, a genuine deadline, a capacity cap. Manufactured urgency erodes trust and may breach advertising rules.

Match the offer to the funnel stage

Stage	Offer type	Commitment asked	Example HYPOTHETICAL
Awareness	Useful content, tools, newsletter	Attention; maybe an email	"Ten checks before you replace your boiler" guide
Consideration	Checklist, calculator, comparison, webinar	Email and basic role/context	Heating cost calculator
Decision	Consultation, demo, quote, trial, sample	Time, contact details, intent	Free home survey with written quote
Purchase	Clear price with guarantee	Payment	Fixed-price installation package
Retention	Service plan, replenishment, referral reward	Continued payment or advocacy	Annual service plan

Mismatches cause the most common funnel problems. Asking for a demo from someone who is still learning the topic yields a low conversion rate. Offering only a generic ebook to someone ready to buy loses them to a competitor who answered their question faster.

Trust and credibility

Trust signals reduce perceived risk. Use those you can substantiate, and put them near the decision point rather than relegating them to an "About" page:

- Named customer quotes or case studies **with written permission**.
- Specific, verifiable results with context (period, scope, how measured).
- Certifications, licenses, memberships, insurance, and security practices relevant to your sector.
- Transparent pricing or pricing ranges; clear policies on refunds, privacy, and support.
- Real people: team pages, author bios with relevant experience.
- Third-party review profiles where you have a genuine volume of reviews.

DO NOT FABRICATE PROOF

Fake reviews, invented testimonials, and unsupported claims damage trust and can breach consumer-protection and advertising rules in many jurisdictions. If you do not yet have proof, say what you do offer to reduce risk, and make collecting genuine proof an early objective.

Message-market alignment

A message fits when the people it is aimed at recognize themselves in it. Test alignment with a few quick checks: Does the headline name a situation or outcome the segment actually cares about? Does the vocabulary match what interviewees said? Is the proof relevant to *this* segment? Does the call to action match their stage?

The same product may need distinct messages for distinct segments. Keep a **message matrix**: rows for segments, columns for problem, promise, proof, and call to action. Resist the temptation to collapse them into a vague universal message.

Landing-page messaging

A landing page has one job: convince a particular visitor, arriving from a particular source, to take a particular action. A reliable structure, adapted to context:

1. **Headline** naming the outcome or problem in the visitor's language, matching the ad or search result that brought them.
2. **Subheadline** clarifying what it is, who it is for, and how it works.
3. **Primary call to action** visible without scrolling, with a specific verb ("Get the pricing guide", "Book a 20-minute audit").
4. **Benefits tied to outcomes**, not feature lists.
5. **Proof**: logos you are authorized to show, quotes, numbers with context.
6. **How it works**: three steps, so the next step feels safe.
7. **Objection handling**: FAQ addressing the top concerns from interviews.
8. **Repeat call to action** and a brief, honest note on what happens after submission.

Before-and-after messaging example **HYPOTHETICAL SCENARIO**

A constructed example: a small firm offering bookkeeping to independent veterinary clinics.

BEFORE

Headline: Professional Financial Solutions for Your Business

Body: We offer comprehensive bookkeeping, payroll, and reporting services tailored to your needs. Our experienced team is committed to excellence.

CTA: Contact Us

Problems: no named customer, no outcome, no proof, no reason to act now, generic call to action.

AFTER

Headline: Month-end books for veterinary clinics, closed by the 8th

Subheadline: Bookkeeping built around clinic revenue streams, supplier invoices, and payroll, so your owner and your accountant see the same numbers.

Proof (to be replaced by real, permissioned proof): named clinic quote, credentials, fixed monthly fee shown.

CTA: Book a 20-minute books review

Improvements: specific segment, tangible outcome, plain next step. Whether it converts better is a hypothesis to test, not a certainty.

Handling objections

Objections are information. List the top five from interviews and sales calls, then decide where each should be answered: in the headline, near the call to action, in an FAQ, in a case study, or in the sales conversation. Typical categories are price ("too expensive"), risk ("what if it doesn't work"), effort ("too much to set up"), trust ("who are you?"), and timing ("not now"). Each deserves a specific, honest answer.

CHAPTER 3 DELIVERABLE

A completed positioning worksheet, a one-sentence value proposition, two or three tested headlines per priority offer, a message matrix, and a landing page copy draft that follows the structure above, ready for the Day 30 gate.

Marketing Infrastructure and Measurement

Measurement built before launch turns every later result into evidence. Measurement built after launch turns it into an argument.

The rule for this chapter is simple: **no paid campaign launches until tracking has been validated end to end**. A leaky measurement system teaches teams the wrong lessons with great confidence. This chapter covers what to set up and how to prove it works. It names specific platforms because most readers use them, but the principles apply to any stack, and you should consult your own tools' official documentation.

Website and landing-page readiness

Before driving traffic, check that the pages that will receive it can convert it.

- **Loads acceptably on mobile.** Google's documentation recommends aiming for good Core Web Vitals: Largest Contentful Paint within 2.5 seconds, Interaction to Next Paint under 200 milliseconds, and Cumulative Layout Shift under 0.1^[S4]. Treat these as guidance for user experience, not a guarantee of ranking.
- **Message matches source.** The landing page headline should echo the ad or search intent that led to it.
- **Single clear action** on conversion pages, with navigation reduced if appropriate.
- **Forms work** on major browsers and devices, show clear error messages, and send submissions to a place someone actually checks.
- **Thank-you states exist:** a confirmation page or message that can also be used as a conversion signal and tells people what happens next.
- **Basic trust and legal pages:** privacy policy, terms, contact details, cookie notice where required.

Analytics configuration

Most teams use Google Analytics 4 (GA4) for website behavior and Google Search Console for organic search performance. Both are free and complementary: Search Console shows how people find you in Google Search, while analytics shows what they do after they arrive. If you use other analytics products, apply the same checklist.

Setting	What to do
Property and data stream	One property per site or app; confirm the tag fires on every page, including checkout and thank-you pages.
Key events	Mark the actions that matter to the business (form submit, booked call, purchase) as key events. Do not mark routine engagement events such as page views or scrolls; doing so inflates counts until they are meaningless. See Google Analytics Help for the current procedure and limits ^[S18] .
Internal traffic	Exclude your own team's and agency's traffic so tests and QA visits do not pollute data.
Cross-domain and subdomains	Configure if checkout, booking, or forms live on a different domain, otherwise sessions break and sources are lost.
Access and ownership	Ensure the business, not an agency or former employee, owns the accounts. List admins; remove people who have left.
Search Console	Verify the domain property; submit the sitemap; review indexing and page-experience reports. Search Console's Performance report is covered in Chapter 5 ^[S5] .

Conversion tracking

A **conversion** is a counted action that matters. Decide what counts *before* configuring it. A good practice is a tiered definition:

- **Primary conversions** (feed bidding and reporting): purchase, qualified form submission, booked appointment.
- **Secondary conversions** (monitoring only): newsletter sign-up, resource download, pricing-page view.

Each ad platform has its own measurement setup. In Google Ads, conversion actions are created in the account and tracked with a tag or by importing events from a linked Google Analytics property; Google documents both a URL-based approach and a manual setup^[S9]. Note that settings such as whether an action is "primary" determine whether it influences optimization. For Meta, the Pixel tracks website events, and the Conversions API sends events from a server, website platform, or CRM; Meta recommends deduplicating events sent through both routes and testing server events with its Test Events tool^{[S12][S13]}. Other platforms, such as LinkedIn, TikTok, or Microsoft Advertising, offer comparable mechanisms; check their documentation.

OPTIMIZATION FOLLOWS WHAT YOU MEASURE

Automated bidding learns from the conversions you tell it to count. If "conversion" means a low-quality form submit, the platform will find more of those. Where possible, send downstream signals (qualified lead, closed sale) back to the platform, via offline conversion import or the Conversions API, and check the platform's documentation for requirements.

UTM conventions

UTM parameters are tags added to URLs so analytics can identify where a visit came from. Google's documentation notes that `utm_source`, `utm_medium`, and `utm_campaign` should always be used together, and that values are case-sensitive: `utm_source=google` is different from `utm_source=Google`^[S7]. Consistency is the entire point.

Parameter	Convention (recommended)	Example
<code>utm_source</code>	Lowercase platform or publisher	<code>google, meta, newsletter</code>
<code>utm_medium</code>	Lowercase channel type from a fixed list	<code>cpc, paid_social, email, referral</code>
<code>utm_campaign</code>	Lowercase, hyphenated, includes quarter and offer	<code>2026q4-audit-offer</code>
<code>utm_content</code>	Creative or link variant	<code>video-a, toplink</code>
<code>utm_term</code>	Keyword (manual campaigns only)	<code>bookkeeping-vets</code>

Keep a single shared naming sheet, give one person ownership of it, and **never apply UTMs to internal links** on your own site, because they overwrite the original source of a visit. Check whether your ad platforms use auto-tagging, and understand how it interacts with manual tagging in your analytics setup.

CRM and lead management

A customer relationship management (CRM) system, or even a disciplined spreadsheet at the smallest scale, is where marketing evidence meets revenue. Without it, you can count leads but not learn which ones mattered.

- **Capture the source on every record:** UTM values, landing page, and first and latest touch where possible, stored in dedicated fields at form submission.
- **Define lifecycle stages** that everyone shares: for example Lead → Marketing-qualified → Sales-accepted → Opportunity → Customer → Lost (with reason).

- **Standardize the lead source list** in a picklist, not free text, so reports do not fragment into "Google", "google", and "Google Ads".
- **Record outcomes:** close date, value, and lost reason. These fuel Chapter 14's metrics.
- **Set up de-duplication** and basic data-hygiene rules.

Choose a CRM based on your team size, sales process, integrations needed, and budget; features and pricing change often, so check each vendor's current pricing page before committing. This book does not endorse a particular product.

Consent and privacy

Privacy rules and platform requirements affect what you can measure and how you may contact people. The rules differ by region and sector, and this is a field where professional legal advice is worth the cost.

- **Cookie and tracking consent.** Where law or platform policy requires consent, a consent management platform (CMP) collects it. Google's consent mode lets Google tags adjust their behavior based on the visitor's consent choice, but it does not itself provide a banner or widget^[S11].
- **Data minimization.** Collect only what you need; avoid putting personal data into URLs, event names, or free-text fields sent to analytics.
- **Email consent and unsubscribe.** See Chapter 9 for the US CAN-SPAM requirements and Gmail's sender requirements; other regions have their own rules.
- **Vendor and data-processing terms.** Review the terms of tools that handle customer data, including AI tools (Chapter 10).
- **Expect gaps.** Consent choices, browser restrictions, and ad blockers mean that observed conversions are a subset of actual ones. Plan for this when interpreting results.

Attribution limitations

Attribution assigns credit for a conversion to marketing touchpoints. It is a model, not a measurement of cause. Different tools use different rules and look-back windows, so they will not agree. For example, Google Ads reports that its data-driven attribution model uses conversion data to estimate the contribution of ad interactions across the path and is the default for most conversion actions^[S10], while Google Analytics offers its own attribution reporting and has retired several rules-based models^[S8]. Meta's help center describes its own attribution settings, which determine how conversions can be credited to ads^[S14].

The practical consequences:

- Each platform tends to claim credit generously for its own channel, so the platforms' conversions can sum to more than your actual total.
- Last-touch views favor channels near the end of the journey (branded search, email, retargeting) and undervalue those that create demand earlier (content, social, awareness).
- The most trustworthy reconciliation is **your CRM or order system**: total customers and revenue are facts, and platform numbers are estimates to be compared against them.
- Whenever possible, add a **"how did you hear about us?"** field to forms or sales calls. Self-reported source is imperfect but catches influence that trackers miss.

Lead-source consistency and reporting infrastructure

Pick one definition of each source and apply it everywhere. A simple, durable channel taxonomy: *Organic search, Paid search, Paid social, Email, Direct, Referral, Partner, Offline/Other*. Map each platform's naming to this list in one place. Then build a reporting layer with a clear data flow: platforms → analytics and CRM → a single dashboard

(Bonus B), refreshed on a fixed cadence. For small teams a well-organized spreadsheet updated weekly beats an elaborate dashboard nobody trusts. If you automate reporting later (Chapter 10), automate a process you already understand.

How to validate tracking before launching campaigns

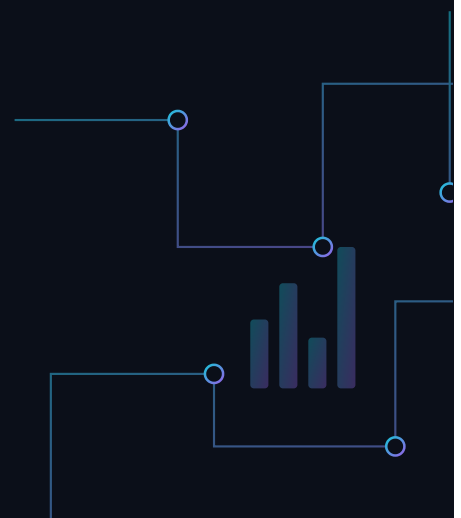
Validation means proving that every important action is recorded once, with the right source, in every system that should hold it. Do this *before* spending and repeat it after any site or tag change.

TRACKING VALIDATION CHECKLIST

Test	Pass condition
☐ Open the site in a private window with consent accepted, then declined.	Tags behave as configured for each consent state.
☐ Visit a landing page through a tagged test URL (use real UTM values).	Session appears with correct source, medium, and campaign in real-time reports.
☐ Submit each form with test data, on desktop and mobile.	Key event fires exactly once; record arrives in CRM with source fields filled; notification reaches an owner.
☐ Complete a test purchase or booking (ecommerce or scheduling).	Transaction appears once in analytics and in the order system, with matching value.
☐ Use platform diagnostic tools (for example, tag assistant tools and the Meta Test Events tool ^[s13]).	Events recognized; no duplicate or missing parameters; deduplication working where Pixel and server events coexist.
☐ Click-test phone numbers, chat widgets, and booking links.	Each is recorded as intended, or you have documented it as untracked.
☐ Compare 7 days of platform-reported conversions with CRM counts.	Differences are explainable (attribution, consent, test records) and documented.
☐ Delete or label test records.	Reports are not polluted by QA data.

CHAPTER 4 DELIVERABLE

A tracking plan listing every primary and secondary conversion, a UTM naming sheet, a CRM field and stage specification, a consent approach, and a signed-off validation checklist. This feeds directly into Gate 1.



PART II

Build Your Acquisition Engine

Search, content, paid media, lead capture, email, and automation. Each chapter explains the mechanics, the trade-offs, and which activities can show results inside ninety days and which cannot.

Chapters 5–10 · Phases: BUILD (planning) and PROVE (launch)

SEO and Organic Search Growth

Organic search compounds slowly and rewards patience, but a small number of well-chosen actions in the first 90 days set the trajectory.

What SEO is, and what a quarter can realistically show

Search engine optimization is the work of making a site easier for search engines to crawl, index, and understand, and more useful to the people searching. Google's own introduction describes SEO as the process of making your site better for search engines, and its Starter Guide covers practices that make it easier to crawl, index, and understand content^[51]. No practice, however sound, guarantees a particular ranking.

TIMING EXPECTATIONS (PRACTICE)

Some SEO work shows effects within weeks: fixing an accidental noindex tag, repairing broken internal links, or rewriting titles for pages with many impressions and few clicks. Other work, such as building topical depth with new content, earning links and mentions, and establishing brand recognition, commonly takes several months or longer to produce measurable results. Nobody can promise a first-page ranking or a specific amount of traffic. Judge the first 90 days on **leading indicators** (indexed pages, impressions, click-through rate on improved pages, rankings movement for target queries) and on whether the foundation is sound, not on revenue alone.

Activity	Often visible in 90 days?	Typical leading indicator
Fixing crawl, indexing, and redirect errors	Yes, frequently	Indexed page count; Search Console indexing reports
Rewriting titles and snippets for low-CTR pages	Often within weeks	CTR on those pages in Search Console
Improving internal links to priority pages	Sometimes	Impressions and positions for target queries
Refreshing existing content that already ranks	Often	Clicks, average position, engagement
Publishing new pages for new topics	Partially; ranking takes time	Indexing, first impressions, query variety
Local profile completeness and reviews	Often	Profile actions, calls, direction requests
Earning authoritative links and brand mentions	Rarely at scale	Referring domains; branded search growth
Competing for highly competitive head terms	Unlikely	Long-term position trend

Technical SEO foundations

Technical work removes barriers. It rarely wins rankings by itself, but it prevents otherwise good pages from being invisible, slow, or confusing to crawlers and users.

TECHNICAL SEO CHECKLIST (WEEK 3–5)

Check	What to look for
☐ Crawlability	robots.txt does not block important sections; key pages reachable by internal links; no accidental noindex on revenue pages.
☐ Indexing	Priority pages appear in Search Console as indexed; check reasons for excluded pages and decide which exclusions are intentional.
☐ XML sitemap	Lists canonical, indexable URLs only; submitted in Search Console; updated automatically.
☐ Canonicals and duplicates	One preferred URL per page; parameter and www/non-www variants consolidated. Note that Search Console credits clicks to the canonical URL, which can make duplicates show zero clicks ^[S5] .
☐ Status codes and redirects	No long redirect chains; broken pages return proper 404/410; old URLs redirect to the closest relevant page.
☐ HTTPS and mobile	Site served securely; layout and tap targets usable on phones.
☐ Page experience	Review the Core Web Vitals report; work toward the thresholds Google describes (LCP 2.5 s, INP 200 ms, CLS 0.1) ^[S4] , prioritizing templates that carry commercial pages.
☐ Titles and headings	Unique, descriptive title per page; one clear H1; logical heading hierarchy.
☐ Structured data	Where used, markup matches the visible content on the page ^[S2] ; validate with Google's testing tools.
☐ Site architecture	Important pages within a few clicks of the homepage; descriptive URLs; no orphan pages.
☐ Images and media	Meaningful alt text; compressed files; supported formats.
☐ JavaScript rendering	If content loads by script, verify that search engines can see it (for example, with the URL Inspection tool in Search Console).

Keyword and topic research, without a big tool budget

Keyword research answers one question: **what are the people I want to reach actually searching for, and in what words?** You can begin with free sources and add paid tools later if the volume of decisions justifies the cost.

1. **Start with customers.** Take the problem phrases, objections, and vocabulary from your interviews (Chapter 2) and sales calls. Support tickets and chat transcripts are rich sources.
2. **Mine Search Console.** The Performance report shows queries that already earn impressions for your site. Queries where you appear at lower positions with decent impressions are opportunities ^[S5].
3. **Use search suggestions and related searches** in the search interface itself, plus "people also ask" style questions, to find phrasing variations.
4. **Study the results.** For each target query, look at what currently ranks: content type, depth, freshness, and whether results are dominated by large publishers, marketplaces, or local businesses. If you cannot offer something better or different, choose another query.
5. **Group queries by topic and intent**, not by individual phrase. Many variants are answered by one good page.

Treat third-party search-volume estimates as rough guides, not facts: tools differ and all are modeled. A query with modest volume and strong buying intent can be worth more than a high-volume informational one.

