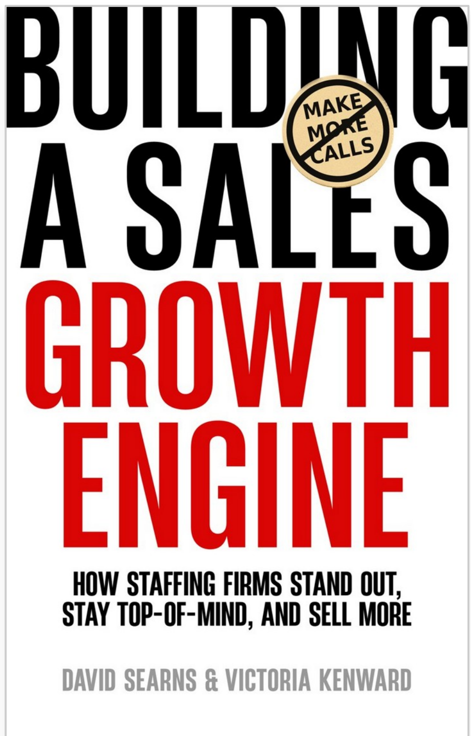
THE COMPANION WORKBOOK



growthenginebook.com

Every tool in this workbook, plus Brogue's completed worked example, lives at growthenginebook.com/workbook — the address printed in your copy of the book.

Welcome

We wrote Building a Sales Growth Engine because most staffing firms do not need more marketing. They need a system, one that helps them stand out, stay top of mind, and sell more by making sales and marketing work together. Making more calls is not a strategy. Building a Growth Engine is.

We wrote this workbook because ideas only matter when they become systems. There is a visible half of growth, the campaign you launched, the website you redesigned, the conference you attended. And there is an invisible half: whether your company can actually support what you started, repeat it, and improve on it. The book explains the engine. This workbook is where you build it, one component at a time, in your own words, with room to write.

Each module matches a chapter in the book. The book gives you the why, the stories, and the judgment; the module gives you the steps and the space. If the book is nearby, read a chapter and then open its module. If you are starting here, that is fine too, the short assessment a few pages on will point you to the best place to begin.

HOW THE WORKBOOK WORKS

Six parts, every module. Start Here orients you. Assess scores where you stand. Build walks you through making the artifact, with room to write. Quick Wins are 5 to 15 minute actions. AI Assist offers light, evergreen tips. Done Check tells you when the component is built. Learn the rhythm once, and you can pick up any module and go.

Start anywhere. You do not have to work front to back. Use the self-assessment a few pages on to find your weakest component and start there. Two pieces come first for almost everyone: your Foundation (Module 4) and a website that converts (Module 5). After those, pick one lane, finish it, then add the next.

Write in it. This is a workbook, not a book. The blanks, tables, and boxes are yours. A filled-in workbook is the whole point.

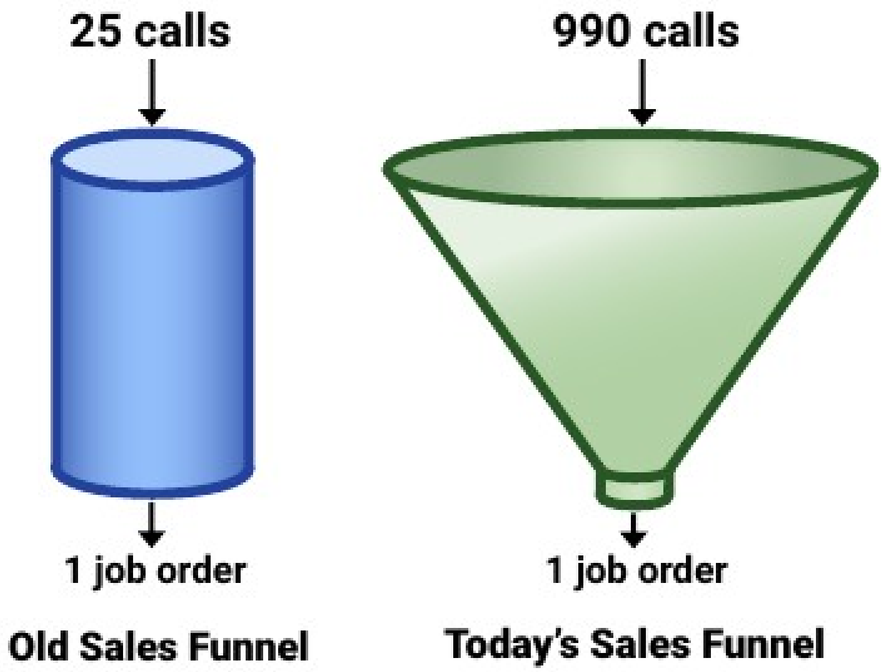
One score, carried forward. Each module ends with a 1 to 5 score. Record each on the Engine Scorecard a few pages ahead, and watch the numbers climb as you build.

> **MEET BROGUE INDUSTRIAL STAFFING**
>
> *The examples in this workbook follow one firm. Brogue Industrial Staffing is a fictional light-industrial staffing company in the Southeast: $12 million in revenue, offices in Greenville and Charlotte, six salespeople, and clients in mid-size manufacturing and distribution. Brogue is good at filling orders and, like most firms, weaker at the engine that keeps orders coming. Watch Brogue build each component, then build your own.*

Why an Engine, Not More Calls

Making more calls is not a strategy, because the math behind it has collapsed. It used to take a handful of calls to land a job order. Today, with buyers screening out cold outreach and doing their own research first, it can take hundreds of dials to get the same result.

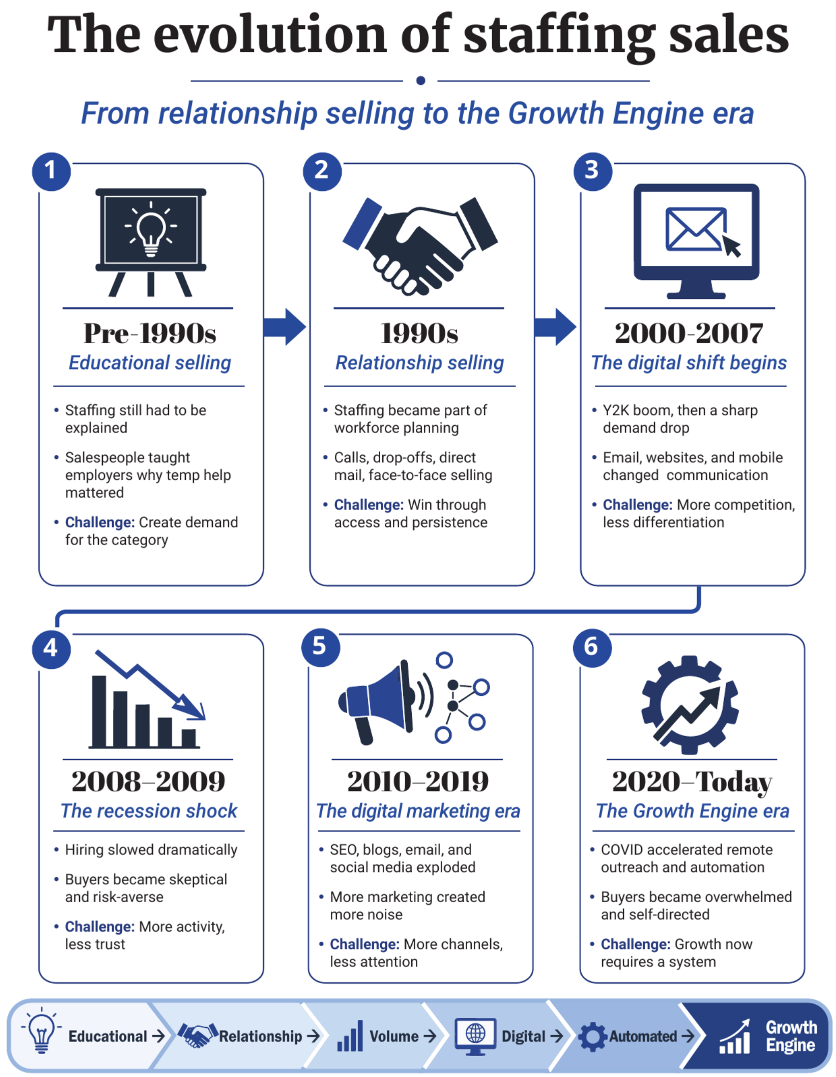
Figure 1.1: Old Sales Math vs. Modern Sales Math



The figure makes it plain. The old funnel turned roughly 25 calls into one job order. Today's funnel can take closer to 990 calls to produce the same order. You cannot out-dial a gap that large. The answer is not more activity; it is a system that brings the right buyers to you before they are ready to talk.

That shift did not happen overnight. Staffing sales has moved through several eras, from educational and relationship selling, through the digital and recession years, to the growth-engine era we are in now. The figure below traces that path.

Figure 1.3: The Evolution of Staffing Sales

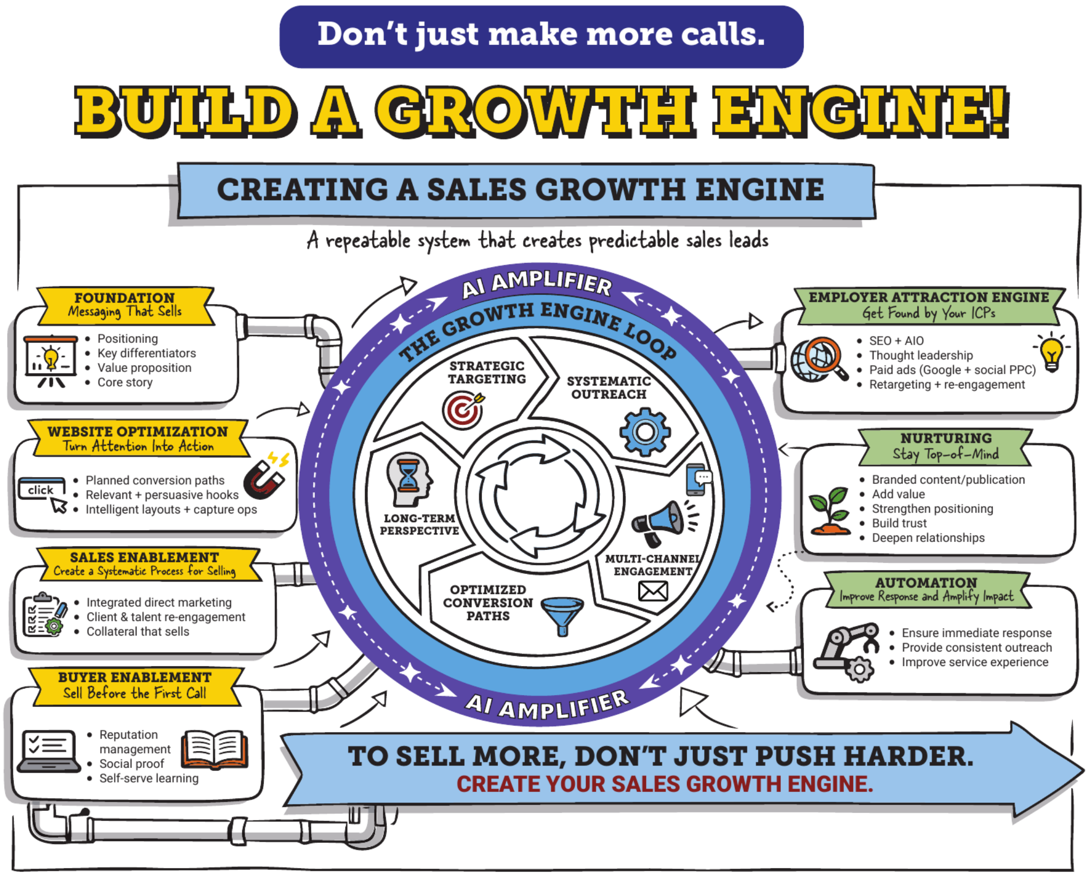


Each era added a new way buyers find and judge firms, and none of the old ways fully disappeared. The firms that win today do not pick just one. They build an engine that works across all of them at once, which is exactly what the rest of this workbook helps you do, one component at a time.

The Sales Growth Engine

The Sales Growth Engine is a complete system: seven components that work together, with AI as an amplifier across all of them. Each component is a module in this workbook. Here is the whole engine in one picture.

The Sales Growth Engine



At the center of the engine is the loop, the operating rhythm that turns those seven components from a static checklist into a system that actually runs. Every cycle moves the same way: target the right buyers, reach them with a useful reason to pay attention, engage across the channels they already use, convert interest into action, and repeat, learning a little more each time around.

The components are what you build, one module at a time. The loop is how you run them once they exist, week to week and quarter to quarter. You will build and practice the loop itself in Module 12, Run the Loop.

Where Should You Start?

This is the router for the whole workbook. Score each of the seven components below. The lowest-scoring component that is furthest upstream is your highest-priority building investment, and it tells you which module to open first.

Score each line using the 1-to-5 scale (see "How to Score" in the front matter).

SCORE YOUR SEVEN COMPONENTS

Engine component	Score	Biggest gap
1. Foundation Positioning, key differentiators, value proposition		
2. Website Optimization Conversion paths, primary and secondary CTAs		
3. Sales Enablement Integrated direct-marketing process, collateral, training		
4. Buyer Enablement Reviews, proof content, self-education assets		
5. Market Attraction SEO and AIO, social, OPS, thought leadership		
6. Nurturing Regular production and automation to stay top of mind		
7. Automation Triggers, sequences, speed-to-response, re-engagement		

Your priorities. Our weakest component: _______________. The one component that would most improve pipeline if we strengthened it: _______________.

The Entry Map

Your lowest score points to a module. Build it, then come back and pick the next. Foundation and Website come first for almost everyone, regardless of score.

If your lowest score is...	Open...	You will build...
Foundation / messaging	**Module 4**	ICP, positioning, differentiators, story, proof, offer

Website / lead capture	**Module 5**	A CRO audit and fixed conversion paths
Sales process and tools	**Module 6**	Account targeting, an IDM campaign, a first-call framework
Buyer self-service info	**Module 7**	A buyer-question curriculum and review system
Getting found	**Module 8**	A three-layer channel map
Staying in touch	**Module 9**	A lifecycle nurture map and branded-content engine
Manual follow-up	**Module 10**	An automation opportunity map
Using AI well	**Module 11**	An AI brief and 90-day integration plan
No operating rhythm	**Module 12**	A weekly and monthly cadence
Can't tell what's working	**Module 13**	A five-number scorecard and leak map
Ready to sequence it all	**Module 14**	One 90-day launch plan

Your Engine Scorecard

This is the running scorecard for the whole engine. Each module ends with a 1 to 5 score. Record it here as you finish each module, then re-score at 90 days and watch the numbers climb. Your lowest scores are always your next lane.

Component (module)	Baseline	Day 90	Day 180
Foundation (Module 4)			
Website (Module 5)			
Sales Enablement (Module 6)			

Buyer Enablement (Module 7)			
Market Attraction (Module 8)			
Nurturing (Module 9)			
Automation (Module 10)			
AI-Amplified Judgment (Module 11)			
Run the Loop (Module 12)			
Measure and Improve (Module 13)			
Overall engine readiness (average)			

How Each Module Works

How to Score (the 1-to-5 scale)

Every module's Assess uses this same 1-to-5 scale. Score each line honestly; the wording under each score is tailored per module where it helps.

Score	What it means
1	Does not exist. This component is entirely absent.
2	Exists informally. In someone's head or a partial attempt, nothing systematic.
3	Built but inconsistent. Exists, but not regularly used or producing results.
4	Working. Systematic, regularly used, producing measurable activity.
5	Strong and improving. Tested, refined, and compounding over time.

Every module has the same shape so you can move fast: a short Start Here (what you build), Assess (score it, using the book's chapter Tool), Build (the worksheets, done in order), Quick Wins (5- to 15-minute actions), a light AI Assist, a Done Check, and a one-page summary to capture the result. Work the modules in any order. If you are unsure, do Foundation and Measurement first.

Contents

SALES GROWTH ENGINE • COMPANION WORKBOOK

Module 4

Foundation

Messaging That Sells

Maps to book Chapter 4 and Tool 4.

A. Start Here

Build your Foundation: the seven strategic choices every other module runs on. You walk out with a one-page summary you can hand to a rep, a copywriter, or an AI tool.

Do this first: one of two must-do modules, whatever your scores. About 15 minutes to Assess; take the Build in two or three short sittings.

Start here first. This is the recommended first module for almost every reader. A weak Foundation makes every other component work harder, so even if another area scored lower, build this one first.

B. Assess Your Foundation

This is Tool 4 from the book. Score each element honestly. It is a working tool, not a report card. The gaps you find are your starting point.

Score each line using the 1-to-5 scale (see "How to Score" in the front matter).

SCORE EACH LINE

Foundation element	Score	What's missing
Market Focus (ICP) Who are we actually best at serving?		
Positioning Have we defined how we want to be seen?		

Differentiators (3 to 5) What do we do measurably better, with proof?		
Value Proposition What outcomes do we create for buyers?		
Core Story Do we have a before-and-after we use consistently?		
Proof Assets What data, reviews, and results do we have on hand?		
Offer What do we invite prospects to do that is specific?		
Messaging Consistency Can five reps give the same answer about what makes us different?		

Now find your average. Add the eight scores for a total out of 40, then divide that total by 8.

