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The 80/20 Marketer

Field Guide preview

Chapter One: Marketing to Everyone

Explore the opening chapter, worksheets and completed examples.

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Chapter 1

Marketing to Everyone

Chapter 1 of the book. Before Step 1: establish the honest spending and customer baseline. Instruments: worksheets 1, 2.

Before you change anything about marketing, get two numbers on paper. The first is what you spent last year, line by line, as the books recorded it. The second is what that spending brought back, counted all the way down to customers. Most companies have the first in pieces and the second not at all. Marketing's plan holds most of the budget, the co-op money sits in sales, a sponsorship or two lives in the CEO's own account, and the results stop at the inquiry, which is exactly where the leads report likes them to stop.

These two worksheets put both numbers in one place. Worksheet 1 maps where the money went. Worksheet 2 follows the year's inquiries down to the customers they became and prices every step. I call the second one honest because it charges the spending to the customers you wanted, not to the names you collected, and that is the division nobody volunteers to do.

Skip them and every later step argues from memory. You won't be able to say whether the new plan wins a good customer for less than the old one did, because nobody wrote down what the old one cost. The work takes the controller and whoever runs marketing about a week. What skipping it costs is the only before-picture you will ever get.

WHAT IT LOOKS LIKE WHEN IT IS MISSING

- Marketing's monthly report opens with inquiries, booth visits or clicks, and nothing below them.
- The marketing budget and the general ledger (the accounts as the controller keeps them) disagree, and nobody can say by how much.
- Co-op money, sponsorships and samples sit in other departments' accounts, so nobody has seen the whole spend in one place.
- Nobody knows how many of last year's inquiries became customers, let alone customers like the best ones.
- The reps keep a private list of inquiries they never call back, and marketing doesn't know the list exists.
- A show gets booked again because it was booked last year.
- Ask five leaders what marketing is for and you hear five activities.

The tell is a leads total that everyone can quote and a cost per good new customer that nobody has ever worked out.

IN THE BOOK

A large inquiry report can hide a small useful result. Read the prior year's spending from the books and carry the source counts down to customers of the right kind. The historical baseline is a diagnosis, not permission to call every dollar an acquisition expense. The later whole-spend page makes the allocations explicit. Marketing should improve Fort material margin through better conversations and easier choices, including the accounts already buying from you. That means the CEO has to name the aim, accept the uncomfortable baseline and protect the time required to build a method.

Its Do This list, as a checklist:

☐ List the prior-year spending from the general ledger rather than copying a plan.
☐ Mark the buyer each line was intended to reach.
☐ Read the largest margin accounts beside the marketing they received.
☐ Count new accounts that resemble the best ones, and label any cost allocation used in the division.
☐ Ask sales which inquiries do not deserve its time and why.
☐ State the job of marketing in material-margin terms.

WORKED EXAMPLE

The question came from a board director on Thursday 9 January 2025: what had Keelson's $1.4 million of marketing bought? Sam Nowak, the marketing manager, answered with 2024's leads, 1,900 of them. Gil Ferraro, VP Sales, said from the far end of the table that his people couldn't phone that many names and that most of the callers had garage floors, not tanks. Helen Varga, the CEO, promised the board a plan she could defend, Over the following weeks, Pete Lindgren and Sam traced the records from the ledger through to the customer outcomes. Pete was the controller.

The ledger showed $1.40 million in eight lines, from nine trade shows at $520,000 down to marketing software at $50,000, or 2.3 percent of revenue. Divided by 1,900 inquiries, that came to $737 an inquiry. The old Keelson test for calling a lead qualified asked very little (a company name, a phone number, a question about an industrial product), and 114 passed it, or 6 percent, at $12,281 each. Then Pete counted Gil's homeowners. Of the 1,160 website inquiries, 710 asked about the garage-floor kit, a product with 1.9 percent of revenue and roughly 40 percent of technical support's calls. Of the $110,000 spent on search ads, $70,000 had gone on garage-floor words.

The last division was the one that hurt. Keelson had won sixty-five new customers in 2024, sixty-one of them small accounts and four of them the kind its best customers are. The 80/20 program calls that kind the Fort: the accounts at the top of the revenue list, down to where they add up to 80 percent of sales, buying the products at the top of the same kind of list. Charge all $1.40 million to those four Fort customers and each one cost $350,000. Helen read that figure to her leadership team. Sam objected that part of the money had kept existing customers rather than won new ones, which was fair, so they charged half: $175,000 a customer, still. Months later, once Keelson had a written definition of a qualified conversation, Sam recounted 2024 against it and found forty-one. Figure 01-01 draws the year: the money, the small share of it aimed at buyers like Keelson's best, and how little came back.