Search intent drives page type

Match the page to the intent behind the query (see Chapter 2). A transactional query answered by a long essay, or an informational query answered by a sales page, tends to underperform regardless of keyword use. Check the current results to see what the search engine is already rewarding for that query.

Content clusters and internal linking

A **topic cluster** is a set of pages that cover a subject in depth: one comprehensive pillar page, and several supporting pages that answer specific questions, each linking back to the pillar and to each other where relevant. This structure helps visitors find the next useful page and helps crawlers understand how pages relate.

- Create one cluster per priority topic. A small site can focus on two or three clusters in a quarter.
- Use descriptive anchor text. "bookkeeping for veterinary clinics" tells a user and a crawler more than "click here."
- Link **from** pages that already attract visits **to** pages that convert. Internal links are the cheapest SEO lever and are fully under your control.
- Audit orphan pages (with no internal links) and either connect or remove them.

On-page optimization

For each target page, confirm: the title states the topic and benefit clearly; the opening paragraph resolves the searcher's main question; headings reflect the sub-questions; content includes the specific details, examples, and evidence that distinguish it; images and tables support understanding; and there is a clear next step. Write for readers first. Keyword stuffing makes content worse and does not help.

Content refreshes

Updating an existing page that already has impressions is often more efficient than publishing a new one. Select pages with declining clicks, outdated facts, or positions just below the first results. Update statistics and examples, add missing sub-questions, improve the title and opening, strengthen internal links, and record the date and change so you can measure the effect. Refreshing for its own sake, such as changing the date without substantive improvement, is not useful.

Local SEO, where relevant

For businesses serving a local area, Google's AI features documentation lists keeping Business Profile and Merchant Center information up to date among its recommendations^[s2], which also supports local discovery in general. A sensible local checklist: claim and verify the Business Profile; ensure name, address, phone, hours, categories, and services are accurate and consistent across the web; add photos; build a steady, honest process for asking real customers for reviews (never incentivize or fake them); respond to reviews; create location or service-area pages with unique content; and track calls and direction requests as conversions.

A Search Console workflow you can run weekly

Google defines the Performance report's main measures: **impressions** (how often someone saw a link to your site), **clicks**, **click-through rate** (clicks divided by impressions), and **average position**, a relative ranking where 1 is the topmost result^[s6]. Google also advises focusing more on trends in impressions and clicks than on position alone^[s5]. A 30-minute weekly routine:

1. **Total trend:** compare the last 28 days with the previous 28 and the same period last year. Annotate site changes.

2. **Pages tab:** sort by clicks to see what works; sort by CTR ascending for pages with many impressions and low CTR. Rewrite titles and descriptions for those, since Google notes that a low CTR may mean users see the result but do not think it answers their query^[S5].
3. **Queries tab:** find queries with rising impressions and positions between roughly 8 and 20; these pages may benefit from refreshed content or stronger internal links.
4. **Segment by country and device** if you serve specific markets.
5. **Check the indexing and experience reports** for new errors.
6. **Log decisions** in the weekly review (Bonus E).

Remember that average position blends many queries and impression types; an average can worsen even as performance improves, if the site starts appearing for many new, lower-ranked queries.

AI search visibility and Generative Engine Optimization (GEO)

People increasingly get answers from AI-generated summaries and assistants. Google's documentation says that for AI features such as AI Overviews and AI Mode, the best practices for SEO remain relevant and that there are no additional requirements or special optimizations needed to appear; it adds that you do not need to create new machine-readable files, AI text files, or markup^[S2]. In May 2026 Google published a dedicated guide on optimizing for generative AI features, which emphasizes valuable, unique content and describes SEO fundamentals as still foundational^[S3]. Google also states that sites appearing in AI features are included in overall Search Console traffic^[S2].

What that implies in practice (**PRACTICE**):

- **Do the fundamentals well.** Crawlable, indexable pages with accurate structured data and consistent business information are prerequisites.
- **Create content with something distinctive to offer:** original data from your own operations (clearly described), real experience, specific methods, clear definitions, and honest comparisons. Generic summaries of what everyone else says are the easiest to replace.
- **Write clearly.** Direct answers to specific questions, well-structured sections, and plain definitions help both readers and automated systems.
- **Be consistent about who you are.** Consistent names, descriptions, and profiles across your site and public profiles help systems connect mentions of your brand.

WHAT IS NOT ESTABLISHED

Other AI assistants and answer engines operate differently from Google Search, and their selection and citation behavior is not publicly documented in a way that can be treated as fact. Claims that a particular formatting trick or file reliably earns citations should be treated as **HYPOTHESES**. A responsible approach is to test cautiously, check whether your analytics show referral traffic from AI assistants, record brand mentions for a fixed set of questions at regular intervals, and judge by business outcomes. No one can guarantee AI citations.

SEOLabsAI publishes additional articles on AI search and GEO on its [blog](#) for readers who want more depth^[S17].

Prioritizing SEO work: impact, effort, confidence

SEO backlogs grow endlessly. A simple scoring method keeps effort pointed at what matters. Score each item from 1 to 5 on **impact** (expected benefit if it works), **confidence** (how sure you are that it will work, given evidence) and **effort** (time and cost, where 5 is heavy). Then:

Priority score = (Impact × Confidence) ÷ Effort

Candidate task	HYPOTHETICAL SCORING	Impact	Confidence	Effort	Score
----------------	----------------------	--------	------------	--------	-------

Remove accidental noindex from three service pages	5	5	1	25.0
Add internal links from top blog posts to service pages	3	4	1	12.0
Rewrite titles on 20 high-impression, low-CTR pages	3	3	2	4.5
Build a pillar page and four supporting articles	4	3	4	3.0
Template-level Core Web Vitals project	3	3	4	2.3

The scores are judgments, so argue about them openly and record the reasoning. A low score does not mean "never": the pillar page is a long-term asset. It means that, with limited capacity, quick wins come first. Revisit confidence scores after each experiment.

Measuring sustainable organic growth

Track, monthly: clicks and impressions (Search Console); non-brand versus brand queries (brand growth often reflects demand created elsewhere); leads and customers from organic sessions (analytics and CRM); indexed pages and technical health; and content-level performance. Compare against your baseline and be explicit about lag. If organic leads are flat at Day 90 but impressions, indexed pages, and rankings for target queries are trending up, you may be on track; if none are moving, investigate rather than wait.

CHAPTER 5 DELIVERABLE

A completed technical checklist with fixes ranked by the priority score, a keyword and topic map grouped by intent, one to three planned content clusters, an internal-link plan, a weekly Search Console routine, and a list of organic leading indicators with baselines.

Content Marketing That Supports Revenue

Publish less than you could, and make each piece easier to act on than anything else a buyer will find.

Content strategy begins with decisions, not output

Content marketing earns attention by being genuinely useful to the people you want to reach, and moves them toward a next step when they are ready. Strategy means deciding *whom* the content is for, *which questions* it answers, *what* you can say that others cannot, and *how* you will know it worked. The temptation is volume. The better measure is whether each piece helps someone decide.

A simple test before commissioning any piece: **Who will read this, what decision does it help them make, and what will they do next?** If you cannot answer all three, the piece is not ready.

Topic selection

Build the topic list from four sources and keep it in one backlog:

- **Sales and support questions:** the questions prospects actually ask, in their words.
- **Objections and comparisons:** content that addresses doubts ("is X worth it?", "X versus Y") often sits close to buying decisions.
- **Search data:** queries from Chapter 5 mapped to clusters.
- **Your unique knowledge:** processes, data you can share, lessons, and judgment others lack.

Score each candidate on *proximity to revenue* (how close to a purchase decision), *search or distribution potential*, *your ability to be distinctive*, and *effort*. Favor topics near the bottom of the funnel early in the quarter, since they can produce leads quickly, and invest in top-of-funnel education in parallel for long-term growth.

Educational versus commercial content

	Educational (top and middle funnel)	Commercial (lower funnel)
Purpose	Help people understand a problem and build trust	Help ready buyers choose and act
Examples	How-to guides, explainers, glossaries, research summaries	Comparisons, pricing explainers, buyer's guides, case studies, implementation guides
Primary action	Subscribe, read the next piece, download	Request quote, book a call, start a trial
Typical measure	Engagement, subscribers, assisted conversions	Leads, qualified leads, revenue influenced

A reasonable starting ratio for a small team is to weight early output toward commercial and comparison content and keep a smaller steady stream of educational pieces; treat the ratio as a **HYPOTHESIS** to adjust with data.

Editorial planning

Plan in four-week cycles with a fixed weekly rhythm. For every piece, create a **brief** (use Prompt 4 in Bonus F to speed it up) containing: target reader and stage; the question being answered; primary search query and intent; the

point of view or unique contribution; required evidence and sources; internal links; the call to action; and the owner and due dates. Briefs prevent rewrites.

Lead magnets

A lead magnet is a resource offered in exchange for contact details. It works when it solves a specific, immediate problem for the primary segment and is closely related to what you sell. Good formats are checklists, templates, calculators, benchmark-free worksheets, short diagnostic tools, and concise guides. Poor magnets are generic ebooks that attract people who will never buy. Check results by looking at the *qualification rate* of leads from each magnet, not only the sign-up rate (Chapter 8).

Case studies

Case studies are among the most persuasive assets, and also the easiest to get wrong. Use only real customer work and **obtain written permission** for naming the customer and publishing results. A solid structure: the customer's situation and goal; what was tried before; what you did and why; the measured result, with the baseline, timeframe, and method of measurement; what did not work or what they would do differently; and a direct quote. Avoid exaggerated claims, and avoid implying that results are typical when they are not. If you have no case studies yet, start by documenting small, real outcomes, or publish methodology articles explaining how you work.

Email newsletters

A newsletter provides an owned channel that does not depend on algorithms. Keep a consistent, modest cadence (weekly or fortnightly), a single clear theme per issue, and one primary call to action. Share original insight, curated material with commentary, or practical examples. Review engagement by click rate and replies rather than opens alone. Chapter 9 covers deliverability and consent.

Repurposing

One substantial piece can feed many formats. A guide becomes a short checklist, a newsletter issue, three social posts built around different points, a short video or audio explanation, a slide deck, and an answer to a sales question. Repurposing saves effort only if each version is adapted to its channel's audience. Copying the same text everywhere does not work.

AI-assisted research and editing

AI tools can reduce time spent on desk research, outlines, first-draft structures, editing for clarity, and summarizing interviews. They can also produce confident errors, bland generic prose, and fabricated sources. Safe use keeps **people responsible for accuracy and judgment**:

- Supply your own source material (interviews, notes, data) and ask for structuring rather than invention.
- Verify every factual claim, number, quotation, and link before publishing. Never publish a source you have not opened.
- Add what AI cannot: genuine experience, original data, and a viewpoint.
- Follow your company's data-handling rules; do not paste confidential customer information into tools you have not vetted (Chapter 10).
- Secondary coverage of Google's generative-AI guide reports that it stresses unique, helpful content as the factor with the greatest long-term impact^[S19]; confirm the wording in Google's own guide (see Verification list). Whatever the tool, quality control is yours.

Editorial quality control

PRE-PUBLICATION CHECKLIST

Check
☐ Purpose: the piece answers the question in its brief, for the stated reader.
☐ Accuracy: every fact, figure, and claim has a source you have opened; unsupported statements are removed.
☐ Originality: contains something distinctive (data, example, method, experience); passes a plagiarism check; quotes are short and attributed.
☐ Clarity: opening answers the main question quickly; headings are descriptive; jargon is explained.
☐ Credibility: author named, with relevant experience; date shown; sources cited.
☐ SEO basics: title, description, headings, internal links, image alt text, canonical.
☐ Conversion: one clear call to action that matches the reader's stage; tracking in place.
☐ Compliance: permissions for names and results; claims you can substantiate; disclosures where needed.

Measuring content performance

Judge content by the job it was meant to do. Educational pieces: organic impressions and clicks, engaged sessions, newsletter sign-ups, and assisted conversions. Commercial pieces: conversion rate, qualified leads, and pipeline influenced. Record, per piece: publish date, target query, owner, baseline, and a review date 60 to 90 days later. Retire, merge, refresh, or promote based on what you learn.

A practical 30-day content calendar **ILLUSTRATIVE EXAMPLE**

The following example assumes a small B2B services business with one primary segment, one writer-owner, and occasional design help. It sets a deliberately modest pace: **four substantial pieces, one lead magnet, four newsletters, and repurposed assets**. Adapt topics to your own research.

Week	Piece	Funnel stage	Format and intent	Call to action / owner
1	Comparison: "Option A vs Option B: how to choose for a team of your size"	Decision	Comparison page; commercial investigation	Book a consultation · Writer
	Newsletter #1: three questions to ask before hiring a provider	Consideration	Email; list nurture	Link to comparison · Writer
	Draft lead magnet outline: readiness checklist	Consideration	Checklist (PDF + web page)	Email capture · Writer / Designer
2	Pillar guide: "Complete guide to [core topic] for [segment]"	Awareness / Consideration	Long-form guide; informational	Download checklist · Writer
	Publish readiness checklist with landing page	Consideration	Lead magnet	Email capture; tracked key event · Marketer
	Newsletter #2: highlights from the guide	Awareness	Email	Link to guide · Writer
3	Objection page: "What does [service] really cost, and what affects price?"	Decision	Pricing explainer; transactional	Request quote · Founder + Writer
	Three social posts and a short video from the guide	Awareness	Repurposed content	Read guide · Marketer
	Newsletter #3: common mistakes (from sales questions)	Consideration	Email	Link to pricing page · Writer

4	Process explainer: "How a typical engagement works, step by step"	Decision	Process page; reduces risk	Book a call · Founder
	Refresh best-performing existing page (using Search Console data)	Varies	Content refresh	Existing CTA improved · Writer
	Newsletter #4: month in review plus a question to readers	Retention	Email; reply-driven	Reply or book · Writer

Total effort in this example is roughly 40 to 55 hours across the month, depending on length and review needs; the calendar in Bonus A distributes it across the quarter. Scale the pace to your capacity. Four excellent pieces beat twelve forgettable ones.

CHAPTER 6 DELIVERABLE

A prioritized topic backlog, briefs for the first four pieces, one lead magnet, a pre-publication checklist in use, and a 30-day calendar with owners and review dates.

Paid Acquisition and Campaign Testing

Paid media buys speed and learning, not certainty. Treat the first campaigns as experiments with a budget for finding out.

Choosing channels without declaring a winner

No channel is universally better. Each reaches people in a different state of mind, and the right choice depends on your offer, audience, sales cycle, margin, and budget. A framework for the decision:

Channel type	Typical strength	Typical limitation	Often fits
Search advertising (for example, Google Ads search campaigns)	Reaches people actively searching; intent is visible in the query.	Limited by existing search demand; can be costly for competitive terms.	Services, B2B, local businesses, products with existing demand
Paid social (for example, Meta ads)	Can reach defined audiences before they search; strong for visual products and creative testing.	Interrupts rather than answers; intent is weaker, so downstream quality needs close monitoring.	Ecommerce, consumer offers, events, retargeting, awareness
Professional social (for example, LinkedIn)	Targeting by job role and company attributes.	Often higher cost per click, so the offer must be worth it; check current costs yourself.	B2B with high customer value
Retargeting	Re-engages people who already visited.	Needs enough traffic; tends to claim credit that was earned elsewhere.	Any business with steady visits
Partnerships, directories, sponsorships	Borrowed audiences and trust.	Harder to scale and track; quality varies widely.	Niche B2B, local, community-driven offers

For a first quarter, choose **one primary paid channel** and optionally one secondary test. Use these questions: Where does my customer look when the problem becomes urgent? How much can I afford per customer (Chapter 14's break-even)? How long is my sales cycle, and when will I know if the leads were good? Do I have the creative resources this channel demands?

Campaign objectives

Platforms optimize toward the objective you select. Choose the one closest to the outcome you care about, and the deepest conversion event that will give the system enough data. A traffic objective will deliver clicks, possibly of low quality; a lead or sales objective optimizes toward those actions. If you lack conversion volume for deep events, begin with a slightly higher-level event, but keep evaluating on quality in the CRM.

Audience and keyword targeting

- **Search:** begin with a tight set of high-intent keywords grouped by theme, using exact and phrase match types where appropriate, and add negative keywords early to exclude irrelevant queries. Review the search terms report weekly.
- **Social:** begin with a defined audience from your ICP and test broader targeting against it; platform systems increasingly optimize delivery themselves, so creative and offer often matter more than narrow targeting. Test rather than assume.

- **Exclusions:** exclude existing customers and your own team where appropriate; apply geographic limits consistent with where you can serve.
- **Ad policies:** each platform restricts claims, categories, and targeting in some sectors; read the current policies before building.

Creative testing

Creative is typically the largest lever you control in paid social and an important one in search ad copy. Test **one variable at a time** where volume allows: the angle (problem, outcome, proof, comparison), the format (static, video, carousel), the headline, and the offer. Write hypotheses ("An ad that leads with the cost of delay will beat one that leads with features, as measured by cost per qualified lead"). Keep a test log with the variant, the dates, spend, results, and decision.

Avoid declaring winners on thin data. With a small number of conversions, differences between variants are often noise. A rough statistical guide: the relative uncertainty of a count is about 1 divided by its square root, so 30 conversions carry roughly $\pm 18\%$ uncertainty before even accounting for differences in audience and timing, and 100 conversions roughly $\pm 10\%$. Two variants that differ by less than that margin have not been separated.

Landing-page alignment

Paid clicks are paid for whether or not the page converts. Send traffic to a dedicated page that matches the ad's promise: same offer, same language, one action. Check speed on mobile, keep forms short while balancing lead quality, and make the next step obvious. A common failure is a strong ad pointing to a generic homepage.

Conversion tracking and attribution

Everything above depends on Chapter 4. Remember that each platform reports conversions under its own attribution rules (Google Ads describes data-driven attribution as using conversion data to estimate the contribution of interactions^[S10]; Meta describes its own attribution settings^[S14]), so compare platform numbers with CRM totals and judge channels by the revenue and qualified leads they produce.

The metric chain: CPM, CTR, CPC, conversion rate, CPA, ROAS, lifetime value

Paid performance is a chain of ratios. Understanding how they connect lets you diagnose problems, since a change in cost per acquisition always comes from one of a few links.

CTR = clicks ÷ impressions CPM = (spend ÷ impressions) × 1,000 CPC = spend ÷ clicks = CPM ÷ (1,000 × CTR) Conversion rate (CVR) = conversions ÷ clicks CPA = spend ÷ conversions = CPC ÷ CVR ROAS = revenue from ads ÷ ad spend Break-even ROAS = 1 ÷ gross margin LTV = average revenue per customer per period × gross margin × expected lifetime (periods)

Notice what the relationships say. **CPA = CPC ÷ CVR**. If CPC rises 20% while conversion rate holds, CPA rises 20%. If conversion rate halves, CPA doubles regardless of how cheap clicks are. That is why improving the landing page often lowers CPA more than bidding adjustments.

