

MARKETING FOUNDATIONS TEMPLATES

Templates, frameworks and AI prompts for every module.

HOW TO USE THIS DOCUMENT

A Note Before You Start

Every template in this document is a starting point. The most effective marketing communication sounds like you, uses your specific context and speaks directly to the person you are trying to reach. Before using any template, read it through and ask: does this sound like me? Change whatever does not fit.

The AI prompts are organised in pairs where relevant. The first prompt generates the raw material. The second pressure tests it so you leave with something specific, strong and genuinely yours rather than a polished version of something generic.

Templates and prompts are organised by module so you can find what you need as you work through the guide and workbook. Use the module number to navigate.

Customer Research and Audience Templates

Use these templates to gather real insight from real people before you write a word of marketing copy.

Template 1: Personalised Customer Research Email

Use this when reaching out to existing customers for a one-to-one conversation. Personalise every field in brackets. A personalised email will always outperform a generic one.

TEMPLATE

Subject: A quick favour from [your name] at [business name] Hi [customer name], I hope you are well. I have been thinking about how I can improve things for clients like you, and I realised the best way to do that is simply to ask. I would love to spend fifteen minutes getting your honest thoughts on your experience with [business name]. Not a sales call, just a genuine conversation about what worked for you, what could be better and what made you decide to get in touch in the first place. In return, I would like to offer you [incentive, e.g. a complimentary conditioning treatment at your next visit / a free thirty-minute review call / a coffee and cake on me next time]. If you are happy to help, just reply to this email and we will find a time that works. I am flexible and will keep it to fifteen minutes. Thank you so much for being such a valued client. [Your name]

Template 2: Short Customer Survey (3 to 5 Questions)

Use this as a Google Form, Typeform or within an email. Keep to five questions maximum. Open-ended questions produce the most useful answers.

TEMPLATE

Intro text: Thank you so much for taking a few minutes to help me. Your honest answers will help me understand what is working and where I can do better. This will take no more than five minutes. Question 1: What made you decide to get in touch with [business name] in the first place? Question 2: What were you hoping to get out of it when you first reached out? Question 3: Was there anything that nearly stopped you from getting in touch? Question 4: What has changed or improved as a result of working with us? Question 5: What would you tell someone else who was considering getting in touch with us? Closing: As a small thank you for your time, [insert your incentive here].

Template 3: In-Person or Phone Research Questions

Use these as a loose guide for a conversation rather than reading them word for word. Let them talk and follow the thread.

TEMPLATE

Opening: Thank you so much for making time for this. I am doing some research to understand what my clients really value. 1. Can you tell me a little about where you were before you found us? What were you dealing with and what had you already tried? 2. What made you decide to get in touch with us rather than someone else? 3. Was there anything that nearly put you off or made you hesitate? 4. What has been the most valuable part of working with us for you? 5. If you were recommending us to a friend, how would you describe what we do and who we are for? Closing: That is incredibly helpful, thank you. As a small thank you, [insert incentive].

Template 4: Buyer Behaviour Research Questions

Add these to your customer research conversations or survey to understand how your audience makes decisions, not just who they are.

TEMPLATE

1. When you are thinking about spending money on something like this, what does your decision-making process typically look like? Do you research a lot first, act on recommendations from people you trust, or something else? 2. What nearly stopped you from getting in touch with us? What reassured you or helped you decide to go ahead? 3. How many other options did you consider before choosing us? What made the difference? 4. Was there anyone else you needed to speak to or get approval from before making the decision? 5. What would have made the process of choosing easier or quicker?

Template 5: Buyer Behaviour Type Quick Reference

Use this when reviewing your marketing to check whether you are serving your dominant audience behaviour types.

