



Is Chaos Holding Back Your Marketing?

Use this 5-minute checklist to find out where your system is leaking leads, hiding insight, or burning time – and what clarity could unlock for your business.

Step 1: Spot the Chaos

Check all that feel familiar.

- We don't know which channel is actually driving revenue
- Our CRM is barely used or only used by one person
- We're still manually following up with leads
- Tools and vendors aren't integrated
- Performance feels like a black box
- Reporting takes too long or gets skipped
- We're reacting more than we're planning
- If leads tripled next month, we'd break



_____ Total number of checked boxes.

3 or more = you're likely operating in the Chaos Zone.

Step 2: Score Your System

Rate each area from 1 (not set up) to 5 (fully dialed-in).



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System Area	1 Not set up	2	3	4	5 Fully dialed-in
CRM Lifecycle Setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Source Tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nurture + Follow-Up Automation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly Funnel Visibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-Owned Systems vs. Vendor-Owned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total Score: ___ / 25 (Add up the numbers you checked.)

Total Score < 15? Your system likely needs a rebuild – not a band-aid.

Step 3: Reflect Before You React

What parts of our system am I avoiding because they feel messy?

Where are we making decisions based on guesswork instead of data?

What would I delegate or automate if our system could handle it?



Step 4: Turn Insight Into Action

You've just spotted the gaps. Now let's build the system that removes them.

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