Worked example 1: lead generation (search) HYPOTHETICAL DATA

Step	Calculation	Result
Spend	Given	\$3,000
CPC	Given	\$2.50

Clicks	$\$3,000 \div \$2.50$	1,200
CTR	Given	4%
Impressions	$1,200 \div 0.04$	30,000
CPM	$(\$3,000 \div 30,000) \times 1,000$	\$100
Landing-page conversion rate	Given	5%
Leads	$1,200 \times 0.05$	60
Cost per lead (CPL)	$\$3,000 \div 60$	\$50
Lead-to-customer rate	Given	10%
Customers	60×0.10	6
CPA (media cost per customer)	$\$3,000 \div 6$	\$500
First-year revenue per customer	Given	\$1,800
Revenue and ROAS	$6 \times \$1,800 = \$10,800; \div \$3,000$	3.6×
Gross margin	Given	60%
Break-even ROAS	$1 \div 0.60$	1.67×
Gross profit less ad spend	$(\$10,800 \times 0.60) - \$3,000$	\$3,480
LTV (gross profit basis)	$\$1,800 \times 0.60 \times 2.5 \text{ years}$	\$2,700
LTV : media CPA	$\$2,700 \div \$500$	5.4 : 1

Interpretation: the campaign clears break-even comfortably on these invented numbers. But note what the example *omits*: agency fees, staff time, tools, and sales effort are not in the \$500. A **fully loaded** customer acquisition cost would be higher, and the LTV assumption (2.5 years) is a forecast. An honest report states the limits. Also note that the 10% lead-to-customer rate would not be known for weeks or months; early on you would judge the campaign by CPL and lead quality, with sales feedback.

Worked example 2: ecommerce (paid social) HYPOTHETICAL DATA

Step	Calculation	Result
Spend	Given	\$2,000
CPM	Given	\$12
Impressions	$(\$2,000 \div \$12) \times 1,000$	$\approx 166,667$
Link CTR	Given	1.2%
Clicks	$166,667 \times 0.012$	$\approx 2,000$
CPC	$\$2,000 \div 2,000$	\$1.00
Purchase conversion rate	Given	2.5%
Orders	$2,000 \times 0.025$	50
CPA	$\$2,000 \div 50$	\$40
Average order value; revenue	$\$60; 50 \times \$60$	\$3,000
ROAS	$\$3,000 \div \$2,000$	1.5×
Gross margin on order	Given (45%)	\$27 per order
Break-even ROAS (first order)	$1 \div 0.45$	2.22×
First-order gross profit less ad spend	$(50 \times \$27) - \$2,000$	-\$650
With 30% repurchase once (adds 0.3 orders)	$\$27 \times 1.3 = \$35.10 \text{ per customer vs. } \$40 \text{ CPA}$	still below break-even

Interpretation: a ROAS of 1.5 may look acceptable in a dashboard, yet it loses money on the first order and, under these assumptions, even after a modest repeat purchase. The decision then becomes one of improving margin, raising order value (bundles, thresholds), lowering CPA through creative and landing-page work, increasing repeat rate, or accepting a planned loss to acquire customers only if retention data supports it. **ROAS that ignores margin can mislead.**

Budget allocation

Allocate paid budget in three buckets for the first quarter, as a **PRACTICE** starting point to adapt:

- **Core (about 60–70%):** the single best-fit channel and campaign structure, funded enough to produce readable data.
- **Test (about 20–30%):** creative, audience, and landing-page experiments.
- **Reserve (about 10%):** cash held for opportunities revealed by the data, or errors.

Minimum viable test budget: work backward from the sample you need. If your target CPA is \$50 and you want at least 30 conversions in a test cell before judging, you need about $30 \times \$50 = \$1,500$ per cell. Two creative variants therefore need roughly \$3,000. **HYPOTHETICAL** If the budget cannot support that, test fewer variants, not smaller samples of many.

Campaign diagnostics (short form; Chapter 15 expands)

Read the chain from the top: Are ads being shown (impressions)? Are they relevant (CTR)? Is the click worth buying (CPC)? Does the page convert (CVR)? Are leads good (qualification)? Does revenue follow (close rate and value)? The weakest link tells you where to work.

Scaling and stopping decisions

Decision	Evidence required (suggested)	Action
Scale	Enough conversions to read; cost and quality within targets for at least two review periods; downstream quality confirmed by sales.	Raise budget in measured steps (for example 20–30% at a time) and watch for efficiency decay. Larger jumps can destabilize learning; verify against platform guidance.
Maintain	Performance near target but evidence thin or volatile.	Hold budget; keep collecting data; limit changes.
Revise	Clicks or leads are plentiful but conversion or quality is poor; or one element (creative, audience, offer) is clearly underperforming.	Change one variable; set a new review date.
Stop	Spent the pre-agreed learning budget without meeting minimum thresholds, tracking verified as correct, and no credible hypothesis remains; or quality is persistently poor.	Pause, document learnings, reallocate funds.

Set the stop thresholds *before* launch ("If cost per lead exceeds \$X after \$Y spend with tracking verified, pause and review"). Pre-commitment guards against the sunk-cost impulse.

CHAPTER 7 DELIVERABLE

A channel decision with rationale, one campaign brief per launch (Bonus D), a test log with hypotheses and pre-set decision rules, a validated tracking setup, and a budget plan with core, test, and reserve buckets.

Lead Generation and Conversion Optimization

A lead is a promise someone made to talk to you. How fast, how well, and how honestly you respond decides whether it becomes revenue.

Lead generation is a system, not a form

Traffic becomes revenue only through a sequence: a visitor sees an offer, completes a form or contacts you, is qualified, receives a timely response, and moves through a sales process. Weakness at any step wastes the investment upstream. This chapter treats the sequence end to end and gives you a way to find where it leaks.

Forms and landing pages

Every form field is a small cost to the visitor. Fewer fields usually raise completion rates; more fields usually raise lead quality. Neither is automatically better. The right balance depends on the offer and your capacity.

Situation	Form approach (Practice)
Low-commitment resource (checklist, newsletter)	Name and email only. Qualify later through behavior and nurture.
Consultation or demo request	Add company, role, and one qualifying question (for example, team size or main goal) so sales can prioritize and prepare.
Quote for services with large price variance	Ask the two or three questions that determine scope and fit; consider a multi-step form with an easy first step.
High-volume, low-margin enquiries	Add friction deliberately (a qualifying question, budget range) to filter out poor fits.

- Use **clear labels and inline help**; avoid placeholder text as the only label.
- Explain what happens after submission ("We reply within one business day").
- Offer a phone or booking option for people who prefer it, and track it.
- Do not ask for information you will not use. State how you will use personal data and link to your privacy policy.

Calls to action

A call to action (CTA) should say what the person will get, in plain language, at a level of commitment that fits their stage. "Get the pricing guide" or "See a sample report" usually outperforms "Submit" or "Learn more" on a decision page, but test it; assumptions about copy are hypotheses. Make the primary CTA visually dominant, repeat it after major sections, and avoid placing competing CTAs of equal weight beside it.

Lead qualification

Qualification is the process of deciding whether a lead is worth sales effort now. It protects sales time and keeps marketing honest about quality. A definition everyone agrees on is the most valuable artifact in the funnel. Typical dimensions: **fit** (does this match our ICP?), **need** (is there a real problem we solve?), **timing** (are they acting now?), and **capacity** (do they have the authority and budget?).

LEAD QUALIFICATION CHECKLIST — ADAPT THE CRITERIA TO YOUR BUSINESS

Dimension	Questions / evidence
☐ Fit	In our target segment (industry, size, location, customer type)? In a market and language we serve? Not a competitor, student, or job seeker?
☐ Need	Described a problem we solve? Specific, rather than vague curiosity?
☐ Timing	Has a trigger or deadline? Evaluating options now, or "someday"?
☐ Capacity	Can they decide or influence the decision? Budget range plausible for our price?
☐ Contactability	Valid email or phone? Not a duplicate? Consent recorded where required?
☐ Engagement	Viewed pricing or case pages, replied to emails, attended an event?
Outcome: ☐ Marketing-qualified (pass to sales) ☐ Nurture (not ready) ☐ Disqualify (record reason)	

Lead scoring, where appropriate

Lead scoring assigns points to attributes and behaviors to prioritize follow-up. It earns its keep only with enough lead volume to be tested against outcomes. Small teams with a few leads a week usually do better with manual qualification and a clear checklist. If you do score, keep it simple and validate it against closed deals every quarter.

Signal	ILLUSTRATIVE MODEL	Points	Type
Company size in ICP range		+20	Fit
Job role is a decision-maker or influencer		+15	Fit
Industry in primary segment		+15	Fit
Outside service area		-20	Fit
Visited pricing or service page twice or more		+15	Behavior
Requested a consultation		+40	Behavior
Downloaded the checklist		+5	Behavior
Free personal email domain (for B2B only)		-10	Fit
Unsubscribed from emails		-20	Behavior
Illustrative threshold for sales review		50+	Replace after testing against closed deals

Scores are heuristics, not truths. A score that has never been compared with actual outcomes is a guess in numerical form.

CRM stages and definitions

Stage	Entry definition	Owner and exit evidence
New lead	Form submission or enquiry captured with source data.	Marketing ops; contacted or disqualified
Marketing-qualified	Meets agreed qualification criteria or score threshold.	Marketing; accepted or rejected by sales with reason
Sales-accepted	Sales agrees to pursue and attempts contact.	Sales; conversation held or recycled
Opportunity	Real conversation with defined need, a decision process, and expected value.	Sales; won or lost
Customer	Signed or paid.	Sales to success; onboarding complete

Lost / disqualified

Not pursued or not won, with mandatory reason.

Whoever closes the record

Follow-up speed

Prospects who submit a form are usually comparing options and are most receptive soon after. Many teams see better contact and meeting rates when they respond quickly, but the size of the effect depends on your market and sales model, so measure it in your own data. Set an internal **service-level agreement**, for example "first response within one business hour during working hours," record the time to first contact on every lead, and report it weekly. It is often the cheapest fix in the entire funnel.

FOLLOW-UP WORKFLOW (TEMPLATE)

When	Action	Owner / notes
Minute 0	Automatic confirmation email: what happens next, who will contact them, how to book directly. Internal alert to the lead owner with source, offer, and answers.	Automation; routing rule by segment or territory
Within SLA	Personal reply or call referencing what they submitted. Offer a specific next step and a calendar link.	Sales or founder; log the attempt
Day 1	If no response: second attempt by a different channel (call vs. email).	Sales
Day 3–5	Helpful follow-up: a relevant resource or answer to a likely question. No guilt-trip language.	Sales or marketing
Day 10	Polite close-the-loop message. Move to nurture if still interested later, or to lost with reason.	Sales
Weekly	Review leads that were not contacted in SLA, and all lost reasons.	Marketing + sales lead

Keep calls and messages compliant with applicable rules on consent, calling hours, and do-not-contact lists in your jurisdictions.

Email nurture

Most leads are not ready when they arrive. Nurture keeps your offer relevant until they are, by providing useful content and gently inviting the next step. Chapter 9 provides a complete five-email sequence.

Sales and marketing alignment

Alignment is mostly mechanical, not cultural: shared definitions, shared data, and shared review. Agree on the qualification criteria and stage definitions; hold a short weekly lead review; require sales to record outcomes and lost reasons; have marketing report *pipeline and customers*, not only leads; and have sales commit to the response SLA. When marketing and sales each optimize their own numbers, both can look good while the business stalls.

A sample lead funnel, and how to find its weakest stage

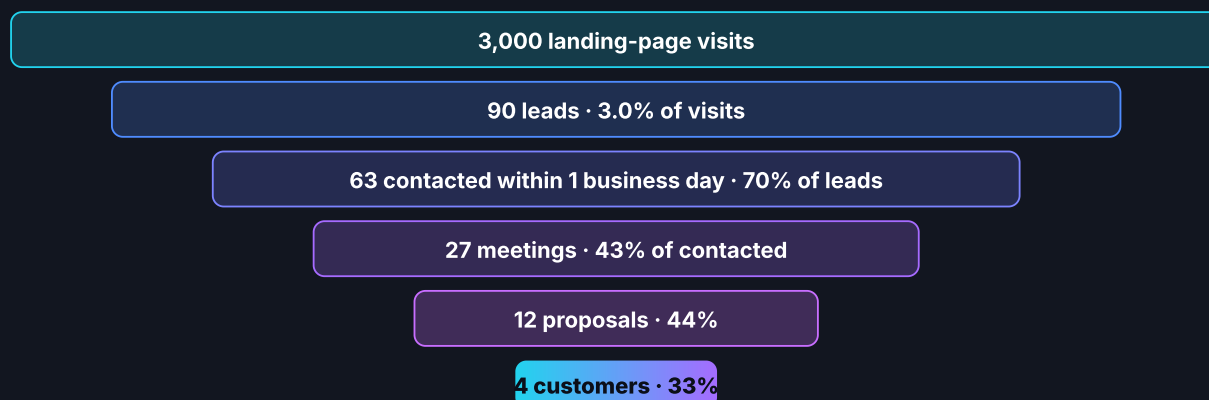


Figure 2. Sample funnel with hypothetical monthly figures (not benchmarks).

Step one is to compute the conversion rate at each stage. Step two, and the one most teams skip, is to compare each rate with a **target** drawn from your own history or from what the economics require, because absolute percentages are not comparable across stages. Step three is to estimate what would happen if *only that stage* reached its target.

Stage	HYPOTHETICAL	Current rate	Illustrative target	Customers if only this stage hits target	Gain vs. 4.0
Lead → contacted in 1 business day		70%	90%	5.1	+1.1
Contacted → meeting		43%	50%	4.7	+0.7
Meeting → proposal		44%	50%	4.5	+0.5
Proposal → customer		33%	35%	4.2	+0.2

In this constructed case the contact stage has the largest gap to target and the largest payoff, and it is largely an operational problem (response speed and routing) rather than a creative one. The method matters more than the numbers:

- **Relative improvements are multiplicative.** A 20% relative improvement at any single stage lifts customers by 20%, so choose based on *headroom* (how far from a realistic target) and *cost and speed of the fix*, not on which percentage looks smallest.
- **Look upstream and downstream.** A change that raises lead volume by lowering quality may reduce the next stages' rates. Track the whole chain.
- **Segment the funnel.** Averages hide differences by source, offer, and device. The weakest stage for paid social leads may differ from that for organic leads.
- **Beware small numbers.** With four customers, one deal changes the rate by 25%. Use several months of data or concentrate on the earlier stages for faster signals.

Conversion-rate optimization (CRO)

CRO is the disciplined improvement of the share of visitors who take a desired action. It is a research and testing process, not a list of button colors.

1. **Diagnose.** Combine quantitative data (analytics funnel, drop-off pages) with qualitative evidence (session recordings or heatmaps if you use them, customer interviews, sales objections, form-field analytics).
2. **Form hypotheses.** "Because interviews show buyers fear hidden costs, adding a pricing range above the form will increase quote requests."
3. **Prioritize** using impact, confidence, and effort (Chapter 5's scoring works here too).

4. **Test.** Make bold, meaningful changes to the message, offer, or page structure before micro-optimizing details. If traffic is too low for a reliable split test, make the change, monitor before-and-after results cautiously, and treat conclusions as provisional.
5. **Decide and document.** Define success measures and duration in advance, run the test for full business cycles (including weekdays and weekends), and record outcomes whether they win or lose.

COMMON CRO MISTAKES

- Stopping a test as soon as one variant looks ahead.
- Testing many things on a page with only a few conversions a month.
- Optimizing the form completion rate while lead quality falls.
- Ignoring seasonality, promotions, or traffic-source shifts during a test.

CHAPTER 8 DELIVERABLE

Shared qualification and stage definitions, a lead form and landing page ready for launch, a documented follow-up workflow with an SLA, a funnel table with stage rates and targets, and a first CRO test hypothesis list.

Email Marketing and Retention

Email is an owned channel with high leverage and unforgiving rules. Respect for consent and relevance protects deliverability, and deliverability protects revenue.

Welcome sequences

The first messages a new subscriber receives set expectations and receive the highest attention. A good welcome sequence delivers what was promised immediately, introduces who you are and what to expect, and offers one clear next step. Avoid immediate hard selling for subscribers who joined for a free resource. Instead, help first, and invite action once you have shown value.

Lead nurturing

Nurturing moves a lead toward a decision by answering the questions they have at each stage. Map emails to the journey (Chapter 2): problem recognition, options, evaluation, decision. Use behavior to adapt: someone who views the pricing page might receive a message about cost and value, while someone who only read a guide might receive a related article.

Segmentation

Segmentation means sending different messages to different groups. Start with a few meaningful dimensions rather than dozens: **stage** (subscriber, lead, opportunity, customer), **interest** (topic or product category), **source** (which offer brought them), and **engagement** (recently active versus dormant). Customers and prospects should never receive identical sales sequences. Segmenting well usually improves relevance and protects sender reputation, though you should verify the effect in your own results.

Email deliverability fundamentals

Deliverability is whether your messages reach the inbox. Mailbox providers evaluate authentication, sender reputation, complaint rates, and recipient engagement. Google's sender guidelines state that all senders should authenticate with SPF or DKIM, and that bulk senders should authenticate with SPF, DKIM, and DMARC; the guidelines define bulk senders by volume, and those who send more than 5,000 messages per day to Gmail accounts must support one-click unsubscribe in marketing and subscribed messages^[S15]. Even if you are far below that volume, following the same practices is sensible and costs little.

Fundamental	What to do (Practice unless cited)
Authentication	Set up SPF, DKIM, and DMARC for your sending domain, and make sure each email service you use is authorized in your DNS ^[S15] . Verify with your email provider's documentation.
Consent and list quality	Email people who asked to hear from you. Do not buy lists. Remove invalid addresses and repeated bounces promptly.
Dedicated sending domain choices	Consider separating transactional and marketing mail streams; ask your provider how they recommend structuring them.
Engagement	Send relevant content; segment; suppress long-inactive subscribers (see re-engagement below).
Content hygiene	Honest subject lines; reasonable text-to-image balance; working links; avoid misleading sender names. Test on major mail clients.

Consent and unsubscribe practices

The United States' CAN-SPAM Act applies to all commercial email, including business-to-business messages, according to the Federal Trade Commission's compliance guide. The guide's requirements include accurate header information that identifies the sender, a clear and conspicuous way to opt out, a valid physical postal address, and honoring opt-out requests within 10 business days; it states that violations can carry penalties of up to \$53,088 per email ^[S16]. Amounts are adjusted periodically, so check the current figure. Other jurisdictions, including the EU and UK, the Canadian anti-spam law and others, have different and sometimes stricter consent regimes. If you email internationally, get advice for the regions you serve.

- Make unsubscribing easy: a visible link in every marketing email and, for volume senders, a one-click header as Google requires ^[S15].
- Process opt-outs fast and never re-add suppressed addresses.
- Record when, where, and how each person consented.
- Distinguish *transactional* messages (receipts, password resets) from *commercial* ones; the legal treatment differs.

Customer retention and lifecycle marketing

Retaining a customer is typically less costly than acquiring a new one, although the economics vary by business, so check yours with your own data. Lifecycle marketing sends the right message at each stage after the sale.