TEMPLATE

The Researcher: needs depth on your website, multiple case studies, detailed testimonials, FAQ content, evidence of credentials. The Relationship Buyer: needs personal stories, behind the scenes content, visible values, your face and voice, connection content before conversion content. The Social Proof Seeker: needs specific testimonials with real outcomes, volume of reviews, case studies, before and after results, third party mentions. The Value-Led Buyer: needs clear articulation of what is included, outcome-focused language, proof of return on investment, transparent pricing. The Convenience Buyer: needs a frictionless booking or enquiry process, a clear single next step, fast response times, easy-to-find contact information. The Risk-Averse Buyer: needs a clear process explanation, guarantees or reassurance policies, evidence of reliability, transparent communication. The Impulse Buyer: needs emotionally resonant content, a compelling offer, a short path from interest to action, urgency without pressure.

Incentive Ideas by Business Type

These are suggestions to spark your own ideas. Choose something genuinely valuable to your client at minimal cost to you.

EXAMPLES

Hair salon or beauty therapist: A complimentary conditioning treatment or express facial at their next appointment. Personal trainer or fitness studio: A free movement assessment or one complimentary class. Photographer: A free set of three edited social media headshots. Bookkeeper or accountant: A free thirty-minute finance health check call. Cafe or hospitality: A complimentary coffee and slice on their next visit. Retail or product business: A small free sample or a discount on their next order. Coach or consultant: A free thirty-minute strategy or discovery call. Trades business: A free home maintenance checklist tailored to their property. Tech or software: An extended free trial or a free onboarding call. Any business: Early access to a new product, service or resource before it is publicly available.

AI Prompt 1: Customer research email and survey generator

I run a [type of business] and I want to reach out to existing customers to gather honest feedback about their experience. My brand voice is [describe your voice, e.g. warm, direct and conversational]. I would like you to write: a short personalised email asking for fifteen minutes of their time with a subject line, a five-question survey using open-ended questions that will help me understand what drove them to choose me, what nearly stopped them and what they got out of it, and three incentive ideas that would be low cost for my type of business but genuinely valuable to my clients.

AI Prompt 2: Audience buyer behaviour analysis

My primary audience for my [type of business] is [describe]. Based on what I know about them, can you help me identify which buyer behaviour types are most likely to dominate from this list: Researcher, Relationship Buyer, Social Proof Seeker, Value-Led Buyer, Convenience Buyer, Risk-Averse Buyer, Impulse Buyer. For each type you identify as dominant, suggest two or three specific things I should add or change in my marketing to better serve how they make decisions. Then identify the single biggest gap in my current marketing based on my dominant buyer behaviour type.

Positioning Templates

Work through the Anchor Framework exercises in your workbook first. Then use these templates to write up your outputs.

Template 6: The Difference Statement

Format: While most [competitors] do X, I do Y, which means [client outcome]. Fill in each section with your specific context.

TEMPLATE

While most [describe what most competitors do, the generic approach in your industry], I [describe what you do differently and specifically], which means [describe the outcome your client gets as a result of your different approach]. --- Example for a hair salon: While most salons optimise their schedule to fit as many clients as possible, I limit my bookings to make sure every client gets my full attention, which means you leave with exactly what you came for rather than what fits in the time slot. Example for a trades business: While most trades businesses give a rough estimate and adjust the invoice afterwards, I always provide a fixed written quote before I start and I stick to it, which means you never get a surprise when the invoice arrives. Example for a consultant: While most marketing consultants hand over a strategy and leave the client to implement it, I stay involved through the build phase, which means you have expert input at the moments when decisions matter most.

Template 7: The Brand Manifesto

Work through your Anchor Framework in the workbook first. Then use this structure to write your manifesto. It should take around twenty to thirty minutes and is worth every one of them.

TEMPLATE

We believe [your core belief about how things should be done in your industry]. The problem is [describe what is wrong with the way most businesses in your space operate, and why it matters to your clients]. It does not have to be this way [explain what a better version looks like and why it is possible]. We help [describe who you help and what they are trying to achieve]. To achieve [describe the outcome or change your clients experience]. By doing [describe your specific approach, the things you do that make the difference].

