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MARKETING SNAPSHOT

A SMALL BUSINESS MARKETING SELF-ASSESSMENT WORKBOOK

A practical worksheet to help
you understand your customers,
assess your current marketing,
and identify the gaps holding
your business back.



CLARIFY
your ideal customer



ASSESS
your marketing



IDENTIFY
the gaps



PLAN
your next steps

GET CLEARER. MAKE SMARTER DECISIONS. GROW YOUR BUSINESS.

KATHYTOWNSEND.CA

Welcome

I'm so glad you're here!

If you're a small business owner trying to market your business but not seeing the results you hoped for, you're not alone.

Many business owners are doing "all the things": posting on social media, updating their website, networking, running promotions, maybe even trying paid ads but still feel unclear about what's working and what needs attention.

That's where this workbook comes in.

The Marketing Snapshot is designed to help you take a step back and look at the bigger picture of your marketing. It walks you through the key areas of your business so you can better understand:

- who you're trying to reach
- what your business offers that matters to them
- what your current marketing looks like
- where the biggest gaps may be
- and what you may need to improve next

How to use this booklet

Start with what you know

Don't worry about having every answer right away. Some questions will be easy; others may require more thought or research. That's okay, the goal isn't perfection. The goal is clarity and to become the expert in your business, not just the product you're selling.

Don't be intimidated by all the questions. Just start answering the best you can.

This is a dynamic document is to be updated as your knowledge grows. Save copies along the way is a great way to look back to see how far you've come. The docs will become a diary of all the work you've done. Don't deny yourself this pat on the back!

Let's get started!

The journey of
a thousand miles

starts with just
one step



Section 1: Business Basics

Business Name: _____

Website: _____

Main Contact Name: _____

Email: _____

Phone: _____

Date: _____ / _____ / _____

_____ / _____

In one or two sentences, what does your business do?

What products or services do you currently offer?

What is the main offer or service you most want to sell right now?

What geographic area do you serve? (local, Alberta-wide, Canada-wide, online only, etc.)

Section 2: Ideal Customers

Who is your ideal customer or customers? Describe in as much detail as possible:

- general demographics (age, gender, marital status)
- occupation or industry
- location
- life stage (young, mid, pre-retirement, post-retirement)
- lifestyle (DIYer, hiker, gardener, golf player, drinker or non, interests)
- buying habits (pays with cash/credit, buys regularly, pays on time)

What problem are they trying to solve when they look for a business like yours?

How does your business solve their problem?

Why would your ideal customer choose you over someone else?

Are your current customers the same type of people you want more of?

- ☐ Yes
- ☐ Mostly
- ☐ Not really
- ☐ I'm not sure

What do your best customers have in common?

List any additional industries you would like to target?

Do you think your current marketing clearly speaks to this ideal customer?

- ☐ Yes
- ☐ Somewhat
- ☐ No

If not, why not?

Section 3: Current Customers & Database

Do you currently have a customer or client database?

☐ Yes

☐ No

If yes: Where is it stored?

☐ Spreadsheet

☐ CRM

☐ Email marketing platform

☐ Other: _____

Approximately how many contacts do you have? _____

How up-to-date and organized is your customer information?

Do you stay in regular contact with past or current customers?

☐ Yes

☐ No

If yes, how?

☐ Email newsletters

☐ Social media

☐ Phone / personal outreach

☐ Promotions / special offers

☐ Other: _____

Section 4: Value Proposition Statement

A value proposition statement is a concise explanation of why a customer should choose your product, service, or business instead of a competitor. It clearly communicates the unique value you provide, who you provide it for, and the benefit the customer will receive.

A strong value proposition answers three questions:

- Who do you help?
- What problem do you solve?
- Why are you the best choice?

Who are you selling to? _____

What problem(s) do you solve for them?

1. _____
2. _____
3. _____

If someone asked, “Why should I buy from you instead of a competitor?”, what would you say?

Based on this information, craft your value proposition statement.

Section 5: Brand Message

Is your logo and **exact** website url, physical address, phone number and email address consistent across these platforms:

- Website ☐ Yes ☐ No
- Facebook ☐ Yes ☐ No
- Instagram ☐ Yes ☐ No
- Other social media ☐ Yes ☐ No
- Sales brochures ☐ Yes ☐ No
- Email marketing ☐ Yes ☐ No
- Advertising ☐ Yes ☐ No
- Google Business Profile ☐ Yes ☐ No

Is your marketing message consistent across your website, social media, and printed materials?

- ☐ Yes
- ☐ Somewhat
- ☐ No
- ☐ I'm not sure

If someone landed on your website or social media for the first time, would they immediately understand:

- what you do? ☐ Yes ☐ No
- who it's for? ☐ Yes ☐ No
- why they should choose you? ☐ Yes ☐ No

Section 6: Website Review

Do you currently have a website?

☐ Yes

☐ No

If yes, what is your website address? _____

Are you happy with your website overall?

☐ Yes

☐ Somewhat

☐ No

What is your website supposed to help people do?