Lifecycle stage	Goal	Example emails (Practice)
Onboarding	Reach first value quickly	Welcome and set-up steps; quick-start tips; check-in from a real person
Adoption	Deepen use	Feature or product-use guidance; usage-based tips; tutorials
Expansion	Increase value	Relevant add-ons; replenishment reminders; loyalty offers
Advocacy	Generate referrals and proof	Review request after success; referral invitation; case-study conversation
At risk	Prevent churn	Low-usage nudge; survey asking what is missing; offer help
Win-back	Restore lapsed customers	"What's changed" update; targeted offer; ask for feedback

Re-engagement

Subscribers who have not opened or clicked for a long period hurt engagement metrics and may hurt deliverability. A reasonable process: define "inactive" for your cadence (for example, no click in 90 to 180 days), send a short re-permission sequence asking whether they still want to hear from you, and suppress or remove those who do not respond. Be aware that open tracking is unreliable in some mail clients because of privacy features, so rely on clicks and actions as well as opens (check your platform's documentation on how it handles this).

Measuring email revenue and engagement

Metric	Formula	Caution
Delivery rate	$\text{delivered} \div \text{sent}$	Low rates signal list-quality or authentication problems.

Click rate	$\text{unique clicks} \div \text{delivered}$	More reliable than opens; still includes some automated clicks from security scanners.
Click-to-open rate	$\text{unique clicks} \div \text{unique opens}$	Inherits the unreliability of opens.
Unsubscribe and complaint rates	$\text{unsubscribes (or complaints)} \div \text{delivered}$	Complaints are the more serious signal for reputation.
Conversion rate	$\text{conversions attributed to email} \div \text{delivered (or clicks)}$	Define the attribution window and keep it constant.
Revenue per recipient	$\text{attributed revenue} \div \text{delivered}$	Attribution is imperfect; compare with CRM totals.
Repeat purchase rate	$\text{customers with 2+ orders} \div \text{customers (in a period)}$	Specify the time period and cohort.

Sample five-email nurture sequence ILLUSTRATIVE TEMPLATE

Scenario: a visitor downloaded a readiness checklist from a B2B services business. Each email has one job. Replace bracketed text and use only real proof.

#	Send	Objective	Content outline	CTA and success measure
1	Day 0	Deliver and set expectations	Deliver the checklist link; tell them in two lines what to expect from the next emails; ask a single, easy question ("What is the biggest obstacle right now?").	Reply or click to checklist. Measure: delivery, click, reply rate.
2	Day 2	Demonstrate understanding	Name the most common mistake you see at their stage, why it happens, and how to avoid it. No pitch.	Read the related guide. Measure: click rate.
3	Day 5	Build credibility	Explain your method in three steps. Include a real example or short case study if you have permission; if not, share a transparent walk-through of how you work.	View process page. Measure: clicks, page engagement.
4	Day 8	Address the main objection	Tackle cost, risk, or effort directly using wording from interviews. Provide a pricing range or guarantee where truthful.	See pricing explainer. Measure: clicks, replies about price.
5	Day 12	Invite a decision	Summarize the benefit in a sentence, offer a clear next step (a short consultation or audit), and say what happens on the call. Respect their choice if they are not ready.	Book a call. Measure: booked meetings, qualified rate.

SAMPLE EMAIL 1 (ADAPT FREELY)

Subject: Your readiness checklist (plus one question)

Hi [First name],

Here is the checklist you asked for: [link]. Most people work through it in about ten minutes, and the third section tends to prompt the most useful discussions.

Over the next two weeks I will send four short emails covering the mistakes we see most often, how we approach the work, and how to decide whether it makes sense for you. You can unsubscribe at any point using the link below.

One question: what is the biggest obstacle you are facing in [topic] right now? Reply with a line or two; I read every message.

[Name], [Business], [Postal address] · [Unsubscribe]

CHAPTER 9 DELIVERABLE

A verified authentication setup, a welcome email and five-email nurture sequence, at least three subscriber segments, a re-engagement rule, a lifecycle map for existing customers, and an email section in the weekly dashboard.

AI and Marketing Automation

Automate the repetitive parts so people can spend time on judgment, relationships, and the work customers actually notice.

A sensible stance

AI and automation are tools for removing repetitive work and speeding up first drafts. They are not strategy, and they do not remove accountability. The most reliable pattern is **automate the predictable, assist the creative, and keep a human responsible for anything customer-facing, financial, or reputational**. Choose a workflow by asking: Is it repetitive and rules-based (automate)? Is it text-heavy and benefits from a first draft (assist with AI, with review)? Does it involve judgment, empathy, or risk (human-led)?

Where AI and automation help in the Blueprint

Task	AI or automation role	Human role	Main risk
Interview and call analysis	Summarize transcripts; cluster themes	Verify against the transcripts; interpret meaning	Invented quotes; over-confident summaries
Keyword and topic grouping	Cluster queries; suggest sub-questions	Choose by business value and intent	Plausible but irrelevant topics
Content briefs and outlines	Draft structure from your inputs	Add distinct viewpoint and evidence	Generic content that duplicates competitors
Drafting and editing	First drafts, tone edits, alternatives	Fact-check; approve; add experience	Hallucinated facts and sources
Ad copy variants	Generate variants from a brief	Check claims, policy, and brand fit	Policy violations; unsupported claims
Reporting	Assemble data; draft commentary	Validate numbers; interpret	Misread metrics; wrong conclusions
Lead routing	Rule-based assignment; alerts	Handle exceptions; talk to leads	Misrouted or duplicated leads
CRM updates	Auto-fill source fields; log activities	Audit data quality	Silent data corruption

Practical prompts you can use today

Fifteen full prompts appear in Bonus F. These two illustrate the pattern: specific inputs, a defined output, and explicit constraints against invention.

A Summarize interview themes with traceable evidence

You are helping me analyze customer interviews. Below are [N] transcripts, each labeled with an ID. Identify recurring themes about (1) what triggered the search, (2) alternatives considered, (3) objections, (4) deciding factors. For every theme, list the interview IDs where it appears and quote at most 15 words from each as evidence. If a theme appears in only one interview, mark it "single mention". Do not infer motives that are not stated. End with three questions the transcripts leave unanswered.
[Transcripts]

B Turn raw weekly numbers into a first-draft commentary

Here is this week's and last week's data as a table: [table]. Write a plain-English commentary of no more than 150 words. State what changed, by how much (use only the numbers given), and two possible explanations for each major change, labeled as hypotheses. List the checks I should perform to test each hypothesis. Do not state causes as facts. If a metric moved less than [X]% or the sample is small (fewer than [N] conversions), say the change is within normal noise.

Workflow diagrams and automation examples

Example 1: lead routing

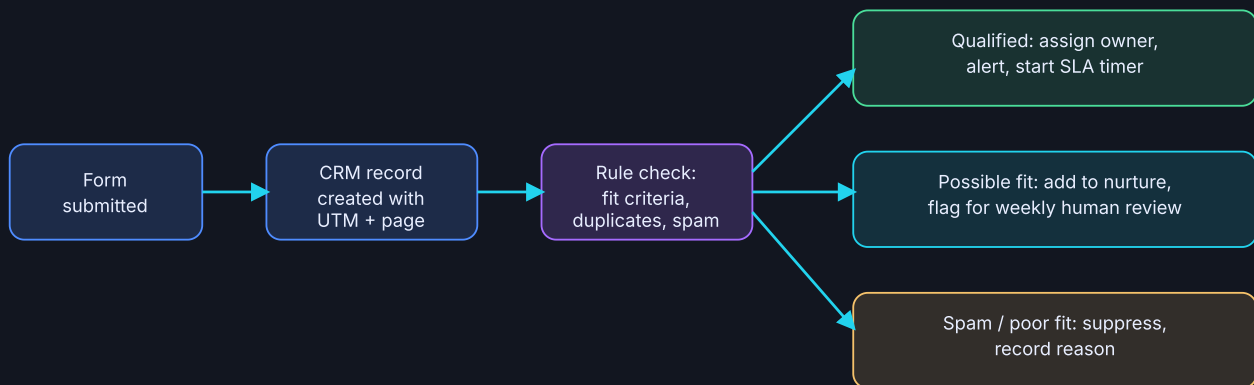


Figure 3. Rule-based lead routing. Rules are written by people; exceptions are reviewed weekly.

Example 2: weekly reporting

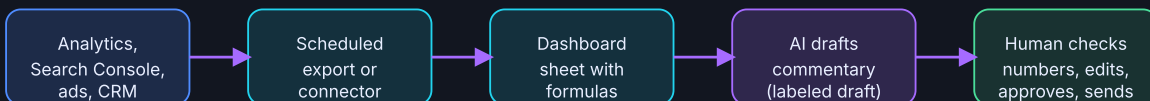


Figure 4. Weekly reporting pipeline. The human step is not optional.

Further automation ideas (all optional)

- **Auto-confirmation and booking:** confirmation email with calendar link on form submit.
- **UTM validation:** a scheduled check that flags links or records with missing or inconsistent campaign values.
- **Review requests:** trigger a request to customers a set period after a successful delivery.
- **Alerting:** notify the owner when spend spikes, conversions drop to zero, or a form stops sending.
- **Content operations:** create tasks and deadlines automatically when a brief is approved.

Human review and quality assurance

- **Define what must always be reviewed:** anything published, sent to customers, spending money, or changing records at scale.
- **Keep an audit trail:** what ran, when, and what it changed; keep the ability to undo.
- **Test with dummy data first,** then a small live batch.

- **Set monitoring for silent failure:** an automation that stops working is more dangerous than a manual process that is visibly late.
- **Sample outputs weekly** and record error rates to decide whether to expand or restrict automation.

Data privacy and security

BEFORE USING ANY AI OR AUTOMATION TOOL WITH CUSTOMER DATA

- Read the vendor's terms and privacy documentation: how input data is stored, whether it is used to train models, retention periods, and where it is processed.
- Do not enter personal, confidential, or regulated data into tools you have not approved for that purpose; anonymize where possible.
- Limit access with least-privilege accounts, strong authentication, and separate credentials for automations; remove access when staff leave.
- Know what your privacy policy promises and make sure the workflow does not violate it.
- Confirm whether a data-processing agreement is required in your jurisdiction.

Selecting tools based on actual workflow needs

Start with the workflow, not the tool. Write down the trigger, the steps, the data involved, the owner, and the failure cost. Then ask what you already own: many CRMs and email platforms include native automation that covers routing, sequences, and alerts. Only when the workflow crosses systems, consider a general-purpose automation platform or custom scripts.

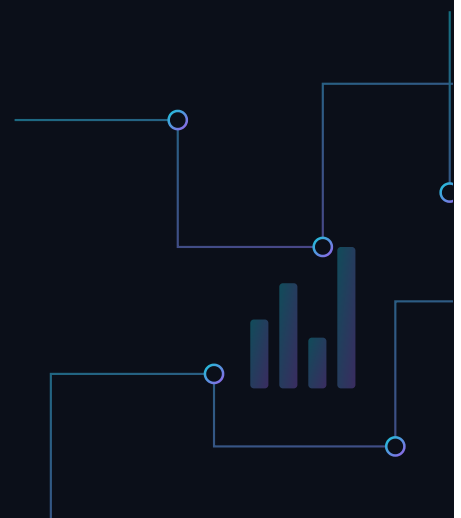
Evaluation question	What to confirm from the vendor's current documentation
Does it integrate with the systems I use?	The specific integration, the data it can read or write, and any plan limits.
What does it really cost?	Current pricing page: per user, per task, per contact, overage rules, and annual versus monthly terms.
How does it handle my data?	Privacy and security documentation, certifications relevant to your sector, retention, and export.
What happens when it fails?	Logging, error notifications, retries, and rollback.
Can I leave?	Data export and portability.

WHY THIS CHAPTER NAMES NO SPECIFIC PAID TOOLS

Features, integrations, and prices for automation and AI products change frequently, and they could not all be verified against current vendor documentation for this edition. Rather than risk describing an integration that no longer exists, this book describes capabilities and the questions to ask. Verify any specific tool's availability, pricing, and connections on the vendor's own pages before relying on them. The free resources from SEOLabsAI, including its [AI Prompt Library](#) and [free AI tools](#), are listed on its website^[S17]; review their terms and suitability before use with business data.

CHAPTER 10 DELIVERABLE

A short automation register (workflow, trigger, owner, review step, failure plan), two or three automations live by Week 12, and a documented AI-use policy covering data, review, and disclosure.



PART III

Execute the 90-Day Plan

Three phases, thirteen weeks, three gates. Every task has an owner, a deliverable, an effort estimate, a dependency, and a measure of done. The plan is sized for a small team and cut down for a solo marketer in Bonus A.

Chapters 11–13 · BUILD · PROVE · COMPOUND

Days 1–30: Diagnose and Build

Four weeks to learn the customer, sharpen the offer, repair measurement, and decide where to place bets.

Phase objectives

- A documented goal, North Star metric, and baseline.
- An evidence-based ICP and a clear value proposition.
- Reliable tracking for every primary conversion.
- A prioritized SEO fix list, topic clusters, and the first content briefs.
- A chosen primary channel, an approved budget, and a shared lead definition.

Capacity note. The tasks below total 60 hours across four weeks, an average of about 15.0 hours per week. That fits two or three part-time contributors. A solo marketer should use the lightweight plan in Bonus A rather than attempt everything.

Week 1: Goals and baseline (12 team hours)

Agree what success means and capture where you stand today.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
1.1 Set the goal sheet <i>Objective:</i> Turn the business goal into marketing targets.	Write the business goal, choose the North Star metric, run the funnel arithmetic from Chapter 1 at three conversion scenarios.	One-page goal sheet	Lead / founder 3 h	None	Targets approved by the budget owner
1.2 Pull the baseline <i>Objective:</i> Know current performance before changing anything.	Export 90 days (and the prior 90 where available) from analytics, Search Console, ad accounts, CRM, and finance. Note gaps and data issues.	Completed Worksheet 1.1	Analyst / marketer 4 h	Access to all tools	Every metric filled or marked 'not measured'
1.3 Audit access and tracking <i>Objective:</i> Find measurement gaps early.	List all accounts and admins; open each form, booking link, and phone number; note which actions are tracked.	Tracking gap log	Analyst 3 h	Tool access	Every conversion path marked tracked or untracked
1.4 Recruit interviewees <i>Objective:</i> Secure customer conversations for Week 2.	Select 8 recent customers and 2 lost or stalled prospects; send requests with a short, honest explanation and scheduling link.	8 interviews booked	Marketer 2 h	Customer list from CRM or sales	8 confirmed times

Week 2: Customer and market research (16 team hours)

Learn why people buy, hesitate, or choose others, in their words.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
2.1 Run customer interviews <i>Objective:</i> Understand triggers, alternatives, objections, and language.	Conduct 6 to 8 interviews using the question bank; record with permission; write notes within 24 hours.	Interview notes and theme tags	Lead + marketer 8 h	1.4	6+ interviews completed and logged

2.2 Map competitors and alternatives <i>Objective:</i> See how the market is positioned and where gaps exist.	Review 5 direct competitors, 2 alternatives, and the status quo: promise, audience, pricing signals, proof, omissions.	Competitor and alternatives grid	Marketer 4 h	None	Grid completed with source links
2.3 Seed the keyword and topic list <i>Objective:</i> Start search research from real demand.	Combine interview language, Search Console queries, search suggestions, and sales questions; group by intent.	Seed topic list (50 to 100 queries, grouped)	SEO lead 4 h	Search Console access	Queries grouped into themes with intent labels

Week 3: Positioning and tracking fixes (16 team hours)

Turn research into a clear offer, and make measurement reliable.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
3.1 Synthesize research into an ICP <i>Objective:</i> Define who to target and who to exclude.	Cluster interview themes; complete Worksheet 2.1; score segments in the audience matrix; pick a primary segment.	ICP one-pager; scored matrix	Lead 4 h	2.1, 2.2	Primary segment chosen with evidence
3.2 Write positioning and message variants <i>Objective:</i> Create a clear value proposition and testable messages.	Complete Worksheet 3.1; draft three headline and offer variants; draft landing page copy for the main offer.	Positioning sheet; copy draft	Lead / writer 4 h	3.1	Value proposition passes the 'who is it for and why us' test
3.3 Audit key conversion pages <i>Objective:</i> Find friction before sending traffic.	Review the main landing pages on mobile and desktop: message match, speed, form, trust, next step.	Page audit with fix list	Marketer 3 h	None	Top five fixes ranked
3.4 Fix tracking gaps <i>Objective:</i> Make every primary conversion measurable.	Configure key events, UTM sheet, CRM source fields, consent setup, and internal-traffic filters from the gap log.	Tracking plan and implemented fixes	Analyst / developer 5 h	1.3	All primary conversions fire once with source captured

Week 4: SEO map, channel plan, Gate 1 (16 team hours)

Choose where to focus, define lead stages, and decide whether to launch.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
4.1 Crawl and prioritize technical SEO <i>Objective:</i> Identify issues that block visibility.	Crawl the site; review Search Console indexing; score fixes by impact, confidence, and effort.	Prioritized SEO fix list	SEO lead 5 h	Search Console access	Top 5 fixes scoped with owners
4.2 Map clusters and write four briefs <i>Objective:</i> Plan content tied to intent and revenue.	Group topics into one to three clusters; write briefs for the first four pieces using the brief template.	Cluster map; 4 content briefs	SEO lead / writer 4 h	2.3, 3.1	Briefs approved
4.3 Decide channels and budget <i>Objective:</i> Commit resources with a clear rationale.	Choose one primary paid channel and optional secondary; set core, test, and reserve budgets; define stop thresholds.	Channel decision and budget plan	Lead 2 h	1.2, 3.1	Budget approved; stop rules written
4.4 Define CRM stages, lead definition, and SLA <i>Objective:</i> Align marketing and sales on what a good lead is.	Agree qualification criteria, stage definitions, response SLA, and lost-reason list; configure in the CRM.	Lead definition sheet; CRM configured	Sales ops / lead 3 h	3.4	Sales signs off the definitions

4.5 Gate 1 review <i>Objective:</i> Decide whether the foundation is ready.	Review the Gate 1 checklist (Chapter 11); record the decision and conditions.	Gate 1 decision record	Whole team 2 h	4.1 to 4.4	Decision recorded: proceed, conditions, or extend
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Day 30 review and decision gate (G1: Readiness)

Hold a 60 to 90 minute review with the decision-maker, sales lead, and marketing owner. The question is not "did we finish everything?" It is **"is the foundation trustworthy enough to spend money and publish at volume?"**

GATE 1 CHECKLIST

Criterion	Evidence to examine	Required?
☐ Goals and targets agreed	Goal sheet signed off; funnel arithmetic reviewed at three scenarios.	Required
☐ Baseline documented	Completed baseline; gaps and data issues listed.	Required
☐ Tracking trustworthy	Primary conversions fire once, with source captured; CRM matches analytics within an explained margin.	Required before paid spend
☐ Customer understanding	At least six interviews; ICP written; objections and triggers listed.	Required
☐ Positioning and offer	Value proposition and main landing page copy drafted.	Required
☐ SEO plan	Prioritized fixes; one to three clusters; four briefs.	Required
☐ Channel and budget	Primary channel chosen with rationale; stop rules written.	Required
☐ Lead process	Shared definitions, SLA, owner for follow-up.	Required before launch

Outcome	When to choose it
Proceed	All required items are met.
Proceed with conditions	One or two non-critical gaps remain; name the owner and date. Example: nurture emails are not ready but tracking and follow-up are.
Extend Phase 1 by one week	Tracking is unreliable, interviews were not completed, or sales has not agreed the lead definition. Do not launch paid spend on shaky measurement.
Stop and rethink	Research shows that the offer, segment, or economics do not work (for example, the required cost per customer exceeds what margin supports). Revisit positioning before investing.

