



# Marketing Inventory

## Introduction

I'm Kristen Beireis and I am on a mission to change the way you work within your marketing.

In order to change the way you do marketing, you have to have a full understanding of what you are doing and how it's working for you.

This inventory will help you do that. In going through this inventory, you will look carefully at what's working and not working in your marketing. You might see some obvious changes that need to be made in order to remedy these situations. If not, I've included some important places to look in order to improve your marketing efforts.

I suggest you print out the inventory and write your answers in it. The key to this inventory is to be honest with yourself. No one has to see it.

If you don't have answers, that's ok. Some of it may not even apply to you. It's ok to skip it. Get down as much information as you can now and continually come back to add to it or re-evaluate. I suggest going through the workbook every year or when you have a major shift in your business.

Use the worksheet, at the end, to record your final decisions in each section. It can be helpful to share this one page with your marketing team.

I wish you much marketing success and ease. Use this Marketing Inventory to help you start finding it.

Create a great day!

*Kristen Beireis*

Marketing Coach/Consultant and  
Trust-Building in Marketing Expert



# Marketing Inventory

**Marketing Systems** - List all systems and technology you use in marketing (regularly and irregularly. (ie... 1ShoppingCart, Hootsuite, Facebook, Aweber, Project Management Software, Marketing Calendar, Contact Management Program Etc...)

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Which systems are you working with that frustrate you?

Which ones do you enjoy using?

Which ones frustrate you but you know they are good for your business?

**TIP:** Frustrating systems slow you down, and bleed frustration into marketing pieces that go out through that system. So, if you are still going into a marketing system that is frustrating it's time to consider new alternatives. Hire someone to go in there for you, get a new system or ditch that type of system all together.

**Record your final list of systems** on worksheet, at the end.



## Marketing Inventory

**Business Team** - List all members of your team (including Admins and Bookkeeper), if you have any.

NAME	ROLE	PHONE	E-MAIL

How are your team members working out? Do you trust them to do a good job? Can you leave them to do their work? Or do you have to look over their shoulder, check things and make sure they are doing it right?

If your team members are working out, then go on to the next section. If not, here's a tip for you.

**TIP:** Sometimes it takes a while to get to know team members and understand the way they work. However, if you haven't figured that out in 3 months of working together, then it's time to move on.

If you don't trust them, then you're going to spend more time and energy on your team members than it would take for you to do the work they are supposed to be doing for you.

It's important to have great team members who allow you to focus where you are best. Providing them with information and working with your clients. Anything less, isn't worth the money you're paying.

**TIP 2:** Check your processes. If you're working with a team, they should have a list of Standard Operating Procedures (SOP's) to inform them of the way you want things done. If you haven't taken the time to create these, that could be the source of friction between you and your team.

**TIP 3:** Do your team members love their work? Having team members who love their work, means they will be on top of it and ready for you when you need them.

**Record your team members** on the worksheet, at the end.



**Coaches' Marketing Source**

You are as unique as tie-dye. Trust it & capitalize on it.

# Marketing Inventory

**Marketing Strategies** - What marketing is getting done in your business? Frequently or infrequently. That you do or you hire someone else to do? List all the activities (strategies) here.



# Marketing Inventory

**Most Successful Marketing Strategies** - List your top 1-3 most successful marketing strategies you are currently using. Explain why you think they have been most successful?

#1 \_\_\_\_\_

Why? \_\_\_\_\_

#2 \_\_\_\_\_

Why? \_\_\_\_\_

#3 \_\_\_\_\_

Why? \_\_\_\_\_

**Least Successful Marketing Strategies** - List your top 1-3 least successful marketing strategies you are currently using. Explain why you think they have been unsuccessful.

#1 \_\_\_\_\_

Why? \_\_\_\_\_

#2 \_\_\_\_\_

Why? \_\_\_\_\_

#3 \_\_\_\_\_

Why? \_\_\_\_\_

**What gets ditched?** Now it's time to decide. If you haven't gotten good results in the last 8 months you're probably not going to improve those results, so ditch it. If you've been procrastinating, ditch it. If you aren't willing to work on it now, then you're likely not going to work on it in the future.