AI Prompt 1: Competitor landscape analysis

I run a [type of business] in [location or market]. My primary audience is [describe in one sentence]. My three main competitors or alternatives are [name them if you know them, or describe the type of competitor]. For each competitor I have named, tell me: what they do well, where they commonly fall short based on what you know about this type of business, and what their customers tend to complain about or wish was different. Then give me a one paragraph summary of the gap in this market that an independent business with genuine expertise and a personal approach could own.

AI Prompt 2: Positioning opportunity finder

Based on what you just told me about my competitor landscape, and knowing that my strengths are [list two or three genuine strengths], what is the single most compelling positioning opportunity available to me? Describe it in two or three sentences as if you were advising me directly, and then write a one sentence positioning statement I could use as the foundation for my Difference Statement.

AI Prompt 3: Anchor Framework review and Difference Statement writer

Here are my Anchor Framework answers for my [type of business]: what I stand for is [insert], the real problem my clients have is [insert], my approach is [insert], the outcome I create is [insert] and my proof is [insert]. Using this, can you help me write a Difference Statement using the format: while most competitors do X, I do Y, which means client outcome. Then write a Brand Manifesto using the structure: we believe, the problem is, it does not have to be this way, we help, to achieve, by doing. My brand voice is [describe].

AI Prompt 4: Brand voice and word list generator

I run a [type of business] and my brand voice is [describe using your four dimensions: warm or formal, direct or detailed, calm or energetic, accessible or expert]. My primary audience is [describe] and the three things I want to be known for are [list them]. Suggest two lists. First, twenty words and phrases I should actively use in my marketing that will resonate with my audience, feel natural in my voice and reinforce what I want to be known for. Second, twenty words and phrases I should actively avoid, including generic industry jargon, overused marketing language, anything that feels corporate or hollow, and anything that contradicts the brand I am trying to build. For each word or phrase in the avoid list, briefly explain in one sentence why it works against my brand.

AI Prompt 5: Word list pressure test against existing copy

Here is a piece of copy I have written for my business: [paste your website homepage, social bio, a recent caption or any existing copy]. Cross reference it against my word list. Tell me every word or phrase in this copy that appears on my avoid list or that contradicts my brand voice. Then rewrite the copy using my approved language, keeping the same meaning and structure but replacing anything that does not fit. My brand voice is [describe] and my approved word list is [paste your use list].

Messaging Templates

Use these templates to write your core message, website copy and key messaging in your brand voice.

Template 8: Core Message Versions

Write three versions: short for introductions and social bios, medium for your website hero, full for your about page.

TEMPLATE

Short version (one sentence for social bios and introductions): I help [who] to [do what] so they can [outcome]. Example: I help small business owners build a clear marketing foundation so they can stop guessing and start growing. --- Medium version (two to three sentences for website hero section): I help [who] who [describe their situation or frustration] to [do what]. Most [who] I work with have [describe the common problem or gap]. [Describe your approach in one sentence]. Example: I help small business owners who feel like their marketing is never quite working to build a foundation that makes sense for their business. Most of the people I work with are great at what they do but struggle to communicate it clearly. I help them get clear on who they are talking to, what makes them different and what to say. --- Full version (paragraph length for about page): [Describe the situation your audience is in when they find you.] [Introduce your approach and why it is different.] [Describe the outcome they can expect.]

Template 9: Website Hero Section

Your hero section is the first thing someone reads when they land on your website. It needs to tell them immediately whether they are in the right place.

TEMPLATE

Headline: [The outcome your client gets, written for them not about you] Example: Finally, a marketing plan that makes sense for your business. Sub-headline: [One sentence that describes who you help and how] Example: I help small business owners build a clear, structured marketing foundation so they can stop second-guessing every decision. Call to action button: [One clear next step] Example: Start with a free consultation / Download the free guide / Book your spot

AI Prompt 1: Three things generator

I run a [type of business] and my primary audience is [describe]. My brand voice is [describe]. My Difference Statement is [paste yours] and my Brand Manifesto is [paste yours]. Based on everything above, suggest ten things I could potentially be known for. These should not be services or features. They should be qualities, values or outcomes that define what it feels like to work with me and what changes for a client as a result. Write each one as a short memorable phrase of no more than six words, the kind of thing a client might actually say about me to someone else.

