

The Million Dollar Marketing Alignment Toolkit

A Strategic Assessment & Action Guide for High-Growth Remodeling Businesses

Developed by Carl Willis & The Remodeling Marketing Team

How to Use This Toolkit

This toolkit is designed as a working document for remodeling business owners generating \$1M+ in annual revenue. You'll need 45-60 minutes to complete the full assessment and develop your action plan.

What you'll get:

- A comprehensive alignment score across four critical areas
- Specific action items based on your results
- A prioritized 90-day improvement plan
- Strategic insights from working with 100+ million-dollar remodelers

What you'll need:

- Recent marketing performance data (last 6 months)
- Access to your CRM or lead tracking system
- Your current marketing budget breakdown
- 45-60 minutes of uninterrupted time

Part 1: The Million Dollar Marketing Alignment Assessment

Rate each statement on a scale of 1-5:

- 1 = Never/Strongly Disagree
- 2 = Rarely/Disagree
- 3 = Sometimes/Neutral
- 4 = Often/Agree
- 5 = Always/Strongly Agree

Strategic Alignment (25 points possible)

S1. Our marketing consistently attracts clients who can afford projects of \$35K+ ___/5

S2. When we increase marketing spend, lead quality improves (not just quantity) ___/5

S3. Our marketing messaging clearly differentiates us from competitors ___/5

S4. We can trace at least 70% of our closed deals back to specific marketing efforts ___/5

S5. Our marketing directly supports our annual revenue and growth goals ___/5

Strategic Alignment Subtotal: ___/25

Operational Alignment (25 points possible)

O1. Our sales and marketing teams meet at least monthly to discuss lead quality ___/5

O2. We track leads through our entire funnel, from first contact to project completion ___/5

O3. Our marketing campaigns consider our production capacity and scheduling ___/5

O4. We know exactly how much we spend to acquire each new client ___/5

O5. Our CRM and marketing tools work together seamlessly ___/5

Operational Alignment Subtotal: ___/25

Financial Alignment (25 points possible)

F1. We know our customer acquisition cost for each marketing channel ___/5

F2. Our marketing ROI calculations include customer lifetime value and referrals ___/5

F3. We confidently increase spending on marketing channels that prove profitable ___/5

F4. Our marketing budget is based on data and targets, not guesswork ___/5

F5. We regularly review marketing spend against actual business results ___/5

Financial Alignment Subtotal: ___/25

Brand Alignment (25 points possible)

B1. Our website and marketing materials reflect our current capabilities and standards ___/5

B2. New prospects' expectations consistently align with what we actually deliver ___/5

B3. Our brand clearly positions us as premium/expert in our market ___/5

B4. Our marketing voice authentically represents our company culture ___/5

B5. Clients often mention specific marketing content that influenced their decision to work with us ____/5

Brand Alignment Subtotal: ____/25

Your Marketing Alignment Score

Add up all four subtotals:

Strategic: ____/25 + Operational: ____/25 + Financial: ____/25 + Brand: ____/25 = Total: ____/100

Score Interpretation:

90-100: Well Aligned Your marketing is working well. Focus on optimization and scaling what's working. *Primary Priority: Scale and systematize your successes*

70-89: Good Foundation Solid foundation with significant improvement opportunities. *Primary Priority: Strengthen weakest alignment area*

50-69: Misalignment Issues Marketing misalignment is likely costing you substantial revenue. *Primary Priority: Strategic realignment project needed*

Below 50: Major Problems Critical misalignment requiring immediate attention. *Primary Priority: Stop ineffective spend and rebuild from foundation*

Part 2: Diagnostic Deep Dive

Identify Your Biggest Alignment Gaps

Circle your lowest scoring area:

Strategic Alignment | Operational Alignment | Financial Alignment | Brand Alignment

Quick Diagnostic Questions

Answer these based on your actual business data:

Lead Quality Analysis:

- Average project value of marketing-generated leads: \$_____
- Percentage of marketing leads that become estimates: _____%
- Percentage of estimates that close: _____%
- Average time from lead to signed contract: _____ days

Financial Performance:

- Monthly marketing spend: \$_____
- Cost per lead (total spend ÷ number of leads): \$_____
- Cost per new client (total spend ÷ new clients): \$_____

- Average client lifetime value: \$_____

Operational Efficiency:

- Do you have a formal lead scoring system? ☐ Yes ☐ No
- Can you identify your top 3 lead sources by profitability? ☐ Yes ☐ No
- Do you track which marketing touches influence closed deals? ☐ Yes ☐ No

Part 3: Your 90-Day Action Plan

Based on your assessment results, follow the action plan for your score range:

For Scores 90-100: Optimization Plan

Month 1: Scale Analysis

- Week 1: Audit your best-performing campaigns for scaling opportunities
- Week 2: Test increased budgets on proven channels (increase by 25%)
- Week 3: Document your successful processes for replication
- Week 4: Explore new geographic markets or service lines

Month 2: Systematization

- Week 5: Create playbooks for your most effective marketing activities
- Week 6: Implement automation for repetitive high-value tasks
- Week 7: Develop advanced tracking for attribution modeling
- Week 8: Train team members on optimized processes

Month 3: Strategic Growth

- Week 9: Launch one new marketing channel or strategy
- Week 10: Develop partnership opportunities with aligned businesses
- Week 11: Create thought leadership content to reinforce market position
- Week 12: Plan next quarter's growth initiatives

For Scores 70-89: Strengthening Plan

Month 1: Gap Analysis

- Week 1: Focus on your lowest-scoring alignment area (Strategic/Operational/Financial/Brand)
- Week 2: Audit all touchpoints in that area
- Week 3: Identify 3 specific improvement opportunities
- Week 4: Create implementation plan with timeline and responsibilities

Month 2: Implementation

- Week 5: Begin executing improvements in priority order
- Week 6: Implement better tracking and measurement systems

- **Week 7: Align sales and marketing processes**
- **Week 8: Update marketing materials and messaging**

Month 3: Integration

- **Week 9: Test new approaches and gather data**
- **Week 10: Train team on new processes and expectations**
- **Week 11: Optimize based on results**
- **Week 12: Retake assessment and plan next quarter**

For Scores 50-69: Realignment Plan

Month 1: Foundation Rebuild

- **Week 1: Stop spending on lowest-performing marketing activities**
- **Week 2: Clarify ideal customer avatar and value proposition**
- **Week 3: Audit and update all marketing materials for consistency**
- **Week 4: Implement proper tracking and attribution systems**

Month 2: Strategic Reset

- **Week 5: Realign messaging across all marketing channels**
- **Week 6: Retrain sales team on new qualification criteria**
- **Week 7: Launch updated campaigns with new messaging**
- **Week 8: Implement regular sales/marketing alignment meetings**

Month 3: Performance Optimization

- **Week 9: Analyze new campaign performance and optimize**
- **Week 10: Scale activities showing positive ROI**
- **Week 11: Develop standard operating procedures**
- **Week 12: Set up quarterly strategic review process**

For Scores Below 50: Emergency Realignment

Month 1: Immediate Triage

- **Week 1: STOP all non-essential marketing spend immediately**
- **Week 2: Conduct emergency audit of current lead sources and conversion rates**
- **Week 3: Focus only on marketing activities with proven positive ROI**
- **Week 4: Develop crisis recovery plan with specific timelines**

Month 2: Strategic Rebuild

- **Week 5: Completely redefine ideal customer avatar and value proposition**
- **Week 6: Rebuild marketing message from scratch**
- **Week 7: Choose 2-3 marketing channels maximum and focus exclusively on these**
- **Week 8: Implement comprehensive tracking before spending any new marketing dollars**

Month 3: Careful Relaunch

- Week 9: Launch new campaigns with small budgets and careful monitoring
- Week 10: Scale only activities showing clear positive ROI
- Week 11: Document all processes and create accountability systems
- Week 12: Plan conservative growth strategy for next quarter

Part 4: Critical Success Factors

The Five Pillars of Million-Dollar Marketing Alignment

1. Customer Avatar Clarity Your ideal client profile should be specific enough that you can visualize them, understand their decision-making process, and predict their objections.