Total: ________ / 40 **Total ÷ 8 = Average: ________**

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	The engine is amplifying a blank. Build Foundation before spending on anything downstream.
2.0 - 2.9	**Underdeveloped**	You have pieces in people's heads. The work is writing them down and making them provable.
3.0 - 3.9	**Functional**	It exists on paper. The work is consistency: getting everyone to use the same language.
4.0 - 4.4	**Strong**	Solid and used. Sharpen proof and offers, and protect

		against drift.
4.5 - 5.0	**Compounding**	A real asset. Keep refining as the market responds.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
My lowest-scoring element	
What is missing or unclear there	
One thing I can clarify this week (quick win)	
One thing that needs a 90-day build	

Carry it forward. Record your Foundation average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Foundation average today: __________ Date: __________

C. Build: The Foundation Builder

Seven elements, built in order, because each one depends on the clarity of the one before it. For each element: read the short steps, look at the example, then write your answer in the space provided. Complete the finish layer to get a usable result. Take the optional go-deeper path only where you want more rigor.

Element 1. Market Focus (your ICP)

Start with who you serve best, not what you do. Specific beats broad: the firms that own a market, even a small one, build referrals and margins that generalists cannot touch.

STEPS

1. Ask your three best salespeople: who is your easiest client to serve, and why? The easiest client is usually the one you understand best.
2. From the pattern in their answers, fill the six fields below.
3. Then name the one client you would clone if you could. That client is your ICP anchor.

WRITE YOUR ANSWER

Prompt	Your answer
Industry or vertical	
Company size (revenue or headcount)	
The buyer role you sell to	
The trigger event that starts a search	
The top pain you solve for them	
Your proof you serve them well	
The one client we would clone	

Done when: *you can name the client you would clone and all six fields are filled.*

Go deeper: the full ICP attribute bank (Figure 4.1)

You will not fill every line, and most firms never use them all. Read the dimensions, mark the handful that sharpen your picture (for example: triggering events, current buying method, margin potential, decision authority, the questions buyers ask), and ignore the rest.

The company you serve (ideal client)	The buyer you sell to (target persona)
Industry or vertical Sub-industry or niche specialty Company size (revenue or headcount) Headquarters location Geographic markets served Growth stage (startup, scaling, mature, declining) Ownership (founder, PE-backed, franchise, family,	Job title or functional role Department Decision-making authority Budget authority Influence on the buying process Role in the buying committee Business and personal goals

public) Service or product mix Customer segments served Market position (premium, value, niche, commodity) Competitive environment Level of specialization Technology adoption level Existing tech stack Recruiting and talent-acquisition maturity Current buying method (MSP, VMS, direct) Current vendor relationships Current pain points Urgency of need Budget availability Buying history Attitude toward staffing or outsourcing Regulatory or compliance environment Seasonality of demand Speed of growth Profitability or financial health Recent triggering events Strategic priorities Business risks Cultural fit and values alignment Likelihood of long-term retention Potential lifetime value Upsell or cross-sell potential Referral potential Case-study or proof potential Ease of implementation Service-delivery fit Margin potential	Primary responsibilities Key performance indicators Pain points and frustrations Fears and perceived risks Desired outcomes Success metrics Buying motivations Buying objections Level of urgency Awareness of the problem Awareness of available solutions Sophistication as a buyer Experience with similar vendors Attitude toward staffing or outsourcing Attitude toward technology Risk tolerance Preferred communication style Preferred buying process Preferred content formats Information sources they trust Associations and peer groups Events they attend Social platforms they use Common questions they ask Common misconceptions Internal pressures External pressures Emotional drivers Political dynamics inside the org Level of pain from the status quo Likelihood of becoming a champion Likelihood of responding to outreach Fit with your sales approach Fit with your expertise and style

Element 2. Positioning (the aisle you own)

Positioning is the aisle you occupy in a buyer's mind. Most firms sit, by default, in the crowded staffing aisle where commodity and price pressure are highest. You can choose a different one.

STEPS

1. Name the aisle you are in today, in the buyer's words.
2. Decide the aisle you want: staffing, workforce solutions, consulting, or a narrow niche. Note the tradeoff: the staffing aisle is understood but crowded; a new aisle has less competition but you must teach buyers why it matters.
3. Write one positioning sentence you would defend.

WRITE YOUR ANSWER

Prompt	Your answer
The aisle we are in today (buyer's words)	
The aisle we want to own	
Why that aisle (the tradeoff we accept)	

Our positioning sentence: we want to be known as the firm that . . .

Done when: *you have one positioning sentence you would stand behind in front of a competitor.*

Go deeper (optional): pressure-test the tradeoffs out loud with your leadership team before you commit. Do not let the market pick the aisle for you by default.

Element 3. Differentiators (claim, mechanism, proof)

Most firms claim differentiation. Few have it. The difference is provability. Keep three to five differentiators that are specific, meaningful to the buyer, and provable. A claim with no mechanism and proof is just decoration, so cut it.

STEPS

1. List what you say you do better than competitors.
2. For each, add the mechanism (the specific thing you do that creates the result) and the proof (data, client result, or process you can show).
3. Cut every line with no mechanism and proof. Keep three to five.

MORE EXAMPLES (FIGURE 4.2): CLAIMS ANYONE CAN MAKE VS. REAL DIFFERENTIATORS

For worked examples of empty claims vs. real differentiators, see Figure 4.2 in the book.

WRITE YOUR ANSWER

Claim	Mechanism	Proof

Done when: *you have three to five rows, each with a real mechanism and proof, and zero bare claims.*

Go deeper (optional): call three of your best clients and ask: why do you keep using us, what would you miss if we disappeared, and where did we solve something a previous vendor could not? Their answers are your truest differentiators.

Element 4. Value Proposition (outcomes, not services)

A service description says what you do. A value proposition says what changes when a buyer works with you. Lead with the outcomes that map to what keeps your buyer up at night: speed, quality, cost control, productivity, risk reduction, or operational continuity.

STEPS

1. Pick the two or three outcome categories where your proof is strongest.
2. Fill the template below.
3. Check it against a plain service description. If it still just lists what you sell, push it back to the outcome.

WRITE YOUR ANSWER

Prompt	Your answer
The 2 to 3 outcomes we deliver best	
We help (which ICP)	
achieve (which outcome)	

Prompt	Your answer
typically (which result we can prove)	

Our value proposition, in one sentence:

Done when: *you have one sentence stated in outcomes the buyer cares about, with a result you can prove.*

Element 5. Core Story (before, bridge, after)

A core story is a compressed demonstration of your value: specific enough to be credible, simple enough to repeat, compelling enough that a buyer thinks that sounds like us. It is not an origin story, a testimonial, or a service overview.

HOW IT IS BUILT

1. Before: the problem the client was living with, specific and recognizable to your buyer.
2. Bridge: what you specifically did that created the change. This is your differentiator in action.
3. After: the result, quantified where you can, tied to outcomes the buyer values.

WRITE YOUR STORY

Before

Bridge

After

Done when: *you have a four to six sentence story a rep can tell from memory.*

Element 6. Proof (the evidence behind the promise)

Proof turns a claim into a differentiator and a differentiator into a reason to choose you. The most underused proof in staffing is your own performance data, the numbers most firms track but never put in front of a buyer.

STEPS

1. Check every proof type you actually have, below.
2. Circle or star the strongest two. These attach to your differentiators.
3. Assemble a one-page performance summary you can put in front of a buyer.

CHECK WHAT YOU HAVE

☐ Performance data (fill rates, time-to-submit, show-up, 90-day retention)

☐ Client results (specific, quantified outcomes)

☐ Third-party reviews (Google, Indeed, ClearlyRated)

☐ Process documentation (the steps that create your results)

☐ Tenure and volume (years, placements, depth in a role or industry)

☐ Technology (systems that improve the client or candidate experience)

OUR TWO STRONGEST PROOF POINTS

Why it matters. Research by G2 and Heinz Marketing found 92% of B2B buyers trust peer reviews over sales-rep claims. During the research phase, buyers read what your clients say about you, not your Why Us page.

Done when: *at least two provable proof points are attached to your differentiators, and a one-page summary exists.*

Element 7. Offer (what makes the right buyer raise a hand)

An offer is what you invite a prospect to do. Contact us is a request with nothing in return. A strong offer gives the buyer something useful and is easy to say yes to. Build one primary and one secondary.

STEPS

1. Write one primary offer, close to the sale, specific and low-friction. A free 30-minute workforce cost analysis beats a free consultation. Other prompts: custom staffing plan, pay-rate or bill-rate review, on-site staffing support.
2. Write one secondary offer, a lead magnet for buyers not ready to talk: a content, tool, or service item of real value. Prompts: regional salary guide, cost-of-vacancy calculator, interview checklist, overtime reduction worksheet.
3. Check each: specific, useful, clear, and easy to say yes to with no disguised sales pitch.

WRITE YOUR OFFERS

Primary offer

Secondary offer

Done when: *you have one primary and one secondary offer named, each easy to say yes to.*

D. Quick Wins

Pulled straight from the book's Quick Actions. Each takes 5 to 15 minutes and moves you forward even on a day with no time to build. Jot what you learn in the space under each.

The Question That Changes the Conversation 5 minutes

Ask your three best salespeople: who is your easiest client to serve, and why?

Their answers reveal your real market focus faster than any planning session. Feed it into Element 1.

WHAT I LEARNED

The Consistency Test 15 minutes

Pull five salespeople aside individually. Ask each: in one sentence, what makes us different from our top three competitors?

Five different answers means the Foundation is not working yet. Five versions of the same answer means you have built something real.

WHAT I LEARNED

The One Question Worth Asking Right Now 10 minutes

If a buyer asked why should I choose you over a top competitor, and the answer could not include price, proximity, or personality, what would your reps say?

If they struggle, or give three different answers, that is your Foundation gap, and it is exactly what this module closes.

WHAT I LEARNED

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. None of this is a fixed prompt to copy, because the tools change fast.

- ICP: have a current AI assistant cluster your last 20 to 30 closed-won deals and surface the traits they share. You decide which traits are really yours and which are coincidence.
- Differentiators: have AI play skeptic and ask of each claim, could a competitor say this too? Keep only what survives with a mechanism and proof.
- Value proposition: have AI restate your services as outcomes. You verify each result is something you can actually prove.
- Core story: have AI draft a before, bridge, and after from your rough notes. You supply the real numbers and cut anything that sounds like a brag.

Looking ahead. The Foundation you build here is exactly what you will load into your AI brief in Module 11. Good Foundation in, good AI out.

F. Done Check

Your Foundation is built when every line below is true. Check them off.

- ☐ ICP named: I can point to the one client I would clone.
- ☐ One positioning sentence I would defend.
- ☐ Three to five differentiators, each with a mechanism and proof, zero bare claims.
- ☐ A value proposition stated in outcomes, not services.
- ☐ A core story my reps can tell from memory.
- ☐ At least two provable proof points on hand, plus a one-page performance summary.
- ☐ One primary and one secondary offer named.
- ☐ Five reps give the same one-sentence answer about what makes us different.

Your Foundation on One Page

When the seven elements are built, copy the short version here. This is the page you hand to a new rep, a writer, or an AI tool.

Who we serve best (ICP)

How we are positioned (the aisle)

What we do differently, with proof

The outcomes we create (value prop)

Our core story, in one line

Our two strongest proof points

Primary offer

Secondary offer

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Module 5

Website

Turn Attention Into Action

Maps to book Chapter 5 and Tool 5.

A. Start Here

What you build: a website that turns attention into action. Not a brochure that describes your firm, a conversion hub that gives the right visitor a clear next step at every level of intent.

What you walk out with: a prioritized plan: your baseline numbers, a clarity homepage, the buyer questions you will answer, intent-calibrated offers, and a follow-up rule.

Before you start: have your Foundation (Module 4) in hand. Your clarity headline, differentiators, proof, and primary and secondary offers come straight from it. This is the second of the two modules to do first.

Time: about 15 minutes for the audit. Build page by page in short sittings.

Do this right after Foundation. Your website is where most buyers meet your Foundation for the first time. If the site does not reflect it, everything you built in Module 4 stays invisible.

B. Assess Your Website

This is Tool 5 from the book, the Quick CRO Website Audit. Score where your website is today, not where you want it to be. Same 1 to 5 scale as Foundation.

Score each line using the 1-to-5 scale (see “How to Score” in the front matter).

SCORE EACH LINE

Website element	Score	Biggest gap

Homepage clarity (5-second test) A new visitor can answer who do you serve immediately		
Differentiation above the fold The main area says something specific, not generic		
Proof visible without scrolling Reviews, metrics, or client names show on arrival		
Employer content depth Real buyer questions answered, not just service lists		
Candidate experience Job search is easy and the apply process is frictionless		
Routing by visitor type Employer and candidate paths are distinct and easy to find		
Transparency content Pricing, process, comparison, or FAQ content exists		
Proof of life Recent content, current jobs, fresh reviews		
Multiple capture mechanisms More than just a Contact Us form		
Friction assessment Forms are short and calls to action are clear		
Intent-calibrated offers Different options for early vs. ready-to-act visitors		
Follow-up process Every form submission gets a fast, defined response		
Tracking configuration Conversion events are tracked and reviewed		
Visitor identification You know which companies visit without a form fill		

Now find your average. Add the fourteen scores for a total out of 70, then divide that total by 14.

Total: _________ / 70   **Total ÷ 14 = Average: _________**

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	The site is costing you leads every day. Fix clarity and capture before driving more traffic to it.
2.0 - 2.9	**Underdeveloped**	A brochure. The work is turning pages into paths that convert, and proving you are real.
3.0 - 3.9	**Functional**	Present but passive. The work is proof, routing by audience, and intent-based offers.
4.0 - 4.4	**Strong**	Converting and current. Tune friction and follow-up, and keep watching the data.
4.5 - 5.0	**Compounding**	A tested, improving asset. Keep optimizing from analytics.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
The phase with the most gaps (first impression, research, or conversion)	
The one change that would have the most immediate impact	
The follow-up process we need to build or fix first	

Carry it forward. Record your Website average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Website average today: __________ Date: __________

C. Build: Turn Your Site Into a Conversion Hub

Six builders, organized the way a buyer actually moves through your site: see the data, win the first impression, answer the research questions, calibrate the conversion, serve both audiences, and define follow-up. Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Baseline the data

The owners of the best sites have looked at their analytics. Most never log in. You cannot prioritize what to fix without knowing where visitors leave, and you cannot tell if a change worked without a baseline.

STEPS

1. Log into your website analytics. Most firms have it installed and have never opened it.
2. Record this month's numbers in the table below.
3. Find your single worst exit page. That is where you start.

WRITE YOUR BASELINE

Prompt	Your answer
Monthly visitors	
Top traffic source	
Top entry (doorway) page	
Worst exit page	
Form submissions per month	

Prompt	Your answer
Bounce rate (staffing averages around 60%)	

Done when: *you have this month's numbers and your worst exit page named.*

Go deeper (optional): add a B2B visitor-identification tool to see which companies are visiting even without a form fill, so you can tell whether your targeting is working.

Builder 2. Win the first impression (Phase 1)

Visitors decide in seconds whether you can help. A University of Ottawa study put it at 50 milliseconds. In that moment they are not reading your copy, they are asking does this firm look like it can help me. Clarity beats clever, every time.

STEPS

1. Write a clarity headline that names who you serve and the outcome you create. Pull it straight from your Foundation value proposition.
2. Put proof above the fold: a review, a recognizable client name, or a specific metric.
3. Split the top of the page by audience: a clear path to hire and a clear path to find work.
4. Add a primary and a secondary call to action to every section, not just the top, and repeat them in the footer.

Our homepage clarity headline:

THE REST OF THE FIRST IMPRESSION

Prompt	Your answer
Proof we will show above the fold	
Employer path label and its call to action	
Job-seeker path label and its call to action	

Done when: *a stranger can answer what do you do and who for in five seconds.*

Go deeper (optional): every doorway page (a job post, a blog post, a location page) needs the same orienting clarity, because most visitors never land on the homepage first.

Builder 3. Answer the questions buyers research (Phase 2)

Past the first impression, buyers evaluate. The site's job shifts to pre-selling the conversation. The firms that win think of the site as a buyer's guide, not a company brochure, and they keep it visibly alive.

STEPS

1. List the questions buyers ask most in sales calls: what does it cost, how does the process work, what if a hire does not work out, how do I switch vendors without chaos.
2. Make a page or post that answers each one honestly.
3. Frame the services page around the employer's problems, not your capabilities, with proof placed where the decision is made.
4. Add proof of life: recent content, current jobs, fresh reviews, awards from this year.

THREE BUYER QUESTIONS WE WILL ANSWER PUBLICLY

Prompt	Where it will live on the site
Buyer question 1	
Buyer question 2	
Buyer question 3	

Done when: *your top three buyer questions are answered on the site, and the site looks active, not frozen in 2022.*

Go deeper (optional): the full transparency set (pricing context, comparison, switching guides, FAQ) is built out in Module 7, Buyer Enablement.

Builder 4. Calibrate the conversion paths (Phase 3)

The conversion moment is when a visitor decides to act. The strongest sites offer different asks for different levels of intent, and bring the primary and secondary offers from Foundation to life. The most common failure here is friction.

STEPS

1. Define three offers by intent: early (a useful resource or diagnostic), mid (an audit or assessment that shows expertise), ready (a fast, low-friction path to a conversation).

