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FREE WORKBOOK | FOR FOUNDERS AND LEADERS

What's actually holding your marketing back?

Find out what is really stopping you generating more leads or more business, and exactly where to invest next.

Complete the workbook to highlight improvement areas and 5 actions for the next 30 days.

For founders and leaders with a marketer or a small marketing team.

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BEFORE YOU ADD ANOTHER PERSON

Your team is busy. Results are not moving.

Before you add another salary, another tool, or another hour, it's worth finding out what's actually in the way. This workbook is based on my Marketing Scaling Framework: four questions I use with clients to work out whether a marketing team needs clearer direction, sharper skills, smarter use of AI, outside support, or another hire.

WHAT YOU'LL GET FROM THIS

A clear answer

on whether the real constraint is direction, capability, ways of working, or genuine capacity.

A working list

of what should stay human-led, use AI, be automated, be outsourced, or stopped.

One decision

and five actions for the next 30 days.

4 AREAS TO EXPLORE

1 **Is the marketing direction clear?**

2 **Where is the team spending its time?**

3 **Who, or what, should do the work?**

4 **What does the team need next?**

How to use it: Fill this in on screen. Every box, tick and line is editable. Do Section 1 with another person from the team if you can. Different answers are the point.

SECTION ONE

Is the marketing direction clear?

01

For each statement, tick whichever columns are true. I know means you personally believe it. Team knows means every customer-facing person would answer it the same way, not just you. Data-backed means real customer evidence or research confirms it, not assumption. Tick No one's sure if you would get different answers from different people.

STATEMENT	NO ONE'S SURE	I KNOW	TEAM KNOWS	DATA-BACKED
We know which customers and markets we want to prioritise.	☐	☐	☐	☐
We understand the problems and buying priorities of those customers.	☐	☐	☐	☐
We can clearly explain why customers choose us.	☐	☐	☐	☐
Our positioning and messaging are consistent.	☐	☐	☐	☐
Marketing priorities are linked to commercial goals.	☐	☐	☐	☐
The team knows which channels and activities perform best.	☐	☐	☐	☐
Marketing responsibilities are clear.	☐	☐	☐	☐
The team knows how success will be measured.	☐	☐	☐	☐
Leadership and marketing agree on what the team should deliver.	☐	☐	☐	☐
There's a clear plan for the next 90 days.	☐	☐	☐	☐

READ YOUR RESULT

Mostly data-backed or team-confirmed: you may be ready to focus on capacity and ways of working. Mostly "I know": the direction may be right, but it rests on one person's view rather than something the team shares or can prove. Several "no one's sure": more people or more tools may create more activity without creating better marketing.

The three things we most need to clarify:

1. _____ **2.** _____ **3.** _____

SECTION TWO

Where is the team's time going?

02

Common marketing activities are listed to get you started. Estimate the time involved and whether each one creates enough value. Overwrite any of them, or use the blank rows for your own.

ACTIVITY	HOURS / MONTH	VALUE	MAIN PROBLEM
Social media management			
SEO and GEO management			
Content creation			
Event management			
Campaigns to existing customers			
Campaigns to potential new business customers			
Paid advertising management			
Website conversion optimisation			
Positioning and messaging optimisation			
Customer research			
Competitor research			
Product information			
Sales enablement collateral			

LOOK FOR THE PATTERN

- What takes the most time?
- What repeatedly gets delayed?
- Where is skilled marketing time being used on low-value work?
- What continues only because it's always been done?

The biggest time or value problem is:

SECTION THREE

Who, or what, should do the work?

03

Take the activities from your time review and decide the best way to handle each one.

1
Human-led
Customer understanding, positioning, priorities, creativity, stakeholder management, and important decisions.

2
AI-assisted
Research, first drafts, analysis, planning support, repurposing, and reporting that still need human review.