Days 31–60: Launch and Validate

Publish, launch, and capture leads in small, measurable steps, and resist the urge to conclude too early.

Phase objectives

- High-impact SEO fixes deployed and the first commercial and pillar content published.
- One or two paid campaigns live with tracking validated.
- Lead capture, follow-up workflow, and a nurture sequence running.
- At least one creative or landing-page experiment planned with a defined decision rule.
- A data-quality check completed, and an honest view of what the early data does and does not show.

Phase 2 tasks total 70 hours (average 17.5 hours per week). Keep the number of simultaneous experiments low: one new campaign structure, one creative angle test, and one page change at a time make results interpretable.

Week 5: Launch foundations (20 team hours)

Fix the highest-impact issues and publish the first revenue-supporting assets.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
5.1 Fix top technical SEO issues <i>Objective:</i> Remove barriers to crawling and indexing.	Implement the top five fixes from 4.1; request indexing where appropriate; log changes with dates.	Fixes deployed and logged	Developer / SEO 6 h	4.1	Issues no longer reported; change log updated
5.2 Publish commercial content piece #1 <i>Objective:</i> Capture ready-to-buy searches.	Write and publish the first comparison or decision page from its brief; add internal links and tracking.	Live page with tracked CTA	Writer 6 h	4.2, 3.2	Published, indexed, CTA tracked
5.3 Build lead magnet and landing page <i>Objective:</i> Create a safe first step for early-stage visitors.	Create the checklist or template; build the page and form; connect to CRM and email.	Live lead magnet page	Writer / designer / marketer 6 h	3.2, 3.4	Test submission reaches CRM with source
5.4 Validate tracking end to end <i>Objective:</i> Prove measurement before spending.	Run the validation checklist from Chapter 4 across forms, bookings, calls, and test purchases.	Signed validation checklist	Analyst 2 h	3.4	All checks pass or are documented

Week 6: Paid launch and follow-up (18 team hours)

Launch small, well-tracked campaigns and make sure leads get a fast response.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
6.1 Build and launch two campaigns <i>Objective:</i> Begin generating data on the primary channel.	Complete a campaign brief for each; build campaigns, targeting, and tracking; apply UTMs; set budget and review dates.	Two live campaigns	Paid specialist 6 h	5.4, 4.3	Campaigns approved, spending, tracking verified

6.2 Produce creative variants <i>Objective:</i> Test messages, not just audiences.	Create four variants across two angles from the message matrix.	4 ad variants	Designer / paid specialist 5 h	3.2	Variants approved against policy and brand
6.3 Activate the follow-up workflow <i>Objective:</i> Respond to leads quickly and consistently.	Configure confirmation email, internal alert, routing, SLA timer, and weekly uncontacted-lead report.	Live follow-up workflow	Sales ops 4 h	4.4	Test lead triggers alert within one minute
6.4 Promote the lead magnet <i>Objective:</i> Start building an owned audience.	Announce via site, email list, and social; add in-content links from relevant pages.	Promotion live	Marketer 3 h	5.3	First tracked sign-ups

Week 7: Nurture and content depth (16 team hours)

Build the nurture sequence and publish the pillar guide.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
7.1 Build and load the five-email nurture <i>Objective:</i> Move early leads toward a decision.	Write five emails from the template; set triggers, timing, and unsubscribe; test across mail clients.	Live five-email sequence	Marketer / writer 8 h	5.3	Test run succeeds; authentication verified
7.2 Publish the pillar guide <i>Objective:</i> Anchor the first topic cluster.	Publish the comprehensive guide with internal links to supporting and commercial pages.	Live pillar guide	Writer 5 h	4.2	Published, indexed, linked from 3+ pages
7.3 First data-quality check <i>Objective:</i> Catch tracking errors before drawing conclusions.	Compare platform conversions with CRM and analytics; check duplicates, missing sources, and spam.	Data-quality note	Analyst 2 h	6.1	Differences explained and documented
7.4 Strengthen internal links <i>Objective:</i> Direct existing authority to priority pages.	Add contextual links from the top 10 traffic pages to service and lead-magnet pages.	Links added and logged	SEO lead 1 h	5.2	Links live on target pages

Week 8: Early results and Gate 2 (16 team hours)

Review what the early data does and does not establish.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
8.1 Review early results <i>Objective:</i> Separate signal from noise.	Review ads, Search Console, lead volume, and cost with confidence labels; note sample sizes.	Early results review	Lead + analyst 3 h	7.3	Each finding labeled with confidence
8.2 Review lead quality with sales <i>Objective:</i> Check that leads match the definition.	Sit with sales; review each lead's outcome and reasons; adjust criteria if needed.	Lead quality notes	Lead + sales 3 h	6.3	Qualified-rate known per source
8.3 Publish commercial content piece #2 <i>Objective:</i> Answer a high-intent objection.	Publish the pricing or cost explainer; add tracking and links.	Live page	Writer 5 h	4.2	Published, indexed, CTA tracked

8.4 Plan the first landing-page test <i>Objective:</i> Prepare a decision-ready experiment.	Write hypothesis, variant, success measure, minimum data, and duration.	Test plan	Marketer 3 h	8.1	Plan reviewed; success rule set in advance
8.5 Gate 2 review <i>Objective:</i> Decide what earns more resources.	Review the Gate 2 checklist (Chapter 12); record decisions per activity.	Gate 2 decision record	Whole team 2 h	8.1 to 8.4	Each activity marked scale, maintain, revise, or stop

Avoiding strong conclusions from small samples and incomplete data

The first weeks after launch are the most dangerous time for decision-making, because the numbers are exciting and unreliable at once. Five habits protect you.

1. Know how noisy your numbers are

For event counts, the relative uncertainty is roughly 1 divided by the square root of the count. That is a statistical rule of thumb for simple counts and not a guarantee, because audience, timing, and creative differences add more noise.

Conversions observed	Approximate relative uncertainty	What it means
5	±45%	A change of even 40% is indistinguishable from chance.
10	±32%	Large swings are common without any real change.
30	±18%	Large differences become visible; small ones do not.
100	±10%	Moderate differences can be detected, with care.
400	±5%	Reasonable for fine comparisons.

2. Wait for the lag to clear

Conversions are often reported after the click: a lead may convert days later, a lead becomes a customer weeks or months later, and platforms revise numbers as data arrives. Judge early results on *leading* measures (cost per lead, qualified rate) and avoid pronouncing on revenue until the typical sales cycle has had time to pass. In long sales cycles, document that Day 60 conclusions concern lead quality only.

3. Compare like with like

Day-of-week patterns, promotions, seasonality, and launch novelty distort comparisons. Compare whole weeks, not individual days, and avoid comparing a launch week with a normal week.

4. Change one thing at a time

If you change the audience, the creative, the landing page, and the bid strategy in the same week, you cannot attribute any change in results. Keep a change log with dates.

5. Label every finding with a confidence level

Label	Criteria (suggested)	How to act
HIGH	Adequate sample; tracking verified; consistent over several periods; corroborated by a second source (for example, CRM).	Act, including reallocating budget.
MEDIUM	Reasonable sample; some uncertainty about attribution or lag; supported by a plausible mechanism.	Act cautiously; plan a follow-up check.
LOW	Small sample, short period, confounding changes, or a single source.	Do not decide on this alone; keep testing.

Day 60 review and decision gate (G2: Evidence)

The Evidence Gate decides which activities receive more resources, and which are revised or stopped. Bring the dashboard (Bonus B), the test log, the lead-quality review, and the change log.

GATE 2 CHECKLIST

Question	Evidence to examine
☐ Is data trustworthy?	Platform conversions reconciled to CRM; duplicates and test records removed; missing-source rate known.
☐ Are we generating leads at an affordable cost?	Cost per lead and per qualified lead against targets, with sample sizes and confidence labels.
☐ Are leads good?	Qualified rate and sales feedback by source and offer; early opportunity creation.
☐ Is organic moving in the right direction?	Indexed pages, impressions, CTR on improved pages, rankings for target queries; no unresolved technical issues.
☐ What did tests show?	Results versus pre-set decision rules; mark inconclusive tests as inconclusive.
☐ Is follow-up fast enough?	Median time to first contact; share of leads uncontacted within SLA.
☐ Do unit economics look plausible?	Early CAC and payback estimates under stated assumptions.

For each active channel or asset, record a verdict: **scale, maintain, revise, or stop** (rules in Chapter 13). If data is too thin, the honest verdict is "maintain and gather more evidence", not a guess dressed as a decision. If tracking problems appeared, extend Phase 2 by a week and correct them before Phase 3.

Days 61–90: Optimize and Scale

Move resources toward evidence, raise lead quality and conversion, and turn the quarter's learning into a repeatable system.

Phase objectives

- Clarity on which channels and assets work, for whom, and at what cost.
- Measurable improvements to conversion rate and lead quality.
- Budget reallocated based on evidence, with reserve intact.
- A reporting dashboard that the team trusts, and written processes for the essential workflows.
- A next-quarter plan built from results.

Phase 3 spans five weeks, (Weeks 9–13) and totals 87 hours (average 17.4 hours per week). Week 13 is deliberately light so that the review gets proper attention.

Week 9: Optimize paid and organic (18 team hours)

Act on early signals, one change at a time.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
9.1 Decide keep, revise, or stop on paid items <i>Objective:</i> Reallocate effort to what shows promise.	Apply the stop and scale rules; pause clear underperformers; document why.	Updated campaign plan	Paid specialist 3 h	8.5	Decisions recorded with evidence
9.2 Launch the landing-page test <i>Objective:</i> Learn what improves conversion.	Build the variant; split traffic if volume allows or run a controlled before-and-after; start the timer.	Live test	Marketer / developer 5 h	8.4	Test running with tracking verified
9.3 Creative round 2 <i>Objective:</i> Build on early learning.	Create new variants from the best-performing angle; retire weak ones.	New variants live	Paid specialist / designer 5 h	9.1	New variants approved and live
9.4 Refresh two existing pages <i>Objective:</i> Improve pages that already have impressions.	Choose from Search Console; improve titles, content gaps, and internal links; log changes.	Two refreshed pages	SEO lead / writer 5 h	Search Console data	Refresh dates and changes logged

Week 10: Lead quality and conversion (18 team hours)

Raise the share of leads that become customers.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
10.1 Refine qualification with sales <i>Objective:</i> Improve lead quality, not only lead volume.	Review closed and lost leads; adjust criteria, scoring if used, and form questions.	Updated definitions	Lead + sales 4 h	8.2	Agreement on revised criteria

10.2 Improve forms and CTAs <i>Objective:</i> Reduce friction where leads drop.	Apply learning from audits and the running test; simplify or add a qualifying question as evidence suggests.	Updated forms and CTAs	Marketer 3 h	9.2	Changes live; baseline recorded
10.3 Revise nurture emails <i>Objective:</i> Improve downstream conversion.	Use click and reply data to refine subject lines, order, and calls to action.	Revised sequence	Marketer 3 h	7.1	Changes live with change log
10.4 Publish commercial content piece #3 <i>Objective:</i> Cover another decision-stage question.	Publish the process explainer; link from related pages.	Live page	Writer / founder 5 h	4.2	Published, indexed, CTA tracked
10.5 Review lost reasons <i>Objective:</i> Learn from every lost deal.	Categorize lost reasons; identify messaging or offer fixes.	Lost-reason summary	Sales + lead 3 h	4.4	Top three reasons identified

Week 11: Reallocate and build proof (18 team hours)

Put resources where evidence points; create trust assets and the dashboard.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
11.1 Reallocate the budget <i>Objective:</i> Fund what works.	Apply the scale, maintain, revise, stop rules; move spend; keep the reserve.	Updated budget	Lead 3 h	9.1, 10.1	Reallocation documented against evidence
11.2 Expand proven campaigns <i>Objective:</i> Grow the winners carefully.	Add related keywords or audiences; raise budget in measured steps.	Expanded campaigns	Paid specialist 4 h	11.1	Efficiency tracked after each step
11.3 Create a real proof asset <i>Objective:</i> Strengthen trust at the decision point.	With written permission, document a real customer outcome with baseline, timeframe, and measurement method.	Published case study or proof page	Writer / sales 6 h	Customer permission	Customer approval received before publishing
11.4 Build the KPI dashboard <i>Objective:</i> Make performance visible weekly.	Build Bonus B in a spreadsheet or reporting tool; connect or paste sources; document definitions.	Working dashboard	Analyst 5 h	7.3	Dashboard reconciles to CRM totals

Week 12: Systemize (18 team hours)

Document what works and automate the repetitive parts.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
12.1 Document repeatable processes <i>Objective:</i> Make results independent of one person.	Write short SOPs for publishing, campaign launch, lead follow-up, reporting, and tracking checks.	SOP set	Lead / marketer 6 h	11.1	Each SOP tested by a second person
12.2 Automate two workflows <i>Objective:</i> Remove repetitive work safely.	Choose from routing, alerts, reporting, UTM checks; test with dummy data and add monitoring.	Two automations with owners	Marketer / ops 5 h	12.1	Run for a week with no silent failures
12.3 Publish or refresh content <i>Objective:</i> Keep the engine moving.	Publish one new piece or refresh two more, per the evidence.	Content shipped	Writer 4 h	Content backlog	Published or refreshed and logged

12.4 Partnership and referral outreach <i>Objective:</i> Explore additional low-cost channels.	Contact five relevant partners, communities, or referrers with a specific, useful proposal.	Outreach log	Founder / marketer 3 h	11.3	Five conversations started
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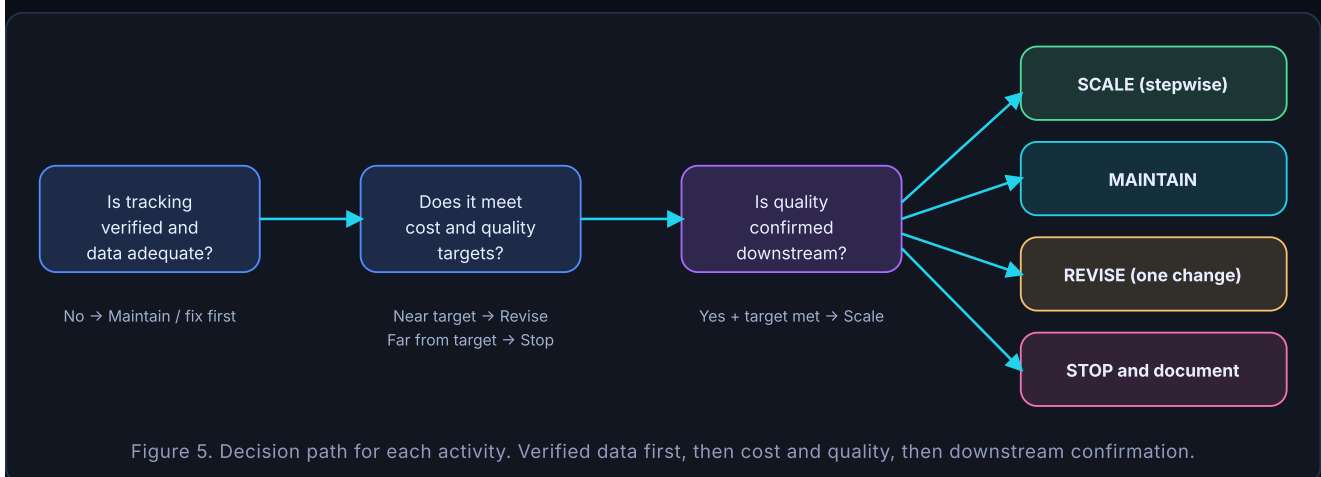
Week 13: Review and plan the next quarter (15 team hours)

Decide what to fund, maintain, revise, or stop, using evidence.

Task and objective	Action	Deliverable	Owner / effort	Depends on	Success measure
13.1 Measure results against baseline <i>Objective:</i> State what changed, with confidence.	Compare Day 90 results to the baseline; label each finding by confidence; note external factors.	Results report	Analyst 4 h	11.4	Every claim has a source and a confidence label
13.2 Review unit economics <i>Objective:</i> Check profitability, not only volume.	Compute CAC, payback, ROAS, margin-based returns, and early LTV indicators.	Unit economics sheet	Analyst / finance 2 h	13.1	Calculations match CRM and finance data
13.3 Write the next-quarter strategy <i>Objective:</i> Convert learning into a plan.	Use the Day 90 template: fund, maintain, revise, stop; set new targets and budget.	Next-quarter plan	Lead 5 h	13.1, 13.2	Plan approved by decision-maker
13.4 Gate 3 review and retrospective <i>Objective:</i> Close the loop and capture lessons.	Run the Gate 3 checklist; hold a blameless retrospective; archive documents.	Gate 3 record; retrospective notes	Whole team 4 h	13.3	Decisions and lessons documented

Deciding whether to scale, maintain, revise, or stop

Apply the same questions to every activity: a campaign, a content cluster, a lead magnet, an email sequence.



Verdict	Typical evidence	Typical next step
Scale	Meets cost and quality targets across at least two review periods; sales confirms quality; capacity exists to handle more volume.	Increase budget or output in steps (for example, 20–30%), monitor efficiency, and keep the review cadence. Prepare to stop scaling when marginal cost rises beyond break-even.
Maintain	On target but small or volatile; or serving an important purpose (brand search defense, retention) with stable economics.	Keep resources constant; collect more data; minimal changes.

Revise	Close to target with an identifiable weak link (offer, creative, targeting, page, follow-up).	Change one variable, set a review date and decision rule.
Stop	Learning budget exhausted without hitting minimums, tracking verified, no credible hypothesis; or persistent poor quality.	Pause; document what you learned; reallocate. Stopping is a valid outcome.

Two cautions. First, **do not scale on a metric that has not been verified downstream**. A low cost per lead is not success if the leads do not convert. Second, content and SEO assets often need longer horizons than paid campaigns; judge them against leading indicators and your lag expectations from Chapter 5, not against a paid-media standard.

Day 90 review (G3: Commitment) and next-quarter strategy

The Commitment Gate converts a quarter of work into a decision about the next. Prepare a short results report (Task 13.1) and the unit economics (13.2), then hold the review.

DAY 90 REVIEW AGENDA (ABOUT TWO HOURS)

- 1. Results versus baseline.** Present each target, baseline, result, and confidence label. Separate marketing effects from external factors.
- 2. What the evidence established.** List findings rated High, Medium, and Low confidence.
- 3. Unit economics.** CAC, payback period, ROAS and margin-based return, and early lifetime value indicators, with stated assumptions.
- 4. Process health.** Tracking quality, follow-up speed, qualified rate, content throughput, workload versus capacity.
- 5. Verdicts.** Scale, maintain, revise, or stop for each activity.
- 6. Next-quarter decisions.** Targets, focus areas, budget, owners.
- 7. Retrospective.** What helped, what slowed us down, what we will change.