2. Put a primary and a secondary call to action on every major page, built into the page, not buried at the end.
3. Give multiple ways to respond: form, click-to-call, text, and chat.
4. Cut every form to the minimum number of fields.

WRITE YOUR THREE OFFERS

Prompt	Your answer
Early-stage offer (just exploring)	
Mid-stage offer (comparing options)	
Ready-to-act offer (wants to talk)	
Ways to respond we will add (form, call, text, chat)	

Done when: *every major page offers a fitting next step for any level of intent, with low friction.*

Builder 5. Serve two audiences without compromising either

A staffing site serves employers and candidates, who need different things. An Employers tab and a Job Seekers tab handle routing, but most sites still fail at differentiation: the employer section sounds like a pitch, the candidate section like a job board.

STEPS

1. Employer path: lead with proof (results, fill rates, retention), transparency, and relevance to their problem.
2. Candidate path: easy job search, a frictionless apply process, and clear expectations.
3. Decide whether one site straining to serve both should become two. AI is making a two-site approach affordable for firms that could never justify it before.

WRITE YOUR TWO-AUDIENCE PLAN

Prompt	Your answer
Employer path: the proof we lead with	

Prompt	Your answer
Candidate path: the biggest apply-process fix	
One site or two? Our decision and why	

Done when: *each audience can tell, fast, that the site was built for them.*

Builder 6. Define follow-up before anything goes live

Speed and quality of follow-up is part of website optimization. A form filled at 7 p.m. Thursday and answered three business days later loses to one answered in minutes. Every capture needs a defined response before it goes live.

STEPS

1. List every capture mechanism on the site (each form, chat, click-to-call, apply).
2. For each, define the response: who handles it, how fast, and what the visitor receives.
3. Set a target response time and test it with a real submission.

MAP YOUR FOLLOW-UP

Prompt	Your answer
Capture mechanism	
Who responds	
Target response time	
Auto-acknowledgement in place?	

Done when: *every capture has a defined, fast, tested follow-up before launch.*

Go deeper (optional): the automation behind this (instant acknowledgements, alerts, sequences) is built in Module 10, Automation. The principle starts here.

D. Quick Wins

Pulled straight from the book's Quick Actions. Each takes 5 to 15 minutes. Jot what you learn in the space under each.

The Five-Second Test 5 minutes

Hand your homepage to someone who has never seen it. Give them five seconds, then take it away.

Ask two questions: what does this company do, and who do they do it for? If they cannot answer both clearly, the homepage is failing Phase 1.

WHAT I LEARNED

The Walk-Through 15 minutes

If an ideal client visited your site today, what would they actually do? Not what you hope, what the site allows.

Walk it as that buyer: start on the homepage, then start again on a blog post and the employers page. Find the dead ends. What you find is your audit.

WHAT I LEARNED

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Headlines: have a current AI assistant draft three clarity-headline options from your Foundation value proposition and ICP. You pick the one that is specific, not clever.
- Services copy: have AI rewrite a feature list as the employer's problems and outcomes. You confirm every claim has proof behind it.
- Buyer questions: have AI mine your recent sales-call notes for the questions buyers actually ask. You decide which to answer publicly.
- Follow-up: have AI draft the acknowledgement and first-response messages for each capture. You set the timing and the voice.

The human's job. Reading the analytics and choosing the single change that will move the number most. AI cannot tell you where your buyers actually leave. Your data can.

F. Done Check

Your website is doing its job when every line below is true. Check them off.

☐ The homepage passes the five-second test: who you serve and what you do, in seconds.

☐ Proof is visible above the fold.

☐ Employer and candidate paths are clearly distinct and easy to find.

☐ Your top buyer questions are answered on the site.

☐ Every major page has a primary and secondary call to action, and more than one way to respond.

☐ Every capture has a fast, defined follow-up.

☐ Analytics are reviewed monthly, not never.

Your Website Plan on One Page

When the six builders are done, copy the short version here. This is the brief you hand to a designer, a writer, or an AI tool.

This month's baseline (visitors / bounce / form fills)

Our homepage clarity headline

Top three buyer questions we answer on the site

Early-stage offer

Mid-stage offer

Ready-to-act offer

Our follow-up rule (who responds, how fast)

The one highest-impact change we will make first

SALES GROWTH ENGINE • COMPANION WORKBOOK

Module 6

Sales Enablement

A Systematic Process for Selling

Maps to book Chapter 6 and Tool 6.

A. Start Here

What you build: a selling system, so success does not depend on heroic effort or a few veteran reps. The four pillars: a defined process, the right tools, the right training, and the accountability to keep improving.

What you walk out with: a tiered account list, a documented outreach campaign a new rep could run, a first-conversation framework, an intentional tool stack, an onboarding path, and a weekly review rhythm.

Before you start: have your Foundation (Module 4) in hand, your messaging and proof are what the reps say, and your Website (Module 5) is where reps send buyers between conversations.

Time: about 15 minutes for the audit. Build the campaign and the rhythm over a few sittings.

> **The point of the system.** A great rep with no system is a single point of failure. The goal here is a process your whole team can run, so an average rep gets above-average results.

B. Assess Your Sales Enablement

This is Tool 6 from the book, the Sales Enablement Asset Audit. Score what actually exists and is used, not what you intend to build. Same 1 to 5 scale, grouped into process, tools, and training.

Score each line using the 1-to-5 scale (see “How to Score” in the front matter).

SCORE EACH LINE

Sales enablement element	Score	Biggest gap

PROCESS		
Cold-outreach campaign (12 to 16 steps) Is the full sequence documented?		
Voicemail scripts by step Does each phone step have a tested script?		
Email templates by step Is each email a template the rep edits, not writes?		
LinkedIn templates by step Are social steps as defined as phone and email?		
Direct mail integration Are mail pieces tied to specific campaign steps?		
Re-engagement sequence A defined process for 90 and 180-day stalled prospects?		
Past-client reactivation campaign Structured outreach for dormant accounts?		
Placed-talent reconnection campaign Outreach to candidates who became buyers?		
Candidate experience sequences Automated touches (pre-interview, pre-assignment)?		
TOOLS		
CRM with automation Can a rep see their next action for every prospect?		
Collateral library by audience and pain Is campaign content organized and findable?		
Intent and engagement alerts Real-time alerts when a prospect engages?		

Video and video email Can reps create video emails?		
Proposal management system Rapid, consistent proposal creation?		
AI sales enablement AI for research, call summaries, coaching?		
TRAINING		
Onboarding for new reps Can a new rep run the full campaign?		
Meeting cadence Daily huddles and weekly pipeline reviews in place?		
Call and email coaching Coached on real examples from their pipeline?		
Objection-handling training Top five objections addressed with proof?		

Now find your average. Add the nineteen scores for a total out of 95, then divide that total by 19.

Total: ________ / 95   **Total ÷ 19 = Average: ________**

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	Selling depends on heroics. Document the campaign and CRM discipline before adding reps.
2.0 - 2.9	**Underdeveloped**	It lives in a few heads. The work is writing the process down so any rep can run it.

3.0 - 3.9	**Functional**	The assets exist but are used unevenly. The work is adoption and coaching.
4.0 - 4.4	**Strong**	A real system. Tune the tools and the cadence, and tighten win-loss learning.
4.5 - 5.0	**Compounding**	A tested, improving sales engine. Keep refining from pipeline results.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
The process gap that is costing the most pipeline right now	
The tool a new rep would need most on day one	
The training conversation the team has not had yet	

Carry it forward. Record your Sales Enablement average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Sales Enablement average today: ___________ Date: ___________

C. Build: Your Selling System

Six builders across the four pillars: process (builders 1 to 3), tools (4), training (5), and accountability (6). Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Tier your accounts

Not every account deserves the same effort. Sort your targets by fit, value, and trigger, and match each tier to a different sales motion.

STEPS

1. List your target accounts.
2. Tier them. Tier 1: high-fit, high-value, active trigger, multiple decision makers, an account-based pursuit with coordinated sales and marketing touches. Tier 2: good fit, moderate value or unclear timing, a structured outreach sequence plus nurture. Tier 3: possible fit, low urgency, marketing-first outreach and long-term nurture.
3. For each Tier 1 account, write the one management question: what is the strategy to create a conversation?

TIER YOUR TARGETS

Prompt	Your answer
Tier 1 accounts and the conversation strategy for each	
Tier 2 accounts (structured outreach plus nurture)	
Tier 3 accounts (marketing-first, long-term nurture)	

Done when: *every target account is tiered and matched to a sales motion.*

Builder 2. Build the IDM campaign

This is the signature asset. Integrated direct marketing is a documented, multi-touch, multi-channel sequence, role and relationship-based. The variety across touchpoints is what carries it, so no rep has to improvise, and automation makes it less manual over time.

STEPS

1. Pick the audience and objective. Current clients: cross-sell and up-sell. Former or dormant clients: reconnect. Lost opportunities: reintroduce and find the decision maker. Placed candidates: reconnect with those who moved into hiring roles.
2. Lay out 12 to 16 touches across channels (call, email, LinkedIn, direct mail), each step tied to a defined asset.
3. For each step, create the voicemail script, email template, and LinkedIn message, templates a rep edits, not writes from scratch.

4. Add a re-engagement branch for prospects who stall at 90 and 180 days.

DEFINE YOUR CAMPAIGN

Prompt	Your answer
Audience and objective	
Channels in the mix	
Number of touches and over how long	
Who owns the sequence in the CRM	

Done when: *you have a documented sequence a new rep could run on day one.*

Go deeper (optional): build separate campaigns for past-client reactivation and placed-talent reconnection, each is a different audience with a different opening.

Builder 3. Standardize the first conversation

The first call should not depend on a rep's instincts. A simple framework makes every rep's first conversation consistent and moves the deal toward a real next step.

STEPS

1. Write the opening: why you are worth the time, tied to the buyer's trigger and pain, not a feature list.
2. List the discovery questions that qualify fit and surface the real problem.
3. Define the next-step ask, and what specifically advances the deal (a proposal, a fee agreement, a site visit).

WRITE YOUR FRAMEWORK

Our first-conversation opening:

THE REST OF THE FRAMEWORK

Prompt	Your answer
Top five discovery questions	

Prompt	Your answer
The next-step ask	
What advances the deal to the next stage	

Done when: *any rep can run a consistent, qualifying first conversation.*

Builder 4. Assemble the tool stack

Tools exist to remove friction, not to look modern. Go category by category, note what you have, and name the friction each tool should remove. Then run the Tool Adoption Test: is anyone actually using it?

STEPS

1. For each category below, mark whether you have it and note any gap.
2. Circle the one missing tool a new rep would need most on day one.
3. For anything you own but the team avoids, write why, low adoption is the same as not having it.

AUDIT YOUR STACK

Tool category	The friction it should remove	Have it? Gap?
CRM and automation	Manual admin, missed handoffs, guessing what is in the pipeline	
Sales collateral	Inconsistent capabilities, solutions, and proof points	
Calculators	Price-only conversations	
Drop-off and promo items	Low-impact first calls and forgettable visits	
Business intelligence and data	Random, untargeted outreach	
Communication and engagement	Dependence on a single channel	

Proposal software	Slow, inconsistent proposals	
AI sales enablement	Time lost on research, notes, and call summaries	

Done when: *your stack is intentional and the one tool gap to close first is named.*

Builder 5. Set training and coaching

A system only works if people can run it. The test of your onboarding is simple: can a new rep run the full campaign? Add coaching on real pipeline and a documented answer to your top objections.

STEPS

1. Write the onboarding path: what a new rep must be able to do at 30, 60, and 90 days, ending in running the campaign unaided.
2. Document your top five objections, each with the proof and the response.
3. Set a coaching cadence on real calls and emails from each rep's own pipeline.

WRITE YOUR PLAN

Prompt	Your answer
New-rep milestones at 30, 60, and 90 days	
Our top five objections and where the responses live	
Our coaching cadence (what, how often)	

Done when: *a new rep can run the campaign and handle the top five objections.*

Builder 6. Install the rhythm

Performance management needs rhythm and real questions. Define the few numbers that matter, set the meeting cadence, and make win-loss findings feed back into the campaign and collateral.

STEPS

1. Define the three to five KPIs that matter (activity, pipeline coverage, conversion, speed-to-response).

2. Set the cadence: a daily huddle, a weekly pipeline review (use the five questions in Quick Wins), and a monthly or quarterly win-loss discussion.
3. Decide how win-loss findings change the campaign, the collateral, and the training.

WRITE YOUR RHYTHM

Prompt	Your answer
Our three to five KPIs	
Our meeting cadence (daily, weekly, monthly)	
How win-loss findings feed back into the system	

Done when: *the team has a rhythm and can answer the weekly pipeline questions in 15 minutes.*

D. Quick Wins

From the book's Quick Action. A real pipeline review forces specific answers to specific questions. Use it in your next weekly review with each rep.

The 5 Weekly Pipeline Review Questions

15 minutes per rep

1. Which proposal you sent does not have a next step scheduled? If one or more, what are you doing about it today?

2. Which target account have you not touched in three weeks? Not which is unresponsive, which you have not touched.

3. Which deal moved a stage this week, and what specifically caused it? If the rep cannot name it, the move is optimism, pull it back.

4. Which deal are you least sure about, and why? This surfaces the deals that should never have been forecast.

5. What one account would you like to land next quarter, and what are you doing this week to make it more likely?

If the team cannot answer these in 15 minutes, you do not have a pipeline review. You have a CRM filled out for show.

WHAT THE REVIEW SURFACED

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Campaign drafting: have a current AI assistant draft first-pass email, LinkedIn, and voicemail templates for each step from your Foundation. You edit for voice and attach the proof.
- Account research: have AI summarize an account's likely trigger events and buyer roles before outreach. You decide the angle.
- Call prep and summaries: have AI prepare talking points and summarize calls into the CRM. You confirm the next step is real.
- Objections: have AI draft responses to your top five objections. You attach the actual proof and approve the wording.

The human's job. The relationship and the judgment call on which account to pursue and when to walk away. AI prepares the rep, it does not replace the conversation. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your selling system is built when every line below is true. Check them off.

☐ Every target account is tiered and matched to a sales motion.

☐ A documented 12 to 16 step campaign exists that a new rep could run.

☐ Every step has a template: voicemail, email, and LinkedIn.

☐ A standard first-conversation framework with discovery questions and a next-step ask.

☐ An intentional tool stack, with the one gap to close first named.

- ☐ An onboarding path and documented responses to the top five objections.
- ☐ A weekly pipeline review that answers the five questions in 15 minutes.

Your Selling System on One Page

When the six builders are done, copy the short version here. This is the brief you hand to a new rep or a sales manager.

Tier 1 accounts and the conversation strategy

The IDM campaign (audience, channels, number of touches)

Our first-conversation opening and next-step ask

The one tool gap we will close first

New-rep onboarding milestone (run the campaign by day __)

Our weekly cadence and the KPIs we track

The one change we will make first

Buyer Enablement

Sell Before the First Call

Maps to book Chapter 7 and Tool 7.

A. Start Here

What you build: the curriculum a buyer learns from before they ever call you. Buyers research you with or without your help. This module makes sure they find what you want them to find, not what they piece together on their own.

What you walk out with: a ranked inventory of the questions buyers ask, a review plan, an honest process and pricing-context page, a comparison guide, switching and objection content, and at least one self-service tool.

Before you start: have your Foundation (Module 4) in hand for proof and differentiators, and your Website (Module 5), which is where most of this content will live.

Time: about 15 minutes for the audit. Build the content over a few sittings, starting with reviews and a real process page.

The organizing idea: control the curriculum. The firms that win the invisible research phase are not the ones that hide less. They are the ones that share more proof, more transparency, more context, before anyone asks.

B. Assess Your Buyer Enablement

This is Tool 7 from the book, the Buyer Question Inventory. Score what a buyer actually finds when they research you, not what you intend to publish. Same 1 to 5 scale, grouped by the questions buyers ask.

Score each line using the 1-to-5 scale (see “How to Score” in the front matter).

SCORE EACH LINE

Buyer enablement asset	Score	Biggest gap

SOCIAL PROOF AND REVIEWS		
ClearlyRated or equivalent Do you have 10+ current, specific reviews?		
Google Business reviews Does your profile reflect current, detailed reviews?		
Review response practice Do you respond to every review, good and bad?		
Niche platform presence Are you visible where your ICP looks?		
PROCESS AND TRANSPARENCY		
How we work explanation Is your process explained honestly and specifically?		
Onboarding and timeline content Does a buyer know what to expect, and when?		
Guarantee or service standard Is your guarantee specific and published?		
What we need from you Do you explain what makes the partnership work?		
PRICING AND COST CONTEXT		
Pricing context or range guide Does a buyer have context to evaluate your cost?		
Cost-of-vacancy or ROI calculator Can a buyer calculate the value of solving it?		
How to evaluate a proposal Do you help buyers compare options fairly?		
COMPARISON AND VALIDATION		

Buying guide for your specialty Do you publish what to look for in a firm like yours?		
Vendor comparison framework Do you explain the category and the trade-offs?		
Case studies with specific outcomes Are results specific enough to be credible?		
EDUCATIONAL AND HOW-TO		
Industry-specific guides Do you publish content useful to your ICP?		
Salary or market benchmarking Do you share market intelligence buyers value?		
Webinars or video Content that shows expertise in a format buyers prefer?		
SWITCHING AND RISK REDUCTION		
Vendor switching guide Do you address the complexity of changing vendors?		
Transition process explanation Does a buyer know what onboarding looks like?		
Objection-handling content Are the top five buyer concerns addressed?		

