

ACCULEAD

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# How to Grow Any Organization

A Step-by-Step Guide for Systematically  
Growing Any Organization

Know Your Audience. Provide Value. Build a System.

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## INTRODUCTION

# The Gambling Problem

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The first thing a new client once said to me, right after hiring me for a marketing project, was: "I just don't think marketing works." The irony wasn't lost on either of us.

He wasn't stupid, he was frustrated. He'd spent over a year with a marketing agency and hadn't gotten a single qualified lead out of it. Not one. They had tried LinkedIn, email campaigns, YouTube videos, a website refresh, and a blog. They had posted consistently and done everything the agency told them to do, and none of it moved the needle. By the time he found me, he was convinced the whole thing was a con, and honestly, it was hard to blame him.

I've heard versions of this story from a lot of clients. "We wrote blogs, sent emails, posted on LinkedIn, and even ran a webinar. Nothing closed." These are not lazy business owners. They are showing up and running the plays everyone tells them to run. So why do some businesses make this look effortless while others burn through their budget and wonder what went wrong?

That is the question this book is trying to answer.

Here is the pattern I see over and over. A company tries a tactic and hopes it works. When it doesn't, they try another one. If something does work, most of them can't tell you why, which means they can't repeat it on purpose. That is not really a marketing program; it is gambling with a marketing budget, and the house usually wins.

I had another client ask me once if I could make his videos go viral. If you have any background in marketing, you are probably smiling, but that is how a lot of people think about the problem, as if one lucky video is the difference between growing and dying. The companies that do go viral are almost never lucky. They have usually spent years on research, positioning, and testing, and the content that breaks through is built on top of all that work. It is not accidental and it is not random.

The real difference between the businesses that grow and the ones that struggle is not talent or luck or even budget. It is that one group has built a system for doing this, and the other group is still placing bets.

## Why Listen to Me?

Fair question!

I've been working in marketing since 2011 and have run my own agency, [Acculead.co](http://Acculead.co), since 2016. I also teach advertising at the graduate and undergraduate levels at Calvin University, which means I spend a lot of time explaining this field to people who have never practiced it. That combination, doing the work and teaching it, is most of the reason this book exists.

Across dozens of businesses, I've seen what reliably works and what reliably doesn't, and I've had to explain the difference in plain language.

Companies now hire me to build marketing systems for them. Some are small, like a funnel designed to grow a YouTube channel and some are large, like a pipeline built to close seven-figure deals.

The specific tactics look very different, but the principles underneath them are the same. Those principles are what the rest of this book is about. You don't have to hire me to use any of it. The point is to hand you the blueprint directly.

## What You'll Learn

The book is organized around three ideas. They are easy to describe and much harder to execute in practice.

The first is that you need to know your audience. You cannot connect with people you do not understand, and most marketing that fails is failing at this step without realizing it.

The second is that you need to provide value. Attention has to be earned rather than purchased, and the way to earn it is to give people something genuinely useful before you ask them for anything.

The third is that you need to build systems. Random acts of marketing do not scale and they do not compound. You need a repeatable process that you can plan, run, maintain, and improve over time.

My goal is that by the end of the book you'll have a blueprint for turning your marketing from a series of hopeful bets into a working system, the kind that generates leads and closes deals, and keeps doing it even when you step away from it for a week.

If you are a small business owner who is tired of guessing, this book is written for you. If you are a marketing leader drowning in tactics that don't connect back to anything, this book is written for you too.

Let's get to work.

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## CHAPTER 1

# Who Are They? Identifying Your Audience

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“If you build it, they will come” is a famous line from *Field of Dreams*, and it happens to be a terrible piece of marketing advice.

A lot of businesses run their marketing in something close to the wrong order. They build the product, launch the service, or open the doors for business, and only then start wondering who might want to buy. The content they put out tends to be about whatever they personally find interesting: awards they’ve recently won, anniversaries they are coming up on, blog posts about the company itself. They publish all of it consistently, and they are often surprised when nobody is paying attention.

I had a client who was doing exactly this. Every piece of content they produced, across their blog and their social channels, was about how great their business was: the years they had been in operation, the impressive list of clients they had served, the sophistication of their internal process. The content was genuinely well produced, and it was also completely ignored by the audience it was supposed to be reaching.

The first time I sat down with them, I asked a pretty simple question. Why does anyone care?

They didn't really have an answer, partly because they had never stopped to ask the question in the first place. They were so focused on what they wanted to say that they had forgotten to think about what the audience on the other side wanted to hear. So I walked them through the analogy I tend to use with most clients when this comes up.

Brands work a lot like people. They have personalities, and the same way people do, they make first impressions on whoever they are meeting.

Imagine you are at a networking event and you meet someone new. You shake hands, exchange names, and then for the next twenty minutes that person talks nonstop about how accomplished they are, listing awards and name-dropping the important people on their resume. We all know someone like this, and most of us will quietly avoid them at the next event.

Now picture a different version of that same interaction. You meet someone new, and within the first few minutes they have given you something useful: an introduction to a person you

had been trying to reach, or a practical solution to a problem you mentioned in passing, or a recommendation that will save you hours of frustration later on. You walk away thinking you liked talking to that person, and you hope you run into them again. If you do run into them a few more times, you might even start thinking of them as a friend.

Most business marketing sounds a lot like the first person at that networking event. It is all about the company putting it out: what features the product has, how long the company has been in business, why they think they are impressive. It lands about the same way in content as it would in person, which is badly. When you flip the emphasis and start by asking what is useful to the audience instead, the whole thing starts working differently.

The client I mentioned a minute ago ended up rebuilding their content strategy around the problems and questions their customers were dealing with day to day. Within a few months their pipeline was busier than it had been at any point in the previous year. They had not increased their budget, and they were not posting any more often than they had been. What changed was the substance of the content itself and, more importantly, the audience it was being written for.

## **Know Before You Build**

Before you write a single blog post or launch a campaign, and certainly before you spend any real money on paid ads, you need to be able to answer one question honestly. Who is this for?

“Anyone who might need our services” does not count as an answer. Neither does “businesses in our industry” or “people with money.” You need a specific picture of a specific person, because when you tell yourself your audience is everyone, you tend to end up producing content that doesn’t connect with anyone in particular.

## Four Layers of Knowing Your Audience

There are four layers I work through with clients when I am trying to build out that specific picture. You don’t need all four of them nailed down on day one, but you do want to be steadily moving toward having real answers for each.

### Demographics

Demographics are the surface layer, and they matter even though they are the easiest of the four to fake. Job title, company size, industry, location, budget range. For a B2B client, a useful demographic sketch might look something like “VP of Operations at a \$5M manufacturing company in the Midwest.” For a B2C client, it might be “first-time homeowner, early thirties, dual income, no kids yet.” The more specific you can make that picture, the easier every decision that follows from it will be.

### Psychographics

Psychographics are what your audience believes, values, fears, and aspires to. They tend to predict buying behavior much better than any demographic number does on its own.

Remember the frustrated client from the introduction, the one who had spent a year with an agency and told me he didn't think marketing worked? That conviction is a psychographic, and it matters enormously. If you don't know going in that your prospect believes marketing is fundamentally a scam, you are not going to reach him no matter how sharp the content is.

### **Pain Points**

Pain points are the problems that keep your customer up at night. I mean the real ones, not the surface-level complaints they would mention in a casual conversation. What is the frustration they have tried to solve and failed at? What is the thing that is quietly costing them money, or time, or their sanity? When you can articulate someone's pain better than they can articulate it themselves, you have earned their trust well before you have sold them anything.

### **Behavior**

Behavior is how your audience moves through the world. The channels where they spend their online time, the way they research solutions when they have a problem, the sources they trust for recommendations, and the shape of their buying process from first contact to signed contract. If your audience lives on LinkedIn and you are pouring content into TikTok, it doesn't matter how good the content is.

## How to Find Out

You can guess at these four layers, or you can go find out what the answers really are. I rely on four methods to do that, and they are the subject of the next chapter: talking to the sales team, interviewing customers directly, reading reviews (yours and your competitors'), and watching your own data for patterns you did not expect. Any of them can be started this week without a budget and without a research firm. The information you need is almost always reachable, as long as you are willing to listen for it.

## Action Step

Before you move on to Chapter 2, write your ideal customer profile as a single paragraph. I want you to write a paragraph specifically, rather than a bulleted list, and to write it the way you would describe a real person to a friend over coffee.

An example of what that might look like in practice:

"Our ideal customer is a marketing director at a B2B software company doing between \$3M and \$10M in revenue. She is overwhelmed, running too many channels with too few resources to do any of them well. She has worked with agencies before and came away burned by vague reporting and results that never quite materialized. She is skeptical of marketing jargon and wants someone who will be straight with her. What she is looking for at this point is less a pile of fresh ideas and more a working system."

When you can write that paragraph and believe it, you are ready for the next chapter.