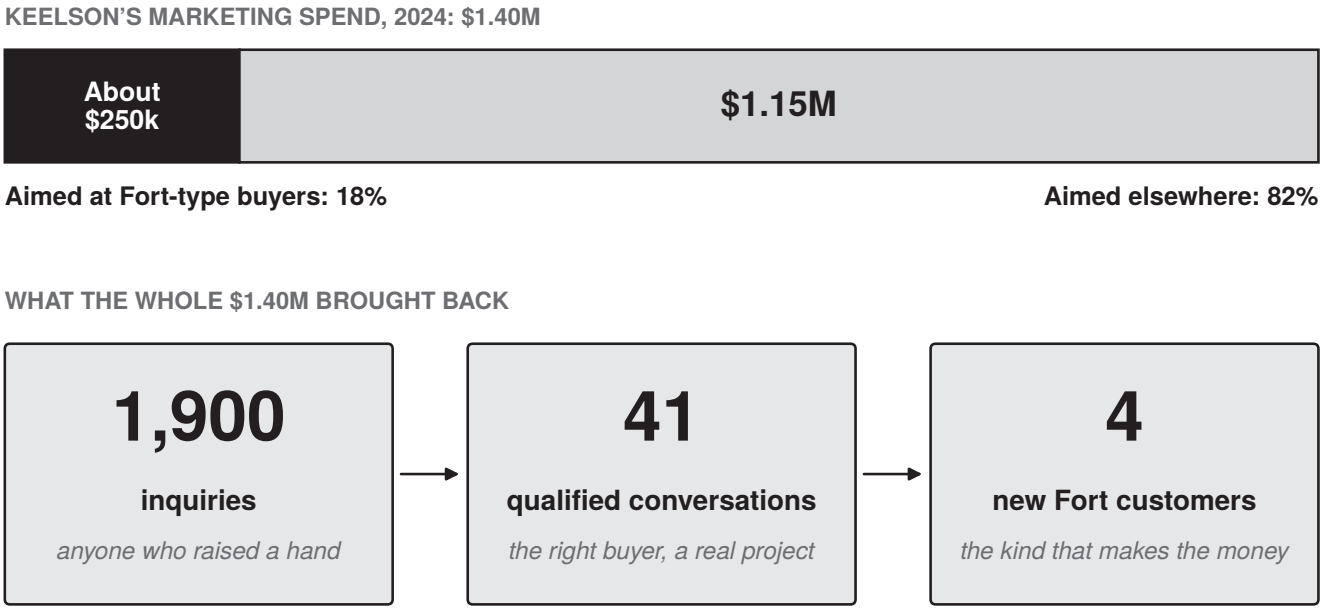


Fig. 01-01: Keelson's marketing in 2024. Of $1.40 million spent, about $250,000 was aimed at buyers who looked like its best customers, and 1,900 inquiries produced forty-one qualified conversations and four new Fort customers.

WORKSHEETS

Use the following working pages in order. Keep the blank fields and the completed Keelson example together. Where your evidence is incomplete, write what must be checked and who will check it.

WORKSHEET 1

The marketing spend map

Every line of last year's marketing spend as the general ledger recorded it, whom each line was meant to reach, and how much of it was aimed at buyers like your best. The controller pulls the lines and whoever runs marketing fills in the rest. By hand or with whatever tools you use, the total ties to the general ledger.

Year mapped, and the ledger accounts the lines came from

Total marketing spend, per the general ledger

Revenue for the year, and spend as a share of it (%)

The lines. One row per line of spend, the biggest first. Fill in the last column after Step 1, once Worksheets 5 and 6 establish which accounts and products form the Fort.

Spend line	Amount	Meant to reach	Fort-type $

Marketing money found outside the marketing budget (co-op paid by sales, a sponsorship signed by the CEO, samples charged to the plant)

☐ The total ties to the general ledger

☐ Every line names someone it was meant to reach, even when the answer is "nobody in particular"

Dollars aimed at Fort-type buyers, and their share of the total (after Step 1)

Keelson's version

Eight lines, $1.40 million, 2.3 percent of 2024's $62.0 million of revenue, every line tied to the ledger. Sam filled in the last column in February, during Step 1. Three of the nine shows, one of the four trade magazines and the search words for Fort-type work came to about $250,000, one dollar in five. Not a dollar had been aimed at the consulting engineers who write coating specifications.