Now find your average. Add the twenty scores for a total out of 100, then divide that total by 20.

Total: _________ / 100 **Total ÷ 20 = Average: _________**

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	Buyers researching you find a vacuum and fill it with competitors and peers. Start with reviews and a real process page.
2.0 - 2.9	**Underdeveloped**	Thin and hard to find. The work is answering the questions buyers actually ask, in public.
3.0 - 3.9	**Functional**	Content exists but does not fully answer or get found. The work is specificity and findability.
4.0 - 4.4	**Strong**	You are becoming the trusted source for the category. Extend with comparison content and self-service tools.
4.5 - 5.0	**Compounding**	Your content actively generates inquiries. Keep it current and distinctive.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
The question buyers most often ask in sales calls that content could answer	
The biggest gap in what a buyer finds when they search you today	
The one asset worth building this quarter	
The client to ask this week about what they searched before calling	

Carry it forward. Record your Buyer Enablement average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Buyer Enablement average today: __________ Date: __________

C. Build: Control the Curriculum

Six builders that follow the buyer's path: inventory their questions, then answer them across discovery, evaluation, and action, and finally let buyers serve themselves. Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Inventory the buyer's questions

Buyers research you with or without your help. Start by writing down the questions they are actually asking, because that list is your content plan.

STEPS

1. From your last ten sales calls, list every question a buyer asked before they were ready to decide.
2. Add the questions they were probably too polite to ask out loud: what does it cost, what happens if a hire does not work out.
3. Sort the list by stage: discovery, evaluation, action.

WRITE YOUR INVENTORY

Prompt	Your answer
Top discovery questions (just learning)	
Top evaluation questions (comparing you)	
Top action questions and objections (deciding)	

Done when: *you have a ranked list of the questions your content must answer.*

Builder 2. Win discovery with how-to content

How-to content that is useful whether or not someone buys proves your expertise and shows how hard the work really is. Give away more to sell more.

STEPS

1. Pick three how-to topics that answer real buyer or candidate questions (recruiting, interviewing, onboarding, retention).
2. For each, write the one specific, genuinely useful takeaway you will teach.
3. Decide where each lives: a blog post, a downloadable guide, or a short video.

PLAN YOUR HOW-TO CONTENT

Prompt	Your answer
How-to topic 1 and its takeaway	
How-to topic 2 and its takeaway	
How-to topic 3 and its takeaway	

Done when: *three how-to pieces are planned that you would be glad a competitor's buyer read.*

Builder 3. Win evaluation with proof and transparency

In evaluation, buyers want reviews, a real explanation of how you work, and cost context. Publish what buyers actually want to know, not the platitudes most firms publish.

STEPS

1. Reviews: name the platforms your buyers use (ClearlyRated, Google), set a target count, and start a steady, specific ask. Respond to every review.
2. Process page: answer the real questions. What the intake covers, what screening actually includes and your show-up rate, your time from order to first submission, your guarantee policy, and what the ongoing relationship looks like.
3. Pricing context: give a range or the drivers of cost, even if you cannot publish exact numbers.

WRITE YOUR PROOF AND TRANSPARENCY PLAN

Prompt	Your answer
Review platforms and our target count	
The five process questions we will answer publicly	
Our pricing-context approach (range or drivers)	

Done when: *a buyer can find real reviews, an honest process, and cost context without calling you.*

Builder 4. Build comparison content

The honest buying guide is one of the most underleveraged assets in staffing, and buyers cannot find it from staffing firms. The firm that publishes it becomes the trusted source for the category.

STEPS

1. Outline a category guide: the types of providers, the trade-offs (national vs. regional, managed service vs. direct), and the questions that reveal what a firm does versus what it claims.
2. Keep it genuinely unbiased: factual, apples-to-apples, with trademark disclaimers, and no disparagement.
3. Decide the format and where it lives.

> **A word of caution.** Never use comparison content to promote yourself or disparage competitors, unless you like lawsuits. Truth is your best defense: claims must be factual and substantiated, comparisons apples-to-apples, with disclaimers that competitor names are trademarks of their owners.

PLAN YOUR COMPARISON CONTENT

Prompt	Your answer
The comparison or buying-guide topic	
The trade-offs we will explain honestly	
Format and where it will live	

Done when: *an honest category guide exists that helps a buyer choose well, even if not you.*

Builder 5. Remove the last obstacle

At the action stage the barrier is risk, above all the fear of switching vendors. Address it directly so the final step feels safe.

STEPS

1. Write a switching guide that addresses the real complexity of changing vendors, honestly.
2. Document responses to the top five buyer objections and concerns, each with proof.
3. Make the next step obvious and low-friction.

WRITE YOUR ACTION-STAGE PLAN

Prompt	Your answer
Switching guide outline	
Top five buyer objections and where the answers live	
The low-friction next step we will offer	

Done when: *a buyer can see how a switch works and that their top concerns are answered.*

Builder 6. Add self-service tools

Buyer enablement is more than content. Self-service tools let buyers educate, qualify, and act on their own terms. Marcus Sheridan names five types worth building.

STEPS

1. Pick one or two to build first: self-assessment (a scorecard or audit), self-selection (which-service helper), self-pricing (a cost or ROI calculator), self-configuration (build-a-solution), or self-scheduling (book a meeting).
2. Define the input the buyer gives and the useful output they get.
3. Note where it lives and what it captures for follow-up.

SPEC YOUR SELF-SERVICE TOOL

Prompt	Your answer
The self-service tool we will build first	
What the buyer puts in, and gets out	
Where it lives and what it captures	

Done when: *at least one self-service tool is specced. Add it to your website tools list.*

Go deeper (optional): over time, build the full set: assessment, selection, pricing, configuration, and scheduling, so a serious buyer can do most of their evaluation without waiting on you.

D. Quick Wins

Pulled straight from the book's Quick Actions. Each takes 5 to 15 minutes. Jot what you learn in the space under each.

Ask for 5-Star Reviews this week

Identify your five happiest clients. Email each a specific, low-friction ask with a one-click link to ClearlyRated or Google.

Do not ask for a long review. Ask them to share one thing that improved since working with you. Better yet, draft it from a past conversation for them to approve. Five genuine, specific reviews do more for the research phase than most campaigns.

WHAT I LEARNED

Google Yourself 10 minutes

Open a private browser window. Search your firm's name, then your firm name plus reviews, then your specialty plus staffing plus your city plus reviews.

That is roughly what your best prospects find before they call. Read every review, note where you appear and where you are absent, and write down three things a buyer would conclude about you from this alone. Those three conclusions are your starting point.

WHAT I LEARNED

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Question mining: have a current AI assistant pull the questions buyers actually ask from your recent sales-call notes and emails. You decide which to answer publicly.
- Content drafting: have AI turn your real process into an honest how-we-work page. You ensure the specifics and the numbers are true.
- Comparison content: have AI outline an unbiased category guide. You verify every claim is factual and add the required disclaimers.
- Reviews: have AI draft the review-request message and a first-draft review from a past conversation, for the client to edit and approve. You keep it genuine.

The human's job. Deciding how much to reveal and standing behind it. Transparency is a judgment call, not a draft. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your buyer enablement is working when every line below is true. Check them off.

- ☐ You have a ranked inventory of the questions buyers ask.
- ☐ Real, specific reviews exist on the platforms your buyers use.
- ☐ Your process is explained honestly, answering what buyers actually want to know.
- ☐ A buyer can find cost context without calling you.
- ☐ An honest comparison or buying guide exists.
- ☐ Switching and top-five objection content is published.
- ☐ At least one self-service tool is live or specced.
- ☐ You have Googled yourself and fixed what a buyer sees first.

Your Buyer Curriculum on One Page

When the six builders are done, copy the short version here. This is the brief you hand to a writer or an AI tool.

The top buyer questions we must answer

Our review plan (platforms and target count)

The process questions we answer publicly

Our pricing-context approach

The comparison or buying guide we will publish

Our switching and objection content

The one self-service tool we will build first

The one asset worth building this quarter

Module 8

Market Attraction

Get Found by the Right People

Maps to book Chapter 8 and Tool 8.

A. Start Here

What you build: a focused plan to get found by the right people, organized in three layers: be findable when buyers are looking, show up where they already pay attention, and stay visible between buying cycles.

What you walk out with: a channel map. A short, honest list of the channels you will actually run well, the ones you will shut down, an OPS play, a between-cycles cadence, and your one 90-day investment.

Before you start: have your Foundation (Module 4) so your content has a point of view, and your Buyer Enablement answers (Module 7), which are the raw material for being findable. Traffic lands on your Website (Module 5).

Time: about 15 minutes for the audit. The Source Audit and Owned Channel Audit in Quick Wins take an hour combined and are worth doing first.

Avoid the visibility trap. More visibility is not the goal. The goal is being found by the right buyers. Not every firm needs every channel, so this module is about choosing, not doing it all.

B. Assess Your Market Attraction

This is Tool 8 from the book, the Market Attraction Channel Map. Score each channel for how well it reaches your ICP today, not how busy you are on it. Same 1 to 5 scale, grouped by the three layers.

Score each line using the 1-to-5 scale (see "How to Score" in the front matter).

SCORE EACH LINE

Attraction channel or activity	Score	Biggest gap

LAYER 1: BE FINDABLE WHEN BUYERS ARE LOOKING		
Organic search (SEO) Do you rank for the questions your ICP actually searches?		
AI-generated search (AIO/GEO) Does your firm appear when buyers ask AI assistants?		
Website content depth Specific, current answers to real buyer questions?		
LAYER 2: SHOW UP WHERE BUYERS PAY ATTENTION		
Social presence Are leaders actively using LinkedIn and creating content?		
YouTube Do you have a video creation and optimization strategy?		
Paid search (Google Ads) Targeting high-intent terms for the ICP?		
Paid social (LinkedIn ads) Using or testing matched-audience ads?		
Retargeting Are website visitors followed with relevant ads?		
OPS: trade publications Do you contribute articles or appear in trade press?		
OPS: conference and event speaking Does leadership speak where the ICP gathers?		
OPS: podcasts and media Has anyone from the firm been a guest?		

Community and group management Have you built a group for your target market?		
Industry association involvement Is the firm actively involved in associations?		
Strategic partnerships and referrals Are there defined referral relationships?		
LAYER 3: STAY VISIBLE BETWEEN BUYING CYCLES		
LinkedIn personal content Do leaders post consistent thought leadership?		
LinkedIn company page Active with proof, results, and proof of life?		
Email content to prospect list A regular send to prospects who have not bought?		
Direct mail cadence Physical mail as part of a coordinated campaign?		

Now find your average. Add the eighteen scores for a total out of 90, then divide that total by 18. Do not expect to score on every line, a firm should not be on every channel.

Total: _________ / 90 **Total ÷ 18 = Average: _________**

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	You are invisible where buyers look. Fix findability first, then pick one channel to do well.
2.0 - 2.9	**Underdeveloped**	Scattered presence, no traction. The work is focus: fewer channels, done consistently.

3.0 - 3.9	**Functional**	Active but unfocused. The work is matching channels to your ICP and tracking what converts.
4.0 - 4.4	**Strong**	Real visibility with your buyers. Deepen your best channels and add an OPS play.
4.5 - 5.0	**Compounding**	A recognized presence generating inbound and referrals. Keep compounding, prune the rest.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
The layer with the most critical gaps today	
The channel most likely to reach our ICP specifically	
The one investment worth making in the next 90 days	
Where the last 10 inbound conversations actually came from	

Carry it forward. Record your Market Attraction average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Market Attraction average today: ___________ Date: ___________

C. Build: Your Channel Map

Six builders. Start from what already works, then build the three layers, choosing channels rather than chasing all of them, and finish with one written map. Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Start from what already works

Do not chase visibility for its own sake. Begin with where your best conversations actually came from, then protect and deepen those channels before adding anything new.

STEPS

1. Run your Source Audit (Quick Win below): trace the last 20 meaningful new-prospect conversations to how each one first found you.
2. Mark the channels that recur most in the conversations that went furthest.
3. Those are your foundation. Deepen them first.

WRITE WHAT YOU FOUND

Prompt	Your answer
Channels behind our best 20 conversations	
The two or three that recur most	
What we will deepen first	

Done when: *you know which channels already produce real conversations.*

Builder 2. Layer 1, be findable

When a buyer is actively looking, you have to be in the results, both in classic search and in the answers AI assistants now give. Your Buyer Enablement content is the raw material.

STEPS

1. Classic search: list the questions your ICP types, and make sure a specific, current page answers each one.
2. AI search: run the AI Visibility Test (Quick Win), note where you are absent, and build the depth that earns a citation, clear, authoritative, quotable answers.
3. Pull the answers from your Module 7 buyer questions rather than starting from a blank page.

WRITE YOUR FINDABILITY PLAN

Prompt	Your answer
Top buyer search questions we must own	
Where we are absent in AI answers today	
The content we will build to close the gap	

Done when: *a buyer searching, by Google or by AI, can find you for your specialty.*

Builder 3. Layer 2, choose your owned channels

Not every firm needs every channel. Choose the few that reach your ICP and do them well. On LinkedIn, the principal's personal voice is the primary engine; the company page is the credibility baseline.

STEPS

1. Run the Owned Channel Audit (Quick Win) on each channel you maintain: who engages, the conversion path, the real commitment required, and the proof-of-life signal.
2. Keep the channels whose audience matches your ICP. Shut down the rest rather than maintain them at low quality.
3. Make LinkedIn personal content your primary attraction channel, and keep the company page current as the baseline.

WRITE YOUR CHANNEL CHOICES

Prompt	Your answer
Channels we will keep (and why they fit the ICP)	
Channels we will shut down	
Our primary owned channel, and who owns it	

Done when: *a short, honest list of owned channels you will actually maintain well.*

Builder 4. Layer 2, borrow other people's stages

OPS, other people's stages, is the fastest path to credibility. Instead of building an audience from scratch, get in front of audiences someone else already built.

STEPS

1. List where your ICP already gathers: trade publications, conferences, podcasts, and associations.
2. Pick one OPS play to pursue this quarter, an article, a talk, a guest spot, or a partnership.
3. Define your angle, a specific, useful point of view, not a pitch.

WRITE YOUR OPS PLAY

Prompt	Your answer
Where our ICP already gathers	
The one OPS play we will pursue this quarter	
Our angle (the genuinely useful point of view)	

Done when: *one OPS play is chosen, with an angle and a target.*

Builder 5. Layer 3, stay visible between buying cycles

Most buyers are not ready now. Consistency keeps you in the consideration set for when they are. The point is a sustainable rhythm, not a burst.

STEPS

1. Set a realistic LinkedIn posting cadence for the principal, one you can sustain.
2. Set a regular email send to prospects who have not bought yet.
3. Add a direct-mail touch tied to the campaign, not a random mailer.

WRITE YOUR BETWEEN-CYCLES CADENCE

Prompt	Your answer
LinkedIn cadence (who posts, how often)	
Email-to-prospects cadence	
Direct-mail touch and its trigger	

Done when: *a sustainable between-cycles cadence is scheduled, not improvised.*

Builder 6. Build the channel map

Synthesize the decisions into one map, so the team knows where you play, why, and who owns it. Naming what you will not do is as important as naming what you will.

STEPS

1. For each chosen channel, record who it reaches and the conversion path (what a buyer does next), plus the owner and cadence.
2. Name the channels you deliberately will not play.
3. Circle the one investment worth making in the next 90 days.

MAP YOUR CHOSEN CHANNELS

Channel	Who it reaches and the next step	Owner and cadence

THE REST OF THE MAP

Prompt	Your answer
Channels we will deliberately NOT play	
The one investment worth making in the next 90 days	

Done when: *a written channel map exists, with what you are not doing named.*

D. Quick Wins

Pulled straight from the book's Quick Actions. The first two take minutes; the audits take longer and are worth doing first. Jot what you learn under each.

Test Your AI Visibility
10 minutes

Open an AI assistant and ask what a buyer would: what should I look for in a [your specialty] staffing firm in [your market]?

Then ask directly: what staffing firms are known for [your specialty] in [your region]? Note whether you appear, who does, and what is likely earning their citation. The gap is your AIO starting point.

WHAT I LEARNED

Audit Your LinkedIn Presence
15 minutes

For both the company page and the principal's profile, ask: when did you last post? More than four weeks means you have an account, not a presence.

Who engaged with your last ten posts? If it is mostly recruiters and candidates, the content is reaching the wrong audience. And: what would a plant manager find if they looked you up right now? That impression is your current strategy, intended or not.

WHAT I LEARNED

Run an Owned Channel Audit 30 minutes

Pull the last 90 days across every social channel you maintain. For each, answer four questions: who is actually engaging (job titles, not follower counts)? What is the conversion path? What would it honestly take to do this well? What is the proof-of-life signal?

Keep the channels that survive. Shut down the ones that do not, rather than maintain them at low quality.

WHAT I LEARNED

The Source Audit 1 hour

Look at the last 20 meaningful new-prospect conversations. For each, find out how that prospect first became aware of the firm: referral, outbound, search, event, content, or untraceable.

The channels that appear most in the conversations that went furthest are worth more investment. The ones that rarely appear deserve scrutiny before more money goes in.

