

THE MARKETING CHECK-IN

“Where Do We Start?”

Marketing Check-In

A 15-minute worksheet for growing local businesses ready for a clearer next step.

Start where you are.

A quick note from us

Your business doesn't have to be starting from scratch for your marketing to need a fresh look. Maybe you've grown, your services have changed, or the way you show up online no longer reflects the work you do today.

This check-in will help you notice what's working, identify what needs attention, and choose one next step that fits where you are right now. There are no scores—and no expectation that you fix everything at once.

— *The Carey Creative team*

HOW IT WORKS

Set aside 15 minutes. Print this out and grab a pen, or type straight into the file. Go through the next three pages as if you were a new customer meeting your business for the first time. For each prompt, pick the answer that feels closest, then jot down what you noticed.

FOUR ANSWERS

- ☐ **Working well.** This feels right as it is. Note why, so you can keep doing it.
- ☐ **Could be clearer.** It's there, but it may not land the way you'd like.
- ☐ **Needs attention.** This is a good place to focus. Worth noting even if you can't get to it yet.
- ☐ **Not sure yet.** A perfectly good answer. It usually means something is worth a closer look.

There are no wrong answers here.

How you show up

Picture someone hearing about you for the first time: a neighbor's recommendation, a search, a post they scrolled past.

01 If a new customer found you today, could they tell what you do within a few seconds?

Think about your website's first screen, your social profile, or your sign.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

02 Is it clear who you help?

The kind of customer, the size of job, the area you serve.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

03 Could someone explain what makes your approach different from others nearby?

Less about what you offer, more about how you do it.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

How people find and contact you

Now follow the path someone takes from interested to in touch.

04 When someone lands on your website, is it clear what to do next?

Call, book, request a quote, stop by. Is there one obvious path?

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

05 Can people find current information without digging?

Hours, services, pricing or starting points, location, service area.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

06 How easy is it to reach you or make an inquiry?

Try it yourself from your phone, start to finish.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

What you share and promote

Posts, emails, flyers, ads. Whatever you put out there, big or small.

07 Does what you share answer the questions customers ask you most?

The ones you hear on the phone, at the counter, or on every first visit.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

08 Do you show up often enough that people remember you?

Consistent doesn't have to mean constant.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

09 When someone clicks one of your ads, do they land somewhere with a useful next step?

Not running ads? Skip this.

☐ Working well ☐ Could be clearer ☐ Needs attention ☐ Not sure yet

WHAT DID YOU NOTICE?

Your next right step

Look back over your notes. You're choosing one thing, not making a plan for everything.

What's working?

What feels most important to improve?

What can wait?

Just one.

My next step is...

IF YOU'D LIKE TO TALK

You don't have to turn these notes into a plan alone. If you'd like another perspective, tell us what you noticed. We'll start with a conversation about your business and what makes sense next.

[\[Booking link\]](#) →

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