

THE ONE-PERSON BUSINESS PLAYBOOKS

THE ONE-PERSON MARKETING DEPARTMENT TOOLKIT

Editable Worksheets, Trackers & Operating Tools

YOU

CONTENT

EMAIL

SEO

ADS

ANALYTICS

Companion to The One-Person Marketing Department

How to Build Demand Without Building a Marketing Team

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How to Use This Toolkit

This companion workbook turns the appendix tools from The One-Person Marketing Department into working documents you can complete, save, revisit, print, and improve. Use the tool that matches the decision in front of you rather than trying to complete everything at once.

If you are...	Start with...
Clarifying the market	Tools A-C: Foundation, Positioning, Offer
Choosing channels / content	Tools D-F: Channel Scorecard, Content Calendar, Repurposing
Building email / search	Tools G-I: Lead Magnet, Welcome Sequence, Search Planner
Considering paid media	Tool J: Paid Media Go/No-Go & Test Log
Using AI / automation	Tools K-N: Knowledge Base, AI Delegation, Automation Map, SOP
Managing performance	Tools O-Q: Dashboard, Monthly 80/20 Review, Weekly Review

COMPANION FILES

The Excel companion includes structured versions of the Channel Scorecard, 30-Day Content Calendar, Paid Media Test Log, AI Delegation Planner, Customer Journey & Automation Map, Marketing Dashboard, and operating reviews. Use the Word/PDF tools for thinking and planning; use the Excel workbook when scoring, calculations, or recurring tracking matter.

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Companion toolkit: OnePersonBusinessPlaybooks.com/marketing-toolkit

TOOL A

One-Page Marketing Foundation

Use this page before adding tactics. If the answers are vague, the marketing system is not ready for more complexity.

1. Ideal Customer

Who is the primary customer we are trying to attract?

2. Painful Problem

What problem are they actively trying to solve?

3. Trigger Event

What usually causes them to start looking now?

4. Desired Outcome

What changes after the problem is solved?

5. Main Alternatives

What will they do if they do not choose us?

6. Primary Objection or Fear

What most often makes a qualified buyer hesitate?

7. Current Marketing Constraint

What is the single biggest reason more qualified customers are not buying today?

8. Marketing North Star

What one commercial metric best tells us whether the current constraint is improving?

Metric: _____ Current: _____ Target: _____

Priority question: What should we deliberately *not* work on until this constraint improves?

TOOL B

Positioning & Message House Builder

Positioning Statement

We help [customer] _____

achieve [outcome] _____

without [major frustration/alternative] _____

through [distinctive approach] _____

Core Promise

In one plain sentence, what is the most important value we want the customer to remember?

Message Pillar 1

Claim: _____

Why it matters to the customer: _____

Proof: _____

Message Pillar 2

Claim: _____

Why it matters to the customer: _____

Proof: _____

Message Pillar 3

Claim: _____

Why it matters to the customer: _____

Proof: _____

Generic-Language Test

Circle or rewrite any word a competitor could use without changing the sentence: quality, service, innovative, trusted, leading, comprehensive, solutions, customer-focused, cutting-edge.

The most defensible difference we can actually prove is:

TOOL C

One-Person Offer Builder

Customer: _____

Problem being solved: _____

Desired outcome: _____

One-sentence offer:

We help _____ achieve _____ without _____.

Standard Deliverables

1. _____

2. _____

3. _____

4. _____

Timeframe: _____

Customer responsibilities: _____

What is explicitly not included: _____

Confidence & Risk

Proof available:

- ☐ Customer result ☐ Testimonial ☐ Demonstration ☐ Sample ☐ Data ☐ Case example

What makes the purchase feel risky? _____

How can we reduce that risk responsibly? _____

Friction Audit

Can we reduce:

- ☐ Time to value
- ☐ Setup effort
- ☐ Complexity
- ☐ Contract commitment
- ☐ Uncertainty
- ☐ Customer workload

Price and Next Step

Price / pricing model: _____

Lowest-friction logical next step: _____

Hard question: If twice as many qualified people saw this offer tomorrow, would we expect materially more sales? Why or why not?

TOOL D

Marketing Channel Scorecard

Rate each potential channel from 1 (weak) to 5 (strong). Add a maintenance estimate so “free” channels do not hide their attention cost.

Ch.	Cust.	Intent	Cost	Speed	Dur.	Scale	Fit	Hrs/Mo	Total

Primary discovery channel: _____

Secondary/supporting channel: _____

Experimental channel: _____

Relationship channel: _____

Conversion channel: _____

Channel we are deliberately ignoring for the next 90 days:

TOOL E

Content Pillars & 30-Day Calendar

Content Pillars

Pillar 1: _____ Customer problem: _____

Questions customers ask:

- 1. _____
- 2. _____
- 3. _____

Pillar 2: _____ Customer problem: _____

Questions customers ask:

- 1. _____
- 2. _____
- 3. _____

Pillar 3: _____ Customer problem: _____

Questions customers ask:

- 1. _____
- 2. _____
- 3. _____

Optional Pillars 4–5: _____

30-Day Content Calendar

For each item, assign one primary job: Attract / Educate / Trust / Convert.