AI Prompt 2: Three things pressure test

My three things are: [list them]. I want you to pressure test each one against three questions. First, is this genuinely specific to my business or could any competitor in my space claim the same thing? Second, does this connect directly to something my audience cares about or is it more about me than them? Third, if a client repeated this to a friend as a recommendation, would it make that friend want to get in touch? For each of the three, give me an honest assessment and suggest a sharper or more specific version if you think one is needed.

AI Prompt 3: Core message generator

I run a [type of business]. My primary audience is [describe them including their main frustration or desire]. My Difference Statement is [paste yours]. The three things I want to be known for are [list them]. My brand voice is [describe using your four dimensions]. Write my core message in three versions using the format: I help [who] to [do what] so they can [outcome]. Version 1 should be one sentence for a social media bio or quick introduction. Version 2 should be two to three sentences for a website hero section. Version 3 should be a full paragraph for an about page. Write all three in my brand voice. Avoid generic phrases like passionate about, dedicated to or helping you reach your potential. Every sentence should only be true of me.

AI Prompt 4: Core message pressure test

Here is my core message: [paste your preferred version]. I want you to pressure test it against four things. First, could any other business in my space say exactly this without changing a word? Second, does it speak to my audience's frustration or desire or does it describe what I do from my own perspective? Third, is the outcome specific enough that someone reading it knows exactly what will be different for them? Fourth, does it sound like a real person wrote it or does it sound like marketing copy? Give me an honest assessment of each and then rewrite it addressing any weaknesses, keeping the same core idea but making it more specific, more human and more clearly mine.

Goals and Revenue Templates

Template 10: Revenue Goal Calculation

Work through each step with your own numbers. The final figure is your monthly enquiry target, the number your marketing exists to produce.

Step 1	Annual revenue goal	NZD _____
Step 2	Average transaction value	NZD _____
Step 3	Annual sales needed	Step 1 ÷ Step 2 = _____
Step 4	Monthly sales needed	Step 3 ÷ 12 = _____
Step 5	Conversion rate	_____ % written as decimal e.g. 70% = 0.7
Step 6 ★	Monthly enquiry target	Step 4 ÷ Step 5 = _____

★ This is the number your marketing needs to hit every month.

Worked example

Step 1	Annual goal	NZD 60,000
Step 2	Average transaction	NZD 80
Step 3	Annual sales needed	60,000 ÷ 80 = 750
Step 4	Monthly sales needed	750 ÷ 12 = 63
Step 5	Conversion rate	70% = 0.7
Step 6 ★	Monthly enquiry target	63 ÷ 0.7 = 90 enquiries per month

AI Prompt 1: KPI and revenue goal sense check

I run a [type of business] and here are my business KPIs with current and target numbers: [list them]. My revenue goal is [describe] and my average transaction value is [amount]. My current conversion rate is approximately [percentage]. Can you: work through the revenue goal calculation to confirm my monthly enquiry target, tell me whether my KPIs are the right ones to track for a business at my stage, and suggest one or two KPIs I might be missing that would give me better visibility of whether my marketing is working.

Channel and Outreach Templates

Use these templates for the most common outreach and channel-specific communication tasks.

Template 11: Referral Ask Email

Send to existing happy clients. Keep it warm and personal. Never make someone feel obligated.