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## CHAPTER 2

# Listening and Learning

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### Tools for Audience Insights

I once worked with a trucking logistics company whose marketing emails were the ugliest I had ever seen in my career. They were plain text, with almost no formatting and barely any paragraph breaks, and there was nothing in them that looked like branding or design. They looked like someone had typed them out in Notepad and hit send without a second thought.

When I was onboarding with them I asked the obvious question about why the emails looked that way. As it turned out, they had arrived at the plain-text format deliberately, after a long experiment that went in exactly the opposite direction of what you would assume.

They had originally started out with the kind of email you would expect a modern marketing team to send, which is to say a designed template with a clean layout, images, section headers, and calls-to-action in the usual places. The problem was that almost nobody was opening them, and the people who did open them were not clicking on anything. So the team started experimenting, stripping things out one element at a time, and every time they took something away, the engagement numbers went up a little further. They kept going in that direction until they had arrived at the bare text-only versions I was looking at.

Their audience was truckers. Truckers tend to ignore anything that looks like marketing and pay attention to anything that reads like internal operational information. The more the company had designed their emails, the more the emails had tripped the first reflex. When the design got stripped out, the second reflex kicked in instead, and the emails started getting read.

This is one of the more important ideas in marketing, and it sounds obvious until you notice how often businesses break it without realizing. The job is to build for the audience. This is harder than it sounds, because the people doing the building are themselves the most convenient audience they have access to, so most companies drift into building for themselves instead, in ways that are invisible to them until somebody points it out. Campaigns, copy, and design choices end up reflecting the taste and language of the people inside the company rather than the taste and language of the people on the

receiving end. That is a completely understandable mistake to make, but it is still a mistake, and the only way around it is to put real effort into finding out what the audience really wants.

## Going Deeper on the Four Methods

In the previous chapter I named the four methods I use to learn what an audience wants. Each is worth a closer look, because the quality of any one of them depends heavily on operational details that are easy to get wrong.

### Talking to the sales team

The sales team spends more face-to-face time with your customers than anyone else in the organization, which tends to give them a different and more accurate picture of why those customers are buying. A common pattern I see goes like this: leadership assumes customers buy because of Feature X, while sales, working from many more data points, knows that customers are buying because Objection Y got handled well in the third meeting. The gap between those two stories matters, because your external positioning ought to line up with the real reason customers say yes, and sales is often the only group in the building that can tell you whether it does.

When I sit down with a sales team, I am trying to get real answers to a handful of questions. Which questions do prospects ask most often? Which objections come up again and again? What has to happen for a skeptical prospect to say yes, and what tends to make someone walk away before that happens? And finally, what do customers say, after the fact,

that they wish they had known earlier? The answers, written down in one place, are a content roadmap you did not have to invent from scratch.

### **Interviewing customers directly**

I like to talk to my clients' customers personally, and the question I always start with is some version of, "Why did you choose this company to begin with?" The answer almost always surprises the leadership team. The company will typically believe it got chosen for its technology or its price, and the customer will tell me, with no prompting, that the real reason was that the salesperson listened carefully, or that an early test project came in faster than they expected. That gap between the company's story about itself and the customer's actual experience is one of the most useful things you can put your hands on.

A few other questions worth asking in the same conversation: what were you dealing with before you found us, what other options did you consider, what almost stopped you from buying, what has been the biggest impact since you started working with us, and what would you tell someone who was still on the fence about us. That last one is especially worth hearing carefully, because whatever the customer says in answer to it will be more convincing than anything you could write about your own company. The phrasing the customer reaches for belongs somewhere on your website, in approximately the words they used.

## Reading reviews

Wherever your industry gets reviewed publicly, whether that is G2, Capterra, Yelp, Google, Amazon, or something more specialized, spend some time reading widely. Read your own reviews, and read your competitors' reviews, because the competitors' reviews are often more revealing than your own. In the positive reviews you will find things people value that you might not have realized were values at all. A review that says "finally, a company that actually answers the phone" is pointing at a positioning opportunity the writer did not even know they were handing you. In the negative reviews you will find the things people were afraid of going in, which doubles as a list of promises you can credibly make if you can deliver on them. A complaint about taking three weeks to get a response is both a warning about the category and a clear opening for any competitor who can beat it.

While you read, pay close attention to the specific language customers use. The exact phrases people reach for when they describe their problems or their desires are better raw material than any copywriting you would come up with on your own, and you should borrow them freely.

## Watching the data

Your analytics tell you a story if you take the time to read them carefully. The pages where people spend the most time are the ones they care about, regardless of what your homepage is organized to tell them to care about. The places where they drop off are usually either a confusing step in the journey or an early signal that the page is talking past the audience.

Email open rates and delete rates, looked at together over a few campaigns, tend to show a pattern in what the audience is responding to. And the search terms that bring people to your site are a window into the language they use to think about the problem in the first place, which is not always the same language you use to describe it.

Data will only get you so far on its own, because it can usually tell you what is happening but rarely why. What it is good for is flagging which areas deserve the bulk of your attention when you sit down to talk to the people who can tell you why.

## **The Customer Journey Map**

Once you have gathered insights from these four sources, the next step is organizing them into a map of the customer's journey toward buying. Your customer does not wake up one morning and decide to purchase your product. They move through a sequence of mental states, and your marketing has to meet them wherever they currently happen to be.

The standard version of the journey has five stages.

Unaware: they have a problem but do not yet know that a solution exists.

Problem-aware: they know they have a problem and are starting to look around for answers.

Solution-aware: they know that solutions exist and are comparing their options.

Product-aware: they know about you specifically and are deciding whether you are the right fit for them.

Ready to buy: they just need a reason to say yes right now, rather than next quarter.

At each stage, ask four things. What does the person think at this stage? How do they feel about their situation? Which questions do they have that have not yet been answered for them? And what would it take to move them forward into the next stage? Write the answers out, on paper or on a whiteboard. When you see the whole journey laid out end to end like that, the gaps in your current marketing tend to become obvious. A common discovery is that you have five pieces of content aimed at product-aware buyers and almost nothing at all for people in the problem-aware stage, which is usually why your top-of-funnel has been drying up.

## Action Step

Before you move on to Chapter 3, pick one of the following and commit to doing it this week.

Interview three customers. Get each of them on a fifteen-minute call and ask the three core questions: why did you choose us, what almost stopped you from buying, and what has been the biggest impact. Take notes, and then look at the three sets of notes side by side to see what patterns emerge.

Spend thirty minutes reading reviews, yours and your competitors', and copy the most striking phrases into a single document as you go. At the end of the half hour, that document will tell you more about your market than most of the research decks consultants charge real money for.

Buy your sales team lunch and ask them what they hear from prospects every day. Bring a notebook and write everything down. The useful patterns usually start surfacing in the hour after the lunch, when you are back at your desk with your notes and looking for the themes.

Any one of those will change how you think about your audience, and the cost of doing it is an hour of your time.

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## CHAPTER 3

# Aligning Vision with Needs

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### **Tailoring Communication to Your Audience**

I worked with a tech company a couple of years ago that had a content problem. They were genuinely brilliant at what they did, working at the cutting edge of technical practice, and their blog reflected that reality. It was full of deep dives into architecture, posts about new frameworks, and thought-leadership essays on where the industry was heading. The writing was sharp, the posts were impressive, and almost none of it was connecting with their actual customers.

Their actual customers were executives who had hired the company precisely because they did not want to have to make technical decisions themselves. A CMO trying to implement a new platform, or an operations director trying to modernize a legacy system, is not in the market for reading mater-

ial about Kubernetes. What they are in the market for is someone who can take the problem off their plate and make it go away.

When I dug into how the company had ended up writing for the wrong audience, the pattern made sense. A lot of their business was coming in through referrals from other tech people who knew their work and sent clients their way. That was a great pipeline, and they had, without meaning to, optimized all their content for the referrers rather than for the clients the referrers were sending. They were writing to impress the thirty percent of their market that already understood them, while the seventy percent who most needed their services could not tell from the blog what the company did for a living.

The fix was a reset of the editorial strategy. We built proper buyer personas based on interviews with the team and with actual clients, and identified the specific language those clients used when they described their own problems. Then we rewrote the editorial calendar around topics those customers were already searching for. Instead of "How We Built a Microservices Architecture," we wrote "How to Tell If Your Tech Team Is Being Straight With You" and "Five Early Signs Your Software Project Is About to Go Over Budget." Same underlying expertise, translated into questions the audience was already asking.

Within a few months the brand started showing up in conversations it had never been part of before. The referral pipeline kept flowing the way it always had, and on top of that, the seventy percent of the market the company had been unintentionally ignoring started finding them too.

## **You Are Not the Main Character**

This is one of the hardest shifts for most business owners to make. You are proud of what you do, and you should be, but your marketing is not the right place to act on that pride.

