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Stage 1 – Intake

What is your current monthly expenditure on Intake strategies? (i.e. advertising) \$_____

What Online Intake strategies need more attention?

- Website design
- Video Production
- Socializing on social media
- Email
- Facebook ads
- Adwords
- Twitter Ads
- LinkedIn Ads
- SEO
- Directory listings
- Pay per call
- Affiliate marketing
- Retargeting
- Other Online strategies

What Offline Intake strategies need more attention?

- Video Production
- Cold calling
- Direct Mail
- Directory listings
- Newspaper/magazines
- TV
- Tradeshows
- Radio
- Other Offline strategies

On a scale of 1 to 10, how important is it that you make changes to your Intake strategy?

What 'should' your monthly Intake budget be? \$_____

Thoughts: _____

Stage 2 – Handshake (Most companies have a HUGE opportunity with this one!)

Get the ‘Secret Handshake’ Training here: <http://marketingvideos.tv/Secret-Handshake>

Current:

How many prospects reached out and gave you their contact details last month? _____

How much did it cost you, per prospect? \$_____

Do you efficiently use video in your current Handshake sequence? Yes No (if no, see below)

Future:

How many new prospects do you *want* to capture, per month? _____

How much are you prepared to invest, per prospect? \$_____

From 1 to 10, how important is it that you make changes to your Handshake strategy?

Thoughts _____

Stage 3 – Cultivate

What is the total number of unsold prospects currently in your database? _____

How often do you communicate with them? _____

What is the total number of previous customers currently in your database? _____

How often do you communicate with them? _____

In the past, has 'staying in touch' paid off? Yes No

Do you use currently automated email to send 'sequences' of communication? Yes No

Do you use video to educate, build trust and communicate your value proposition? Yes No

From 1 to 10, how important is it that you utilize video better in your Cultivation strategy?

From 1 to 10, how important is it that you make changes to your Cultivation strategy?

Thoughts _____

Stage 4 – Uptake

Current:

How many new customers did you create in the past month? _____

How much did it cost, per customer? \$ _____

What was your number-one source of new customers? _____

Future:

How many new customers do you want to create, per month? _____

How much are you prepared to invest, per customer? \$ _____

Is there an easy way to scale your current best source of new customers? Yes No

On a scale of 1 to 10, how important is it that you make changes to your Uptake strategy?

Thoughts _____

Stage 5 – Escalate

Current:

What is the average transaction value in your business? \$ _____

What is the eventual, average annual revenue from each new customer? \$ _____

What is the eventual, average **lifetime** value from each new customer? \$ _____

What is your current business model for creating recurring income? _____

Future:

From 1 to 10, how important is it that you make changes to your Escalation strategy?

What can you do to escalate the lifetime value of each new customer?

(i.e. Broaden your product portfolio to include subscription-based services? Improve customer satisfaction levels?)

Intake – Handshake – Uptake – Cultivate – Escalate

Priorities

You cannot change everything at once, therefore you must set priorities.

Review the above worksheets, then prioritize the top five actions that must be taken:

1. _____
2. _____
3. _____
4. _____
5. _____

EXTRA!

Want to instantly increase your online marketing results by 568%?

Learn the Secret Handshake!

The Secret Handshake is a simple marketing trick that utilizes a short video and one small tweak to your website to bring an immediate and dramatic improvement to the number of prospects who reach out to you.

Register for the training here:

<http://marketingvideos.tv/secret-handshake>

(Includes full access to video pricing)