Spend line	$k	Meant to reach	Fort-type $k
Trade shows (nine)	520	Every market Keelson sold into	170
Distributor co-op	210	Small contractors, through distributors	0
Trade magazine ads	180	Readers of four magazines	40
Website and agency retainer	150	Whoever searched	0
Search ads	110	Garage floors 70, Fort work 40	40
Sponsorships, promotional items	95	Local causes, giveaways	0
Literature and samples	85	Whoever asked	0
Marketing software	50	Marketing's own use	0
Total	1,400		250

WORKSHEET 2

The honest baseline

Last year's inquiries followed down to the customers they became, by source, with the cost of each step, so the new plan has a number to beat. The controller and whoever runs marketing build it, and the head of sales checks the bottom half.

Marketing spend for the year, from Worksheet 1

By source. One row per source: the website, shows, ads, distributors, engineers and referrals, and anything else you count. Leave the last column until Step 9, when you and sales have written down what a qualified conversation is, then recount the same year against it.

Source	Inquiries	Qualified, old test	Qualified, new

Down to customers. Count from the invoices and the CRM (customer relationship management software, the system where sales keeps its accounts and call notes), never from the leads report.

New customers won, of every kind

New customers who buy the way your best ones do

The divisions. The year's spend divided by each count.

Per inquiry

Per qualified conversation (after Step 9)

Per new customer like your best, with every dollar charged to them

The same, with half the spend charged

Which inquiries the reps don't call back, and why, in the words of the head of sales

What marketing is for here, in one sentence, written by the CEO

Keelson's version
Sixty-five new customers in 2024, sixty-one of them small accounts and four of the Fort kind. All $1.40 million charged to the four came to $350,000 each, and $175,000 at half. The last column waited for the definition sales signed in September 2025, and the recount showed where the real buyers had been: engineers, referrals and direct calls gave twenty-one of the forty-one qualified conversations from just 115 inquiries, while the website gave six from 1,160. Gil's answer on what the reps skipped was the garage kit. Helen's sentence said marketing should start conversations with buyers who look like Keelson's best customers and make the reps' first meeting with them easier. It had no lead count in it.

Source	Inquiries	Qualified, old test	Qualified, new
Website forms and calls	1,160	22	6
Trade-show badge scans	420	31	9
Magazine ad responses	45	2	0
Distributor referrals	160	14	5
Engineers, referrals, direct calls	115	45	21
Total	1,900	114	41
Cost each	$737	$12,281	$34,146

RUNNING IT WITH THE TEAM

This is desk work first. The controller pulls every marketing line from the general ledger, not from marketing's plan, and then goes looking in the other departments' accounts for co-op money, sponsorships and samples (there is always some). Whoever runs marketing pulls the inquiry log and, with the head of sales, works out which inquiries became customers. Allow a week. In a $15 million company the CEO and the bookkeeper can do it in two afternoons.

Then hold one meeting, ninety minutes around a table, with the CEO, whoever runs marketing today, the head of sales and the controller. The order is fixed. The spend map comes first, its total read aloud and tied to the ledger. Then the inquiries by source, each count with the record it came from. Then the divisions, which the controller works on the whiteboard, out loud, one line at a time. Then the head of sales on the inquiries the reps skip, and why. Last, everyone writes one sentence on what marketing is for, the sentences go around the table, and the CEO writes the one that stands.

The CEO opens by saying this is a count, not a trial. Nobody in the room set those budgets alone, and the CEO approved every one of them. The CEO closes by reading out what one good new customer cost, then the sentence, and then what happens next: one person will own marketing, and there will be one number to answer to.

Whoever runs marketing has the hardest chair in the room. Bring the lines, read them plainly and don't defend them. I'd rather hear the bad number from the marketing person first than have the controller find it, and so would every CEO I know. The one who reads it out is usually the one who ends up trusted with the plan.

What goes wrong the first time? The budget and the ledger won't agree, and an hour disappears into why. Fix the total before the meeting. Somebody argues with the division, since some of that money kept old customers. Agree, charge half, and watch the conclusion survive. Somebody else wants to fire the agency on the spot. Not today. This page is for counting, and the decisions come with the steps. And the old leads report slips back in as "context." Leave it in the drawer.

THREE QUESTIONS FOR MONDAY

1. A director asks what last year's marketing bought. What do you say, and is there a dollar figure in your answer?

2. Which line of last year's spend would nobody at the table approve again if it came up for a decision this morning?

3. Who decides which inquiries get a call back in your company, and when did anyone last ask how they decide?

BEFORE YOU MOVE ON

You should now have, on paper:

☐ Worksheet 1 — the marketing spend map, completed with evidence, an owner and the next date.
☐ Worksheet 2 — the honest baseline, completed with evidence, an owner and the next date.
☐ The next review is booked, and incomplete evidence has a named person to check it.