WHAT I LEARNED

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- AI visibility: ask an AI assistant what it says about your firm and your category, and which sources it cites. You decide which content gaps to fill to earn citations.
- Content depth: have AI draft long-form answers to your buyers' top questions. You add the specificity, data, and proof only you have.
- LinkedIn: have AI turn a client insight or market observation into a draft post. You keep it in the principal's real voice, generic posts get ignored.
- Channel research: have AI summarize where your ICP actually spends attention, the publications, events, and communities. You verify before you invest.

The human's job. Choosing where NOT to play, and protecting the principal's authentic voice. Focus is a judgment call AI cannot make for you. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your market attraction is focused and working when every line below is true. Check them off.

- ☐ You know where your best conversations actually come from.
- ☐ You appear in AI answers for your category, or you have a plan to.
- ☐ You rank for, or answer, the questions your buyers search.
- ☐ LinkedIn personal content posts consistently, to the right audience.
- ☐ You have a short list of chosen channels, and a list of ones you shut down.
- ☐ At least one OPS play is in motion.
- ☐ A sustainable between-cycles cadence is running.
- ☐ A written channel map exists, naming what you will not do.

Your Channel Map on One Page

When the six builders are done, copy the short version here. This is the brief you hand to whoever runs your marketing.

Where our best conversations come from

Our findability plan (SEO and AI search)

Our one or two primary owned channels

Our OPS play this quarter

Our between-cycles cadence

Channels we are shutting down

The one 90-day investment

Module 9

Nurturing

Stay Relevant Until They Are Ready

Maps to book Chapter 9 and Tool 9.

A. Start Here

What you build: a nurturing system that keeps you relevant until a buyer is ready, across the whole relationship lifecycle, from stranger to past client. Consistency beats brilliance, so this module is built to be sustainable.

What you walk out with: a five-stage journey map, a branded content engine you can actually sustain, a clean and segmented list, the highest-impact stage sequences, and a plan that connects nurture to sales.

Before you start: have your Foundation (Module 4) for a point of view, your Buyer Enablement content (Module 7) as the useful material to send, and your Sales Enablement (Module 6) so nurture and sales coordinate.

Time: about 15 minutes for the audit. The branded content engine is a standing commitment, start with one format.

Stay relevant, not just in touch. The goal is not to be remembered. It is to be useful, consistently, so that when a buyer's timing shifts, you are the firm they already trust.

B. Assess Your Nurturing

This is Tool 9 from the book, the Nurture Journey Map. Score what actually reaches people at each stage, not what you intend to send. Same 1 to 5 scale, grouped by the universal layer and the five buyer stages.

Score each line using the 1-to-5 scale (see “How to Score” in the front matter).

SCORE EACH LINE

Nurture element	Score	Biggest gap

UNIVERSAL NURTURE (ALL STAGES)		
Regular branded content Newsletter, podcast, or webinar on a real schedule?		
Content quality standard Genuinely useful, not drifting to promotional?		
List hygiene and segmentation Current, permission-based, and segmented?		
STAGE 1: NEW PROSPECTS		
New-contact welcome sequence A defined first-30-days sequence for new contacts?		
Expertise-establishing content Does early nurture show the firm's knowledge?		
STAGE 2: WARM PROSPECTS		
Coordination with sales campaign Does nurture run alongside the sales sequence?		
Industry-specific content Can reps reference specific nurture pieces?		
Re-engagement for gone-quiet A defined 90-day sequence for stalled prospects?		
STAGE 3: ACTIVE BUYERS		
Proof content during evaluation Case studies and results sent systematically?		
Risk-reduction content Switching-concern content available and used?		
STAGE 4: ACTIVE CLIENTS		

Regular value-add communication Something useful beyond account talk?		
Proactive market insights Relevant workforce intelligence to clients?		
Expansion nurture Content that surfaces new needs before clients ask?		
STAGE 5: PAST CLIENTS		
Reactivation sequence A defined, value-first sequence for dormant clients?		
Ongoing inclusion in nurture Do past clients still get the universal content?		
Trigger-based reactivation Do changes in their business trigger outreach?		

Now find your average. Add the sixteen scores for a total out of 80, then divide that total by 16.

Total: ________ / 80 **Total ÷ 16 = Average: ________**

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	People enter your world and hear nothing. Start one branded content send that goes to everyone.
2.0 - 2.9	**Underdeveloped**	Occasional, informal touches. The work is one consistent program, then stage-specific sequences.
3.0 - 3.9	**Functional**	Something goes out but it is generic and disconnected. The work is relevance and connecting to sales.

4.0 - 4.4	**Strong**	Real programs running and measured. Deepen stage-specific nurture and client expansion.
4.5 - 5.0	**Compounding**	Stage-specific, sales-coordinated, and refined. Keep it useful and keep it consistent.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
The stage most completely without a nurture program today	
The stage where better nurture would have the most immediate revenue impact	
The branded content format we can sustain for the next 24 months	
The last time any branded content went out, and whether it will go out again	
Ten past clients who have received nothing from us in the last 12 months	

Carry it forward. Record your Nurturing average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Nurturing average today: __________ Date: __________

C. Build: Your Nurture System

Six builders. Map the journey, build the one content engine that powers everything, set the universal foundation, add stage-specific sequences, balance automation with the human touch, and connect it all to sales. Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Map the relationship journey

Everyone in your world is at one of five stages, and each needs a different goal. Map what you want each stage to feel and do before you build the content.

STEPS

1. For each of the five stages below, write your nurture goal and what specifically will move that person to the next stage.
2. Keep it to the buyer's world, not your services. The goal at every early stage is usefulness, not a pitch.

MAP YOUR FIVE STAGES

Stage	Your nurture goal	What moves them forward
Stranger just heard of you		
Prospect knows you, not ready		
Active Buyer evaluating now		
Client wants to feel good about it		
Past Client may not remember why you parted		

Done when: *each of the five stages has a clear goal and a next-step trigger.*

Builder 2. Build the branded content engine

Branded content is the core nurture asset, the one thing that powers every stage. The first issue will not be perfect. The sixtieth will be one of the best marketing assets your firm has ever built. The only failure is never starting.

STEPS

1. Pick one format your team can sustain, not the most impressive, the most consistent. A monthly email is the lowest barrier; a quarterly webinar is a manageable live option.
2. Identify the single most useful thing your team knows that clients and prospects do not, an insight about their market or workforce, not a product feature.
3. Produce one issue on that topic, in plain language, and send it to everyone who has given you permission.
4. Schedule the next one. Every issue compounds.

DEFINE YOUR ENGINE

Prompt	Your answer
The one format we can sustain	
The single most useful insight we will lead with	
Who produces it and on what schedule	

Done when: *one format is chosen, one issue is produced, and the next is scheduled.*

Builder 3. Set the universal foundation

Before stage-specific sequences, get the basics right: a clean, segmented list and a content quality standard, so everything you send is useful and reaches the right people.

STEPS

1. List hygiene: confirm the list is current and permission-based, and segment it (at least by stage and by ICP).
2. Set a content quality standard: a simple test every piece must pass before it goes out, would a client find this genuinely useful?
3. Decide the one thing everyone in the database receives, regardless of stage.

WRITE YOUR FOUNDATION

Prompt	Your answer
How we will clean and segment the list	
Our content quality standard (the test each piece must pass)	
What everyone receives, regardless of stage	

Done when: *the list is clean and segmented, and every piece has a usefulness test to pass.*

Builder 4. Build stage-specific sequences

On top of the universal send, each stage needs its own touches. You do not have to build all five at once. Start with the stage from your Assess that would move revenue most.

STEPS

1. Pick the highest-impact stage gap from your Assess plan.
2. Sketch its sequence: new prospects need a welcome sequence and expertise content; warm prospects need nurture that runs alongside the sales campaign plus a 90-day re-engagement; active buyers need proof and risk-reduction content; clients need value-add and expansion nurture; past clients need a value-first reactivation sequence.
3. Define the trigger that starts it and the cadence.

BUILD YOUR PRIORITY SEQUENCE

Prompt	Your answer
The stage we are building first, and why	
The sequence (touches, content, and trigger)	
The cadence and who owns it	

Done when: *at least the highest-impact stage sequence is built and scheduled.*

Go deeper (optional): over time, build a defined sequence for all five stages, so no one falls through a gap between automation and a rep remembering to reach out.

Builder 5. Automation plus the human touch

Automation makes consistency possible at scale. It does not replace the human layer. Automate the baseline, and reserve personal outreach for the moments that deserve a person.

STEPS

1. Decide what automation carries: the universal send, the welcome sequence, the re-engagement triggers, list-based segmentation.
2. Decide where a human is required: high-value accounts, an active buyer signal, a past client worth a personal note.
3. Write the rule that keeps the two coordinated, so a rep is never blindsided by what automation sent.

SPLIT AUTOMATION AND HUMAN

Prompt	Your answer
What automation will carry	
Where a human touch is required	
The rule that keeps automation and reps coordinated	

Done when: *the baseline runs automatically, and humans own the high-value moments.*

Builder 6. Connect to sales and keep it alive

Nurture fails in four predictable ways: it stops when business gets busy, it turns promotional, it treats everyone the same, and it is never connected to sales. This builder closes the last two and protects against the first.

STEPS

1. Define how nurture hands off to sales: what signal tells a rep to step in, and what the rep can reference.
2. Name an owner and a guardrail so the program keeps running when the business gets busy, the busy season is exactly when staying visible matters most.

3. Set a simple review: each quarter, confirm content is still useful (not promotional) and still stage-relevant.

WRITE YOUR GUARDRAILS

Prompt	Your answer
The signal that hands a contact from nurture to a rep	
The owner and the guardrail that keeps it running when busy	
Our quarterly check (still useful, still stage-relevant?)	

Done when: *nurture is connected to sales and protected against going quiet or promotional.*

D. Quick Wins

From the book's Quick Action. The fastest path to starting a branded content engine, the asset that powers every stage above.

Start Your Branded Content Engine this week

Step 1. Pick one format your team can sustain, the most consistent, not the most impressive. A monthly email is the lowest barrier.

Step 2. Identify the single most useful thing your team knows that clients and prospects do not. An insight about their market, not a product feature.

Step 3. Produce one issue on that topic, in plain language, as if explaining it to a smart client over coffee. Send it to everyone who gave you permission.

Step 4. Do it again next month. The first issue will not be perfect. The twelfth will be better. The sixtieth will be one of the best assets your firm has ever built.

MY FORMAT, MY FIRST TOPIC, MY SEND DATE

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Content drafting: have a current AI assistant turn your team's one useful insight into a first-draft issue. You keep it specific, accurate, and in your voice.
- Segmentation: have AI suggest segments from your list and engagement data. You decide which segments are worth a different message.
- Stage sequences: have AI draft a stage-specific sequence from your Foundation. You set the cadence and mark where a human must step in.
- Reactivation: have AI draft a personalized re-engagement note for a dormant client from your past history with them. You read it and sign off before it sends.

The human's job. Relevance and the genuine relationship. Consistency is a discipline AI supports, not a relationship it can have. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your nurturing is working when every line below is true. Check them off.

- ☐ A five-stage journey map exists, each with a goal and a next-step trigger.
- ☐ A branded content format is chosen and at least one issue has gone out.
- ☐ The list is clean, permission-based, and segmented.
- ☐ At least the highest-impact stage sequence is built and scheduled.
- ☐ Automation runs the baseline; humans own the high-value moments.
- ☐ Nurture is connected to the sales process with a clear handoff.
- ☐ There is an owner and a guardrail so it keeps running when the business gets busy.
- ☐ Content is still useful, not promotional, and past clients still hear from you.

Your Nurture Plan on One Page

When the six builders are done, copy the short version here. This is the brief you hand to whoever runs your nurture.

The goal for each of the five stages

Our branded content format and cadence

Our list segments

The priority stage sequence we built first

What automation carries vs. what a human handles

The nurture-to-sales handoff signal

The owner and guardrail that keeps it running

Automation

Make Consistency Possible at Scale

Maps to book Chapter 10 and Tool 10.

A. Start Here

What you build: an automation system that makes consistency possible at scale, so follow-up never depends on someone remembering. The rule of this module: automate the consistency, and own the voice.

What you walk out with: a trigger-to-action map, a speed-to-response automation, the core marketing and sales sequences, intent alerts that route to a human, and a review cadence that keeps it from going stale.

Before you start: have your Foundation (Module 4), automation amplifies whatever you point it at, so it has to point at something real. Your Nurturing sequences (Module 9) and Sales process (Module 6) are what you are automating; speed-to-response fires from your Website (Module 5).

Time: about 15 minutes for the audit. Build speed-to-response first; it is the highest-ROI automation in the system.

Two ways automation fails. Automating before the Foundation exists (you scale generic noise), and under-automating after a bad past experience (follow-up keeps falling through). This module avoids both.

B. Assess Your Automation

This is Tool 10 from the book, the Automation Opportunity Map. Score what actually fires on its own today, not what you could set up. Same 1 to 5 scale, grouped into marketing automation, sales automation, and AI-assisted content.

Score each line using the 1-to-5 scale (see "How to Score" in the front matter).

SCORE EACH LINE

Automation opportunity	Score	Biggest gap
MARKETING AUTOMATION		
New-contact welcome sequence Does every new contact get a defined first-30-days sequence?		
Nurture follow-up Is the team leveraging content to start conversations?		
Segmentation by relationship stage Are prospects, clients, and past clients separated?		
Re-engagement trigger (90-day) Does silence trigger an automatic sequence?		
Intent-based content delivery Does a click or download trigger relevant follow-up?		
List hygiene automation Are unengaged contacts flagged and processed automatically?		
SALES AUTOMATION		
Speed-to-response (web forms) Does every form fill get an immediate auto-response?		
CRM sequence step reminders Does the CRM surface the next action for every deal?		
Email template loading by step Does the rep get the right template at each step?		
Website intent alerts to sales Does a key page visit trigger an immediate alert?		
High-engagement signal alerts Do 3+ consecutive opens trigger a rep alert?		

Proposal follow-up sequence Does a sent proposal trigger a defined follow-up?		
Dormant opportunity re-engagement Does 90-day pipeline inactivity trigger outreach?		
Past-client reactivation trigger Does 6-month client inactivity trigger a sequence?		
AI-ASSISTED CONTENT		
Sequence brief template exists Is there a defined brief before any sequence is built?		
Brand voice guidelines documented Does AI have specific guidance on tone and words?		
Content review cadence Are sequences reviewed at least annually?		

Now find your average. Add the seventeen scores for a total out of 85, then divide that total by 17.

Total: ________ / 85 Total ÷ 17 = Average: ________

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	Everything runs on memory, and follow-up falls through. Automate speed-to-response first.
2.0 - 2.9	**Underdeveloped**	Manual processes, nothing fires on its own. The work is the first few reliable triggers.
3.0 - 3.9	**Functional**	Basic automation exists but is untested or generic. The work is briefs, integration, and review.

4.0 - 4.4	**Strong**	Fires reliably and measurably. Deepen intent-based routing and proposal follow-up.
4.5 - 5.0	**Compounding**	Reviewed, refined, and integrated with sales. Keep the voice yours.

TURN YOUR SCORE INTO A PLAN

Prompt	Your answer
The workflow costing the most pipeline because no one is following up	
The highest-ROI automation to build in the next 30 days	
The sequence that most needs a content review before it runs another day	
The Foundation element that needs to exist before new automation is built	

Carry it forward. Record your Automation average on the Engine Scorecard at the front of the workbook. You will watch this number move as you build.

My Automation average today: __________ Date: __________

C. Build: Your Automation Map

Six builders. Map what to automate, build the highest-ROI automation first, then the marketing and sales sequences, route intent signals to a human, and govern the whole system. Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Map trigger to action

Automation is a set of triggers and responses. Decide what fires automatically and what needs a human, before you build anything. Behavioral intent and high-stakes moments deserve a person; predictable, low-stakes touches do not.

STEPS

1. List the trigger events in your world: a new contact, a form fill, a key page visit, a stretch of silence, a sent proposal.
2. For each, decide what fires and whether a human step is required.
3. Mark the one with the biggest gap as your first build.

MAP YOUR TRIGGERS

Trigger event	What fires	Human step?

Done when: *you have a trigger-to-action map, with the human steps marked.*

Builder 2. Build speed-to-response

Speed-to-response is the highest-ROI automation in the system. A buyer who fills a form and hears back in minutes has a very different experience than one who waits three days. Build this one first.

STEPS

1. List every form and capture point on the site.
2. Write the instant acknowledgment a buyer receives, useful, not just we got it.
3. Set the rep alert and the target time for a human follow-up, in minutes, not days.

BUILD YOUR SPEED-TO-RESPONSE

Prompt	Your answer
The forms and capture points this covers	
The instant acknowledgment a buyer receives	
The rep alert and the target human-response time	

Done when: *every form fires an instant acknowledgment and a fast human follow-up.*

Builder 3. Build the core marketing sequences

Three sequences carry most of the marketing-automation value: a welcome, a re-engagement, and a reactivation. Start each one by filling the Sequence Brief in Quick Wins, then write the touches.

STEPS

1. Welcome: a defined first-30-days sequence every new contact receives.
2. Re-engagement: a sequence that fires after 90 days of silence.
3. Reactivation: for past clients dormant 6 months, automate the first two touches and add a human step at touch three.
4. Fill the Sequence Brief (Quick Wins) for each before writing a word.