NEXT-QUARTER STRATEGY TEMPLATE

Section	Content
Business goal and North Star	Updated, with baseline reset to this quarter's actual results.
Focus (maximum three)	The three bets that earned their place from the evidence, for example "scale the best-performing campaign", "complete the second content cluster", "improve lead-to-opportunity rate".
Activities to scale	Specific actions and budget steps.
Activities to maintain	Minimal-attention items and their review dates.
Activities to revise	Hypothesis, change, and decision rule.
Activities to stop	What was stopped and why.
New experiments (maximum two)	Hypothesis, success measure, minimum data, budget.
Budget and capacity	Updated budget planner (Bonus C) and hours plan.
Risks and dependencies	Platform changes, staffing, seasonality, product changes.
Next gates	Dates and evidence required.

PHASE 3 DELIVERABLE

A results report with confidence labels, a unit economics sheet, SOPs for the core workflows, a working dashboard, and an approved next-quarter plan. The next quarter starts at BUILD again, but faster, because the foundation already exists.

PART IV

Measurement and Continuous Improvement

The metrics that matter, how they relate, where they mislead, and how to diagnose underperformance without jumping to a conclusion from a single number.

Chapters 14–15 · Reference and troubleshooting

Marketing KPIs That Actually Matter

Every metric answers one question and hides several. Know the formula, the use, and the limit before you put it on a dashboard.

How to read this chapter

Metrics fall into four layers, which the dashboard in Bonus B also uses: **business outcomes** (revenue, customers, profit), **funnel performance** (leads, qualified leads, conversion rates), **channel performance** (clicks, cost, return), and **operational activity** (what the team did). Strong reports start at the top and use the lower layers to explain what happened.

Definitions, formulas, uses, and limits

Metric	Formula	Use	Limitation
Qualified lead	Leads meeting your written qualification criteria	Measures lead quality; the best volume metric for most B2B teams.	Only as good as the definition; changing criteria breaks trend comparisons.
Conversion rate	$\text{conversions} \div \text{visitors}$ (sessions, users, or clicks; state which)	Page and offer effectiveness; funnel stage comparison.	Denominator choice changes the number; averages hide segment differences.
Cost per lead (CPL)	$\text{cost} \div \text{leads}$	Early efficiency of lead generation.	Ignores lead quality; cheap leads can be the most expensive customers.
Customer acquisition cost (CAC)	$\text{total acquisition cost} \div \text{new customers}$	Unit economics; budgeting.	Definition varies: media-only versus fully loaded (media, creative, tools, labor, sales). Always state which.
Click-through rate (CTR)	$\text{clicks} \div \text{impressions}$	Relevance of ad or search result.	High CTR can reflect curiosity rather than fit.
Cost per click (CPC)	$\text{cost} \div \text{clicks}$	Price of traffic.	Cheap clicks may be low intent.
CPM (cost per thousand impressions)	$(\text{cost} \div \text{impressions}) \times 1,000$	Price of reach; compare audiences and placements.	Says nothing about outcomes.
Return on ad spend (ROAS)	$\text{revenue from ads} \div \text{ad spend}$	Quick revenue efficiency check, especially ecommerce.	Revenue-based: ignores margin and non-ad costs; platform-reported revenue is attribution-dependent.
Marketing ROI	$(\text{gross profit attributable to marketing} - \text{marketing cost}) \div \text{marketing cost}$	Profit-based return on all marketing cost.	Attribution and timing issues; long-term effects (brand, SEO) arrive later.
Lead-to-customer rate	$\text{new customers} \div \text{leads (same cohort)}$	Downstream lead quality; sales effectiveness.	Lag: use cohorts by lead-created month.
Customer lifetime value (LTV)	$\text{revenue per period} \times \text{gross margin} \times \text{expected lifetime (or } \div \text{ churn rate)}$	How much you can afford to spend to acquire a customer.	A forecast built on assumptions; unstable for new businesses.
Organic clicks and impressions	As reported by Search Console ^[S6]	Search visibility and demand capture.	Position is an average; impressions can include irrelevant queries; clicks credited to canonical URLs ^[S5] .

Email engagement	click rate = unique clicks ÷ delivered; unsubscribe rate; complaint rate	Relevance and list health.	Opens can be inflated by mail-client privacy features; prefer clicks and actions.
Retention rate	(customers at end – new customers in period) ÷ customers at start	Subscription and service businesses.	Needs consistent cohort definition. Churn = 1 – retention.
Repeat purchase rate	customers with 2+ orders ÷ customers (in a stated period)	Ecommerce loyalty and LTV inputs.	Strongly depends on the period and product replenishment cycle.

Revenue-based versus profit-based metrics

ROAS, revenue per lead, and total sales are **revenue-based**. They say how much money arrived, but not what remained. **Profit-based** measures subtract the cost of delivering the product or service. Marketing decisions should rest on profit-based measures wherever possible, because two campaigns with the same ROAS can have very different profitability if their products carry different margins.

Break-even ROAS = $1 \div \text{gross margin}$ Profit-on-ad-spend (POAS) = $\text{gross profit} \div \text{ad spend}$ (break-even is 1.0) Payback period (months) = $\text{CAC} \div \text{monthly gross profit per customer}$

Worked example **HYPOTHETICAL DATA, CONTINUING CHAPTER 7'S SEARCH CAMPAIGN**

Item	Calculation	Result
Revenue and ROAS	6 customers × \$1,800 = \$10,800; ÷ \$3,000 spend	3.6×
Gross profit	\$10,800 × 60%	\$6,480
POAS	\$6,480 ÷ \$3,000	2.16
Marketing ROI (ad spend only)	$(\$6,480 - \$3,000) \div \$3,000$	116%
Fully loaded cost	\$3,000 ads + \$600 creative + \$300 tools + \$2,100 labor	\$6,000
Marketing ROI (fully loaded)	$(\$6,480 - \$6,000) \div \$6,000$	8%
Media-only CAC vs fully loaded CAC	$\$3,000 \div 6$ vs $\$6,000 \div 6$	\$500 vs \$1,000
Monthly gross profit per customer	$(\$1,800 \div 12) \times 60\%$	\$90
Payback (media-only / fully loaded)	$\$500 \div \$90$; $\$1,000 \div \$90$	5.6 / 11.1 months
LTV : CAC (media-only / fully loaded)	$\$2,700 \div \$500$; $\$2,700 \div \$1,000$	5.4 : 1 / 2.7 : 1

The same campaign reads as strongly profitable on ROAS, comfortably so on media-only CAC, and barely positive on a fully loaded first-year basis. None of these numbers is wrong; each answers a different question. Report the definition next to the figure. And note again that the LTV rests on an assumed 2.5-year lifetime, so label the ratio as an estimate.

AVOID ARBITRARY UNIVERSAL TARGETS

You will see rules of thumb about "good" CTRs, conversion rates, or LTV : CAC ratios quoted as if they applied to every business. They do not. Benchmarks differ enormously by industry, price, audience, and channel, and published figures vary in method. Derive your targets from your own baseline and from the break-even your margins require.

Why attribution models disagree

A single sale usually follows several marketing touches. How credit is divided among them depends entirely on the rule applied. Consider a constructed journey **HYPOTHETICAL** that ends in a \$1,000 sale: Day 1, the customer reads a

blog post found through organic search; Day 5, clicks a paid social ad; Day 9, clicks a newsletter email; Day 12, searches for your brand name, clicks a paid search ad, and buys.

Attribution rule	Organic	Paid social	Email	Branded paid search
Last click	\$0	\$0	\$0	\$1,000
First click	\$1,000	\$0	\$0	\$0
Linear	\$250	\$250	\$250	\$250
Position-based (40% first, 40% last, 10% each middle)	\$400	\$100	\$100	\$400
Data-driven	Estimated by a model from observed paths; the split is not a fixed rule and differs by advertiser			

All four rule-based views describe the *same* journey and reach different conclusions about which channel "worked". Under last click, organic search and social look worthless and branded search looks like the star. Under first click, the reverse is true. Google Ads describes data-driven attribution as using an advertiser's own conversion data to estimate how much each ad interaction contributed^[S10], and Google Analytics has retired several rules-based models, retaining data-driven and others^[S8], but a model is still a model: none establishes causation. The sensible practice:

- Pick **one primary view for consistent reporting** and use others as sanity checks.
- Judge channels together: ask what happens to total revenue when a channel is paused or increased, if you can run that test safely.
- Pair modeled attribution with self-reported source and sales-call notes.
- Reconcile to CRM or order totals, since only those are facts.

CHAPTER 14 DELIVERABLE

A metric glossary with your own agreed definitions (especially CAC and qualified lead), break-even calculations for each product or service, and a decision on the primary attribution view for reporting.

Diagnosing Underperforming Campaigns

A symptom is not a diagnosis. Work from verified data, down the chain of ratios, and test the cheapest explanation first.

A five-step diagnostic method

1. **Verify the data.** Check tracking, date ranges, attribution windows, and recent changes before believing a problem exists.
2. **Locate the link in the chain.** Impressions → CTR → CPC → conversion rate → lead quality → close rate → revenue. Use the identity $CPA = CPC \div \text{conversion rate}$ to see whether cost rose from clicks or from conversion.
3. **List several hypotheses.** A single metric rarely proves a single cause. Write at least three.
4. **Test the cheapest and most reversible first.** Checking a setting costs nothing; rewriting a landing page costs a week.
5. **Change one thing, log it, and set a review date.**

DO NOT ASSUME A SINGLE METRIC PROVES A CAUSE

A falling conversion rate can come from the page, the audience, the offer, the season, a tracking fault, or a change in the follow-up process. Treat each symptom below as a starting list of possibilities, not a verdict.

Scenario 1: High traffic, low conversions

Likely causes. Low-intent or mismatched audience; message mismatch between source and page; page friction (speed, form, unclear next step); the conversion is mis-tracked; mobile experience problems; offer unattractive at this stage.

Checks. Segment conversion by source, campaign, device, and landing page. Compare engaged sessions or scroll depth. Test the form and tags on mobile. Review search terms or audience definitions. Compare queries or keywords driving visits with your ICP.

Next steps. Tighten targeting and exclusions; align the headline with the source; fix the largest friction point; test a lower-commitment offer. If tracking was wrong, restate historical results.

Scenario 2: High CTR, low conversion rate

Likely causes. The ad attracts curiosity rather than intent; the ad promise differs from the page; the page loads slowly; the offer demands too much too soon; the audience is wrong despite relevant creative; tracking undercounts.

Checks. Compare ad copy and page promise side by side. Check page speed on mobile. Compare engagement by device. Look at the quality of the few leads obtained. Verify conversion tracking with test submissions.

Next steps. Make the ad more specific, including who it is for and, where relevant, price or commitment; align the landing page; test a simpler action.

Scenario 3: High CPC, low ROAS

Likely causes. Competitive auctions; broad or irrelevant terms inflating cost; low relevance leading to higher costs; weak conversion rate (remember $CPA = CPC \div CVR$); low margin or order value; the channel's role is early in the journey and last-click under-credits it; seasonal competition.

Checks. CPC and conversion by keyword or audience; the search terms report; the platform's competitive and impression-share reports; break-even ROAS from margin; assisted conversions and CRM revenue by source; the trend over time.

Next steps. Add negative keywords; split poor performers from good; improve ad relevance and page conversion; raise average order value; reconsider whether the channel suits this offer at this price.

Scenario 4: Low impressions despite an active campaign

Likely causes. Budget or bids too low for the auction; targeting too narrow (small audience, limited geography, low-volume keywords); ads disapproved or limited by policy; schedule restrictions; campaign still in a learning period; creative or landing page quality issues; seasonal or demand limits.

Checks. Campaign and ad status; policy notices; budget against actual daily spend; bid strategy limits; estimated audience size and keyword volume in the platform's planning tools; impression-share and lost-impression reasons where the platform reports them.

Next steps. Resolve policy issues; broaden targeting or match types carefully; raise budget or bids only if unit economics allow; allow adequate time for learning before changing again.

Scenario 5: Rising cost per lead

Likely causes. Creative fatigue or higher frequency; audience saturation; competitor activity or seasonality; recent landing-page, form, or tracking changes; rapid budget increases; platform delivery changes; lead quality improvements that raise cost by design.

Checks. Break CPL into CPC and conversion rate; review the trend by campaign, ad, and audience; check frequency; review the change log; compare against the same period last year; check qualified rate (a higher CPL with a much higher qualified rate may be an improvement).

Next steps. Refresh creative; expand the audience or keywords; revert recent page changes that coincide with the rise; scale budget in smaller steps; judge on cost per *qualified* lead.

Scenario 6: Many leads, few qualified opportunities

Likely causes. Attracting the wrong audience; vague offer or free offer attracting browsers; low-friction form without qualifying questions; slow or poor follow-up; sales criteria differ from marketing's; bot or spam submissions; the campaign is optimizing for form submissions rather than quality.

Checks. Qualified rate by source, campaign, and offer; read a sample of 20 leads; time to first contact; sales feedback and lost reasons; patterns in email domains or timings that suggest spam.

Next steps. Add a qualifying question; make the offer more specific; exclude poor-fit audiences; feed qualified-lead signals back to ad platforms where supported; let the ad copy pre-qualify (who it is for, price expectation); agree and document the definition with sales.

Scenario 7: Organic impressions rising without corresponding clicks

Likely causes. New queries where you appear at low positions; a title or snippet that does not match the query; changes in the search results layout; impressions from irrelevant or very broad queries; a changing mix of branded and non-branded queries; seasonal demand; average position diluted by many new low-ranked queries; reporting changes.

Checks. In Search Console, find pages and queries with high impressions and low CTR; compare CTR by position band over time; separate branded from non-branded; check device and country; search the queries yourself to see what appears. Google notes that a low CTR can indicate users do not think the result answers their query ^[S5], which is one explanation among several.

Next steps. Rewrite titles and descriptions for the biggest gaps; improve the page's answer to the query; focus on queries where you can reach higher positions; exclude irrelevant queries from success reporting. Google states that sites appearing in its AI features are included in overall Search Console traffic ^[S2], but whether such features change click behavior for your queries is a **HYPOTHESIS** you would need to test; do not assume it is the cause.

Scenario 8: High email opens, low downstream conversions

Likely causes. Opens inflated by mail-client privacy features or automated prefetching; subject line over-promises relative to the content; weak or buried call to action; the landing page does not continue the email's promise; the audience is not qualified; broken links or lost tracking; deliverability issues that reduce real engagement.

Checks. Compare clicks and click-to-open rate rather than opens; test links and UTMs from a real inbox; review landing-page behavior for the email source; compare segments; check bounce, complaint, and authentication status ^[S15].

Next steps. Report on clicks and conversions rather than opens; align subject and body; simplify to one call to action; fix the landing experience; segment by stage and interest.

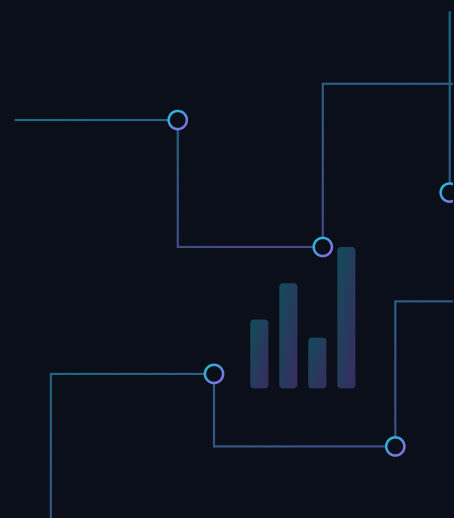
A one-page diagnostic worksheet

DIAGNOSTIC WORKSHEET

Step	Notes
Symptom (metric, change, period)	
Data verified? How?	
Which link in the chain moved?	
Hypothesis 1 / 2 / 3	
Cheapest check for each	
Single change to make	
Decision rule and review date	
Owner	

CHAPTER 15 DELIVERABLE

A completed diagnostic worksheet for each underperforming activity, a shared change log, and a standing agenda slot in the weekly review for "what the data actually establishes".



BONUS ASSETS

Templates You Can Use Tomorrow

Six ready-to-use assets: a 13-week execution calendar, a KPI dashboard specification, a budget planner, a campaign brief, a weekly review, and a prompt pack. Copy them into your own spreadsheet or document and replace every illustrative figure with your own.

Bonus A–F

Weekly Execution Calendar

All 13 weeks in one table, with owners, hours, dependencies, and completion measures. The same tasks appear in Chapters 11–13.

Full team calendar

Hours are team hours for a small group of two to four part-time contributors; the whole quarter totals **217 hours**, an average of about 16.7 hours per week, and no week exceeds 20. Dependencies refer to task numbers. If a dependency slips, push the dependent task rather than doing it without its input. Owners are roles, and one person may hold several.