Date	Topic	Pillar	Format	Job	CTA	Status

Sustainable publishing floor: _____

TOOL F

Content Repurposing Matrix

Start with one substantial source asset and map the useful adaptations *before* creating unrelated new material.

Cornerstone asset: _____

Primary customer question answered: _____

Primary call to action: _____

Adaptation	Audience / Channel	New Angle or Hook	CTA	Owner Work	AI / Contractor Role
Newsletter					
Blog / article					
Social post 1					
Social post 2					
Short video					
FAQ					

What new questions did this asset create that belong in the content bank?

TOOL G

Lead Magnet Planner

A good lead magnet solves a small real problem for a person who could plausibly become a customer.

Target customer: _____

Small problem to solve: _____

Moment when the resource is most useful: _____

Format:

- ☐ Checklist ☐ Template ☐ Calculator ☐ Guide ☐ Assessment ☐ Mini-course ☐ Other

Working title: _____

What useful result can the person get in 10–30 minutes?

How does this naturally connect to the larger problem we solve?

What should happen immediately after download?

Quality test: Would a qualified prospect be glad they gave us an email address for this?

- ☐ Yes ☐ Not yet

TOOL H

Seven-Email Welcome Sequence Planner

Email	Purpose	Core Point	Proof / Example	CTA
1	Deliver the promise			
2	Define the problem			
3	Teach a useful win			
4	Establish credibility			
5	Introduce the solution			
6	Address the real objection			
7	Ask for action			

Sequence Rules

- ☐ The promised resource is delivered immediately.
- ☐ Every email has one main idea.
- ☐ At least one email creates value without asking for a purchase.
- ☐ Proof is specific rather than generic.
- ☐ Objections are real, not straw men.
- ☐ The final action is clear.
- ☐ The language sounds like a person, not a press release.

Metric that determines whether the sequence is working: _____

TOOL I

Search Intent & Topic Cluster Planner

Primary topic / customer problem: _____

Commercially Relevant Questions

Search / Customer Question	Intent	Buying Stage	Existing Page?	Priority 1–5	CTA

Intent options: Informational / Commercial / Comparison / Transactional

Pillar Page

Core page: _____

What makes our answer more useful than a generic summary?

- ☐ Original data ☐ Experience ☐ Framework ☐ Case example ☐ Calculator/tool ☐ Detailed comparison

Supporting Cluster Pages

- _____
- _____
- _____
- _____
- _____

Existing winning page to refresh before creating something new:

TOOL J

Paid Media Go/No-Go & Test Log

Pre-Launch Gate

Target customer: _____

Offer: _____

Primary message: _____

Conversion action: _____

Estimated customer value / gross profit: \$ _____

Maximum acceptable acquisition cost: \$ _____

Test budget: \$ _____

Minimum evidence needed before scaling: _____

Kill / Change Criteria

Pause or revise if:

1. _____

2. _____

3. _____

Test Log

Date	Variable Tested	What Stayed Constant	Result	What We Learned	Decision

Next test should change only: _____

TOOL K

AI Marketing Knowledge Base Template

Create one source of truth that can be supplied to AI tools and contractors. Keep it current.

Company

What do we do? _____

What do we *not* do? _____

Customers

Primary customer: _____

Main problem: _____

Trigger event: _____

Desired outcome: _____

Main objection: _____

Positioning

Positioning statement: _____

Core promise: _____

Message pillars: _____

Offers

Primary offer: _____

Price / model: _____

Standard deliverables: _____

Proof

Customer results: _____

Testimonials / evidence: _____

Competitors and Alternatives

Main alternatives: _____

Our defensible difference: _____

Brand Voice

We sound like: _____

We do not sound like: _____

Preferred words: _____

Words / phrases to avoid: _____

Accuracy Rules

Claims requiring verification: _____

Sensitive / confidential information rules: _____

TOOL L

AI Marketing Delegation Planner

Choose the right role for AI rather than forcing it into every task.

Task	Hrs/Month	Best AI Role	Inputs Required	Human Review	Est. Time Saved	Reusable Workflow

Suggested AI roles: brainstorm/assist; first draft; analyze/summarize; transform/repurpose; automate predictable work; human only.

Human Review Checklist

- ☐ Facts
- ☐ Numbers
- ☐ Sources
- ☐ Tone
- ☐ Privacy/confidentiality
- ☐ Customer context
- ☐ Legal/regulatory implications
- ☐ Strategic judgment
- ☐ Final CTA / promise

Operating rule: What must always be verified personally before an AI-assisted output reaches a customer or drives a consequential decision?

TOOL M

Customer Journey & Marketing Automation Map

Stage	Customer Action	Business Response	Trigger	Automated ?	Owner Judgment ?	Next Step
Visitor						
Lead						
Qualified Lead						
Prospect						
Customer						
Repeat Customer						
Advocate						

Automation Priority

Which repeated step creates the most delay, manual copying, forgetting, or scheduling effort?