PLAN YOUR THREE SEQUENCES

Prompt	Your answer
Welcome sequence (touches and content)	
90-day re-engagement sequence	
6-month past-client reactivation (auto + human step)	

Done when: *the welcome, re-engagement, and reactivation sequences are defined.*

Builder 4. Build the sales sequences

Sales automation gives speed and persistence without heroic effort, while keeping human judgment on the message. The CRM should surface the next action; the rep should still own the send.

STEPS

1. CRM step reminders: the CRM surfaces the next action and loads the right template at each step, the rep personalizes and sends.
2. Proposal follow-up: a sent proposal triggers follow-up at day 3, 7, and 14, with the rep reviewing before each send.
3. Dormant opportunity: 90 days of pipeline inactivity triggers a re-engagement step.

PLAN YOUR SALES SEQUENCES

Prompt	Your answer
CRM step reminders and templates we will set up	
Proposal follow-up cadence (and who reviews)	
Dormant-opportunity re-engagement trigger	

Done when: *the CRM prompts the next action, and proposal follow-up never falls through.*

Builder 5. Route intent to a human

Behavioral intent signals are buying signals, and they deserve a person, not an autoresponder. Decide which signals route to a rep, and what the rep does when one fires.

STEPS

1. Define the intent signals: a key page visit (pricing, case study), three consecutive email opens, a repeat visit.
2. Route each to an immediate rep alert.
3. Write what the rep does with it: a personal, relevant reach-out based on what the buyer looked at, not a generic template.

PLAN YOUR INTENT ROUTING

Prompt	Your answer
The intent signals worth a human response	
Where the alert goes	
What the rep does when it fires	

Done when: *buying signals reach a human fast, with a relevant response ready.*

Builder 6. Govern the system

Automation drifts. Content goes stale, voice slips toward generic, and a sequence built two years ago keeps sending. Governance keeps the system useful and keeps it sounding like you.

STEPS

1. Set a content review cadence: review every automated sequence at least annually, and refine on engagement data.
2. Document your brand voice for AI and writers: the tone you use, and the words you never use.
3. Confirm the two failure modes are handled: nothing is automated on top of a missing Foundation, and no follow-up is left to memory.

WRITE YOUR GOVERNANCE

Prompt	Your answer
Our content review cadence and who owns it	
Where our brand-voice guidance lives	
How we keep automation pointed at a real Foundation	

Done when: *every sequence has an owner, a review date, and a documented voice.*

D. Quick Wins

From the book's Quick Action. Fill this brief before you build any sequence, and before you hand anything to an AI tool. A good brief is the difference between generic output and output that sounds like you.

Build the Sequence Brief

before any new sequence

1. Who specifically receives this sequence? Not prospects, the role, industry, company size, and the situation that triggers it.
2. What is the one thing this person most needs to believe about us afterward?
3. What proof supports that belief? A specific metric, client result, case study, or proprietary process.
4. What does our voice sound like here? Direct, warm, confident, conversational, and what words do we never use?
5. What is the specific next step we are asking for, and why should this person want to take it?

MY SEQUENCE BRIEF

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Sequence drafting: feed AI your filled Sequence Brief and it drafts the touches. An under-briefed request produces generic sludge; a well-briefed one produces a usable first draft you edit.
- Voice: give AI your documented brand voice and never-use words, so the output sounds like the firm, not a template.
- Personalization at scale: have AI tailor a template by role and industry from your CRM data. You spot-check before it sends.
- Review: have AI flag sequences that have gone stale or off-voice. You decide what to refresh.

The human's job. The brief and the voice. AI without a brief produces exactly the generic output that makes automation feel automated. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your automation is working when every line below is true. Check them off.

- ☐ A trigger-to-action map exists, with the human steps marked.
- ☐ Speed-to-response fires within minutes of any form fill.
- ☐ A Sequence Brief is filled before any new sequence is built.
- ☐ Welcome, re-engagement, and reactivation sequences are running.
- ☐ Proposal follow-up is automated, with rep review before each send.
- ☐ Intent signals route to a human, with a relevant response ready.
- ☐ Every sequence has an owner, a review date, and a documented voice.
- ☐ Nothing is automated on top of a missing Foundation.

Your Automation Map on One Page

When the six builders are done, copy the short version here. This is the brief you hand to whoever runs your marketing operations.

Our priority workflows to automate

Our speed-to-response rule (acknowledgment and rep time)

The marketing sequences live (welcome, re-engage, reactivate)

The sales sequences live (CRM steps, proposal follow-up)

How intent signals route to a human

Our review cadence and where brand voice lives

The highest-ROI automation we will build in 30 days

Module 11

AI-Amplified Judgment

Make the Engine Smarter

Maps to book Chapter 11 and Tool 11.

A. Start Here

What you build: AI as the amplifier layer across your engine, not as a replacement for judgment. The central artifact is your AI brief, the place your judgment enters the machine. The brief matters more than the tool.

What you walk out with: a reusable AI brief template, written decision boundaries, your first AI workflows, an operating rhythm, and a 90-day integration plan with a 30-day milestone.

Before you start: this module has the strictest prerequisite in the book. AI amplifies your Foundation (Module 4), so your ICP, differentiators, and brand voice must be documented first. The Assess gates on exactly that.

Time: about 15 minutes for the assessment. Build the brief and boundaries before adding any new tool.

> **The CEO cannot delegate understanding.** You do not need to run the tools. You do need to understand what AI can and cannot do, so you can set the boundaries no one else can set for you.

B. Assess Your AI Readiness

AI has two questions worth assessing: are you ready, and how far along are you. The book's Tool 11 is a plan rather than a scorecard, so the Assess here is the Foundation Check (the readiness gate) plus the Five Levels of AI Integration (your AI score).

FIRST: THE FOUNDATION CHECK (THE GATE)

Answer yes or no. Be honest; this decides whether AI will amplify clarity or amplify noise.

☐ Is our ICP documented specifically enough that a new team member could identify an ideal client from it?

☐ Do we have three to five differentiators written down that are specific, meaningful, and provable?

☐ Can we describe our brand voice in enough detail to brief an AI tool, including what we never say?

☐ Do we know which company knowledge AI may use, and which is sensitive or off-limits?

☐ Do we know which decisions AI may recommend, which it may make, and which must stay human?

Read the gate. If you cannot answer yes to the first three, the highest-ROI move is finishing your Foundation in Module 4 before running AI on your content. If you cannot answer yes to the last two, keep AI in assistance mode until the boundaries are clearer.

Then: place yourself on the Five Levels

CIRCLE THE LEVEL THAT BEST DESCRIBES YOU TODAY

Level	What it looks like	Your next move
Level 1: Individual Assistance	One person uses AI to draft, summarize, brainstorm, or analyze.	Spread the habit, and build an AI brief.
Level 2: Specialized Support	AI is used for defined functions: research, personas, content.	Standardize a brief and proof for each function.
Level 3: Workflow Integration	AI is built into repeatable processes with inputs, outputs, and review.	Add review gates and measure the productivity gain.
Level 4: Agentic Decisioning	AI evaluates context and makes bounded decisions, recommending next steps.	Set the decision boundaries and the governance.
Level 5: AI-Orchestrated Engine	Multiple AI capabilities work across the engine, connected to data and workflows.	Protect the human judgment layer; keep governance current.

Carry it forward. Your level (1 to 5) is your AI score. Record it on the Engine Scorecard at the front of the workbook, and aim to move up one level at a time, not five at once.

My AI integration level today: ______ (1 to 5)   Foundation gate passed? Y / N
Date: ___________

C. Build: Where Judgment Enters the Machine

Six builders. Build the brief that carries your judgment, set the boundaries, choose your first workflows, decide where AI assists versus acts, set a rhythm, and write the 90-day plan. Complete the finish layer of each to get a usable result. Take the go-deeper path only where you want more rigor.

Builder 1. Build the AI brief

The brief is the single most important AI artifact you will build. It is where your judgment enters the machine, and it is what separates output that sounds like you from generic output that sounds like everyone. The brief matters more than the tool.

STEPS

1. Create a reusable template that answers the five questions below.
2. Fill it once for your most common use (for example, a prospect follow-up), so the team has a model to copy.
3. Name an owner who maintains it as your Foundation and voice evolve.

BUILD YOUR BRIEF TEMPLATE

Prompt	Your answer
Context: what AI needs to understand before helping	
Audience: who this is for, and what matters to them	

Prompt	Your answer
Outcome: what we want them to believe, do, or decide	
Voice: how it should sound, and the words we never use	
Standards: what makes it good enough to use (proof, review)	

Done when: *a reusable AI brief template exists, filled once, with an owner.*

Go deeper (optional): keep the filled brief beside every AI tool the team uses. The same brief that improves a follow-up email improves a nurture sequence, a job ad, and a proposal.

Builder 2. Set the boundaries

Agentic AI is only safe when the boundaries are clear. The leadership work is deciding which decisions AI may recommend, which it may make, and which must stay human, and what company knowledge it may touch.

STEPS

1. Sort decisions into three buckets: AI may recommend, AI may make within limits, must stay human (trust, risk, money, employment).
2. Define what company knowledge AI may use, and what is sensitive or off-limits.
3. Write the default: until a boundary is clear, AI stays in assistance mode.

WRITE YOUR BOUNDARIES

Prompt	Your answer
Decisions AI may recommend	
Decisions AI may make within limits	
Decisions that must stay human	
Company knowledge AI may use, and what is off-limits	

Done when: *the three decision buckets and the data boundaries are written down.*

Builder 3. Pick your first workflows

Do not boil the ocean. Start where AI assistance has the most immediate value and where your Foundation is already solid, so AI amplifies clarity, not noise.

STEPS

1. Pick the one engine component where AI assistance would help most right now.
2. Pick the one repetitive workflow where AI would save the most time or improve quality most.
3. Confirm the Foundation under each is solid enough to brief AI well.

CHOOSE YOUR STARTING POINTS

Prompt	Your answer
The engine component where AI helps most now	
The repetitive workflow that would save the most time	
Why the Foundation under each is solid enough	

Done when: *two clear, well-founded starting workflows are chosen.*

Builder 4. Assistance vs. agentic

Automation follows rules. Agentic workflows pursue outcomes and make bounded decisions along the way. Most firms should start in assistance mode, where a human leads, and earn their way toward agentic as the boundaries prove out.

STEPS

1. List where AI assists today: a human asks, AI helps, the human decides.
2. List where AI could act with bounded autonomy, inside the limits you set in Builder 2.
3. Write the rule for moving a task from assistance to agentic: what has to be true first.

DRAW THE LINE

Prompt	Your answer
Where AI assists (human-led) today	
Where AI could act with bounded autonomy	
The rule for moving a task from assistance to agentic	

Done when: *you know what AI does for you, what it may do on its own, and how a task graduates.*

Builder 5. Set the operating rhythm

AI output drifts and Foundations evolve. A simple rhythm keeps briefs current, output on-voice, and governance alive.

STEPS

1. Set when you review AI output quality and refine the briefs.
2. Set when you review governance: the decision boundaries and the data rules.
3. Name who owns the rhythm and keeps the brief and boundaries updated.

WRITE YOUR RHYTHM

Prompt	Your answer
When we review AI output and refine briefs	
When we review governance and boundaries	
Who owns the rhythm	

Done when: *a review rhythm exists for output, briefs, and governance, with an owner.*

Builder 6. Write the 90-day plan

This is Tool 11 from the book. Synthesize the decisions above into one plan with a near-term milestone, so the integration has direction and a way to tell if it is working.

COMPLETE YOUR PLAN

Prompt	Your answer
The engine component where AI would have the most immediate impact	
The repetitive workflow where AI could save the most time or improve quality	
The decision AI could recommend but should not yet make alone	
The decision that must remain human (trust, risk, money, employment)	
The Foundation element to document before briefing any AI	
The person responsible for the AI brief template	
The 30-day milestone that will tell us the integration is working	

Done when: *a 90-day plan exists with named owners and a 30-day milestone.*

D. Quick Wins

From the book's Quick Actions. Start the habit and start the brief; both pay off immediately. Jot what you learn under each.

The AI Habit
one workday

For one full workday, before starting any meaningful task, ask: how could AI help me with this? Not can AI do this for me, that is usually the wrong question. Ask where it can help you think faster, draft better, challenge an assumption, or prepare for a stronger conversation.

At day's end, write the three uses that created the most real value, the ones that saved time or improved a decision, not the ones that felt clever. Start there.

MY THREE HIGHEST-VALUE AI USES

Develop Your AI Brief 30 minutes

Before adding another AI tool, draft a brief that answers five questions: Context (what AI must understand), Audience (who it is for), Outcome (what they should believe or do), Voice (how it sounds and what to avoid), and Standards (what makes it good enough to use).

The brief is more important than the tool. It is where your judgment enters the machine. Builder 1 turns this into a reusable template.

MY FIRST BRIEF

E. AI Assist

Even in the AI module, AI drafts and you decide. It can accelerate the artifacts above, as long as the judgment stays yours.

- Brief: have AI interview you about a use case and draft the five-part brief from your answers. You confirm the voice and the proof standard.
- Boundaries: have AI propose a first-draft list of recommend / may-act / must-stay-human decisions for a staffing firm. You edit it to your risk tolerance, this list is a leadership decision.
- Personas and research: have AI build ICP research and personas from your Foundation. You verify against real clients.
- Governance: have AI draft a starting data-use policy. You decide what is truly off-limits.

What AI cannot replace. Trust, judgment, and the relationship, which is good news for staffing, a relationship business. The lesson from building any AI marketing system is the same: good Foundation in, good output out. The brief, not the tool, is the work.

F. Done Check

Your AI integration is on solid ground when every line below is true. Check them off.

- ☐ The Foundation gate is passed, or Module 4 is scheduled first.
- ☐ A reusable AI brief template exists, filled once, with an owner.
- ☐ Decision boundaries are written: recommend, may-act, must-stay-human.
- ☐ Data boundaries are set: what AI may use, what is off-limits.
- ☐ Two well-founded starting workflows are chosen.
- ☐ The assistance-versus-agentic line is drawn, starting in assistance.
- ☐ A review rhythm exists for output, briefs, and governance.
- ☐ A 90-day plan exists with owners and a 30-day milestone.

Re-assess and carry forward. Re-place yourself on the Five Levels, update your AI score on the Engine Scorecard, and aim to move up one level. Next module: 12, Run the Loop, where the whole engine becomes a weekly operating rhythm.

Your AI Plan on One Page

When the six builders are done, copy the short version here. This is the brief you hand to your team and revisit each quarter.

Our current AI level (1 to 5) and whether the Foundation gate is passed

Where our AI brief template lives, and who owns it

Our decision boundaries (recommend / may-act / must-stay-human)

Our two starting workflows

The assistance-versus-agentic line

Our review rhythm for output and governance

The 30-day milestone that tells us it is working

Run the Loop

Target, Reach, Engage, Convert, Repeat

Maps to book Chapter 12 and Tool 12.

A. Start Here

What you build: an operating rhythm that turns the seven components into one running loop: target, reach, engage, convert, repeat. The loop runs at two speeds, a weekly cycle of execution inside a quarterly cycle of strategy.

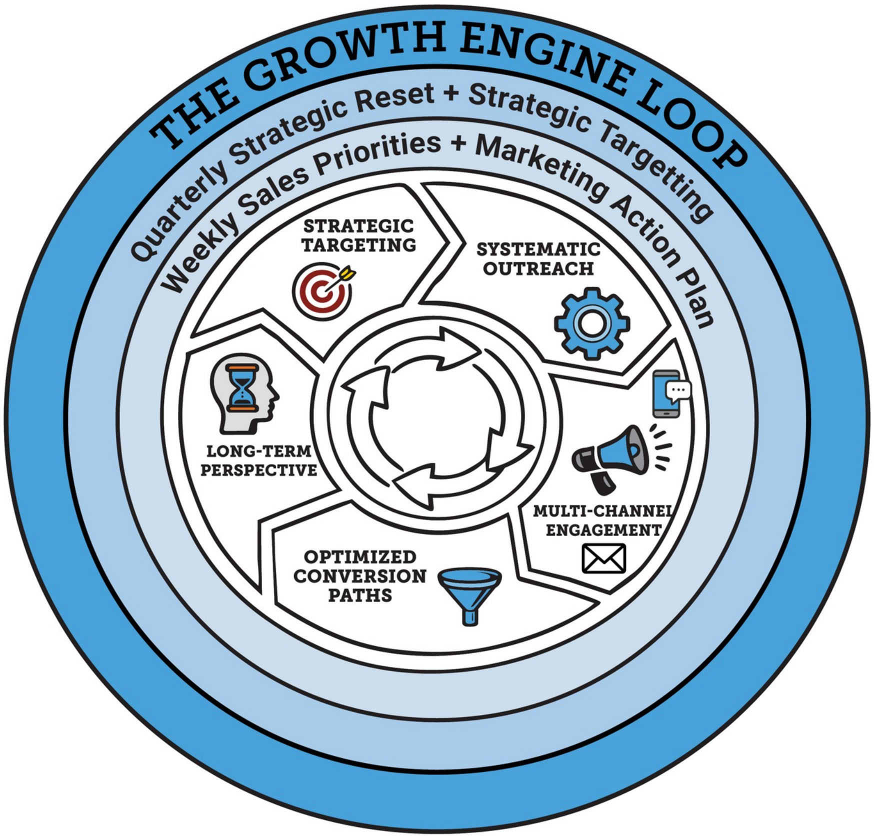
What you walk out with: a filled operating worksheet, a quarterly thesis, a weekly outreach plan, a coordinated channel plan, a conversion-path rule, a Friday feedback review, and a monthly meet-up that produces decisions.