A useful way to think about it, which I am borrowing from Donald Miller's StoryBrand framework, is to cast your audience as the main character of the story your marketing is telling, and to cast your company as the guide who shows up at the right moment with exactly what that character needs to succeed. Luke Skywalker is the hero of Star Wars. Obi-Wan is the guide. Your customer is Luke, and you are Obi-Wan.

If you turn yourself into the hero of your own marketing, the audience tunes out, because the audience was never asking about you in the first place. When you position yourself instead as the guide who helps them win, the content starts doing the work you wanted it to do.

## **Three Alignment Checks**

Knowing your audience is a starting point, but you also have to align the rest of your business around what you know. In practice, that comes down to three specific kinds of fit.

## Message-audience fit

Message-audience fit is whether your messaging speaks to what the audience cares about, in the language they would use themselves. “We use cutting-edge technology to deliver enterprise-grade solutions” is a sentence that will impress your peers in the industry and mean almost nothing to a buyer. “We make your tech problems disappear so you can focus on running your business” is a sentence that lands with a buyer, even though it is a less technically precise description of what the company does.

A quick test: read your homepage out loud, and count how many times the word “we” or the name of your company appears, compared to how many times you address the customer’s actual problem. If the ratio tilts toward you, your messaging is tilted the wrong way.

## Offer-audience fit

Offer-audience fit is whether you are selling what the audience wants to buy, as opposed to what you personally want to sell. Some businesses build a product around what the founders find interesting, and then spend years trying to convince customers to want it, which is a slow and expensive way to run a company. The trucking logistics team from the previous chapter is a good example going the other direction. They could have dug in on the “professional” email design they were originally proud of. They built what their audience wanted instead, and the business kept growing.

A quick test: pick up the phone and ask a customer why they bought from you. If the answer does not match how you describe the offer on your website, you have an alignment problem, and it is worth fixing.

### **Channel-audience fit**

Channel-audience fit is whether you are showing up in the places your audience already spends its time. If your audience lives on LinkedIn and you are pouring effort into TikTok, the quality of the content does not matter, because nobody is seeing it. The same logic holds for every other channel mismatch you can imagine.

A quick test: ask five of your customers how they first found you, and where they spend time online in the course of a normal week. If your current marketing spend does not match their answers, move it.

## **The Small Version of the Big Mistake**

You do not have to be a Fortune 500 company to get alignment wrong. I see small businesses making the same mistake all the time, in a handful of familiar shapes. A beautiful website turns out to be unusable because visual design got prioritized over navigation. Content wins compliments from competitors but baffles the actual customers. A marketing channel gets chosen because "everyone is on it" rather than because the audience is there. A tagline that is visibly not converting keeps getting defended on the grounds of being "on-brand," as if being on-brand mattered more than working.

Alignment is an ongoing habit rather than a one-time exercise. It is worth checking every quarter or so whether what you are doing out in the world is still serving the people you are trying to reach.

## Action Step

Before you move on to Chapter 4, run a quick alignment audit across the three dimensions above.

For messaging, read through your homepage, a couple of recent emails, and your most recent social posts. Ask yourself honestly whether each one is about you or about the person on the other end. If the answer is mostly about you, rewrite one piece of it to put the customer in the lead role. Keep the question "how does this answer the reader's 'what's in this for me?'" somewhere you can see it while you write.

For your offer, call three customers and ask them why they bought. Compare their answers to how you describe your product on your website and in your sales materials, and write down the places where the two descriptions fail to match.

For channels, list where you are currently spending marketing time and money, then ask five customers where they spend their time online. Where the two lists do not match, change where you are spending.

You will not get perfect alignment on every axis, and you do not need to. The goal is to close the obvious gaps between what you are saying and what your audience needs to hear.



## CHAPTER 4

# What Is Value?

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### Understanding Value From Their Perspective

A client asked me recently, with total sincerity, why we were not using AI to post four or five times a day on LinkedIn. They had just discovered the current generation of AI writing tools and saw what looked like an enormous opportunity: unlimited posts, minimal effort, maximum visibility. More content, they assumed, would automatically mean more value being delivered to their audience. That assumption turns out to be wrong in a way that matters for the rest of this book.

The reality your audience is living in is that they are drowning in marketing. The average person sees somewhere between four thousand and ten thousand ads in a given day, counting everything that qualifies, from Instagram posts to billboards to podcast reads to the logos on a coworker's coffee cup. That number is not a typo. Four to ten thousand advertising impressions, every single day, across every channel that exists.

In that environment, your next LinkedIn post is supposed to stand out. It is not going to stand out on the strength of volume, and it is definitely not going to stand out on the strength of AI-generated content that restates the same problem fifteen slightly different ways without contributing anything useful. More content, by itself, is not more valuable content. Most of the time it is just more noise added to a system that was already drowning in it.

The client I mentioned at the top of the chapter had assumed that “showing up” constantly was the same thing as providing value. Constant showing up is not, on its own, valuable. An audience that sees several thousand pieces of other people also “showing up” every day has gotten very good at ignoring all of it. What the audience needs is content that delivers something to them: an answer to a real question, a solution to a real problem, a moment where they feel understood or amused. That kind of content is what cuts through.

## **What Value Means**

The question your audience is always asking, whether they say it out loud or not, is the same one every audience has asked since the beginning of marketing. What is in this for me? Every piece of content you put out has to answer that question in one form or another. If it does not, the audience will read it as noise and treat it accordingly.

What counts as value in the audience’s eyes usually involves one or more of a few things. Solving a problem the reader is currently dealing with. Saving them time or effort on some-

thing they would otherwise have to do themselves. Teaching them something they did not know. Making them feel seen or understood. Helping them look good to their boss, or their peers, or their customers. Content that delivers any of those tends to earn attention, especially when the thing it delivers is something the reader can use today. Content that is mostly about how great your company is, or that restates a problem without offering any answer, or that got posted to keep a calendar full, tends to get ignored.

## The Four Types of Value

When you are creating content or designing an offer, it helps to think explicitly about which kind of value you are delivering. There are four broad kinds, and the strongest work often lands more than one at once.

### Utility value

Utility value is the most straightforward of the four. You help the reader do something concrete: a template they can use, a calculator that saves them from doing the math themselves, a checklist that keeps them from forgetting a step, a script they can adapt for their own situation. The test for whether something has genuine utility value is a simple one. Would somebody pay even a small amount for it? If the answer is yes, it has utility value, and it is worth putting out.

## **Time value**

Time value is what you give the reader when you do work for them that they would otherwise have had to do themselves. Curation is time value. Synthesis is time value. Turning ten hours of industry research into a five-minute summary is time value. "Here is what you need to know about this topic" beats "here is a list of everything ever written about this topic" in almost every case that matters.

## **Status value**

Status value is what you deliver when your content makes the reader look smart, informed, or ahead of the curve to the people they share it with. People share content that makes them look good by association, which is one of the underappreciated engines of how ideas travel online. Original research, surprising insights, and clean framings that turn into quotable one-liners all trade on status value.

## **Emotional value**

Emotional value is harder to manufacture and more powerful when it lands. Sometimes the most valuable thing you can offer is a sentence that makes the reader feel understood. Content that quietly says "I see the thing you are dealing with," or makes someone laugh, or gives them a moment of hope in a hard situation, can be more memorable than anything functional. Emotional value is hard to fake, which is why it tends to come from writers who have lived through the thing they are writing about.

## A Note on AI

The question of AI is everywhere right now, and it connects directly to the lesson from the trucking client in Chapter 2: build for the audience rather than for yourself. That principle applies just as much to AI-generated content as it does to over-designed email templates, so it is worth being specific about where AI fits in this picture. AI is an excellent tool for generating ideas. You can feed a model everything you know about your audience, from demographics to psychographics to pain points to the specific language they use, and ask it to produce dozens of angles you might never have come up with on your own. That kind of brainstorming, where the goal is volume so you can pick from it, is exactly what the current tools are good at.

Where AI gets you in trouble is when you try to use it for finishing rather than starting. Output pasted straight out of a chatbot has a recognizable shape and a generic feel that your audience will pick up on, sometimes consciously and often unconsciously. It has no insight of its own, no specific experience behind it, and no point of view. If you ship it, the content reads exactly like what it is. The model's job is to help you generate candidate ideas. The work of picking which candidate is worth developing, and then developing it with the kind of specificity and perspective only you can bring, is still yours to do.

## **Going Back to the Audience Work**

Building real value is not a mystery, as long as you have done the audience work from the first three chapters. The things that keep your customers up at night become your topics, and your blog posts and email series and lead magnets grow out of those. The things that excite them tell you which hooks will get attention in the first place, and the sources they trust tell you which voice to use and what proof points to include. Once all of those pieces are in hand, creating valuable content stops being a creative puzzle and becomes a matter of answering real questions with useful, honest, human answers.

