

## SECTION 1: Marketing Assessment

Previously we covered how to define your ideal client. Once we identify WHO we're marketing to, the next question is HOW do we market to them? The following self-assessment of your marketing efforts can help you identify strengths and areas for improvement. *Rate yourself on a scale of 1 to 5 (1 = strong disagreement, 5 = strong agreement).*

- 1. Unique Selling Proposition (USP):** We can clearly & confidently explain our Unique Selling Proposition and why a prospect should choose us over our competitors. 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐
- 2. Target Market Identification:** We have a clearly defined target market and can describe our ideal client in detail, including demographics and psychographics. 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐
- 3. Marketing Plan Alignment:** We have a written, up-to-date marketing plan that aligns with our strategic vision and business goals. 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐
- 4. Brand Consistency:** Our branding, including logo, colors, & designs, is consistent across all marketing materials and accurately communicates our values. 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐
- 5. Lead Generation Effectiveness:** We have multiple marketing initiatives in place that consistently generate high-quality leads or sales for our business. 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

**Scoring:** Add scores together for your TOTAL: \_\_\_\_\_

- 21–25: Excellent - Your marketing efforts are well-structured and effective.
- 16–20: Good - There are minor areas for improvement to enhance your marketing performance.
- 11–15: Fair - Consider revisiting and refining your marketing strategies to achieve better results.
- 5–10: Needs Improvement - Significant enhancements are needed in your marketing approach.

By honestly evaluating each area, you can pinpoint specific aspects of your marketing strategy that may require attention and take actionable steps to improve your overall marketing effectiveness.

## SECTION 2: Watch “The 4i’s of Marketing” video by John Gardner

John Gardner is president and CEO of Luckie & Company, an agency that drives results for challenger brands as an “informed navigator” in marketing. Sectors include healthcare, travel, consumer packaged goods and financial services. For many years, John has been at the center of the marketing revolution created by the impact of technology and data.

Luckie helps companies get closer to their customers to build connections between people, businesses, and communities. In this content session Iron Forums Board Chairman and Executive Creative Director at Luckie, Rob Marbury, interviews John Gardner about a new framework he developed for marketing: The 4i's™. The traditional 4P's (Product, Price, Place, Promotion) were focused on controlling demand. In this video, you will learn how today the marketing landscape has shifted toward the 4i's: Intelligence, Individualization, Inspiration, and Integration, acknowledging that consumers are now in control.

## SECTION 3: Discussion

Today's discussion aims to openly assess our current marketing efforts, identify areas for improvement, and align our strategies to better serve existing clients and attract new ones, fostering business growth. While we won't solve all marketing challenges today, our goal is to initiate thinking on areas for enhancement and starting points.

- Individual Reflection (5 mins):** Review and answer the four questions below.
- Sharing Responses (2 mins):** Each person will share their assessment score and one key area they'd like to discuss with the group.
- Group Engagement (8 mins):** Ask clarifying questions and offer insights to help identify actionable takeaways for their business.

### Questions

1. **Customer Intelligence:** What data do you currently collect on your customers, and how do you utilize it? Are there any untapped channels you could explore?
2. **Individualized Guest Experience:** How can you prioritize customer relationships to ensure each interaction feels personalized and timely? How can you take a negative customer interaction and turn it into a positive experience?
3. **Inspiring Storytelling:** Can you share an example of an inspiring client interaction? How have you used this story in your marketing, and how do you encourage customers to advocate for your brand?
4. **Seamless Integration Across Channels:** Are there inconsistencies in your customer touch points? What steps can you take to ensure a consistent and cohesive experience across all channels?

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## SECTION 4: Iron Forums Toolkit

**WORKSHEET:** We developed an "Empower Your Marketing" worksheet to help you analyze your marketing efforts, identify improvements, and create a marketing plan with action steps. It is available for download at [IronForums.org](https://IronForums.org).

**ADVISORS:** The Iron Forums Advisor Corp and fellow members are here to support you through this process and help interpret the tool's results. For questions or assistance, please reach out to your Facilitator.

**RECOMMENDED BOOK:** "Building a StoryBrand: Clarify your Message so Customers will Listen" by D. Miller

**PODCAST:** "Marketing Over Coffee" Katie Robbert on Ideal Customer Profiles