Before you start: this module runs everything you built in Modules 4 through 11. You do not need them all finished, but the loop is what makes them work together, so have at least your Foundation, a sales process, and one or two channels in place.

Time: about 15 minutes for the assessment. The worksheet is a living document you fill each quarter and each week.

The loop runs at two speeds at once. The fast inner cycle is your week: target, reach, engage, convert, repeat. The slow outer cycle is your quarter: set a thesis, run it, and reset. The diagram below shows how the weekly cycle of execution sits inside the quarterly cycle of strategy.

Figure 12.1: The Two-Speed Loop



Read it from the inside out. Each week you turn the inner loop once. Each quarter you step back, judge what the weeks revealed, and choose the next thesis. The same five steps repeat; what changes is what you learn.

Inventory thinking vs. operating thinking. A pile of tactics is inventory. An engine is a loop that runs on a rhythm and gets smarter each cycle. This module is where the parts start operating as one system.

B. Assess Your Operating Rhythm

The book's Tool 12 is the operating worksheet itself, which you build in Part C. This assessment, drawn from the chapter's loop, rhythm, and Engine Diagnostic, tells you how consistently the engine is actually running today. Score each line 1 to 5.

Score each line using the 1-to-5 scale (see “How to Score” in the front matter).

SCORE EACH LINE

Operating element	Score	Biggest gap
THE LOOP		
Strategic targeting A quarterly market thesis guides who you pursue?		
Systematic outreach A useful weekly reason to reach out, not just checking in?		
Multi-channel engagement Channels coordinated around one message?		
Optimized conversion The next step is defined before the touch is made?		
Long-term perspective You hold consistency instead of switching tactics at week 6?		
THE OPERATING RHYTHM		
Daily sales huddle A 10-minute daily huddle on priorities and blockers?		
Weekly marketing sprint A 30 to 45 minute weekly sprint on the week's plan?		
Monthly sales and marketing meet-up A 60 to 90 minute meet-up that produces decisions?		
Monthly learning meeting A monthly marketing learning review?		
Quarterly strategic reset A half-day quarterly reset of the thesis?		
THE FEEDBACK LOOP		

Shared visibility Do sales and marketing share what each sees that the other cannot?		
Decisions, not explanations Does the weekly review produce decisions, not status updates?		

Now find your average. Add the twelve scores for a total out of 60, then divide that total by 12.

Total: ________ / 60   Total ÷ 12 = Average: ________

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	Activity without a loop. You may be doing marketing and sales, but not operating an engine. Start the Friday review.
2.0 - 2.9	**Underdeveloped**	Pieces happen, but nothing connects week to week. The work is a weekly rhythm that produces decisions.
3.0 - 3.9	**Functional**	The loop turns, but inconsistently. The work is the cadence and the thesis that focuses it.
4.0 - 4.4	**Strong**	A real operating rhythm. Tighten the feedback loop and protect the cadence when busy.
4.5 - 5.0	**Compounding**	The loop produces decisions and gets smarter each cycle. Keep owning the loop.

Carry it forward. Record your Run-the-Loop average on the Engine Scorecard at the front of the workbook. You will watch this number move as the rhythm takes hold.

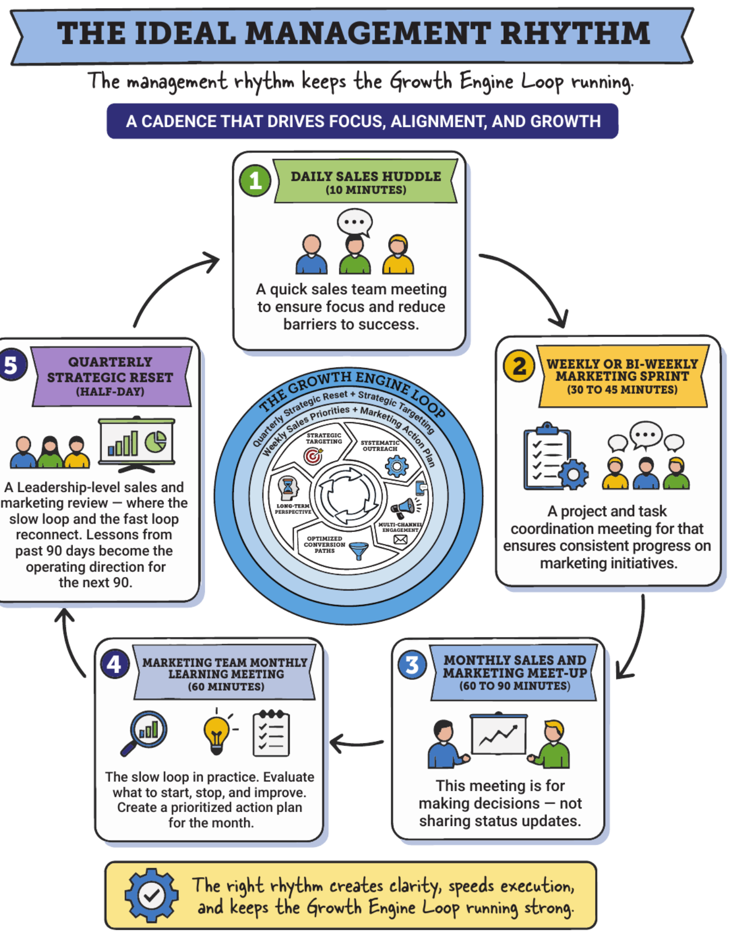
My Run-the-Loop average today: __________ Date: __________

C. Build: The Operating Worksheet

This is Tool 12 from the book: the six worksheets that make up your operating rhythm. The quarterly thesis sets direction; the weekly plans execute it; the reviews turn results into decisions. Fill the quarterly and weekly sheets now, and reuse them every cycle.

Before the worksheets, here is the cadence they run on. The rhythm below shows the meetings that keep the engine turning: a short daily huddle, a weekly marketing sprint, a monthly sales-and-marketing meet-up, a monthly learning review, and a quarterly reset. The worksheets are what each of those meetings produces.

Figure 12.6: The Ideal Management Rhythm



Worksheet 1. Quarterly Thesis Planning

Once a quarter, decide the pursuit, not just the list. The thesis is why this audience, why now, and what you will say to them. Use the strategic-targeting checklist below to sharpen the choice: define your ideal client, name the buyer roles inside the account, and score how hard the account is worth pursuing.

Figure 2.2: Checklist for Strategic Targeting

ICP Definition
Who are we best at serving?

- [ ] **Industry / vertical** Specific sector, not "anyone who hires"
- [ ] **Company size** Headcount or revenue range where we win
- [ ] **Geographic market** Markets where we have depth
- [ ] **Role types we fill best** Where our talent pool is strongest
- [ ] **Trigger / timing signal** Event that makes them ready now

Buyer Role Stack
Who is inside the account?

- [ ] **Economic buyer** Approves the spend, signs the contract
- [ ] **Operational buyer** Manages workforce daily, feels the pain
- [ ] **User / influencer** HR or hiring manager, uses the service
- [ ] **Internal champion** Wants change, advocates for us
- [ ] **Potential blocker** Satisfied with current vendor, needs a reason

Priority Score
How hard should we pursue this?

Fit	☐ ☐ ☐	ICP match
Pain	☐ ☐ ☐	Known problem
Timing	☐ ☐ ☐	Readiness signal
Access	☐ ☐ ☐	Entry point
Value	☐ ☐ ☐	Revenue potential

Low priority — Score: 0 / 15 — Pursue now

FILL IN FOR THIS QUARTER

Consideration	Goals for this quarter
Target segment	
Account list or source	
Buyer roles we are targeting	
Why this audience now (the market thesis)	
Primary pain or problem we are addressing	
Offers and conversion paths	

Consideration	Goals for this quarter
Sales enablement campaign to use or create	
Buyer enablement content needed	
Market attraction efforts (SEO, content, paid, reputation)	
What needs to be automated	

Done when: *the quarter has a written thesis that the weekly plans can execute against.*

Worksheet 2. Weekly Sales Outreach Plan

Each week, give the market a useful reason to pay attention, and make sure sales and marketing are pulling in the same direction.

FILL IN FOR THIS WEEK

Consideration	This week
Primary weekly theme	
Useful reason to reach out (specific)	
Sales touchpoints planned	
Marketing touchpoints planned	
Content or proof asset available	
Primary call to action	
Secondary call to action	
Follow-up sequence in place?	

Done when: *the week has one theme and a specific, useful reason to reach out.*

Worksheet 3. Monthly Channel Coordination

Coordinate every channel around the one market conversation, so sales, email, social, the website, and ads reinforce a single message instead of saying different things.

COORDINATE YOUR CHANNELS

Channel	Role this week	Message angle	Asset needed	Owner	CTA
Sales calls					
Email					
LinkedIn					
Direct mail					
Website / landing					
Paid / retargeting					
Newsletter / nurture					
Events / OPS					

Done when: *every active channel reinforces one message, with an owner and a CTA.*

Worksheet 4. Conversion-Path Review

Before any campaign goes out, the next step has to already exist. Answer these before you create the touch, not after.

ANSWER BEFORE YOU LAUNCH

Consideration	Answer
Where are we sending people?	
What action do we want them to take?	

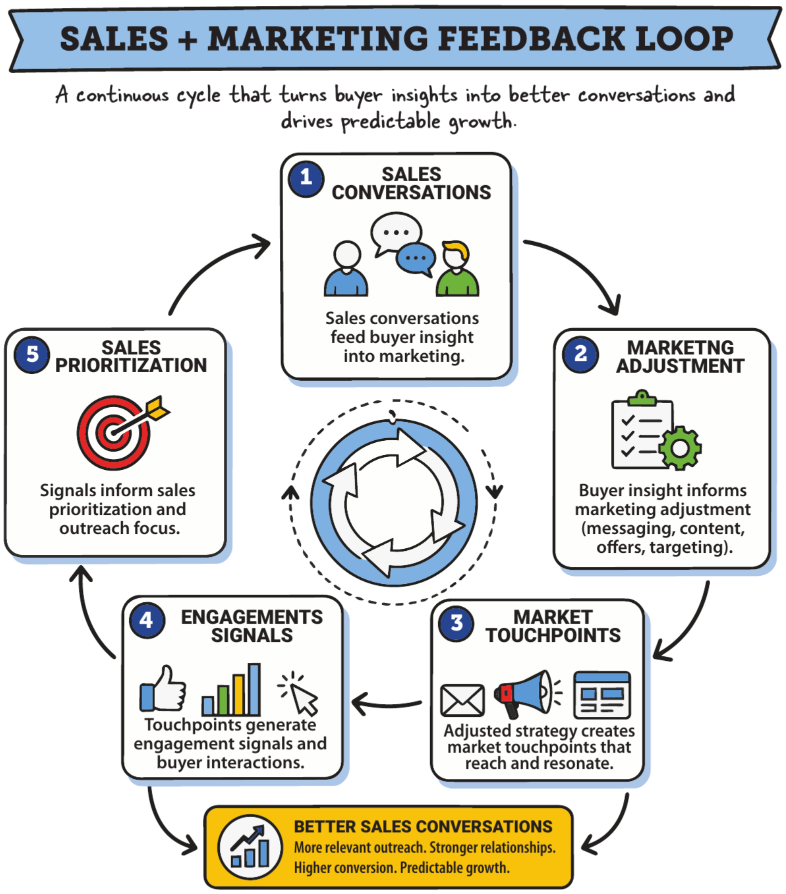
Consideration	Answer
Is there a low-friction action available?	
Is there a high-intent action available?	
Who gets notified when someone converts?	
What happens immediately after conversion?	

Done when: *every touch has a defined next step and a person who responds.*

Worksheet 5. The Friday Feedback Loop

The loop gets smarter only if the week's results turn into decisions. Sales and marketing each see something the other cannot, so run this together.

Figure 12.5: The Sales and Marketing Feedback Loop



FILL IN EACH FRIDAY

Consideration	This week
What did prospects respond to?	
What did they ignore?	
What objections surfaced?	
Which buyer roles engaged?	

Consideration	This week
Which accounts showed intent?	
Which content did sales need but not have?	
Where did follow-up break down?	
What changes next week?	

Done when: *the week ends with a written decision about what changes next week.*

Worksheet 6. Monthly Meet-Up Output

Once a month, sales and marketing meet to make one real decision, not to trade status updates. Capture the output here.

CAPTURE THE MONTHLY OUTPUT

Consideration	This month
Best-performing target segment	
Weakest-performing target segment	
Best-performing message or theme	
Best-performing channel	
Strongest conversion path	
Biggest leak in the funnel	
Content or tool to build next month	
Process to fix next month	
One decision this meeting must produce	

Done when: *the month ends with one decision the meeting was required to produce.*

D. Quick Wins

From the book's Quick Action. The fastest way to tell whether you are operating an engine, or just doing marketing and sales.

The Friday Loop Review

every Friday, 4 weeks

Every Friday, before the week disappears, ask five questions:

1. Who did we intentionally target this week?
2. What useful reason did we give them to pay attention?
3. Which channels reinforced the message?
4. Where did interest turn into action?
5. What did we learn that should change next week?

Run it four Fridays in a row. By the fourth, the answers get better and the questions start producing decisions instead of explanations. That is when the loop has actually started.

THIS FRIDAY'S ANSWERS

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Quarterly thesis: have a current AI assistant synthesize a market thesis from your win-loss notes and market signals. You decide the focus.
- Weekly reasons: have AI draft useful reasons to reach out per segment from recent industry news. You pick the ones that are genuinely relevant.
- Channel coordination: have AI turn one thesis into channel-specific angles. You keep the core message consistent across all of them.
- Feedback synthesis: have AI summarize the week's responses and objections into the Friday review. You draw the decision.

The human's job. The decisions the loop is supposed to produce. AI can organize the inputs and surface patterns; only leadership can decide what changes next week. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your engine is operating, not just busy, when every line below is true. Check them off.

- ☐ A quarterly thesis exists and guides the weekly plan.
- ☐ Each week has one theme and a specific, useful reason to reach out.
- ☐ Channels are coordinated around one message, with owners.
- ☐ Every touch has a defined next step before it goes out.
- ☐ The Friday review produces a decision about next week.
- ☐ The monthly meet-up produces one real decision.
- ☐ The cadence meetings actually happen, even when business is busy.

Your Operating Rhythm on One Page

When the worksheets are filled, copy the short version here. This is what your team runs against each week.

This quarter's market thesis

This week's theme and reason to reach out

Our channel owners

Our conversion-path rule (the next step must already exist)

Our Friday review cadence

The decision this month's meet-up must produce

Our cadence calendar (daily, weekly, monthly, quarterly)

Module 13

Measure and Improve

Budget, Track, Learn, Fix

Maps to book Chapter 13 and Tool 13.

A. Start Here

What you build: a measurement system that produces decisions, not reports. You decide how much to invest, track the few numbers that matter, find where the engine leaks, and turn each month's results into a fix.

What you walk out with: a goal-based budget, a five-number scorecard with thresholds, a decision rule for each number, a leak finder, and a monthly learning loop.

Before you start: this module reads the engine you run in Module 12. It assumes your components are producing data, website analytics, a CRM pipeline, campaign results, so have those flowing, even roughly.

Time: about 15 minutes for the assessment. The scorecard and learning loop are living tools you run every month.

> **From proving to learning.** Measurement is not about proving marketing works. It is about learning fast enough to make the next decision better. A number that does not change a decision does not belong in the conversation.

B. Assess Your Measurement

The book's Tool 13 is the learning loop you build in Part C. This assessment, drawn from the chapter's five numbers and the Measurement Diagnostic, tells you how well your numbers actually drive decisions today. Score each line 1 to 5.

Score each line using the 1-to-5 scale (see “How to Score” in the front matter).

SCORE EACH LINE

Measurement element	Score	Biggest gap

MEASUREMENT FOUNDATION		
Budget set by goal Is the budget tied to a growth goal, not last year's habit?		
The one number Is there one number leadership reports and acts on each month?		
Analytics in use Do you actually look at your data, not just collect it?		
THE FIVE NUMBERS		
Visibility: website visitors Do you track visitors and the traffic trend?		
Engagement: engaged accounts Do you track engaged target accounts?		
Conversion: opportunities Do you track marketing-sourced or influenced opportunities?		
Pipeline by stage Do you track pipeline counts by stage?		
Revenue Do you track new and expansion revenue?		
DECISIONS FROM NUMBERS		
Decision rules Does each number have a rule for what you do if it moves?		
Leak finding Do you locate where the funnel loses progress?		
The learning loop Does a monthly review turn numbers into decisions and tests?		

Now find your average. Add the eleven scores for a total out of 55, then divide that total by 11.

Total: _________ / 55 Total ÷ 11 = Average: _________

Read Your Score

WHAT YOUR AVERAGE MEANS

Average	Band	What it means for you
1.0 - 1.9	**Critical**	Flying blind, or drowning in vanity metrics. Pick one number and one decision rule.
2.0 - 2.9	**Underdeveloped**	You track things, but they do not drive action. The work is decision rules and the five numbers.
3.0 - 3.9	**Functional**	The numbers exist, but the monthly review explains instead of deciding. The work is the learning loop.
4.0 - 4.4	**Strong**	Numbers produce decisions. Tighten leak-finding and honest attribution.
4.5 - 5.0	**Compounding**	A learning loop that gets smarter each month. Keep killing useless metrics.