## **The Brand-as-Friend Test**

I come back to the analogy from Chapter 1 whenever I am stuck on a piece of content. Brands behave a lot like people, and a brand that works well tends to behave like a good friend. A good friend does not spam you with the same message five times a day, does not talk only about themselves and never ask about what is going on in your life, and does not hand you generic advice they copied from someone else. A good friend is helpful and supportive and thoughtful. They give before they ask, they show up when it matters, and they provide value in ways you can feel. Be that kind of friend to your audience, and most of what this chapter is arguing for takes care of itself.

## Action Step

Before you move on to Chapter 5, make two short lists and keep them somewhere you can see them while you are writing.

The first list is five things your audience genuinely struggles with. Not surface-level annoyances, but real problems: things that make their job harder, frustrate them about their industry, or come up when they are venting to a colleague after hours.

For each of those five problems, write down one way you could deliver value on that problem before the reader has paid you anything. Not a sales pitch, and not a thinly disguised sales pitch either. A resource, a tip, a tool, an insight that leaves the reader better off even if they never end up buying from you.

If you can give away something genuinely useful at that level, you have earned the right to ask for something in return later. That kind of giving-first exchange is how attention gets earned, trust gets built, and business eventually gets closed. Chapter 5 is going to describe the machinery behind it in more detail.

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## CHAPTER 5

# Building Compelling Value

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### Creating Offers Your Audience Wants

I had a client a while back who was already doing everything right but did not know it. The CEO was the leading expert in a specialized corner of marketing, the kind of person you put on a main stage if you wanted the room to show up. He spoke at dozens of industry events a year, and his sales funnel ran on that speaking circuit: get invited to speak, build connections at the event, follow up with whoever seemed interested.

It worked. Speaking gigs turned into sales meetings, and conference handshakes turned into signed contracts a few months down the line. The ceiling on the model, though, was physical. He could only be in one city at a time, and there

were only so many events worth attending in a given year. What he wanted was a digital layer that could scale past the limits of showing up in person.

The fix was almost obvious once we stepped back to look at it. He already had the content. He had been refining the same set of talks for years in front of live audiences, sharpening his examples and rewriting his arguments in response to what was and was not landing. All we really needed to do was take away the requirement that someone be in the room for it. We launched a webinar series built directly on the presentations he was already giving, promoted it through LinkedIn and the company's email list, and waited to see what happened.

Over a thousand people registered for the first one. One event, a thousand registrants, and direct sales conversations booked off the back of it before the week was out.

The reason it worked is worth naming, because it runs counter to how most people think about scaling marketing. We had not built anything new. The webinar was repackaged value, content that had been sharpened over years of live delivery and was now available to people who could not get to the conferences in person. The thousand people who registered got something worth their time: expertise they could put to use, from somebody who clearly knew what he was doing. And the client got something worth his time too: a thousand people who now thought of him as the expert they would call when they needed help. That exchange, where value gets traded for trust, is the core of everything this chapter is about.

## The Permission Marketing Cycle

The framework behind the exchange is one Seth Godin described in his 1999 book *Permission Marketing*, and it is still the cleanest way to think about how digital marketing works when it works. Most businesses run the cycle backwards, asking before they give. They want email addresses and phone numbers and meeting requests, and they offer very little of real value in return. The reward for handing over your email is usually a newsletter nobody asked for, or a “free consultation” that turns out to be a sales call in a light disguise.

Permission marketing flips the direction of travel. You provide value upfront, without asking anyone for anything in return for it. Over time, if you keep providing that value, the audience starts to recognize you as somebody worth paying attention to, and trust builds. Only after the trust is built, and only when you have something specific worth asking for, do you ask.

The webinar worked because my client had been running this cycle for years without calling it that. Every conference talk he had given had been a gift to the audience, and every useful insight he had shared had been a deposit in a trust bank. By the time we launched the digital version of that work, his reputation preceded him into the registration form. The thousand registrations came out of years of accumulated permission that had finally been collected in one place.

## What Makes an Offer Compelling

A strong offer answers two questions honestly. The first is why the reader should care at all, which is really the question of what they are going to get out of engaging with whatever you are offering them. The second is why now rather than later, which is the question of whether there is any reason to act today instead of bookmarking the page and forgetting about it.

Most weak offers fail on the first question. They are vague in a way that does not promise anything specific, which is why offers like "Sign up for our newsletter" or "Learn more about our services" or "Request a demo" tend to convert at rates indistinguishable from zero. The stronger version names what the reader will get and why it will be worth their time. Instead of "sign up for our newsletter," you write something closer to "get our weekly breakdown of what is working in B2B marketing right now, with no fluff and only tactics you can use in the next seven days." The second version is specific, and specific is what the reader can make a decision about.

## The Give-First Toolbox

Three formats do most of the work when I am trying to put substantive value in front of an audience before asking for anything in return. They are not the only options, but they are the ones that reliably perform when they are built well.

## **Lead magnets**

A lead magnet is a downloadable resource that solves one specific problem for the reader. Checklists, templates, calculators, field guides, and cheat sheets all qualify. The operative word is specific. “The Ultimate Guide to Everything” collects dust on a hard drive somewhere; “The Five-Minute Website Audit Checklist” gets downloaded, opened, and used. A good lead magnet solves one clear problem and delivers value the reader can feel within the first few minutes of using it. Past that, it tends to show something about the depth of your thinking along the way, and to leave the reader curious about what else you might have that they could learn from.

## **Webinars and workshops**

A webinar or workshop is a live or recorded event that teaches the audience something useful in real time. They work best when the person running them has deep expertise, because audiences can sense the difference between genuine insight and rehearsed thought leadership. A workshop that teaches attendees something they can use whether they ever hire you, with plenty of room for Q\&A and interaction during the event, is one of the strongest tools in this entire book. The workshops that tend to perform best share a couple of traits past the teaching itself: a recording goes out to the people who could not make the live session, and the follow-up sequence carries more useful content rather than a conversion pitch.

## Free consultations

The free consultation is one of the most powerful offers in this toolbox when it is run properly, and it is part of the reason digital marketing has a reputation problem when it is not. Most of what passes for a free consultation is a sales call with a thin educational wrapper on it, and the prospect can sense that inside the first two minutes. Whatever trust existed before the call tends to erode before the relationship has really started.

A real consultation delivers value whether or not the prospect buys anything. The prep work matters: you come in with insights that are specific to the person sitting across from you, offer advice they can use whether or not they hire you, and treat the call as a chance to demonstrate the quality of your thinking rather than as a chance to pitch. The quality of the thinking does the selling, if you let it.

## Building Your Core Offer

Go back to the audience work from the first three chapters and look at the pain points you wrote down. Pick the one that is most painful for your customer, the one that keeps them up at night, and ask yourself what you could give them that would genuinely help with that one problem.

The give has to be a complete piece of value, not a preview or a sample that reveals the rest behind a paywall. What the reader needs is something they can take home, use today, and see results from, regardless of whether they ever come back to buy anything else from you.

I know this feels risky, and the question that always comes up at this point is what happens if someone takes the free thing and never buys the paid thing. Some people will do exactly that, and that is fine. The ones who experience your value directly, and who come away thinking you knew what you were doing, tend to become your strongest customers and your best referrers over time. The math works out in your favor as long as the give is good.

The aim of the whole approach is straightforward. You deliver enough substantive value upfront that, by the time the reader is ready to buy anything in your category, you are the obvious vendor to buy it from. That is a very different exercise from trying to trick someone into a sales funnel, and it compounds over time in a way that manipulative marketing never will.

## **Action Step**

Before you move on to Chapter 6, create one “give” piece.

Look back at the problems your audience is dealing with, pick one you can help with directly, and build something useful around that problem. It could be a guide, a checklist, a template, a worked example, a webinar outline, or any other

format that fits the problem you are solving. Spend proper time on it, and make it good enough that you would be proud to put your name at the bottom.

Then give it away in exchange for nothing more than an email address, and see what happens. That is how you earn the right to ask for more later.

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## CHAPTER 6

# Measuring and Refining Value

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### How to Know If It's Working

A couple of years ago I ran a LinkedIn project for a B2B client who wanted to turn five years of blog content into posts on the platform. LinkedIn was the right channel for their audience, so we built out a content calendar and got creative with it, running short-form video, custom-graphic carousels, quote cards, the whole modern LinkedIn playbook. We launched all of it at once and then watched the performance data come in.

One format outperformed everything else by a wide margin, and it was not the one I had expected.

The highest-performing format turned out to be the simple blog-announcement post: a headshot of the author, a sentence or two of introduction, and a link to the article in the

body of the post. There was nothing fancy about it, and it technically broke a common LinkedIn best practice, because the platform tends to penalize posts that include external links. We had pushed back internally on whether to include the link at all. My client insisted, so we did, and those posts worked better than everything else we ran.