Action Item: Write a one-page description of your ideal client including demographics, psychographics, project preferences, and buying behavior.

2. Message-Market Match Your marketing message should speak directly to your ideal client's needs, concerns, and aspirations using language that resonates with them.

Action Item: Create a simple message hierarchy: Core value proposition → Supporting benefits → Proof points → Call to action.

3. Channel Strategy Focus on being excellent in the channels where your ideal clients actually spend time, rather than trying to be everywhere.

Action Item: List the top 3 places your ideal clients go when researching remodeling projects. Focus your efforts there.

4. Sales-Marketing Integration Your marketing should make selling easier by attracting qualified prospects and setting proper expectations.

Action Item: Schedule monthly sales-marketing alignment meetings to discuss lead quality and conversion insights.

5. Performance Measurement Track metrics that matter to business growth, not just marketing activity.

Action Item: Implement tracking for: Cost per qualified lead, Customer acquisition cost, Customer lifetime value, Marketing ROI.

Part 5: Warning Signs & Red Flags

When to Pause and Reassess

 Stop and reassess immediately if:

- Your cost per acquisition exceeds 15% of average project value
- Lead quality is declining as marketing spend increases
- Your sales team is complaining about lead quality consistently

- You can't trace marketing spend to actual closed deals
- Your marketing messaging doesn't match what you actually deliver

Red Flags in Marketing Partnerships

🚫 Your marketing partner/agency is wrong for million-dollar remodelers if:

- They treat you like a typical contractor
- They focus on lead volume over lead quality
- They can't explain how their work impacts your profit margins
- They don't understand remodeling sales cycles and client behavior
- They use cookie-cutter approaches designed for smaller contractors
- They can't demonstrate clear ROI with real numbers

Part 6: Resources & Next Steps

Recommended Tools for Tracking Marketing Alignment

CRM/Lead Management:

- HubSpot, Salesforce, or BuilderTrend for comprehensive lead tracking
- CallRail or similar for phone call attribution
- Google Analytics 4 with conversion tracking

Marketing Automation:

- Email sequences for lead nurturing
- Retargeting campaigns for website visitors
- Social media scheduling and monitoring tools

Performance Measurement:

- Monthly marketing ROI reports
- Lead quality scoring systems
- Customer lifetime value calculations

Creating Your Marketing Alignment Dashboard

Track these key metrics monthly:

Metric	Target	Current	Trend
Cost Per Lead	< \$200	\$_____	↑↓→
Lead-to-Appointment Rate	> 30%	_____%	↑↓→
Appointment-to-Estimate Rate	> 70%	_____%	↑↓→
Estimate-to-Close Rate	> 40%	_____%	↑↓→
Average Project Value	\$_____	\$_____	↑↓→
Customer Acquisition Cost	< \$2,000	\$_____	↑↓→
Marketing ROI	> 5:1	____:1	↑↓→

Your Next Steps

Based on completing this toolkit, you should now have:

- ✓ A clear understanding of your marketing alignment strengths and gaps
- ✓ A specific score that indicates your priority level
- ✓ A 90-day action plan tailored to your situation
- ✓ Key metrics to track your progress

Immediate Action Items:

1. Schedule time in your calendar to implement your 90-day plan

2. **Share results with your sales team and marketing partners**
3. **Set up monthly tracking for your key alignment metrics**
4. **Plan your quarterly strategic review process**

About This Toolkit

This toolkit was developed by Carl Willis and the Remodeling Marketing Team based on working with remodeling businesses generating \$1M+ in annual revenue.

The assessment and frameworks have been tested and refined through real-world application with successful remodeling companies across North America.

Ready to take your marketing alignment to the next level?

If you scored below 70 on the assessment or want help implementing your 90-day plan, we offer strategic consultation sessions specifically for million-dollar remodeling businesses.

Schedule a complimentary strategy session:

<https://remodelingmarketingteam.com/get-started>

Because your business deserves marketing that matches its caliber.

Remodling Marketing Team

📞 888-350-7859

10100 West Maple Street • Wichita, KS 67209

