

WORKSHEET:

Empower Your Marketing (Luckie 4i's™)

Use this worksheet as a guide to explore the core aspects of marketing outlined in the video segment presented by John Gardener at Luckie and Company. Work through the questions and exercises around the Luckie 4i's™ with your leadership team to uncover actionable insights that will enhance your marketing efforts. *Your Facilitator, Advisors, and fellow Members are always available to discuss and help implement your findings.*

INTELLIGENCE: Identifying Your Customers

1. Data Sources Audit

- List all the current channels where you collect customer data (e.g., POS data, social media followers, shipping info, website analytics).
- Identify one new channel you could begin leveraging for customer insights. What steps will you take to activate it?

2. Customer Profile Deep Dive

- Identify your top three customer profiles (e.g., frequent visitors, high spenders, loyal advocates).
- For each profile, answer:
 - How often do they interact with your business?
 - What products/services do they prefer?
 - Which marketing channels reach them most effectively?

3. Scenario Planning

- Create a hypothesis: "If I implement [specific change], it will result in [desired outcome]."
 - Design a simple test or experiment to validate your hypothesis.
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INDIVIDUALIZATION: Creating an Personalized Guest Experience

1. Customer Relationship Map

- Choose one key customer segment. Map out their journey with your business:
 - Where do they first engage with you?
 - What are their primary touchpoints?
 - What are their pain points?

2. Personalization Opportunities

- Brainstorm three ways you can make each customer's experience more personalized (e.g., tailored messaging, exclusive offers, remembering preferences).
- Assign a team member to lead the implementation of one of these ideas.

3. Communication Preferences

- Poll or survey your customers to understand:
 - Their preferred communication channels (email, social media, SMS, etc.).
 - The best times for them to receive communications.
 - Discuss how you can adapt your messaging strategy based on these preferences.
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INSPIRATION: Tell a Good Story

1. Core Values Alignment

- List your business's top three core values.
- Write a short statement connecting each value to your customers' needs/desires.

2. Story Collection

- Identify one inspiring story from your business (e.g., a customer success story, a team achievement, or a community impact).
- Answer:
 - How can this story be communicated visually and emotionally?
 - Where can you share this story (e.g., social media, email, website)?

3. Advocate Activation

- Design a simple program to encourage customers to share their experiences with your business (e.g., referral incentives, user-generated content campaigns).
 - Set a goal for the number of customer stories you want to collect and share over the next quarter.
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INTEGRATION: Seamless Experience Across All Channels

1. Channel Audit

- List all the channels where your customers interact with your brand (e.g., website, social media, physical store, email).
- Evaluate each channel for consistency in:
 - Branding (logos, colors, tone, quality).
 - Customer experience (ease of use, response time).

2. Gap Analysis

- Identify any inconsistencies or gaps in customer experience across channels.
- Develop a plan to address these issues, assigning specific tasks to team members.

3. Internal Alignment

- Conduct a team meeting to ensure everyone understands the importance of consistency.
- Discuss how internal processes and communication can better reflect the external experience you want to deliver.

Action Plan

Use the following prompts to document your key takeaways and next steps for each focus area:

Use Intelligence to Identifying Customers

- Key Takeaway:
- Next Step:
- Owner:

Individualized Experience

- Key Takeaway:
- Next Step:
- Owner:

Inspiring Storytelling

- Key Takeaway:
- Next Step:
- Owner:

Seamless Integration

- Key Takeaway:
- Next Step:
- Owner:

Take time to revisit this worksheet regularly with your leadership team to measure progress and refine your strategies.

IF Toolkit!

Advisor: The Iron Forums Advisor Corp and fellow members are here to support you. To get connected, reach out to your Facilitator or visit the [Advisor Corp Directory](#).

Book: **Building a StoryBrand**: Clarify Your Message So Customers Will Listen by Donald Miller

Podcast: **Marketing Over Coffee**: Katie Robbert on Ideal Customer Profiles, The 5Ps, & AI!