TEMPLATE

Subject: A small favour from [your name] Hi [name], I hope things are going well. I am reaching out because I am focused on growing [business name] this year and one of the things I value most is connecting with people who are genuinely the right fit. If you know anyone who might benefit from what I do, I would be really grateful for an introduction. Even a simple message from you saying "you should chat to [your name]" makes a huge difference because people trust a recommendation from someone they know. There is no obligation at all, and if nobody comes to mind right now that is completely fine. I just wanted to ask the people who know my work best. Thank you so much for being such a wonderful client. [Your name]

Template 12: Partnership Outreach Email

Use when reaching out to a complementary business. Keep the first email short and focused on them, not you.

TEMPLATE

Subject: Working together? Hi [name], I have been following [their business name] for a while and I really admire [something specific about their work or approach]. I run [your business name], which helps [describe your audience and what you do briefly]. I think our clients overlap in a really natural way because [explain the connection between your audiences]. I wondered whether there might be an opportunity to refer clients to each other, or to collaborate in some way that benefits both our audiences. I do not have anything specific in mind yet, I just thought it was worth a conversation. Would you be open to a quick call? I am happy to keep it to twenty minutes. [Your name] [Business name] [Contact details]

AI Prompt 1: Channel strategy review

I run a [type of business] and my primary audience is [describe]. My 90-day marketing goal is [describe]. My chosen channels are [list them]. Can you tell me whether my channel choices make sense given my audience behaviour and goal, suggest one specific first action on each chosen channel to start building momentum, and flag any channel I have not considered that might be worth adding given my business type and audience.

AI Prompt 2: Outreach email generator

I want to reach out to [describe the type of business or person] about [referrals / a partnership / a collaboration]. My business is [describe briefly] and their audience overlaps with mine because [explain the connection]. My voice is [describe]. Can you write a short, warm and direct outreach email that focuses on what is in it for them and ends with a simple, low-pressure call to action? Keep it to under 150 words.

Content Templates

These templates give you a starting structure for the most common types of content a small business creates.

Template 13: Credibility Post Framework

Use for educational or expert content. The goal is to demonstrate your knowledge and build trust. Sits in MOFU.

TEMPLATE

Hook (first line, stops the scroll): [Start with the problem, a surprising fact, a common mistake or a question your audience is asking] Example: A five star review that says amazing service tells a potential client very little. Body (the value): [Share the insight, the tip, the process or the perspective. Be specific. Generic advice is ignored.] Closing thought: [Bring it back to the reader. What can they take from this and do today?] Call to action (optional): [One clear next step if relevant: save this, reply with your question, book a consultation]

Template 14: Connection Post Framework

Use for behind the scenes, personal story or values-based content. The goal is warmth and familiarity. Sits in TOFU.

TEMPLATE

Opening (human and real): [Share something personal, a moment, a realisation, something that happened in your business today] The connection: [Link it to something your audience will recognise or relate to] Why it matters: [Bring in your values or your perspective on the industry or your clients] Closing: [Leave them with something warm, a question, a thought or an honest reflection]

Template 15: Conversion Post Framework

Use when you want to drive a specific action. Keep the ask clear and connect it to the outcome. Sits in BOFU.

TEMPLATE

Set the scene: [Describe who this is for and what they are dealing with. Make the reader see themselves.] The outcome: [Describe what changes when they take the next step. Focus on the result, not the process.] Social proof (optional): [One short specific line from a client or a result that validates the outcome] The ask: [One clear, simple call to action. One option, not three.] Example closing: If this sounds like where you are right now, [the link / the booking / the reply] is the place to start.

Template 16: Email Newsletter Framework

Use for a regular email to your list. Keep it personal, useful and short enough that people actually read it.

TEMPLATE

Subject line: [Personal, specific and either useful or intriguing. Avoid generic subject lines.] Example: The thing I see small businesses get wrong every single time Example: Three questions worth asking about your marketing right now Opening: [Write as if you are talking to one person. Reference something current or personal.] The main thing: [One useful insight, tip, story or resource. Not three. One. Give it the space it deserves.] Optional closing offer or prompt: [A relevant resource, a link, a question for them to reply to or a soft mention of how you can help] Sign off: [Keep it human. Your name, a warm closing line, that is all.]