(Examples: book an appointment, request a quote, buy a product, call you, join your email list, etc.) _____

Does your website clearly explain:

- what you do? ☐ Yes ☐ No
- who you help? ☐ Yes ☐ No
- how to contact or buy from you? ☐ Yes ☐ No

What do you think is working well on your website?

What would you like to improve or change?

Section 7: Social Media & Content

Do you have social media accounts for your business?

☐ Yes ☐ No

If yes, which platforms do you use?

☐ Facebook

☐ Instagram

☐ LinkedIn

☐ TikTok

☐ Pinterest

☐ YouTube

☐ Other: _____

Do you post regularly?

☐ Yes

☐ No

☐ Sometimes

What do you usually post about?

Which platform feels most effective for your business right now?

Which platform feels like the biggest waste of time right now?

Do you know what type of content your audience actually wants from you?

- ☐ Yes
- ☐ Somewhat
- ☐ No

Do you know what social media platform your customers are frequenting?

- ☐ Yes
- ☐ No

Do you have a photo library of your business?

- ☐ Yes
- ☐ No

Do you use AI for content creation?

- ☐ Yes
- ☐ No

Do you use a social media scheduler?

- ☐ Yes
- ☐ No

Have you created a social media calendar?

- ☐ Yes
- ☐ No

Section 8: SEO / Search / Digital Visibility

Have you researched keywords or hashtags related to your business?

☐ Yes

☐ No

If yes, list a few: _____

Is the business showing up in Google for the services/products it wants to be found for?

☐ Yes

☐ Somewhat

☐ No

☐ Unsure

Google Business Profile set up and optimized?

☐ Yes

☐ No

☐ Unsure

Directory listings / backlinks / citations in place?

☐ Yes

☐ No

☐ Unsure

Section 9: Competition & Positioning

Who are your top 3-5 competitors?

What do those competitors seem to do well?

What do they do poorly?

What do you think customers might choose a competitor for instead of you?

Are there trends, obstacles, or challenges in your industry right now that could affect your marketing?

Section 10: Goals, Numbers & Budget

Revenue last year: _____

Revenue goal for next year: _____

What is your main marketing goal over the next 12 months? (more leads, more website traffic, more bookings, better brand awareness, more email subscribers, more online sales)

Do you know how many leads you typically generate in a month?

☐ Yes _____

☐ No

Do you know what percentage of those leads become paying customers?

☐ Yes _____

☐ No

Do you know how many more leads need to generated to hit your revenue goal?

☐ Yes _____

☐ No

Do you currently have a marketing budget?

☐ Yes

☐ No

If yes, approximately how much per month? _____

Where are you currently investing in marketing?

- ☐ Website
- ☐ Social media
- ☐ Paid ads
- ☐ Print materials
- ☐ Signage
- ☐ Networking / events
- ☐ Email marketing
- ☐ Other: _____

How much time per week (hours) are you spending on marketing? _____

Section 11: Quick Self-Assessment

For each statement below, rate yourself from 1-5

1 = not at all / 5 = very confident

I know who my ideal customer is 1 2 3 4 5

- I can clearly explain what makes my business different 1 2 3 4 5
- My website supports my business goals 1 2 3 4 5
- My social media content is strategic, not random 1 2 3 4 5
- I know which marketing efforts are bringing in results 1 2 3 4 5
- I have a clear plan for what to focus on next 1 2 3 4 5
- I know what I need help with 1 2 3 4 5

Section 12: Your Next Steps

After completing this worksheet, what are the top 3 areas of your marketing that need attention?

1. _____
2. _____
3. _____

What's one marketing action you could take in the next 30 days?

Where do you feel most stuck right now?

YOU'VE COMPLETED YOUR **MARKETING SNAPSHOT** *Now What?*

Chances are your workbook highlighted a few things you're doing well, but it also revealed areas that could use some attention. That's completely normal. The good news is that you don't have to figure out the next steps on your own. Whether you need help with one project or ongoing marketing support, I offer practical services designed specifically for small businesses.

Every business has different priorities. Some need a better website. Others need consistent social media, clearer messaging, or a yearly marketing plan. Choose the services that make the biggest impact for your business:

Website Creation & Development



Your website should work as hard as you do.

whether a new website or improvements to your existing one, I'll clearly explain to your ideal customer what you do.

Graphic Design & Printing



Professional marketing materials that represent your business.

Communicate your message clearly and consistently.

Social Media Page Setup



I'll make sure your pages are set up properly and professionally branded.

Social Media Content Library



Knowing you should post regularly and actually creating the content are two different things.

We work together to create authentic, valuable content.

Email Newsletter Campaigns



Email remains one of the highest-return marketing tools available to stay connected with your customers.

I'll create newsletters your customers actually want to read.

Blog Creation & Writing



Blog articles help improve SEO while positioning your business as an expert.

I research, write and format blogs that answer your customers' questions with rich keywords.

Marketing Assessment & Plan



Stop wondering.

I'll define your ideal customer profile(s), write your value proposition statement and create your marketing message(s).

Promotional Products & Branded items



Keep your business top of mind.

Branded products create lasting impressions long after a trade show or event.

Sign Up for a Free Marketing Consultation and/or my newsletter at [KathyTownsend.ca](https://www.KathyTownsend.ca)

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KathyTownsend
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