Carry it forward. Record your Measure-and-Improve average on the Engine Scorecard at the front of the workbook. You will watch this number move as the loop takes hold.

My Measure-and-Improve average today: ___________ Date: ___________

C. Build: The Learning Loop

This is Tool 13 from the book: five worksheets that turn measurement into decisions. Set the budget, track five numbers, write a rule for each, find the leak, and close the month with a learning review. Fill them now and reuse them every quarter and every month.

Worksheet 1. Budget Reality Check

Budget by goal, not by habit. Start from the growth you want, work back to the clients and expansion that requires, and the investment it justifies. Keep the unit economics (cost to acquire vs. lifetime value) in view.

FILL IN FOR THIS QUARTER

Consideration	This quarter
Growth goal (total gross margin growth)	
New clients needed to hit the goal	
Current-client expansion targeted	
Maximum marketing investment to achieve the goal	
Quarterly engine priorities: build, run, improve	
The one investment that would most improve results	

Done when: *the budget is tied to a growth goal, not last year's number.*

Worksheet 2. Five Numbers on the Scorecard

Five numbers cover the whole engine, from visibility to revenue. Record each one's current value, last month, and the threshold that should trigger action.

TRACK YOUR FIVE NUMBERS

Number	Current	Last month	Threshold
Website visitors (visibility)			
Marketing-sourced or influenced opportunities			

Engaged target accounts			
Pipeline counts by stage			
New and expansion revenue (prior quarter)			

Done when: *five numbers are on one scorecard, each with a threshold.*

Worksheet 3. Decision Rules

A number without a decision rule is just trivia. For each of the five numbers, write what you will do, and how fast, if it moves the wrong way.

WRITE A RULE FOR EACH NUMBER

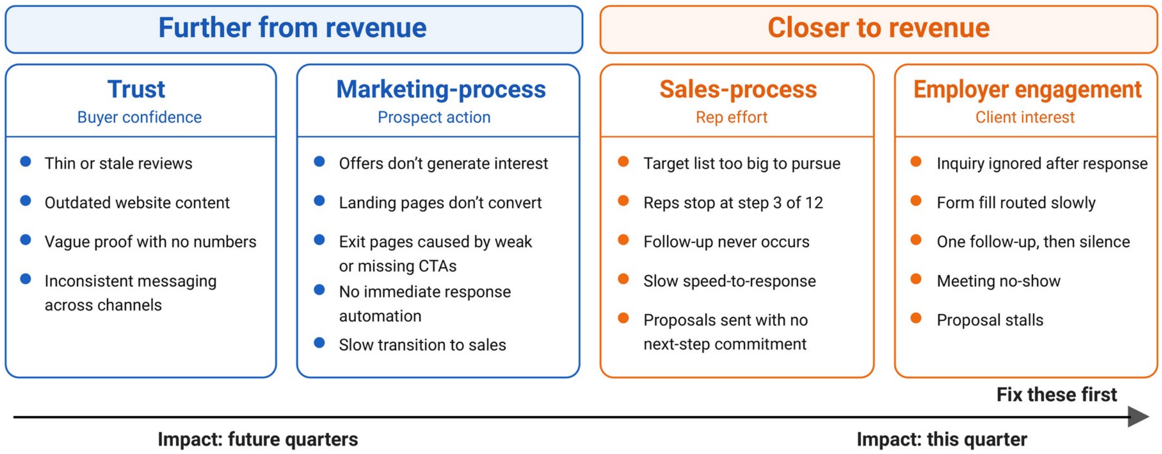
If this number...	We will...	Within...
Website visitors drops below threshold		
Opportunities miss target		
Engaged accounts drops below threshold		
Pipeline is advancing too slowly		
New and expansion revenue falls below target		

Done when: *every number has a written if-then-by-when rule.*

Worksheet 4. Leak Finder

Growth is usually lost at a specific point, not everywhere at once. The Leak Map below sorts the four places an engine leaks, trust, marketing process, sales process, and employer engagement, and lines them up from furthest from revenue (on the left) to closest to revenue (on the right).

Figure 13.5: The Leak Map



Work from the right. A leak close to revenue, like proposals sent with no next step, costs you faster than one further upstream, so fix the rightmost leak first. Use the map to name where you are losing progress this month, then commit to one fix.

FIND THIS MONTH'S LEAK

Consideration	Where did we lose progress this month?
Marketing process (campaign to lead)	
Sales process (outreach to close)	
Employer conversion (lead to meeting)	
Trust (buyer confidence or proof)	
The biggest leak, closest to revenue	
The one fix to make this month	

Done when: *the biggest leak is named, with one fix scheduled this month.*

Worksheet 5. Monthly Learning Loop

Close every month by turning the numbers into learning. Run this with sales and marketing together, because each sees what the other cannot.

FILL IN EACH MONTH

Consideration	This month
What worked?	
What did not?	
What did sales hear that marketing needs to know?	
What did marketing see that sales needs to know?	
What should we stop?	
What should we do more of?	
What should we test next month?	

Done when: *the month ends with a stop, a do-more, and a test for next month.*

D. Quick Wins

Pulled straight from the book's Quick Actions. One sets your single number; the other clears the clutter. Jot what you learn under each.

The Starting Sentence

10 minutes

Write this sentence and put it where leadership will see it on Monday:

This month, the one number we will report and act on is ______. If it goes up, we will ______. If it drops below ______, we will ______.

Example: the number is engaged target accounts. If it goes up, we increase outreach to similar accounts. If it drops below 40, we rebuild the campaign theme and refresh the offer.

OUR STARTING SENTENCE

Kill One Useless Metric
15 minutes

Pick one metric reviewed every month and ask: what decision does it help us make? What would we do differently if it went up? If it went down? Does anyone actually act on it?

If no one acts on it, take it off the dashboard (keep collecting it, just stop pretending it belongs in the conversation), and replace it with one number that changes behavior. Most teams find they could remove three more.

THE METRIC WE ARE REMOVING, AND WHAT REPLACES IT

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Budget: have a current AI assistant model CAC and LTV and a few budget scenarios from your numbers. You set the growth goal and the risk you will accept.
- Scorecard: have AI pull the five numbers from your tools into one dashboard. You set the thresholds that trigger action.
- Attribution: have AI surface which touches preceded wins. You judge causation versus coincidence, attribution without self-deception is a human call.
- Learning loop: have AI summarize the month's data into the what-worked and what-did-not review. You decide what to stop, do more of, and test.

The human's job. The thresholds and the decisions. AI can compute and summarize, but only leadership can decide what a number means and what to do about it. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your measurement is producing decisions, not just reports, when every line below is true. Check them off.

☐ The budget is tied to a growth goal.

- ☐ One number is reported and acted on each month.
- ☐ The five numbers are tracked, each with a threshold.
- ☐ Every number has a written decision rule.
- ☐ The biggest leak is located each month, with one fix.
- ☐ A monthly learning loop produces decisions and a test.
- ☐ The dashboard has been pruned of metrics no one acts on.

Your Measurement System on One Page

When the worksheets are filled, copy the short version here. This is what leadership reviews each month.

Our growth goal and budget this quarter

Our five numbers and their thresholds

Our decision rules (if X, then Y, by when)

The biggest leak and this month's fix

Our one number, reported and acted on

Our monthly learning cadence (stop, do-more, test)

SALES GROWTH ENGINE • COMPANION WORKBOOK

Module 14

Your 90-Day Plan

One Thing, Then the Next

Maps to book Chapter 14 and Tool 14.

A. Start Here

What you build: one 90-day plan that turns everything you have assessed into a sequenced launch. Two steps come first for everyone, then you pick one lane, and you build it before adding the next.

What you walk out with: a whole-engine scorecard, a prioritized lane, a 90-day phased plan, a marked component checklist, and the one thing you will do this week.

Before you start: this is where the other modules come together. You do not need all of them finished. You need an honest snapshot and the discipline to do one thing well before the next.

Time: about 20 minutes to assess and sequence. Then 90 days of watering it, one week at a time.

The black bamboo. Black bamboo does not grow 20 feet because someone decided it should. It grows because someone watered it the first week, then the next, and the week after that. Firms build engines the same way: one thing, then the next thing, then the next. Expect an invisible period before the visible growth.

B. Assess Your Whole Engine

The capstone assessment has two parts: pull your scores from every module into one scorecard, then run the book's Simple Assessment to decide where to focus first.

PART 1: YOUR ENGINE SCORECARD

Copy the average (or level) you recorded at the end of each module. The lowest scores point to your priority lanes.

Component (module)	Your score	Priority lane?

Foundation (Module 4)		
Website (Module 5)		
Sales Enablement (Module 6)		
Buyer Enablement (Module 7)		
Market Attraction (Module 8)		
Nurturing (Module 9)		
Automation (Module 10)		
AI-Amplified Judgment (Module 11)		
Run the Loop (Module 12)		
Measure and Improve (Module 13)		
Overall engine readiness (average)		

PART 2: THE SIMPLE ASSESSMENT

For each component, a fast gut check: does it exist, and is it working? Note what to improve.

Component	Exists? Y/N	Working? What to improve
Foundation ICP, differentiators, and value prop documented?		
Website Communicates the difference in 5 seconds, and converts?		
Sales Enablement A 12 to 16 step campaign a new rep can use day one?		

Buyer Enablement Real reviews and honest self-education buyers can find?		
Market Attraction Findable when buyers search, including AI answers?		
Nurturing A regular send that goes out even when the team is busy?		
Automation Web leads get an immediate response without a human?		
AI-Amplified Judgment A Foundation brief that guides AI to execute, not just produce?		

Gap analysis. Review every improvement you noted. What one item, fixed in the next 90 days, would most improve results? Write it here:

____

This is the consolidated Engine Scorecard. It is the front-of-workbook scorecard every module fed. Your lowest scores are your lanes; your overall average is your engine readiness today.

C. Build: Your 90-Day Plan

Five builders. Do the two universal first steps, choose one lane, sequence the 90 days, mark the component checklist, and set the rhythm that keeps it alive. The firms that compound do not do it all at once. They do one thing, then the next.

Builder 1. The two universal first steps

Every launch starts the same way, regardless of your scores: refresh the Foundation, then make sure the website converts. Without these two, everything downstream works harder.

SCHEDULE THE TWO FIRST STEPS

Prompt	When and who
Step 1: Refresh the Foundation (date and owner)	
Step 2: Website CRO review (date and owner)	

Done when: *both first steps are scheduled with an owner and a date.*

Builder 2. Choose your lane

After the two first steps, do not try to build everything. Pick the one component, from your gap analysis, that would move results most this quarter. Add the next lane only once this one compounds.

The book gives you three proven starting options. Let your gap analysis point to the fit, and your scorecard break ties:

Option 1: Sales enablement + automation. The fastest path to new conversations. Choose this if you have a target list and proof points, but no systematic outreach.

Option 2: Market attraction + buyer enablement. The get-found path. Choose this if the buyers who do find you convert, but too few ever find you.

Option 3: Nurturing. The always-on, right-place-right-time path. Choose this if you have a database of past clients and contacts that has gone quiet.

PICK ONE LANE

Prompt	Your answer
Our lowest-scoring lane from the scorecard	
The starting option we chose (1, 2, or 3)	
The one component we will build this quarter	

Prompt	Your answer
Why it matters most right now	

Done when: *one priority lane is chosen, not a list of all of them.*

Builder 3. Sequence the 90 days

Lay the lane across three phases: build the asset, manage it into the routine, then implement, learn, and improve. Give each phase one milestone so you can tell it is working.

MAP YOUR PHASES

Phase	Focus this phase	Milestone
Days 1 to 30: Build Create the asset		
Days 31 to 60: Manage Make it routine		
Days 61 to 90: Implement, learn, improve Measure and refine		

Done when: *the 90 days has three phases, each with a milestone.*

Builder 4. The component checklist

This is Tool 14 from the book, the full menu of tasks by component. It is a menu, not a to-do list for one quarter. Check the tasks that belong in this 90 days, and leave the rest for later cycles.

FOUNDATION

Task	In this 90 days? Owner / date
☐ Define positioning (your aisle)	
☐ Define key differentiators (3 to 5 max)	
☐ Determine your value proposition	

Task	In this 90 days? Owner / date
☐ Write your core story	
☐ Select your target ICPs	
☐ Profile the buyer personas	

WEBSITE OPTIMIZATION

Task	In this 90 days? Owner / date
☐ Complete the 5-second test	
☐ Create primary and secondary offers	
☐ Complete a CRO audit	
☐ Plan the site changes to be made (what and when)	

SALES ENABLEMENT

Task	In this 90 days? Owner / date
☐ Define your 12 to 16 step outbound campaign	
☐ Build voicemail, email, and LinkedIn templates per step	
☐ Organize a collateral library by audience and pain	
☐ Set the sales management cadence (huddles, pipeline reviews)	
☐ Create a day-one onboarding path for new reps	

BUYER ENABLEMENT

Task	In this 90 days? Owner / date
☐ Build a review and social-proof program (10+ current reviews)	
☐ Publish your how-we-work process and timeline	
☐ Add pricing or cost context (range guide or ROI calculator)	
☐ Create case studies with specific outcomes	
☐ Answer your top buyer questions in findable content	

MARKET ATTRACTION

Task	In this 90 days? Owner / date
☐ Optimize for traditional and AI search (SEO and GEO)	
☐ Activate company leaders on LinkedIn with consistent content	
☐ Choose your priority channels for your ICP	
☐ Build OPS visibility (articles, speaking, podcasts)	
☐ Define your referral and partnership sources	

NURTURING

Task	In this 90 days? Owner / date
☐ Choose one branded content format you can sustain	
☐ Commit to a consistent send schedule, regardless of workload	
☐ Segment your list by relationship stage	

Task	In this 90 days? Owner / date
☐ Build stage-specific nurture sequences	
☐ Set up a past-client reactivation sequence	

AUTOMATION

Task	In this 90 days? Owner / date
☐ Automate speed-to-response on every web form	
☐ Build a new-contact welcome sequence	
☐ Automate CRM step reminders and template loading	
☐ Add website intent and engagement alerts for sales	
☐ Create dormant re-engagement triggers (90-day and 6-month)	

Done when: *the tasks for this quarter are checked, and the rest are left for later cycles.*

Builder 5. Keep it running

A plan without a rhythm stalls. Connect the lane to your operating loop (Module 12) and your one number (Module 13), so the engine keeps turning after the launch energy fades.

SET THE RHYTHM

Prompt	Your answer
Our operating cadence (daily, weekly, monthly)	
The one number we report and act on	
Who owns the loop and the plan	

Done when: *the plan has a cadence, a number, and an owner.*

D. Quick Wins

From the book's Quick Action. The whole plan comes down to starting. One thing, this week, before anything else.

The One Thing this week

Before you close this workbook, write down one thing. Not a 90-day plan, not a component audit. One action you will take before this time next week.

It might be: I will block four hours to do the Foundation review, this week. Or: we will choose our quarterly thesis. The firms that build engines do one thing, then the next, then the next.

WHAT I AM GOING TO DO THIS WEEK

E. AI Assist

Light, evergreen guidance. AI drafts; you decide. Each tip names the part you must own. No fixed prompts, because the tools change fast.

- Prioritization: have a current AI assistant weigh your assessment gaps by impact and effort. You choose the lane.
- Plan drafting: have AI turn your chosen lane into a 90-day phased plan with tasks. You set the milestones and the owners.
- Progress tracking: have AI roll up your weekly loop and monthly numbers into a one-page status. You decide the course corrections.
- Accountability: have AI draft the weekly check-in question for your One Thing. You answer it honestly.

The human's job. The commitment and the patience. AI can sequence the plan, but only you can water it each week through the invisible period. These get sharper once you build your AI brief in Module 11.

F. Done Check

Your 90-day plan is real, not aspirational, when every line below is true. Check them off.

- ☐ The whole-engine scorecard is filled, with an overall readiness average.
- ☐ The two universal first steps are scheduled with owners.
- ☐ One priority lane is chosen, not all of them.
- ☐ The 90 days is sequenced into three phases, each with a milestone.
- ☐ The component checklist is marked for this quarter's scope.
- ☐ An operating cadence and one number are set, with an owner.
- ☐ The One Thing for this week is written down.

This is the loop, not the finish line. At day 90, re-run the whole-engine scorecard, pick the next lane, and plan the next 90 days. The engine is never finished. It compounds.

Your 90-Day Plan on One Page

When the builders are done, copy the short version here. This is the page you put on the wall.

Our overall engine readiness today

The two first steps (Foundation refresh, Website CRO) and their dates

Our chosen lane this quarter

Our 90-day phases and milestones

Our operating cadence and the one number we track

The One Thing we are doing this week

WHAT TO DO NEXT

The firms that build engines do one thing, then the next, then the next.

1. **Do your One Thing this week.** You wrote it down in Module 14. It is the whole plan until it is done.
2. **Use the tools.** Every tool in this workbook lives at growthenginebook.com, along with Brogue's completed copy for whenever a blank page stares back.
3. **Re-score at 90 days.** Run the Engine Scorecard again, pick your next lane, and plan the next 90. The engine is never finished. It compounds.