Content Pillar Examples by Business Type

Each example shows four pillars mapped to the Five Cs framework and funnel stage. Conversation content is not shown as a standalone pillar as it works across all four.

HAIR SALON

Pillar	Five Cs	Funnel Stage
Colour education and hair health	Credibility	MOFU
Client transformations and results	Community	TOFU to MOFU
Behind the scenes of salon life	Connection	TOFU
Booking, seasonal offers and availability	Conversion	BOFU

PERSONAL TRAINER

Pillar	Five Cs	Funnel Stage
Training tips and movement education	Credibility	MOFU
Client results and progress stories	Community	TOFU to MOFU
The mindset and lifestyle side of fitness	Connection	TOFU
Programmes, availability and next steps	Conversion	BOFU

BOOKKEEPER

Pillar	Five Cs	Funnel Stage
Financial education for small business owners	Credibility	MOFU
Client success stories and outcomes	Community	TOFU to MOFU
Behind the business and personal perspective	Connection	TOFU
Services, onboarding and how to get started	Conversion	BOFU

WEDDING PHOTOGRAPHER

Pillar	Five Cs	Funnel Stage
Photography education and planning advice	Credibility	MOFU
Real weddings and client stories	Community	TOFU to MOFU
The experience of working together	Connection	TOFU
Availability, packages and booking	Conversion	BOFU

SAAS BUSINESS

Pillar	Five Cs	Funnel Stage
Product education and how-to guides	Credibility	MOFU
Customer success stories and use cases	Community	TOFU to MOFU
Team, culture and the problem we are solving	Connection	TOFU
Product updates, trials and onboarding	Conversion	BOFU

MARKETING CONSULTANT

Pillar	Five Cs	Funnel Stage
Marketing strategy and education	Credibility	MOFU
Client results and case studies	Community	TOFU to MOFU
Behind the business and honest perspective	Connection	TOFU
Services, availability and how to work together	Conversion	BOFU

HEALTH AND SAFETY CONSULTANT

Pillar	Five Cs	Funnel Stage
Legislation updates and compliance education	Credibility	MOFU
Client outcomes and workplace success stories	Community	TOFU to MOFU
Behind the consultancy and why this work matters	Connection	TOFU
Services, audits and how to get started	Conversion	BOFU

CO-WORKING SPACE

Pillar	Five Cs	Funnel Stage
Productivity tips and flexible working guidance	Credibility	MOFU
Member stories and community highlights	Community	TOFU to MOFU
Behind the space, the people and why it exists	Connection	TOFU
Memberships, day passes and how to book	Conversion	BOFU

AI Prompt 1: Content ideas bank generator

I run a [type of business] and my primary audience is [describe them including their main frustration or desire]. My four content pillars are [list them with their Five Cs category and funnel stage]. My brand voice is [describe using your four dimensions]. Generate forty content ideas mapped across my four pillars. For each idea include: the pillar it belongs to, the Five Cs category, the funnel stage (TOFU, MOFU or BOFU), the format it works best in (caption, short video, carousel, blog post, story, email) and a one sentence description of what the content covers and why it would resonate with my specific audience. Distribute the ideas so no single pillar or funnel stage dominates. Every idea must be specific to my business and audience.

AI Prompt 2: Content ideas bank sense check

Here is my content ideas bank: [paste the output from Prompt 1]. Review it against three things. First, is the mix balanced across TOFU, MOFU and BOFU or am I heavily weighted towards one funnel stage? Second, are there any obvious gaps in the Five Cs? Third, are there any ideas that feel too generic or interchangeable with a competitor in my space? For each gap or weakness you identify, suggest three additional content ideas that would address it, mapped to the relevant pillar, Five Cs category and funnel stage.