## Marketing Inventory

**Marketing Time** - Spend a couple weeks tracking the time you spend on marketing. Use a clock and a sheet of paper. Write down stop/start times. Then total up your daily/weekly, hours/minutes you worked on marketing activities. If you want to dig in deeper then track how much time you spent with each marketing activity (ie... Newsletter - 1 hour, Blog - 30 minutes etc...)

Week 1: \_\_\_\_\_

Week 2: \_\_\_\_\_

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

**Other Priorities** - What other priorities do you have that require your time? Family? Health? Vacation? Business Travel? Etc... Write down all your other priorities outside of marketing and how much time you need for each of them on a per year basis?

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**What kind of time do you have to work on marketing?** Now that you know what kind of time you are spending on marketing and what time you need to save for other priorities. How many hours do you have for marketing every:

Week? \_\_\_\_\_ Month? \_\_\_\_\_ Year? \_\_\_\_\_

How does it match up? Is there time to spare or do you need to shave off some time on marketing to keep up? If you have time to spare, then what marketing activities are you excited about that you can throw in? If you need to get rid of something, ditch the ones that are least exciting and/or most time consuming for you (unless you're willing to hire someone to do it for you).

**Record your final list of strategies & Marketing Time** on the worksheet, at the end.



## Marketing Inventory

**Marketing Money** - How much money do you spend each month and year on marketing? Go back through your taxes from last year AND consider what you are paying this year. Your accountant may be able to help you compile this information.

You may want to ask your VA's to give you a breakdown of how much time and/or money they spend on each marketing task they work on. If you use Basecamp or another project management software program, you might be able to have them track it in your system. Otherwise, just total their monthly invoices.

Include your marketing infrastructure costs such as your shopping cart, google ads etc...

Include money you pay to learn marketing such as books, courses, mentors, trainers, and training events.

Also make sure you include incidentals like networking luncheons, professional membership fees etc...

\$\_\_\_\_\_ /year on average.

**Business Gross Income** - When looking at marketing cost, it helps to make sure you know how much of your gross income is spent on marketing. Then you can make smart marketing purchase decisions. Below, include how much gross income you have made for the time periods listed.

\$\_\_\_\_\_ Previous Year Gross Income

\$\_\_\_\_\_ This Year's Gross Income So Far

\$\_\_\_\_\_ Last Month's Gross Income

\$\_\_\_\_\_ Gross Income 2 months ago

\$\_\_\_\_\_ Gross Income 3 months ago

**What percentage of your gross income goes towards marketing?** (Here's the math: Total spent on marketing divided by Gross income. Then times that by 100)\_\_\_\_%.

**What percentage do you want it to be?** \_\_\_\_% Record this on the next page.



## Marketing Inventory

**Where do you stand?** Now that you have gone through the inventory and added as much information as you possibly can, it's time to create a summary for you to use and share, if you choose to.

Consider this your planning guide. Use it to make decisions, see how you're doing on your budget or to make important marketing decisions. When you wonder what you should be doing in marketing, who can help, how much you want to spend and whether it fits your marketing strategies or not, this is where you go.

### Marketing Systems

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### Business Team Members & Roles

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### Marketing Strategies

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### Time for Marketing

Weekly \_\_\_\_\_

Monthly \_\_\_\_\_

Yearly \_\_\_\_\_

### Yearly Marketing Budget

\_\_\_\_\_ % of gross sales.



# Marketing Inventory

## About Kristen



So, how did it go? Do you know more about what you're doing in marketing than you did when you started? That was by design.

Having awareness around what you are doing in marketing, what works and what you want to accomplish can be very helpful in creating marketing success. In fact, I believe it creates a very strong foundation to start from.

The part I can't do in writing that I really enjoy doing with my clients, is adding in their personal values. When you keep your personal values in mind while making decisions about marketing, it takes the planning to a whole new level.

My specialty is helping Coaches, Massage Therapists and other "Life-Changers" design their marketing plan to honor their personal values. In my work, I use values to help choose marketing strategies, plan a budget and create a marketing message that is unique and stands out.

If you're interested in taking this to the next level of marketing ease by exploring how your values play a part, then I encourage you to sign up for a Marketing Alignment Session at <http://www.coachesmarketingsource.com/valuesmarketing.html>. It's just \$50 to spend 30 minutes with me and your values. You'll discover where your marketing strategies aren't quite lining up with your values. You may even find out the reason you struggle with certain kinds of marketing so you can choose a much easier path.

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