Can it be eliminated first? [] Yes [] No

Can the inputs be standardized? [] Yes [] No

What should trigger the workflow? _____

What exception must always come to the owner? _____

TOOL N

Minimum Viable Marketing SOP

Process name: _____

Owner: _____ Last updated: _____

Purpose — What result should this process reliably produce?

Trigger — What causes the process to begin?

Required inputs — What files, information, permissions, or assets are needed?

Steps — Write the minimum sequence needed to complete the work.

1. _____
2. _____
3. _____
4. _____
5. _____

Expected output: _____

Quality check — How do we know the work is correct and complete?

Exceptions — What requires owner judgment?

Automation / delegation opportunities: _____

TOOL O

One-Page Marketing Dashboard

Use no more than ten primary measures. A dashboard should lead to decisions, not admiration.

Metric	Current	Target	Trend	What Would Make Me Act?	Action / Owner
Qualified leads					
Lead-to-opportunity %					
Opportunity-to-customer %					
Customer acquisition cost					
Customer value / gross profit					
Email list / owned audience					
Retention / repeat purchase					
Revenue attributable to marketing					
Owner marketing hours					
Custom metric					

Current marketing constraint: _____

Metric most likely to warn me before revenue changes: _____

Metric I am removing from the primary dashboard: _____

TOOL P

Monthly Marketing 80/20 Review

Month: _____

1. What Produced Customers?

2. What Produced Qualified Prospects?

3. What Is Not Working?

4. What Should Stop?

5. Where Should We Invest More?

80/20 Audit

Which customers generated disproportionate profit? _____

Which content generated disproportionate qualified traffic? _____

Which channel generated disproportionate opportunity? _____

Which activities consumed disproportionate owner time? _____

Reallocation Decision

Hours moved from: _____ to: _____

Budget moved from: _____ to: _____

One experiment next month: _____

One thing we will deliberately not add: _____

TOOL Q

Weekly Marketing Operating Review

Keep this meeting to 20–30 minutes unless a real decision requires more time.

Week of: _____

Current Constraint

What is the single biggest marketing constraint right now?

Numbers

What changed enough to matter?

Pipeline

High-value lead or opportunity requiring personal attention:

Active Campaign

What is running? _____

What decision is due? _____

Content Asset

What reusable asset are we creating or improving this week?

Customer Learning

What did a customer, prospect, or result teach us this week?

System Improvement

What repeated marketing task should be eliminated, systemized, automated, or delegated next?

One Priority

If only one marketing improvement gets completed this week, it is:

Stop-Doing Decision

What will we *not* spend time on this week?

30-DAY BUILD CHECKLIST

Use this as the final implementation checklist after reading the book.

Week 1 — Foundation

- ☐ Ideal customer defined
- ☐ Customer problems listed
- ☐ Trigger identified
- ☐ Positioning statement written
- ☐ Message house completed
- ☐ Offer improved
- ☐ One low-value marketing activity eliminated

Week 2 — Acquisition

- ☐ Channels scored
- ☐ Primary discovery channel chosen
- ☐ Relationship channel chosen
- ☐ Lead magnet created
- ☐ Landing page built
- ☐ Welcome sequence drafted
- ☐ Customer journey tested

Week 3 — Content

- ☐ Content pillars defined
- ☐ Customer question bank created
- ☐ Content bank created
- ☐ Cornerstone asset produced
- ☐ Asset repurposed
- ☐ Distribution scheduled
- ☐ Thirty-day calendar built

Week 4 — Systems

- ☐ One recurring workflow documented
- ☐ AI knowledge base built
- ☐ AI roles defined
- ☐ One repetitive task automated
- ☐ Dashboard created
- ☐ Weekly review scheduled
- ☐ Monthly 80/20 review scheduled
- ☐ Outsourcing opportunities identified
- ☐ Full marketing operating system tested

Final Test

A one-person marketing department is working when you can answer yes to most of these questions:

- ☐ I know the primary customer we are trying to attract.
- ☐ Our positioning can be explained in one plain sentence.
- ☐ The offer is specific enough that a customer understands what they receive.
- ☐ We have one primary discovery channel rather than a collection of half-maintained channels.
- ☐ We have an owned relationship channel.
- ☐ Content begins with customer questions rather than a blank content calendar.
- ☐ One strong asset can be reused across several formats.
- ☐ New subscribers receive useful follow-up without manual effort.
- ☐ Search content is aimed at relevant intent, not traffic for its own sake.
- ☐ Paid advertising has defined economics and stopping rules.
- ☐ AI has defined roles and human review standards.
- ☐ Repetitive marketing administration is being automated.
- ☐ The dashboard contains only numbers that can affect a decision.
- ☐ We hold a short weekly operating review.
- ☐ We remove low-value marketing work regularly.
- ☐ The amount of useful demand can grow faster than the owner's marketing hours.

If several answers are no, do not add another platform.
Go back to the system.
Fix the weak layer.
Then build again.