Once we looked carefully at why, the answer was not mysterious. The blog-announcement posts were the ones employees engaged with. When we posted a carousel about industry trends, most of the employee base scrolled past without reacting. When we posted a blog announcement featuring a colleague's photo and a plug for their work, employees liked it, shared it, and left congratulatory comments in the replies. That burst of internal engagement signaled to the LinkedIn algorithm that the post was worth showing to more people, the reach extended well beyond the employee base, and the simple format ended up outperforming the carefully designed content because it had triggered real human behavior at the start of its life.

There are two takeaways from that experiment that have stuck with me. The first is that employee engagement on company content matters more than almost anyone thinks it does, and it is worth investing in directly. The second is that people like celebrating other people. Posts that feature humans, with faces and names and specific accomplishments, will almost always beat posts that are about abstract ideas or products. We never would have figured any of this out without looking at the data.

## Data Beats Gut

Your instinct about which piece of content is going to perform is wrong more often than it is right. You will spend five hours crafting a post you are certain will land well, only to watch it fall flat. A week later, something you threw together as an afterthought will pull in more engagement than your team has generated in months. The only reliable way to know what is working is to measure it, which sounds obvious and turns out to be the step most companies skip.

The catch is that what you measure depends on what you are trying to do. Not every metric is equally meaningful at every stage of a relationship with a customer, and a metric that is revealing at one stage can be misleading at another.

## Measuring by Stage

There are six stages in the journey from stranger to repeat buyer, and a clear set of metrics goes with each one. Your job is to make sure you are watching the right numbers for the stage of the relationship you are trying to move forward.

### **Awareness**

The question at the awareness stage is whether your audience is seeing you at all. You are introducing yourself to people who have never encountered your company, and the goal is pure visibility. The metrics that matter here are impressions, reach, video views, website visits from new users, and

follower growth on whichever platforms you live on. Engagement is not the right thing to optimize for yet; the point at this stage is just to get noticed.

### **Interest**

Once people know you exist, the next question is whether any of them are paying attention. The metrics at the interest stage are about leaning in rather than getting seen. On social platforms, the signals worth watching are likes, reactions, and comments. Video tells you whether people stayed through the content, with watch time and completion rate the two numbers to follow. Your website contributes time on page, pages per session, and scroll depth. Email adds open rates, click-through rates, and net new newsletter subscriptions. What the whole set is asking is whether your audience is spending time with you voluntarily, or just walking past.

### **Consideration**

At the consideration stage the prospect knows who you are, has engaged with some of your content, and is starting to evaluate whether you can help with their problem. The metrics here are intent signals: downloads of your lead magnets, webinar registrations and attendance, visits to your pricing and service pages, email replies, and demo requests. Watch for the behaviors that indicate somebody is evaluating you rather than just consuming you.

## **Conversion**

The conversion stage is where marketing output stops being measurable in engagement terms and starts being measurable in money. Sales-qualified leads, proposals sent, close rate, revenue, customer acquisition cost, and return on ad spend all belong here. If you cannot connect your marketing effort to these numbers, you cannot really claim the marketing is working, regardless of how healthy the upstream metrics look.

## **Retention**

Most companies stop measuring the customer the moment money changes hands, which is where the first of the two post-purchase stages gets overlooked. Retention is about whether the customer stays, renews, expands their spend, or quietly leaves. The metrics here are churn rate, renewal rate, expansion revenue, time to second purchase, and any usage or engagement signals that would predict a departure before it happens. A program that acquires new customers well while losing existing ones is running a leakier machine than it looks, and retention is usually much cheaper than acquisition, which makes this the stage with the biggest quiet leverage for most businesses.

## **Advocacy**

The second post-purchase stage, which most companies measure even less than retention, is whether your customers become part of your marketing. At the advocacy stage you are tracking referrals, reviews, Net Promoter Score, participa-

tion in case studies, and organic sharing of your content by people who were not paid or asked to share it. Advocacy is where the compounding happens in a healthy marketing system, and the companies that win long-term are the ones that take this stage as seriously as they take awareness.

## **Vanity Metrics and Real Metrics**

A warning about the numbers you choose to report on. Some metrics feel good to present and do not connect to any business outcome. Follower count is one of those metrics when the followers never engage or buy anything. A big page-view number is meaningless if the visitors are bouncing off within seconds of arriving. Impressions are impressive only if somebody is clicking through to whatever the impression was for. These are fine to watch at the awareness stage, where visibility is genuinely the point, and they become increasingly misleading the further down the funnel you go.

The real metrics are the ones that connect directly to the outcomes your business cares about: leads generated, meetings booked, pipeline influenced, cost per acquisition. If your CEO asks what the marketing team has produced this quarter and the answer is about follower count or impressions, you have a problem that is worth fixing before the next quarterly review.

## Iteration

You will not get any of this right on the first try, and nobody ever has. The goal of a marketing program is to put something out, watch the data, notice what surprised you, adjust based on what you saw, and try the next thing. The LinkedIn test from the beginning of this chapter is a small example of that process working. I never would have predicted that an un-styled blog-announcement post would outperform our carefully designed carousels. Once the pattern was clear, though, there was no value in arguing with the data. We adjusted the calendar and did more of what was working.

The companies that win at this, in my experience, are the ones that learn fastest from what they have already put into the world. A strong plan matters less than a strong feedback loop.

## Feedback Loops

Data tells you what is happening; feedback tells you why. You need both, and feedback is the one most marketing programs do not bother to collect.

Build feedback moments into the ordinary rhythm of the marketing program. A webinar should end with one question for attendees, asking what was most valuable to them and what they would want covered next time. When a sales call ends with a new customer saying yes, take ten minutes to ask them what almost stopped them from taking the meeting in the first place, and what finally convinced them to say yes. When a

project wraps up, the exit conversation with the client should include what they would have had you do differently, along with what they would tell someone who was considering working with you. The website itself can carry a one-line feedback widget that asks whether the visitor found what they came for. You will be surprised at how often people tell you the truth when you give them a small, low-effort way to do it.

## Action Step

Before you move on to Chapter 7, do two things for the next campaign or content push you run.

First, pick three metrics to track for the campaign, and stop at three. Decide before you launch what success looks like for each of them in numerical terms, write those targets down somewhere you can find them again, and resist the pull to measure everything you could theoretically measure. The temptation to watch ten metrics at once is always present and is almost always a mistake.

Second, set up one feedback loop around the same campaign. That might be a follow-up survey, a specific question you ask the first five customers who respond to something, or a short call with two or three people who engaged deeply. Whichever form it takes, build the habit of asking why the numbers are what they are, rather than only watching what the numbers are.

Data without feedback is incomplete, and feedback without data is guessing. A marketing program running on both is the one you are trying to build.

## **End of Section Two**

You now have the three pieces that make up the value half of this book: how to identify your audience, how to listen to them once you know who they are, and how to create and measure real value on their behalf. What you do not yet have is a system for delivering all of that consistently, without it collapsing the moment you stop paying close attention to it. Section Three is about building that system.

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## CHAPTER 7

# The Power of Repeatable Processes

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### Why Systems Beat Tactics

Let me describe a client I worked with recently. They were running two separate email platforms that did not talk to each other, and two CRMs that also did not talk to each other. Their client communication was a mix of Teams, Slack, texting, and email, sometimes all four in the same conversation with the same person. Some video calls happened in Zoom, others in Google Meet, and internal meetings ran through Teams, because nobody had ever made a decision about which tool they were going to use. People on the team used different note-taking apps, nobody owned any of the software, and

most remarkably, the website they were driving traffic to had no clear path for a new prospect to sign up and connect with the sales team.

They were a successful company, which is the part that surprises people.

The more work I have done with clients over the last few years, the less this kind of setup surprises me. It turns out to be depressingly common, and something close to a default state for growing businesses that never paused to design the machinery underneath their growth.

## **Most Businesses Do Not Have a System**

What most businesses have is a scattered set of activities, each of which may work on its own and none of which are connected to each other in any deliberate way. There is no documented process for taking a stranger and turning them into a prospect, no agreed-on handoff from that prospect to a qualified lead, no playbook for moving a qualified lead into a sales conversation, and no structure at all for turning a new client into a retained customer, let alone a retained customer into somebody who refers others. The whole thing is a series of disconnected moves that happen to work sometimes.

Without those connections in place, some good outcomes still happen by accident. Loyal customers show up occasionally, referrals arrive unexpectedly, and people sometimes find you in spite of the chaos. All of that is worth something, but it is a fraction of what a working system would produce.

The thesis of this book, hopefully by this point obvious, is that the difference between the companies that grow reliably and the companies that do not is the presence or absence of a system. The Introduction called that the difference between marketing and gambling. Everything from this chapter forward is about building the actual system.

## What a System Is

A system, in the sense that matters for this book, is a process that is repeatable, documented, and measurable, and that produces consistent results over time when it is run. Repeatable means you can do it a second time and a fiftieth time without depending on any one person's memory or heroic effort. Documented means it is written down clearly enough that somebody new to the organization could pick up the instructions and run it the way you would have. And measurable means that when you finish running it, you can tell whether it worked, because you knew what success looked like before you started.

