

# Lifecycle Marketing Self Assessment



The assessment below will allow you to discover opportunities for growth in your business. Simply identify your score by referencing what stage you're in (1-5) with regards to Collecting Leads, Converting Clients, and Creating Fans. **Instruction: Add the numbers from each column to get your total Lifecycle Marketing Assessment score.**

Stage	 Collect Leads			 Convert Clients			 Create Fans		
	Target	Attract	Capture	Engage	Offer	Close	Deliver	Impress	Multiply
1	We don't focus on a specific type of customer at all; our primary source of customers are prospects who find us by chance and need our services. We collect their information, and stow it away to follow up at later time.			It's not uncommon to lose leads because of delays in follow-up; however, we do close the sale with prospects that are patient and need our services.			Because our business relationships are transactional, we don't have a preferred process for delivering a service. Once we've completed the deal, that's the end of our working relationship until they reach out for something else in the future.		
2	We don't have a specific target, so we rely on customers finding us either on their own, or by referral when they need our business services.			We check in with potential new customers that have shown interest in our services. However, we try to limit communication so that we don't bother them.			We don't have a firm process to make sure customers get what they pay for, but it usually works out. We never ask for referrals because it's uncomfortable to do so.		
3	We don't really know who our specific target customer is, so we actively market to everyone and typically collect leads as a result. Sometimes, details can get scattered because we have no systemic method to store their information and follow up.			We follow up with interested leads as much as possible; they don't typically require much conversation because they're well aware of our services before we get in touch. We create offers as necessary to help close deals.			We always deliver whatever has been committed to the customer. Once we've completed the deal, we set a calendar reminder to check in with them down the road and see how everything's going. Depending on the relationship, we may ask for reviews or referrals, but don't enjoy doing so because it can sometimes be awkward.		
4	We have a clear idea of who our target customer is, and rely on various marketing methods to draw them in. We utilize multiple platforms to track any activity with prospects.			We have consistent educational conversations with prospects and create compelling offers that entice prospects to move forward. Usually that's enough to close the deal with interested prospects.			We personally exhaust all efforts to make sure customers have an overall great experience while we're working together. We politely ask customers to review our business and to keep us in mind when either they or their friends need similar services in the future.		
5	We confidently know who our ideal customer is, and where to find them. Leads consistently take action to learn more about our business, and we have a frictionless method to systematically add every contact into a single system to immediately follow up.			We consistently convert leads by following up in a timely fashion and educating customers about our services. We have a strategic and intentional sales process that utilizes effective offers to close deals. We also regularly engage with those who might not be ready to do business today so that our business can stay top of mind.			We have an automated method to ensure our services are delivered seamlessly and without friction. We deliberately go the extra mile to provide an exceptional customer experience, and follow up to offer incentives for reviews and referrals.		

## Scoring:

**3-8:** You've got the grit of a small business owner, but you may be facing some challenges. Incorporating some systems or automations may be helpful.

**9-11:** You're on the right track! There is some significant opportunity for growth that we would love to help you with. Give us a call for more info.

**12-15:** You're a proficient and thriving business owner. Keep on exploring solutions like Keap that take you from great to greatest!