Week	Priority	Task	Deliverable	Owner	Est. hours	Dependency	KPI or completion measure
1	Goals and baseline	1.1 Set the goal sheet	One-page goal sheet	Lead / founder	3	None	Targets approved by the budget owner
		1.2 Pull the baseline	Completed Worksheet 1.1	Analyst / marketer	4	Access to all tools	Every metric filled or marked 'not measured'
		1.3 Audit access and tracking	Tracking gap log	Analyst	3	Tool access	Every conversion path marked tracked or untracked
		1.4 Recruit interviewees	8 interviews booked	Marketer	2	Customer list from CRM or sales	8 confirmed times
		Week 1 total			12		
2	Customer and market research	2.1 Run customer interviews	Interview notes and theme tags	Lead + marketer	8	1.4	6+ interviews completed and logged
		2.2 Map competitors and alternatives	Competitor and alternatives grid	Marketer	4	None	Grid completed with source links
		2.3 Seed the keyword and topic list	Seed topic list (50 to 100 queries, grouped)	SEO lead	4	Search Console access	Queries grouped into themes with intent labels
		Week 2 total			16		

3	Positioning and tracking fixes	3.1 Synthesize research into an ICP	ICP one-pager; scored matrix	Lead	4	2.1, 2.2	Primary segment chosen with evidence
		3.2 Write positioning and message variants	Positioning sheet; copy draft	Lead / writer	4	3.1	Value proposition passes the 'who is it for and why us' test
		3.3 Audit key conversion pages	Page audit with fix list	Marketer	3	None	Top five fixes ranked
		3.4 Fix tracking gaps	Tracking plan and implemented fixes	Analyst / developer	5	1.3	All primary conversions fire once with source captured
		Week 3 total			16		
4	SEO map, channel plan, Gate 1	4.1 Crawl and prioritize technical SEO	Prioritized SEO fix list	SEO lead	5	Search Console access	Top 5 fixes scoped with owners
		4.2 Map clusters and write four briefs	Cluster map; 4 content briefs	SEO lead / writer	4	2.3, 3.1	Briefs approved
		4.3 Decide channels and budget	Channel decision and budget plan	Lead	2	1.2, 3.1	Budget approved; stop rules written
		4.4 Define CRM stages, lead definition, and SLA	Lead definition sheet; CRM configured	Sales ops / lead	3	3.4	Sales signs off the definitions
		4.5 Gate 1 review	Gate 1 decision record	Whole team	2	4.1 to 4.4	Decision recorded: proceed, conditions, or extend
		Week 4 total			16		
5	Launch foundations	5.1 Fix top technical SEO issues	Fixes deployed and logged	Developer / SEO	6	4.1	Issues no longer reported; change log updated
		5.2 Publish commercial content piece #1	Live page with tracked CTA	Writer	6	4.2, 3.2	Published, indexed, CTA tracked
		5.3 Build lead magnet and landing page	Live lead magnet page	Writer / designer / marketer	6	3.2, 3.4	Test submission reaches CRM with source
		5.4 Validate tracking end to end	Signed validation checklist	Analyst	2	3.4	All checks pass or are documented
		Week 5 total			20		
6	Paid launch and follow-up	6.1 Build and launch two campaigns	Two live campaigns	Paid specialist	6	5.4, 4.3	Campaigns approved, spending, tracking verified
		6.2 Produce creative variants	4 ad variants	Designer / paid specialist	5	3.2	Variants approved against policy and brand
		6.3 Activate the follow-up workflow	Live follow-up workflow	Sales ops	4	4.4	Test lead triggers alert within one minute
		6.4 Promote the lead magnet	Promotion live	Marketer	3	5.3	First tracked sign-ups
		Week 6 total			18		

7	Nurture and content depth	7.1 Build and load the five-email nurture	Live five-email sequence	Marketer / writer	8	5.3	Test run succeeds; authentication verified
		7.2 Publish the pillar guide	Live pillar guide	Writer	5	4.2	Published, indexed, linked from 3+ pages
		7.3 First data-quality check	Data-quality note	Analyst	2	6.1	Differences explained and documented
		7.4 Strengthen internal links	Links added and logged	SEO lead	1	5.2	Links live on target pages
		Week 7 total			16		
8	Early results and Gate 2	8.1 Review early results	Early results review	Lead + analyst	3	7.3	Each finding labeled with confidence
		8.2 Review lead quality with sales	Lead quality notes	Lead + sales	3	6.3	Qualified-rate known per source
		8.3 Publish commercial content piece #2	Live page	Writer	5	4.2	Published, indexed, CTA tracked
		8.4 Plan the first landing-page test	Test plan	Marketer	3	8.1	Plan reviewed; success rule set in advance
		8.5 Gate 2 review	Gate 2 decision record	Whole team	2	8.1 to 8.4	Each activity marked scale, maintain, revise, or stop
		Week 8 total			16		
9	Optimize paid and organic	9.1 Decide keep, revise, or stop on paid items	Updated campaign plan	Paid specialist	3	8.5	Decisions recorded with evidence
		9.2 Launch the landing-page test	Live test	Marketer / developer	5	8.4	Test running with tracking verified
		9.3 Creative round 2	New variants live	Paid specialist / designer	5	9.1	New variants approved and live
		9.4 Refresh two existing pages	Two refreshed pages	SEO lead / writer	5	Search Console data	Refresh dates and changes logged
		Week 9 total			18		
10	Lead quality and conversion	10.1 Refine qualification with sales	Updated definitions	Lead + sales	4	8.2	Agreement on revised criteria
		10.2 Improve forms and CTAs	Updated forms and CTAs	Marketer	3	9.2	Changes live; baseline recorded
		10.3 Revise nurture emails	Revised sequence	Marketer	3	7.1	Changes live with change log
		10.4 Publish commercial content piece #3	Live page	Writer / founder	5	4.2	Published, indexed, CTA tracked
		10.5 Review lost reasons	Lost-reason summary	Sales + lead	3	4.4	Top three reasons identified
		Week 10 total			18		

11	Reallocate and build proof	11.1 Reallocate the budget	Updated budget	Lead	3	9.1, 10.1	Reallocation documented against evidence
		11.2 Expand proven campaigns	Expanded campaigns	Paid specialist	4	11.1	Efficiency tracked after each step
		11.3 Create a real proof asset	Published case study or proof page	Writer / sales	6	Customer permission	Customer approval received before publishing
		11.4 Build the KPI dashboard	Working dashboard	Analyst	5	7.3	Dashboard reconciles to CRM totals
		Week 11 total			18		
12	Systemize	12.1 Document repeatable processes	SOP set	Lead / marketer	6	11.1	Each SOP tested by a second person
		12.2 Automate two workflows	Two automations with owners	Marketer / ops	5	12.1	Run for a week with no silent failures
		12.3 Publish or refresh content	Content shipped	Writer	4	Content backlog	Published or refreshed and logged
		12.4 Partnership and referral outreach	Outreach log	Founder / marketer	3	11.3	Five conversations started
		Week 12 total			18		
13	Review and plan the next quarter	13.1 Measure results against baseline	Results report	Analyst	4	11.4	Every claim has a source and a confidence label
		13.2 Review unit economics	Unit economics sheet	Analyst / finance	2	13.1	Calculations match CRM and finance data
		13.3 Write the next-quarter strategy	Next-quarter plan	Lead	5	13.1, 13.2	Plan approved by decision-maker
		13.4 Gate 3 review and retrospective	Gate 3 record; retrospective notes	Whole team	4	13.3	Decisions and lessons documented
		Week 13 total			15		

GATES IN THE CALENDAR

Gate 1 is Task 4.5 (end of Week 4), Gate 2 is Task 8.5 (end of Week 8), and Gate 3 is Task 13.4 (end of Week 13). If a gate result is "extend", insert a catch-up week and shift later tasks, keeping dependencies intact.

Lightweight calendar for a solo marketer

About 10 hours a week. The solo plan picks **one paid channel, one lead magnet, three commercial content pieces, and a simple nurture**, and trims research and reporting. It totals 129 hours.

Week	Focus	Tasks (hours)	Total
1	Goals and baseline	Goal sheet (2); baseline pull (3); tracking audit (2); book five interviews (1)	8
2	Research	Five customer interviews (5); competitor scan of three (2); seed topics from Search Console and interviews (2)	9
3	Positioning and tracking	ICP and positioning one-pager (4); fix essential tracking: key events, UTMs, CRM source (5); audit the main landing page (2)	11
4	Plan and Gate 1	Top three technical fixes scoped (3); two content briefs (2); choose one channel and budget (2); lead definition and response rule (2); Gate 1 (1)	10

5	First assets	Fix top three technical issues (4); publish commercial piece #1 (6)	10
6	Launch	Validate tracking and launch one campaign (5); two ad variants (3); autoresponder and lead alert (3)	11
7	Capture and nurture	Simple checklist lead magnet with page (5); three-email welcome sequence (5)	10
8	Review and Gate 2	Results review with confidence labels (2); lead quality check (1); publish piece #2 (5); landing-page test plan (1); Gate 2 (1)	10
9	Optimize	Keep, revise, or stop decisions (2); one landing-page change (3); refresh one page (3); ad creative round two (3)	11
10	Quality	Refine lead criteria (2); revise nurture emails (2); publish piece #3 (5); review lost reasons (1)	10
11	Reallocate and proof	Reallocate budget (1); expand the winning campaign (2); real proof asset with permission (5); simple dashboard (3)	11
12	Systemize	Short SOPs for launch, follow-up, reporting (4); one automation (3); refresh content (3)	10
13	Review and plan	Results versus baseline (3); unit economics (1); next-quarter plan (3); Gate 3 (1)	8
Quarter total			129

If you only have five hours a week, keep the sequence but double the length of each phase. The order matters more than the speed.

How a larger team can distribute the work

Role	Primary responsibilities	Tasks led (examples)	Share of effort (illustrative)
Strategy lead / founder	Goals, positioning, budget, gates	1.1, 3.1, 3.2, 4.3, 11.1, 13.3	15%
Marketing manager / operations	Plan, calendar, lead assets, nurture	1.4, 3.3, 5.3, 6.4, 7.1, 8.4	15%
SEO specialist	Technical audit, topic maps, refreshes	2.3, 4.1, 4.2, 5.1, 7.4, 9.4	15%
Content writer	Briefs, commercial and pillar content, case study	5.2, 7.2, 8.3, 10.4, 11.3	20%
Paid media specialist	Campaigns, tests, budget moves	6.1, 6.2, 9.1, 9.3, 11.2	12%
Designer	Creative, landing page visuals, lead magnet layout	5.3 (design), 6.2, 9.3	8%
Analyst / marketing ops	Baseline, tracking, dashboard, reporting	1.2, 1.3, 3.4, 5.4, 7.3, 11.4, 13.1, 13.2	10%
Sales lead	Lead definition, follow-up, quality feedback	4.4, 6.3, 8.2, 10.1, 10.5	5%

Larger teams can run Weeks 5–8 tasks in parallel, but should still hold to the gates. More people raise capacity, not the amount of evidence the market provides.

KPI Dashboard

A reproducible specification. Build it in any spreadsheet or reporting tool, review it weekly, and attach a recommended action to every metric.

ALL FIGURES BELOW ARE HYPOTHETICAL

The baselines, targets, and current results are invented for a constructed B2B services business at about Week 8. "Illustrative target" values are starting points to be replaced with your own baseline and economics; they are **not** industry benchmarks. Trend arrows: ▲ improving, ▼ worsening, ► flat or inconclusive (judge direction by whether the metric is "good when higher" or "good when lower").

Dashboard specification with worked hypothetical example

Metric	Definition	Formula	Data source	Freq.	Baseline → illustrative target	Current	Trend	Owner	Recommended action when it changes
Layer 1 — Business outcomes									
New customers	Contracts signed in the period	Count	CRM	Monthly	3 → 5	4	▲	Founder	Below target two months running: review qualified-lead volume and close rate before adding spend.
New first-year contract value	Sum of first-year value of new customers	Σ contract value	CRM / billing	Monthly	\$18,000 → \$30,000	\$24,000	▲	Founder	If value per customer drops, check offer mix and discounting before judging channels.
Blended CAC (fully loaded)	All marketing cost per new customer	Marketing cost ÷ new customers	Finance + CRM	Monthly	\$1,400 → \$1,100	\$1,250	▲	Lead	If it exceeds break-even CAC for two periods, cut the least efficient channel first; investigate lead quality.
Layer 2 — Funnel performance									
Marketing leads	New CRM leads with a marketing source	Count	CRM	Weekly	28/mo → 40/mo	34/mo	▲	Marketer	Falling volume: check traffic sources and form completion; verify tracking before diagnosing demand.
Qualified-lead rate	Share of leads meeting the written criteria	Qualified ÷ leads	CRM	Weekly	40% → 50%	44%	▲	Lead + sales	Falling rate: review recent campaigns and offers by source; read a sample of leads.
Lead-to-opportunity rate	Qualified leads that become opportunities (cohort)	Opportunities ÷ qualified leads	CRM	Monthly	25% → 30%	28%	▲	Sales	Falling rate: check follow-up speed and sales feedback; revisit criteria.
Median time to first contact	Time from submission to first human reply	Median(contact time – submit time)	CRM	Weekly	20 h → 4 business h	6 h	▲	Sales	Above target: fix routing and alerts first; consider coverage hours.

Layer 3 — Channel performance										
Paid cost per qualified lead	Paid spend per qualified lead from paid sources	Spend ÷ qualified leads	Ad platform + CRM	Weekly	\$140 → \$120	\$128	▲	Paid specialist	Rising: split into CPC and conversion rate; check creative fatigue and recent changes.	
Paid click-to-lead rate	Leads per paid click	Leads ÷ clicks	Analytics + ads	Weekly	3.5% → 5.0%	4.6%	▲	Marketer	Falling: check page speed, message match, form errors, tracking.	
Organic clicks (28 days)	Clicks from Google Search ^[S6]	As reported	Search Console	Weekly	1,900 → 2,400	2,150	▲	SEO lead	Falling: check indexing, recent changes, seasonality; compare impressions to see whether the issue is visibility or CTR.	
CTR on priority pages	Clicks ÷ impressions for target pages	Clicks ÷ impressions	Search Console	Weekly	2.1% → 2.8%	2.4%	▲	SEO lead	Low with high impressions: rewrite titles and descriptions; review the query mix.	
Email click rate	Unique clicks per delivered email	Unique clicks ÷ delivered	Email platform	Per send	2.0% → 3.0%	2.7%	▲	Marketer	Falling: review segmentation, subject, and content relevance; check deliverability.	
Layer 4 — Operational activity										
Content published vs plan	Planned pieces published on time	Published ÷ planned	Content tracker	Weekly	plan: 4/mo	3 of 4	▶	Writer	Behind two weeks: cut scope, not quality; reassess capacity at the next review.	
Tracking checks passed	Validation checklist items passing	Passed ÷ total checks	Validation sheet	Monthly	100% target	92%	▶	Analyst	Below 100%: fix before interpreting any dependent metric.	
Experiments completed with a decision	Tests concluded with a recorded verdict	Count	Test log	Monthly	1 → 2	1	▶	Marketer	If none conclude, reduce the number of concurrent tests or lengthen them.	

How to build and use it

- **Structure:** one tab per layer plus a summary tab. Keep definitions, formulas, and data sources in a "Dictionary" tab so anyone can audit a number.
- **Cadence:** weekly for funnel, channel, and operations; monthly for business outcomes. Review in the weekly meeting (Bonus E).
- **Reconcile monthly** to CRM and finance totals. A dashboard that cannot be reconciled is decoration.
- **Annotate** campaign launches, page changes, outages, and seasonality directly on the sheet.
- **Color rules:** define green, amber, and red in advance (for example, within 10% of target is amber) so status does not depend on mood.
- **Limit to about 15 metrics.** If everything is tracked, nothing is prioritized. Remove a metric when no decision would change.

Marketing Budget Planner

A monthly and quarterly worksheet, three illustrative scenarios, and rules for spending wisely when money is tight.

Monthly and quarterly planning worksheet

Complete the plan columns before the month starts and the actual columns as invoices arrive. **Variance = actual – planned**; a positive variance is overspend. "Expected outcome" means the specific result you will examine, never a promised return.

Category	Purpose	Expected outcome	Owner	M1 Plan	M1 Act.	M2 Plan	M2 Act.	M3 Plan	M3 Act.	Qtr Plan	Qtr Act.	Qtr Var.
Paid advertising												
Content production												
SEO tools												
Design and creative												
Email and CRM software												
Analytics and tracking												
Freelancers or agencies												
Testing and experimentation												
Contingency												
Total												

Three illustrative budget scenarios

ILLUSTRATIVE Monthly amounts in USD, chosen to show how priorities shift as budgets grow. They are not recommendations for your business, nor are they linked to any expected return. Scale to your currency and economics. Staff salaries are excluded; add them for fully loaded CAC.

Category	Lean (\$2,000)	Growth (\$8,000)	Established (\$25,000)	What changes as the budget grows
----------	----------------	------------------	------------------------	----------------------------------

Paid advertising	\$800	\$3,000	\$10,000	One channel with a small test budget; then two channels; then multi-channel with structured testing.
Content production	\$400	\$1,400	\$4,500	From one strong piece a fortnight to a cluster program with editors and research.
SEO tools	\$100	\$300	\$900	Free Google tools first; paid tools only when specific decisions need them.
Design and creative	\$150	\$600	\$1,800	Templates and light freelance support; then regular creative sprints.
Email and CRM software	\$100	\$400	\$1,300	Basic automation; then segmentation and lifecycle flows at scale.
Analytics and tracking	\$50	\$150	\$600	Consent and reporting tools, data-pipeline help as complexity grows.
Freelancers or agencies	\$200	\$1,200	\$3,000	Specialist help for gaps (technical SEO, analytics, creative) rather than the whole program.
Testing and experimentation	\$100	\$600	\$1,800	Dedicated budget for tests, protected from the core spend.
Contingency	\$100	\$350	\$1,100	Kept at roughly 4–5% for surprises and fast-moving opportunities.
Monthly total	\$2,000	\$8,000	\$25,000	
Quarterly total (×3)	\$6,000	\$24,000	\$75,000	

Worked variance example HYPOTHETICAL: Growth scenario, Month 1

Category	Planned	Actual	Variance (A – P)	Note
Paid advertising	\$3,000	\$2,850	–\$150	Campaign launched two days late; budget unspent, not reallocated.
Content production	\$1,400	\$1,550	+\$150	Extra editing for pillar guide.
SEO tools	\$300	\$300	\$0	
Design and creative	\$600	\$520	–\$80	Reused existing template.
Email and CRM software	\$400	\$400	\$0	
Analytics and tracking	\$150	\$150	\$0	
Freelancers or agencies	\$1,200	\$1,350	+\$150	Technical SEO fixes took longer than quoted.
Testing and experimentation	\$600	\$450	–\$150	First test starts Month 2.
Contingency	\$350	\$0	–\$350	Not used.
Total	\$8,000	\$7,570	–\$430	Underspend is not automatically good; ask whether it delayed learning.

How to prioritize when the budget is limited

Spend in this order, and stop when the money runs out:

- 1. Measurement and tracking.** Cheap and necessary; everything else depends on it.
- 2. Conversion assets.** A clear landing page, a working form, and a follow-up process. They multiply every later dollar.

- 3. **One acquisition channel** best matched to your buyers' intent and your margin.
- 4. **Content that supports decisions**, beginning with commercial pages.
- 5. **Tools** only where a free option cannot do the job.
- 6. **A protected test budget**, even if small, so learning is deliberate.

Is an additional tool or channel worth its cost?

Question	How to answer it
What specific decision or task will it improve?	If you cannot name one, do not buy it.
What is its fully loaded cost?	Subscription or media cost, setup time, training, integration, and the opportunity cost of attention.
What must be true for it to pay for itself?	Tools: hours saved × the value of an hour, or errors avoided. Channels: required customers = total cost ÷ gross profit per customer. HYPOTHETICAL A \$2,000 test with \$900 gross profit per customer must produce about 2.2 customers (round up to 3) to break even in the period.
How will we know quickly?	Define the minimum result at a set date, a cheap trial or short contract, and the stop rule in advance.
Is it reversible?	Prefer monthly terms, exportable data, and small first commitments.
What are we not funding if we do this?	Every yes is a no to something else; name it.

REMINDER

Budget scenarios describe how money might be distributed, not what it will return. Returns depend on offer, market, execution, and time. Prices of tools and platforms change; check current vendor pricing before finalizing any line.

Campaign Brief Template

One page that makes a campaign launchable, testable, and reviewable. Complete it before building anything.

Section	Prompt (what a good answer includes)	Your answer
Campaign name	Lowercase, includes quarter and offer. Used in UTMs.	
Objective	One primary outcome with a number and a date (for example, "40 qualified leads by [date]"). One secondary measure at most.	
Target audience	Primary segment from the ICP; who is excluded; geography; stage in the journey.	
Customer problem	The situation and job in the customer's words (from interviews).	
Offer	What they get, what they give, price or commitment, risk reversal, any genuine deadline.	
Channel	Platform, campaign type, objective setting, and why this channel suits this audience and offer.	
Message	Primary angle, proof points, the one thing the audience must remember, and what we will not claim.	
Creative concept	Formats, variants (one variable at a time), tone, required approvals, and policy check.	
Landing page	URL, headline matching the ad, primary CTA, form fields, page speed checked, thank-you state.	
Budget	Total, daily or weekly pace, core versus test split, minimum spend before judging, maximum loss tolerated.	
Tracking	Primary and secondary conversions, UTM values, CRM source fields, validation date and person.	
Success criteria	Target and minimum acceptable results for cost per qualified lead (or ROAS and margin), qualified rate, and the sample needed to decide.	
Decision rules	Pre-agreed triggers for scale, maintain, revise, stop.	
Risks	Policy rejection, tracking failure, capacity to follow up, seasonality, brand risk, and mitigation for each.	
Owner and approvals	Campaign owner, approver, sales contact.	
Review date(s)	First check (data quality, not conclusions), interim review, and final review with decision.	