3
Automate
Repeatable work with clear rules, where manual involvement adds little value.

4
Outsource
Specialist capability the business needs but doesn't need permanently in-house.

5
Stop
Activity that isn't contributing enough value, or is no longer connected to a priority.

WHERE AI ACTUALLY FITS

AI is not a category on its own. It shows up inside the work you keep human-led, and it replaces some of the work you'd otherwise outsource or automate. The useful question isn't "where can we use AI?" It's "which tasks need judgement, and which just need a competent first pass?"

Map your own team's work

MARKETING ACTIVITY	BEST OPTION	WHAT WOULD CHANGE?
Example: monthly reporting	*Automate*	*Connect the platforms once, stop pulling data by hand*
Example: messaging & positioning	*Human-led*	*Keep with the most senior marketing person*

SECTION FOUR

What does the team need next?

04

Read each description and mark the two that best explain your current situation.

- [ ] **Clearer strategy**
  The team is active, but the audience, positioning, message, or priorities aren't clear enough.
- [ ] **Senior marketing direction**
  The team can execute, but nobody is setting direction, challenging priorities, or defining what good looks like.
- [ ] **Alignment with sales**
  Marketing is busy, but it isn't clearly tied to sales priorities, pipeline, or wider commercial objectives.
- [ ] **Stronger skills**
  Direction is reasonably clear, but the team needs development, coaching, or specific marketing capability.
- [ ] **Better use of AI**
  Skilled people spend too much time on research, first drafts, analysis, repurposing, or other work AI could assist.
- [ ] **Automation**
  Repeatable manual processes are consuming capacity even though the rules are clear.
- [ ] **Specialist support**
  The business needs a particular capability, such as paid media, technical SEO, or automation, but not permanently.
- [ ] **Another hire**
  Strategy, responsibilities, and working methods are clear, but valuable work still exceeds the team's capacity.
- [ ] **I'm not sure**
  It's hard to tell where the real constraint is, and I need someone to take a look and tell me.

Our two most important needs are:

1. _____

2. _____

DECIDE

Make the investment decision

05

Use your answers to decide the next move. More than one may apply, but choose the one that needs attention first.

IF...	THEN...
Direction is unclear	**Fix the strategy before increasing output.**
Decisions are slow or inconsistent	**Add senior marketing guidance.**
Marketing isn't tied to sales goals	**Add senior marketing guidance.**
The team lacks a specific capability	**Develop the team or bring in focused expertise.**
Skilled time is used on repeatable work	**Introduce AI support or automation carefully.**
Activity adds little value	**Stop, simplify, or refocus it.**
The model works but capacity is still short	**Define the role and consider another hire.**
Not sure where the constraint is	**Book an audit to develop a roadmap for improvement.**

OUR PRIORITY DECISION

The most important thing our marketing team needs next is:

Because:

DO

Your 30-day action plan

06

Choose five practical changes. Keep them specific enough to complete or test within the next month.

ACTION	OWNER	DEADLINE	WHAT SHOULD IMPROVE?

REVIEW AFTER 30 DAYS

What changed? What saved time? What improved quality or focus? What still needs a bigger decision?

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WHAT DID THE REVIEW REVEAL?

You may have found one practical change you can make immediately. You may also have found that the issue runs wider than capacity, tools, or individual performance.

If there's uncertainty around your target customers, positioning, messaging, priorities, team responsibilities, measurement, or use of AI, adding more activity is unlikely to solve it.

How BrightKeel.ai can help

Build a better marketing function, not simply a bigger one.

1

This workbook

A useful starting self-review.

2

Marketing Assessment & Roadmap

An independent view of what's working, what's missing, and what to prioritise over the next 90 days.

3

Marketing Strategy Foundation

The strategy, positioning, messaging, priorities, and team model your business needs to move forward.

4

Ongoing support

Training, coaching, and hands-on advisory to help your team put the strategy into practice, from on-demand training through to fractional CMO support.

Book a conversation at brightkeel.ai