Think of a marketing system as a machine. You design it, build it, maintain it, and improve it over time, which is four distinct kinds of work: figuring out how the parts fit together, constructing and connecting them, keeping the thing running when parts break, and making the whole system faster or cheaper to operate as you learn.

What you do not want, and what most companies end up with by default, is a junk drawer of disconnected tactics: activities thrown together with no clear connection between any of them, no measurement around what they produce, and no way to know what is working or why.

## **The Fix Starts With Subtraction**

With the client I described at the top of the chapter, the first move was subtraction rather than addition. We consolidated to one CRM, one email platform, one tool for client communication, and one tool for video calls, and we wrote down who was responsible for each. That alone recovered a surprising amount of organizational energy, because the team had been spending real time every week deciding which tool to use for which conversation.

Once the tech stack was consolidated, we got clear on three questions that every marketing system has to answer. Who are we talking to? What do those people care about, and how do we communicate that to them? And how are we going to reach them at different points in their journey with us? We answered each of those in real detail, using the audience work from the first three chapters of this book. What we ended up with was deliberately less sophisticated than what we had started with, and it worked better for that exact reason.

That is what the foundation of a marketing system looks like in practice. You get clear about what you are doing and why, and you build the simplest version of the thing that will work, before you start adding sophistication on top of it.

## The Funnel, Stage by Stage

Every prospective customer moves through roughly the same sequence, whether or not you have built a system to meet them at each step. This is the same six-stage funnel I described in Chapter 6. Chapter 6 was about what to watch at each stage. This chapter is about what to do at each stage, and how to build the machinery that does it.

### Awareness

At the awareness stage, you are trying to get in front of people who have never heard of you. The practical question is how. For most B2B businesses, the answer is some combination of industry events, paid social ads, search and content marketing, PR, and referrals. For B2C the specific mix is different, but the principle is the same. You pick the channels where your audience is, you decide how you are going to show up on those channels, and you track how many new people you are reaching on each one.

### Interest

Once people know you exist, the next job is to give them a reason to care. At the interest stage you are speaking to the pain points, aspirations, and identities you identified in the

audience work, and you are typically giving away something of real value to earn the right to keep talking. A lead magnet, a webinar, a piece of substantive content: the format matters less than the substance, as long as the reader comes away feeling like they got something useful from the exchange.

### **Consideration**

At the consideration stage, the prospect has put you on their list and is comparing you to alternatives. This is where the proof points start to matter: case studies, testimonials, data about outcomes you have delivered for similar customers, and content that addresses the objections a skeptical buyer would raise before they raise them. The job at this stage is to build the case that you are the right choice without sounding like you are trying to build a case.

### **Conversion**

At the conversion stage, the prospect is ready to buy and only needs a reason to act now rather than later. The questions here are operational. What is the offer, what is the call to action, and how much friction sits between the prospect's interest and the next step they need to take. This is where a lot of businesses drop the ball. Leads come in and sit in an inbox for three days before anyone replies, which is plenty of time for momentum to die. Reduce the friction, make the next step obvious, and follow up inside an hour or two rather than inside a week.

## **Retention**

Most marketing programs stop thinking about the customer the moment they sign a contract, which is a mistake. Retention is cheaper than acquisition, usually by a factor somewhere in the single digits and sometimes larger, and the customer experience after they buy is what determines whether they grow with you, renew with you, or leave quietly. The mechanics of retention, from onboarding to customer success to small well-timed check-ins, are what determine the outcome. The goal is to keep the customer engaged, positive, and heard, so that when the renewal question comes around, the answer is obvious to them before you have to ask for it.

## **Advocacy**

The last stage is where your retained customers start helping you grow the next wave. Advocacy covers referrals, testimonials, case studies, community, reviews, and any other way your existing customers become part of your marketing program. The practical job at this stage is to make it easy for a happy customer to refer you to someone else, to ask them for reviews and testimonials at the right moments, and to feature their success in your own content when it is relevant. The underappreciated truth about advocacy is that it compounds. The first good case study is useful, the fifth one is valuable, and the fifteenth one is the difference between a three-month sales cycle and a three-week one. That compounding only happens if you have a system for activating it.

## Building It In Practice

Turning the stages into a working system is the operational work of the next two chapters, but the outline is worth naming here. Five steps, roughly in this order.

First, map the current state. For each stage of the funnel, write down what you are doing right now, what is working, what is broken, and what is missing entirely. Do this honestly, because the point of the exercise is to find the gaps, not to reassure yourself that the gaps are small.

Second, identify the biggest gap. You almost certainly cannot fix everything at once, and trying to fix everything at once is usually how these projects stall. Look at where you are losing the most people and where the friction is worst, and start there.

Third, design the process for that stage. Document what should happen in enough detail that somebody else could run it. Name who is responsible for each step, which tools they use, when each piece happens relative to the others, and what success looks like at the end.

Fourth, set the KPIs. You already know from Chapter 6 that the metrics should match the stage. Pick one to three metrics for the stage you are building, write them down, and commit to tracking them.

Fifth, launch, review, and refine. Run the process long enough to generate real data, look at the numbers, talk to the team and the customers about what they experienced, and adjust based on what you find, and then run the loop again.

## Common Objections

I hear the same three objections every time I try to move a client toward a documented system.

The first is that they are too small. “Systems are for bigger companies; we are too early to need this much process.” If anything, the reverse is true. Systems are about consistency rather than scale, and a one-person business benefits from a documented approach at least as much as a hundred-person company does. The only thing that really changes with size is the number of moving pieces a system has to handle.

The second is that systems kill creativity. The worry is that once the process is written down, the creative work dries up. In practice the effect is the reverse. Systems handle the repetitive work, like follow-up emails, status reports, and the welcome sequence every new customer gets, so that the creative energy can go to the decisions that genuinely need it. You do not want to reinvent your follow-up email every time somebody downloads a lead magnet. You want a template that works, so that the strategic thinking can go into what the next campaign should be about.

The third objection is usually some version of “this is how we have always done it.” That objection is inertia dressed up as an argument. If the current way is producing the results you want, there is no reason to change it. If it is not, then continuing to do the same thing and hoping for a different outcome is exactly the problem we are trying to solve.

## Action Step

Before you move on to Chapter 8, pick one broken process in your current marketing. It could be leads that come in and sit without a follow-up for days, social posts that go out on no particular schedule, a path from “prospect” to “meeting booked” that nobody on the team can articulate, or customers who buy from you and then never hear from you again for six months. If you have more than one of those, pick the one with the biggest obvious cost.

Then write down two things on one page: what happens with that process right now, described honestly, and what should happen instead. That single page is the first piece of your system, and Chapter 8 will turn it into a working process.

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## CHAPTER 8

# Building the System

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### A Step-by-Step Guide

B2B businesses have a particular talent for overcomplicating their marketing. I have worked with clients who were simultaneously running podcasts, writing blogs, hosting webinars, and posting on several social platforms, and at first glance it looked impressive. Look closer and none of it connected into anything that moved people through a funnel. Content happened in one place, ads happened somewhere else, events happened somewhere else again, and there was no measurement of how one piece led to the next or any defined path from an initial point of contact to a booked meeting. What the company had built was a pile of activity rather than a program. The fix in every case was subtraction before addition.

Let me give you one example that worked particularly well, because the setup was simple enough to describe in a paragraph. The client had an email list they had built over several years, thousands of contacts who had interacted with the company at some point and then gone quiet. They were not cold prospects and they were not current customers either, which is a group most marketing programs ignore entirely. We uploaded that list to Meta as a retargeting audience, produced a set of fifteen-second video ads built around a hook-problem-tease-solution-CTA structure, and pointed those ads at a single landing page. Each ad was written for a specific buyer persona, so somebody in that segment who saw it would recognize themselves in the message. The landing page carried the same messaging in more detail and offered one thing: a free consultation with an expert on the team, with one form to fill out and one clear next step.

Three pieces, end to end: a retargeting audience, persona-specific short-form ads, and a focused landing page with a single offer. The system was simple, the metrics were clear, and the meetings started booking.

## **Simple Before Sophisticated**

The point of that example is that a first marketing system does not need to be sophisticated, but it does need to be connected from end to end. Once you have a single audience, a single message, a working offer, and a clear path from one to

the next, you have a system you can measure and iterate on. Sophistication comes later, once the simple version is producing results.

## Building Your System

What follows is a step-by-step walkthrough of how I build a first system with a new client. It is the operational version of the five-step outline from the last chapter.