Tip: store completed briefs together. Reading three past briefs often saves more time than any new research.

Weekly Marketing Review

A one-page template for a 30-minute meeting. Its purpose is to separate what happened from what you hope it means.

WEEKLY REVIEW — WEEK # _____ DATE _____ ATTENDEES _____

Question	Notes	Owner / due
1. What was planned?	Tasks and experiments scheduled this week.	
2. What was completed?	Delivered, with links. Note anything late and why.	
3. What changed?	Site, campaigns, tracking, offers, team, market, seasonality (the change log).	
4. What worked?	Results that met or beat targets, with the number and sample size.	
5. What failed?	Results that missed or broke. No blame; describe.	
6. What did the data actually establish?	Only what the evidence supports. Label confidence: High / Medium / Low.	
7. What remains uncertain?	Open questions; what evidence or time would resolve them.	
8. What should stop?	Activities that did not earn their place; reason.	
9. What should continue?	Activities to keep unchanged, and the next review date.	
10. What should be tested next?	Hypothesis, single change, success measure, minimum data, end date.	
11. Who owns each action?	Action list with a named person and date for each.	

Dashboard snapshot (paste): North Star _____ · Qualified leads _____ · Cost per qualified lead _____
 _____ · Time to first contact _____ · Organic clicks _____

MEETING RULES

- Start with the dashboard, not opinions.
- Distinguish facts, interpretations, and hypotheses out loud.
- No new experiment until the last one has a recorded decision.
- End with owners and dates. An action without both is not an action.

Practical AI Prompt Pack

Fifteen specific prompts, each with inputs, expected output, and a verification step. Replace the bracketed fields. Add your own data; never rely on an AI system to supply facts.

USE RESPONSIBLY

Remove personal and confidential data before pasting content into any AI tool unless your organization has approved it for that use (Chapter 10). Verify every factual claim. Prompts work in most general-purpose AI assistants; results vary by model. More prompts are available in SEOLabsAI's [AI Prompt Library](#)^[S17].

1 Interview synthesis with evidence trail

PURPOSE

Extract triggers, alternatives, objections, and language from customer interviews.

INPUTS

[Transcripts or notes, each with an ID], [product/service], [segment].

PROMPT

Analyze the interview notes below for [product/service] customers in [segment]. Produce a table with columns: Theme | Interview IDs | Direct phrase (max 12 words, verbatim) | Category (trigger / alternative / objection / deciding factor / outcome). Then list: (a) five phrases customers use to describe the problem, verbatim; (b) themes that appear in only one interview, marked "single mention"; (c) contradictions between interviews; (d) three questions the notes do not answer. Do not infer motives or add themes that are not in the notes.

[Notes]

EXPECTED OUTPUT

A traceable theme table plus language bank and open questions.

VERIFICATION

Spot-check five rows against the source notes; confirm every quote exists verbatim.

2 ICP pattern finder from aggregated customer data

PURPOSE

Identify traits shared by your best customers.

INPUTS

Anonymized table: industry, size, source, first-year value, retention or time to close, [no names or contact details].

PROMPT

Below is an anonymized table of [N] customers with these fields: [fields]. Identify patterns that distinguish the top quartile by [value or retention] from the rest. For each pattern give the supporting rows count and a plain-English statement. State clearly where the sample is too small to conclude (fewer than [10] customers in a group). Propose three candidate ICP definitions and one disqualifying trait for each. Do not use outside knowledge about industries.

[Data]

EXPECTED OUTPUT

Patterns with counts, sample-size warnings, and three candidate ICPs.

VERIFICATION

Recompute at least two of the counts in a spreadsheet; discuss the candidates with sales before adopting.

3 Competitor positioning grid from public pages

PURPOSE

Summarize how competitors position themselves, and find gaps.

INPUTS

Pasted text from competitors' home, pricing, and about pages with page URLs; your draft positioning.

PROMPT

I am pasting public web copy from [N] competitors, each labeled with its URL. For each, extract: stated audience, central promise, proof offered, pricing signals, calls to action, and anything notably absent. Then identify (1) claims that all or most competitors make, (2) positions no one occupies, and (3) three ways my draft positioning below overlaps or differs. Quote at most 10 words per source and base every statement only on the text provided.
[Competitor copy] [My draft positioning]

EXPECTED OUTPUT

A competitor grid and a short gap analysis.

VERIFICATION

Open each competitor's page to confirm the extraction; confirm any "absent" claim by searching the site.

4 Content brief that forces a point of view

PURPOSE

Create a brief for a writer, including what makes the piece distinct.

INPUTS

[Topic/query], [reader and stage], [our unique knowledge or data], [top three currently ranking pages' headings], [target action].

PROMPT

Create a content brief for the query "[query]" aimed at [reader] at the [stage] stage. Include: the reader's question in one sentence; search intent; a proposed title and three alternatives; an outline of H2s with the question each answers; the sub-questions competitors' headings below fail to cover; where our unique input below should appear; claims that will need sources (list as "needs source", do not invent sources); internal link targets from this list: [URLs]; the single call to action; and what the piece must NOT do.
[Competitor headings] [Our unique input]

EXPECTED OUTPUT

A one-page brief ready for a writer.

VERIFICATION

Check that the outline contains something competitors lack; remove any generic section that could appear on any site.

5 Topic cluster plan

PURPOSE

Group keywords into a pillar and supporting pages with intent labels.

INPUTS

Query list (from Search Console and research), [business, segment, offer], [existing URLs].

PROMPT

Group the queries below into topic clusters for [business]. For each cluster return: pillar topic; supporting page topics; dominant intent (informational / commercial investigation / transactional / local); suggested page type; existing URL that should be refreshed instead of creating new content (only from the list given); and the internal-linking relationship. Flag queries that do not fit our segment. Order clusters by closeness to purchase decisions.
[Queries] [Existing URLs]

EXPECTED OUTPUT

A cluster table with page types and linking plan.

VERIFICATION

Check actual search results for two queries per cluster to confirm the intent labels; apply the prioritization score from Chapter 5.

6 Search Console opportunity analysis

PURPOSE

Find pages and queries worth improving from a Performance export.

INPUTS

CSV export of queries and pages: clicks, impressions, CTR, position, for the last [28] days vs the prior period.

PROMPT

This is a Search Console export. Find: (1) pages with impressions above [X] and CTR below [Y%] (list up to 15); (2) queries with positions between 8 and 20 and rising impressions; (3) pages whose clicks fell by more than [20%] versus the prior period; (4) branded versus non-branded split, where brand terms are [list]. For each finding, give the numbers and two possible explanations labeled as hypotheses, and the cheapest check for each. Do not state causes as facts. Ignore rows with fewer than [N] impressions. [Export]

EXPECTED OUTPUT

Four lists with numbers, hypotheses, and checks.

VERIFICATION

Recalculate two findings with spreadsheet filters; confirm that the analysis uses the correct date ranges.

7 Title and description rewrites under constraints

PURPOSE

Improve snippets for low-CTR pages while staying accurate.

INPUTS

URL, current title and description, page summary, top three queries, distinct benefit.

PROMPT

Rewrite the title and meta description for the page below. Constraints: title at most 60 characters; description at most 155; include the primary query naturally; state a concrete benefit that is true on the page; no superlatives we cannot prove; no clickbait. Provide three options per page with a one-line rationale each, and note anything in the current snippet that misrepresents the page. [Page data]

EXPECTED OUTPUT

Three tested options per page.

VERIFICATION

Check lengths and claims against the page; log the change date and review CTR after four weeks.

8 Page-versus-intent audit

PURPOSE

Compare a page with the searcher's intent and with what ranks.

INPUTS

Page text, target query, text or headings of three top-ranking pages, our proof assets.

PROMPT

Evaluate whether the page below satisfies the intent behind "[query]". Identify: the likely intent; questions a searcher would expect answered that the page does not answer; sections that are generic or repeat competitors; missing evidence or examples; clarity problems in the first 150 words; and internal-link or call-to-action gaps. Use only the text provided; do not invent facts about competitors. Rank the top five fixes by likely impact and effort. [Page text] [Competitor headings]

EXPECTED OUTPUT

A ranked fix list with reasons.

VERIFICATION

Read the page as a first-time visitor; confirm the gaps are real before editing.

9 Campaign brief first draft

PURPOSE

Populate the Bonus D template from your decisions.

INPUTS

ICP, offer, objective, budget, channel, past results, constraints.

PROMPT

Using only the inputs below, complete a campaign brief with these sections: objective, audience, customer problem, offer, channel and rationale, message, creative concept, landing page requirements, budget split (core/test/reserve), tracking plan, success criteria, decision rules, risks, review dates. Where information is missing, write "NEEDS INPUT: [what]" rather than assuming. Propose two alternative creative angles with a testable hypothesis for each.
[Inputs]

EXPECTED OUTPUT

A draft brief with explicit gaps.

VERIFICATION

Resolve every "NEEDS INPUT"; confirm that success criteria use your own baseline and break-even.

10 Ad copy variants with policy guardrails

PURPOSE

Generate testable variants from one message angle.

INPUTS

Message matrix row, offer, character limits, prohibited claims, platform name.

PROMPT

Write [6] ad variants for [platform] using this angle: [angle]. Respect these limits: [limits]. Each variant must differ in one element only (state which: hook, proof, offer, or CTA). Do not include claims outside this approved list: [claims]. Avoid guarantees, unverifiable superlatives, and personal attributes. Return a table: Variant | Text | Element tested | Hypothesis.
[Offer and approved claims]

EXPECTED OUTPUT

Six labeled variants with hypotheses.

VERIFICATION

Check against the platform's current advertising policies and your legal or compliance review before launch.

11 Creative test design and decision rule

PURPOSE

Turn a test idea into a plan with a decision rule set in advance.

INPUTS

Hypothesis, current conversion count per week, cost per conversion, budget, time available.

PROMPT

Help me design a test. Hypothesis: [hypothesis]. Current volume: [conversions per week]. Budget: [amount]. Calculate roughly how long the test must run, and how many conversions per variant, to detect a [20]% relative difference, stating assumptions and noting where my volume is too low to expect a clear result. Provide: the single variable changed, primary metric, guardrail metrics, minimum run time, stop conditions, and a decision rule for "win / lose / inconclusive". If the test is not feasible, propose a cheaper alternative.

EXPECTED OUTPUT

A test plan with feasibility caveats.

VERIFICATION

Check the arithmetic with a calculator or a trusted statistics tool; confirm the test log entry exists before launch.

12 Lead review and qualification feedback

PURPOSE

Compare lead notes against the written qualification criteria to find patterns in poor leads.

INPUTS

Qualification criteria; 30 to 50 anonymized lead records with source, form answers, and sales outcome.

PROMPT

Here are our qualification criteria: [criteria]. Below are [N] anonymized leads with source, form answers, and outcome (qualified / not qualified / reason). Identify patterns: which sources, offers, and form answers correlate with not qualified; reasons that repeat; and form questions that predict fit. For each pattern give counts. State where the sample is too small. Suggest up to five changes to forms, offers, or targeting, each with the risk it creates. Do not guess at leads' intentions.
[Records]

EXPECTED OUTPUT

Patterns with counts and cautious recommendations.

VERIFICATION

Check counts in the CRM; review the proposals with sales before changing criteria.

13 Anomaly investigation for analytics

PURPOSE

Generate a structured investigation plan when a metric changes unexpectedly.

INPUTS

Metric, change and period, change log, segment tables (source, device, landing page).

PROMPT

The metric [name] changed from [A] to [B] between [dates]. Using the change log and segment data below, (1) check whether the change is concentrated in a segment (list the numbers), (2) decompose the change using [formula, for example $CPA = CPC / \text{conversion rate}$], (3) list at least four hypotheses ranked by how cheaply each can be tested, (4) for each, specify the exact report or check to run. Do not assert a cause. Mark any conclusion that depends on fewer than [30] events as low confidence.
[Change log] [Segment data]

EXPECTED OUTPUT

A segmented breakdown, ranked hypotheses, and a check list.

VERIFICATION

Reproduce the segment numbers from the source platform; run the cheapest check before any change.

14 Monthly executive summary from the dashboard

PURPOSE

Draft a concise, honest monthly update for a decision-maker.

INPUTS

Dashboard table (current, previous, target), notes on changes, confidence labels.

PROMPT

Write a one-page monthly update for a non-specialist owner using only the table and notes below. Structure: (1) three-sentence summary leading with business outcomes; (2) a table of the five metrics that matter most with current, target, and direction; (3) what we learned, separating facts from hypotheses; (4) risks and uncertainties, including data-quality caveats; (5) decisions needed from the owner this month. Use plain language, no hype, and do not report a number that is not in the table.
[Dashboard] [Notes]

EXPECTED OUTPUT

A plain-language one-page summary.

VERIFICATION

Check every number against the dashboard; remove any causal claim that is not backed by evidence.

15 Conversion hypotheses from funnel data and objections

PURPOSE

Generate prioritized CRO hypotheses grounded in evidence.

INPUTS

Funnel table by stage, page text, top objections from interviews, form fields, traffic by device.

PROMPT

Our funnel by stage is: [table]. The landing page text is below, along with the top objections customers gave. Identify the weakest stage versus our targets and propose eight conversion hypotheses in the form "Because [evidence], changing [element] to [change] will improve [metric]". For each give impact, confidence, and effort scores from 1 to 5, a minimum sample needed to judge, and a risk (what could get worse). Prefer changes to message, offer, and structure over cosmetic edits. Mark any hypothesis that lacks evidence in the inputs as "speculative".
[Funnel] [Page text] [Objections]

EXPECTED OUTPUT

Eight scored, evidence-linked hypotheses.

VERIFICATION

Confirm each cited piece of evidence exists in your inputs; select one to test and record the decision rule before building.

References and Verification Notes

Sources consulted in October 2026, with an honest account of what was and was not verified.

References

Bracketed codes such as [S2] in the text point to the entries below. Dates are those shown on the source where available; platform help pages are updated continuously, so confirm current wording before acting.

[S1] Google Search Central. *Explore Google Search documentation to improve your site's SEO* (includes the SEO Starter Guide). Google. <https://developers.google.com/search/docs>

[S2] Google Search Central. *AI features and your website*. Google. Cached copy shows last update 2025-08-22. <https://developers.google.com/search/docs/appearance/ai-features>

[S3] Google Search Central Blog. *A new resource for optimizing for generative AI in Google Search*. 15 May 2026. <https://developers.google.com/search/blog/2026/05/a-new-resource-for-optimizing>

[S4] Google Search Central. *Understanding Core Web Vitals and Google search results*. Google. <https://developers.google.com/search/docs/appearance/core-web-vitals>

[S5] Google Search Console Help. *Performance report (Search results)*. Google. <https://support.google.com/webmasters/answer/7576553>

[S6] Google Search Console Help. *What are impressions, position, and clicks?* Google. <https://support.google.com/webmasters/answer/7042828>

[S7] Google Analytics Help. *URL builders: Collect campaign data with custom URLs*. Google. <https://support.google.com/analytics/answer/10917952>

[S8] Google Analytics Help. *Advertising and attribution (attribution models in Google Analytics)*. Google. <https://support.google.com/analytics/answer/10596866>

[S9] Google Ads Help. *Set up conversion tracking for your website*. Google. <https://support.google.com/google-ads/answer/12216226>

[S10] Google Ads Help. *About data-driven attribution*. Google. <https://support.google.com/google-ads/answer/6394265>

[S11] Google Tag Manager Help. *About consent mode*. Google. <https://support.google.com/tagmanager/answer/10000067>

[S12] Meta for Developers. *Conversions API*. Meta. <https://developers.facebook.com/docs/marketing-api/conversions-api>

[S13] Meta for Developers. *Conversions API: Best Practices* (deduplication; Test Events tool). Meta. <https://developers.facebook.com/documentation/ads-commerce/conversions-api/best-practices>

[S14] Meta Business Help Center. *About Attribution Models and Attribution Settings*. Meta. <https://www.facebook.com/business/help/460276478298895> (link taken from a secondary article; page not opened directly. See verification list.)

[S15] Google Workspace Admin Help. *Email sender guidelines*. Google. <https://support.google.com/a/answer/81126>

[S16] Federal Trade Commission. *CAN-SPAM Act: A Compliance Guide for Business*. FTC. <https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business>

[S17] SEOLabsAI. Home page, navigation, and resource sections (AI Prompt Library, free ebooks, case studies, free AI tools, blog), reviewed October 2026. <https://seolabsai.com/>

[S18] Google Analytics Help. *About key events* (formerly conversions). Existence of the "key events" terminology was confirmed through several search results; the exact help-page URL was not opened, so search the Google Analytics Help Center for the title.

[S19] Gigazine. *Google Search's official guide: "How to optimize your website for generative AI features."* 18 May 2026. Secondary coverage. https://gigazine.net/gsc_news/en/20260518-google-guide-optimizing-generative-ai

What was verified, and what you should still check

Item	Status
Core Web Vitals thresholds (LCP 2.5 s, INP 200 ms, CLS 0.1)	VERIFIED against Google Search Central [S4].
Google statement that SEO best practices apply to AI features and no special markup or files are required	VERIFIED in the AI features page [S2] and announced in Google's May 2026 post [S3].

Google's full generative AI optimization guide	NOT OPENED DIRECTLY . The guide's own URL could not be fetched in this session; its content is described from Google's blog post [S3] and secondary coverage [S19]. Read the guide itself before quoting it.
Search Console metric definitions	VERIFIED [S5][S6].
UTM parameter guidance and case sensitivity	VERIFIED [S7].
Gmail sender requirements (SPF/DKIM/DMARC; one-click unsubscribe above 5,000 messages a day)	VERIFIED [S15]. Enforcement details and thresholds change; re-read the page.
CAN-SPAM requirements and the \$53,088 per-email penalty figure	VERIFIED on the FTC page [S16]. Amounts are adjusted periodically.
GA4 attribution models; Google Ads data-driven attribution	VERIFIED [S8][S10].
Meta Conversions API, deduplication, Test Events	VERIFIED [S12][S13]. Meta attribution settings page [S14] TO CONFIRM .
GA4 key-event limits and role requirements	TO CONFIRM in current Google Analytics Help [S18]; this book makes no claim about specific limits.
Pricing and availability of third-party CRM, email, SEO, automation, and AI tools	DELIBERATELY NOT STATED . Check each vendor's current pricing page.
SEOLabsAI resources (Prompt Library, Ebooks, Case Studies, Free AI Tools, Blog)	VERIFIED as linked from the site's navigation in October 2026 [S17]. Content of each page was not reviewed beyond the home page, and this book makes no claims about it.
All statistical rules of thumb (for example, uncertainty of about $1/\sqrt{n}$ for counts)	PRACTICE . Simplified guidance, not a substitute for proper statistical testing.
All worked-example numbers, budgets, scores, and dashboard values	HYPOTHETICAL . Invented for teaching; not benchmarks or results.
ABOUT ORIGINALITY The frameworks (BUILD · PROVE · COMPOUND, the gate checklists, the worksheets, the prompt pack, and the calendars) were written for this book. Factual claims drawn from documentation are paraphrased and cited; no passages were copied. No case studies, testimonials, client results, or personal anecdotes are included. No AI-detection score is claimed or implied.	
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