### **Step 1: Audit what exists**

Before you build anything new, understand what you already have. Walk through every piece of marketing you are currently running and write down, for each one, what it is, where the leads from it are going, what happens after someone shows interest, where people tend to drop off, and what is being measured about it. Do this honestly. Most businesses discover in the process that they have pieces that do not connect: a blog nobody reads, an email list nobody nurtures, a form that submits to an inbox nobody checks. Seeing the full picture on one page is usually the most useful thing the audit produces.

### **Step 2: Identify the biggest bottleneck**

You almost certainly cannot fix everything at once, so start by finding the place where you are losing the most people or energy in the current setup. Map your current activity against the six funnel stages from Chapters 6 and 7 (awareness, interest, consideration, conversion, retention, advocacy) and ask where the biggest gap sits.

The bottleneck could be any number of shapes. Maybe plenty of people visit your website but very few fill out a form, which points at a conversion problem. Or leads are coming in and sitting in an inbox for three days before anyone replies, which is a sales-handoff problem. Or customers buy from you once and never come back, which is a retention problem. Whatever shape the bottleneck takes in your setup, pick the one that is costing you the most right now, and focus your system-building there first.

### **Step 3: Document the ideal flow**

For the bottleneck you picked, write down what should happen, in enough detail that somebody new to the team could read the document and run the process without needing to ask questions. Start with the trigger, which is the moment the process begins: somebody filling out a form, downloading a resource, or booking a meeting. Describe what happens immediately after the trigger, in minutes rather than days, and name the person or role responsible for each step. Identify the tools involved at each stage and the handoffs between them. And close with the measurement criteria, so that when the process runs, you can tell whether it worked.

The bus-factor test is a useful sanity check. If you were hit by a bus tomorrow, could another person on your team follow your documentation and run this process the way you would have? If the answer is no, the document is not done yet.

#### **Step 4: Choose your tools (and keep the stack small)**

A reliable marketing system is usually built on a small number of tools that fit together well, not a sprawling stack of best-in-class picks that each do their own thing. For most lead-generation systems, the basic stack is five pieces: a landing page builder, a form tool, an email automation platform, a CRM, and a calendar-booking tool. Specific options worth looking at include Carrd, Leadpages, or Unbounce for landing pages; Typeform or Tally for forms (or whatever is native to your landing page tool); Mailchimp, ConvertKit, ActiveCampaign, or HubSpot for email automation; HubSpot or Pipedrive for the CRM (even a well-organized spreadsheet works as a starting point); and Calendly, Cal.com, or HubSpot meetings for the calendar side.

What you are optimizing for at this step is connectivity. Average tools that talk to each other cleanly will outperform premium tools that do not integrate. A form submission should trigger an email, the email should carry a calendar link, the booking should create a CRM record, and every handoff should happen automatically, without anyone on the team manually copying information from one system to another and without any leads falling through the cracks that form between tools that were never meant to talk to each other.

#### **Step 5: Build the connections**

This is the step that turns a set of tools into a system. Most marketing tools talk to each other either natively or through a middleman like Zapier, Make, or the automation features built

into a CRM like HubSpot. The practical work is mapping the trigger-to-action flow and setting up the automation so the handoffs happen without any human in the loop.

A typical flow for a simple lead-to-meeting system looks something like this. An ad click sends the visitor to a landing page, where the form submission fires a thank-you page with a calendar link on it. An automated email confirmation follows a few seconds later with the same link, and a CRM record gets created and assigned to the appropriate sales rep. If the prospect has not booked a meeting within twenty-four hours, a reminder email goes out. If they still have not booked after three days, a follow-up task lands on the sales rep's queue.

Once you have it set up, test the flow yourself. Fill out your own form with a real email address, walk through each step end to end, and time how long each handoff takes in practice. You will usually find one or two things that do not work the way you intended, and finding them in a test run is much cheaper than finding them with a real prospect.

### **Step 6: Launch, measure, and iterate**

Start by driving a small amount of traffic to the new system. See how it performs in the wild before you scale anything. Track the five numbers that matter most for a lead-generation system: how many people see the ad, how many click through, how many fill out the form, how many book a meeting, and how many of those meetings turn into customers.

When something is not working, the metrics will tell you where in the funnel the problem is sitting, which is exactly the information you need to fix it.

## **A Concrete Example End to End**

If you want to see the whole picture in one place, a simple lead-generation system might look roughly like this. The traffic source is a set of retargeting ads on Meta or LinkedIn pointed at a list of around a thousand known email contacts. The ads themselves are fifteen-second videos built around the hook-problem-tease-solution-CTA structure I described earlier, running at a modest daily budget to start, somewhere in the range of twenty to fifty dollars a day.

The ads drive traffic to a landing page with a single focus. The headline speaks to the specific pain point the ad was teasing, and a short list of three to five bullet points describes what the prospect will get in return for signing up. There is one form on the page, collecting name, email, and company, and one offer to go with it: a free consultation with an expert on the team.

Behind the form sits an automated email sequence. The first email goes out immediately with a thank-you message and a calendar link. Two days later, the second email delivers a piece of real value, whether a useful resource, an insight, or a short case study that builds on what the prospect already engaged with. On day five, a third email makes a direct ask and includes the calendar link again. The fourth and final email, on day ten, is the polite last follow-up before the sequence ends.

On the sales side, the rep who owns the meeting pulls full context from the CRM before the call, follows up within twenty-four hours of a booking, and references what the prospect has already engaged with during the conversation itself. Every step connects to the previous step automatically, and every step is measured. That is a complete marketing system at the simplest scale.

## Action Step

Before you move on to Chapter 9, build the smallest possible version of a system this week. You need three pieces: a landing page that presents a single offer, a form that captures contact information from anyone who wants it, and an automated email that delivers what you promised and suggests an obvious next step.

Three pieces, connected, working end to end. That is a system in its smallest form, and once you have built it, everything that comes after it is iteration on something that already exists.

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## CHAPTER 9

# Scaling Smart

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### **Evolving Your Systems Over Time**

A few years ago I worked with a company that looked like a marketing success story from the outside. They were running webinars as a thought-leadership channel and getting in front of dozens of decision-makers from Fortune 500 companies. Their email list was growing by thousands every month. Attendance numbers were strong, open and click rates on the follow-up emails were healthy, and the recorded versions of the webinars were pulling in thousands of views each. On paper, the whole program looked like it was working.

The problem was that none of it was closing any new business.

What had happened, when we dug into it, was that they had built half a funnel. The webinars themselves were excellent: genuinely compelling content that positioned the company as

an expert voice in their category, with audiences that were engaged and leaning in by the end of each session. But everything past that point was missing. After a webinar ended, the sales team would cold-call every attendee, which annoyed people who had signed up for educational content and had not asked to be sold to, and discouraged them from registering for the next webinar. When the team did not cold-call, they sent generic mass newsletters to the whole list, with no personalization for role or industry or where the recipient was in the buying process. There was no qualification, no nurturing, no real attempt to meet anyone where they were.

A funnel built that way cannot convert the interest it is generating at the top. The funnels that do work share a common property, which is that the audience experiences the content at each step as if it had been written for them: the person who just discovered you gets different content from the person who is comparing vendors next week, the VP of Operations at a manufacturing company gets different messaging from the CX Director at a software company, and the follow-up sequence reads like a continuation of the conversation rather than a random cold outreach.

What that requires is a complete marketing system rather than just the top layer of one. My client had built the awareness layer beautifully and then forgotten to build anything underneath it. Awareness on its own, without nurture or qualification, is essentially noise that costs money to produce. The rest of the machine still has to exist.

## **Systems Have to Evolve**

The system that gets a company to a million dollars in revenue is rarely the same system that gets it to five million, and the system that works today may not work three years from now. Markets shift, audiences shift, channels rise and fall, and the assumptions underneath your current marketing program will quietly stop being true at some point without telling you.

I have seen this break a lot of businesses. Many of my B2B clients used to depend almost entirely on in-person events for new customer acquisition, including industry conferences, trade shows, and networking dinners. That was the entire pipeline. Then the pandemic happened, and for two and a half years they could not do any of it. The businesses that had built any digital presence, any content engine, any way to reach an audience without being in the same room, made it through. The ones that had not, and that waited for “normal” to come back, lost ground, and in some cases lost the company.

The acceleration of digital marketing as a discipline since 2020 is largely a consequence of that disruption. Companies were forced into the digital space, realized how it could help them scale beyond what events alone could do, and most of them have not gone back.

## **Scaling Before You Have To**

The best time to build your next system is before you need it.

Going back to 2011, which feels like ancient history at this point, I helped a client scale their marketing by turning their in-person thought-leadership summit into a podcast. This was a more radical suggestion at the time than it sounds now, because podcasts had not yet become what they are today, and I was a kid in my twenties suggesting it to people much further along in their careers than I was. We launched it anyway, and the results were dramatic.

In-person events are expensive and limited to the room you are in. A digital interview, recorded once and then edited and repurposed into blog posts, social clips, and newsletters, requires a laptop and a quiet space. The format also expanded the pool of potential guests dramatically, because asking somebody for a thirty-minute recorded conversation is a much easier ask than asking them to fly across the country for a keynote. The client built relationships with leaders at Fortune 500 companies through the podcast, and a number of those relationships eventually turned into business. The expertise behind the podcast was the same expertise that had been behind the summit, packaged into a format that could scale.

## **When to Scale**

Not every system needs to scale, and some need to be fixed first. The distinction matters because scaling a broken system makes everything worse: you get more of whatever was not working at the smaller scale, faster, and you spend more money getting it.

The conditions that suggest a system is ready to scale tend to be consistent. The current version is producing real results, the underlying model has been proven, and you have the resources to maintain quality if the volume goes up by an order of magnitude. The conditions that suggest a system is not yet ready, despite the temptation to scale anyway, are roughly the opposite. The current version is not producing results, and what looks like a need to scale is really a need to fix something that more volume will only worsen.

The webinar client from the start of this chapter is a good example of the distinction. They needed to complete the funnel before they could meaningfully scale what was working at the top of it. More webinars would have been a louder version of the existing problem. The fix had to live downstream of the webinars, in the part of the funnel that was missing.

## **How to Scale Intentionally**

When a system is genuinely ready to scale, three moves do most of the heavy lifting. There is a fourth element that matters too, which is automation, but automation was the subject of Chapter 8 and most of the scaling work there is to lean harder on the automated handoffs you already built as volume goes up. What sits on top of that work is adding channels, adding segments, and repurposing content across the channels you already have.

### **Add new channels**

Once one channel is working reliably, add another that complements it. The specific next move depends on what you are already doing. LinkedIn programs often expand into email; email programs often add paid ads to amplify what is already landing; webinar programs often extend into podcasts or long-form newsletters to reach people who would not sit through a live event. Pick the new channel based on whether it reaches more of your audience or reinforces what is already working in another channel. Trendiness is a poor reason to expand into a new place.

### **Add new segments**

Once you have nailed one buyer persona, the next move is usually to target an adjacent one. The product is the same, but the message has to change to fit the new audience. The campaign that worked for VPs of Operations may need different hooks for IT Directors at the same companies, even if both end up purchasing the same thing. Segmentation can run by role, by industry, by company size, or by where the prospect is in their buying journey, and the more relevant the segmentation gets, the better the work tends to perform.

### **Add content repurposing**

Most of the work in producing content sits in the original creation. Once that work is done, the same piece of content can typically be turned into many forms. A single hour-long webinar can become a written summary, a series of social clips, a multi-email sequence, a podcast episode, and a download-

able lead magnet. Building once and distributing in many places is one of the few real economies of scale available to a content program.

## **Warning Signs the System Is Breaking**

A handful of patterns usually signal that the system has either outgrown itself or is starting to break under the weight you have put on it. Lead volume going up while conversion rates stay flat usually means something in the middle or bottom of the funnel has stopped working at the new scale. Response rates dropping steadily over time usually means the messaging has gone stale or the audience has been over-emailed. The team being unable to keep up with what the system is generating means processes that worked at lower volume have become bottlenecks at the new one. Quality declining as you push for higher volume is the most common sign of trouble, and customer complaints rising is the lagging indicator that confirms it.

When you see these signs, pause and audit. Whatever is breaking needs to be fixed before any further scaling, because scaling a broken thing only produces more breakage faster.

## **The Quarterly System Review**

Schedule time once a quarter to step back and evaluate the system as a whole rather than individual campaigns inside it. The questions worth asking each time are roughly the same.

What is currently working that you should be doing more of? What is not working that you should fix or stop? What has changed in your audience, your market, or your competition that the system is not yet accounting for? Where is the biggest current bottleneck in the funnel? And what is one thing you could add or improve in the next ninety days that would move the whole system forward?

You do not need to overhaul everything every quarter. You do need to pay attention at the system level, because systems decay, markets shift, and what worked beautifully last year may not work next year for reasons you have not noticed yet.

## **A Note on AI**

A short note on AI, because the question of how to use it is everywhere right now and it belongs in this chapter rather than the earlier ones, since AI shows its real value at scale.

AI is changing what is possible for a small marketing team. The kind of output that used to require a team of fifteen can in some cases be produced by two or three people with the right tools. AI is good at generating content ideas at volume, repurposing one piece of content into many formats, personalizing messaging across segments, surfacing patterns in data that would take days to find by hand, and automating routine communication that does not require nuance.

The crucial thing to know about AI is what it can and cannot do for a marketing program. It can scale output: it can write a hundred emails, repurpose your content into a dozen formats,

and draft segment-specific variations of the same message. What it cannot do is decide who those emails should go to, or why those people should care, or what offer would move them. That work, the strategy underneath all the production, is still yours. The shorthand I use is to let AI multiply the output, and to keep human judgment focused on whether the output is worth multiplying.

## Action Step

Before you move on to the conclusion of the book, do two things.

First, schedule a recurring quarterly system review on your calendar starting now, thirty minutes each time. Use the five questions from the section above as the agenda for the first review, and revise that agenda for yourself in the quarters that follow.

Second, identify one area of your current system that is ready either to scale or to simplify. It might be adding a new channel, automating a manual process, or cutting something that has not been working and is consuming time you could spend somewhere more productive. Pick one and do it this quarter.

Growth is less about doing more of everything than about doing more of what is working, and building the systems that can handle the increased volume without breaking under it.

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## CHAPTER 10

# The Invitation

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You made it to the end of the book.

What you have at this point is the same framework I use with clients who pay me real money to help them grow. The whole thing comes down to three ideas, and neither I nor anyone else in this field is going to give you a fourth.

The first is knowing your audience specifically. Understand who they are, what they want, what keeps them up at night, and what gets them to say yes to a purchase in the first place.

The second is providing value before you ask for anything in return, which is how attention gets earned in a market where every audience is drowning in noise. Behave more like a helpful friend than a salesperson, and the audience will notice.

The third is building systems that connect your marketing efforts into a repeatable machine. Plan it, build it, measure it, and refine it over time, rather than leaving the whole program as a collection of disconnected tactics that happen to work sometimes.

Each of the three is simple to describe and much harder to execute in practice, which is why most businesses get stuck in the gap between understanding the framework and doing the work. The good news is that once you start doing the work, it compounds. A system that is producing a small amount of pipeline in month one is usually producing several times that by month twelve, as long as you keep paying attention to it.

## **Go Build Something**

Some of you will finish this book and go build a system yourself. You will sit down with your team, map your audience, write down what value you could give away before anyone has paid you anything, and build the smallest end-to-end funnel you can stand up. You will measure it, find the things that surprise you, and iterate on what you find.

That is exactly the outcome I hope for. The framework in this book is not proprietary, and nothing about it requires hiring anyone. It is the fundamentals, applied with discipline over a long enough period of time for compounding effects to show up.

Start small. Build the first system around a single audience with a single offer and get the end-to-end flow working before you try to expand into anything else. The businesses that win at this are the ones that built systems early and kept tending them. Budget and tools matter far less than most companies assume.

## If You Want Help Instead

The other path is to bring in somebody who already builds these systems for a living. If that is the path that makes sense for you, and the person you are considering is me, here is what that looks like.

My company, Acculead, works with small and medium-sized businesses to build marketing systems that produce measurable pipeline. Our engagements are usually a blend of strategy (getting clear on who the audience is, what value we can give them, and how the system needs to run) and execution (building the campaigns, the landing pages, the automation, and the measurement layer on top of it). We use modern AI tools to do at a smaller scale and a lower cost what used to require a much larger team.

If you are the decision-maker at a small or medium-sized business, and you are serious about building real marketing infrastructure rather than running one more set of disconnected campaigns, I would welcome the conversation. The best way to start it is to visit the landing page, answer a few short questions about your business, and book a time on my calendar if we look like a good fit for each other.

You can also email me directly at [thomas@acculead.co](mailto:thomas@acculead.co).

[QR CODE PLACEHOLDER]

## **A Final Thought**

Marketing is not magic, and it is not luck, and it is very far from a scam. It is a system. The businesses I respect most, across every category I have worked in, are the ones that figured that out and committed to the work of building the system anyway. If I have done my job in this book, you now have the blueprint. The rest is up to you.

Thank you for reading, and if you build something, I would love to hear about it.

Tom Zandstra

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## **About the Author**

Tom Zandstra is the founder of Acculead and teaches advertising at the graduate and undergraduate levels at Calvin University. For more than a decade he has helped small and medium-sized businesses build marketing systems that connect them to their audiences and drive measurable growth.

He believes marketing should be simple, measurable, and focused on providing genuine value to the people on the receiving end of it. When he is not teaching or consulting, he is usually walking his dog, reading, or spending time with his wife and newborn son.

You can reach Tom at [thomas@acculead.co](mailto:thomas@acculead.co), and you can learn more about Acculead at [acculead.co](http://acculead.co).

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