AI Prompt 3: Campaign strategy builder

I run a [type of business] and my primary audience is [describe them including their main frustration or desire]. My brand voice is [describe using your four dimensions]. My chosen channels are [list them]. I want to plan a marketing campaign for [describe the goal or occasion]. Help me build a complete campaign strategy covering: a specific measurable campaign goal with a start date and end date, a defined audience segment for this campaign, a core campaign message that runs through every piece of content, an offer or hook that gives my audience a genuine reason to act within the campaign window, a content plan of five to seven pieces in sequence showing what to create, which channel it sits on and what purpose each piece serves, the single call to action the entire campaign points to, and a brief note on what success looks like so I know whether the campaign worked.

AI Prompt 4: Campaign content writer

Here is my campaign strategy: [paste the output from Prompt 3]. Now write the content for this campaign in full. For each piece in the content plan write a finished, ready to post version in my brand voice. Label each piece clearly with its channel, its position in the sequence and its purpose in the campaign. Make sure each piece feels like a natural standalone post that also contributes to a building sense of momentum across the campaign as a whole. The call to action should appear in every piece but feel fresh each time rather than repeated word for word.

Social Proof Templates

Use these templates to gather, structure and use social proof consistently across your marketing.

Template 17: Testimonial Request Email

Send shortly after completing work with a client. Personalise the opening to reference their specific experience.

TEMPLATE

Subject: A quick favour if you have two minutes Hi [name], Thank you so much for [reference the specific work or appointment]. I would be really grateful if you would share a few words about your experience. Even two or three sentences would mean a lot. If it helps, here are a few questions to guide you: What were you looking for when you found me and what made you decide to get in touch? What was your experience like and what stood out for you? What has changed or improved as a result? You can leave a Google review here: [insert your Google review link] Or simply reply to this email and I will use your words with your permission. Thank you so much. [Your name]

Template 18: In-Person Testimonial Ask

Use when a client says something positive in person or via message. Ask in the moment while the feeling is fresh.

TEMPLATE

That honestly means so much to hear, thank you. Would you be happy for me to use that as a testimonial on my website or social media? I could write it up from what you have just said and send it to you to check before I use anything. [If they agree]: Thank you so much. I will put something together based on what you shared and send it over for your approval.

Template 19: Case Study Structure

Use this to write a case study about one client. Real details and real outcomes make a case study compelling. Ask your client for permission before publishing.

TEMPLATE

[Client name or description, e.g. "a small landscaping business in Auckland"] The situation: [Who was the client and what were they dealing with before they came to you?] The challenge: [What had they tried before that had not worked? What was making the problem difficult to solve?] What we did: [Describe your approach. What made it different from what they had tried before?] The outcome: [What changed? What specific results did they get? Include numbers where you have them.] In their words: [Include a short direct quote from the client if you have one.]

AI Prompt 1: Case study writer

I want to write a case study for my [type of business]. Here are the details: Who they were: [describe the client]. Where they started: [describe their situation before they came to you, what they were dealing with and what they had already tried]. What we did: [describe your approach and the specific things you did together]. The outcome: [describe what changed, any specific results or numbers]. In their words: [paste any direct quote if you have it]. Using this, write a compelling case study in my brand voice which is [describe]. Structure it around the situation, the challenge, what we did together and the outcome. Make it feel human and specific. Keep it to around 250 words and end with a one sentence summary of the result that could be used as a pull quote.

AI Prompt 2: Testimonial and case study strengthener

Here are three testimonials and one case study from my [type of business]. My audience is [describe] and my brand voice is [describe]. For each testimonial tell me: how specific and credible it is on a scale of one to ten, what is missing that would make it more compelling, and the exact follow-up question I should ask this client to draw out a stronger more detailed version. For the case study tell me: where the narrative loses momentum, whether the outcome is specific enough to be believable and what one addition would make the biggest difference to how it lands. Then suggest four ways I could use this social proof across my marketing in the next thirty days, being specific about where each piece should appear and why it would be effective at that touchpoint.

Tech Stack Templates

AI Prompt 1: Tech stack audit and compatibility check

I run a [type of business] and my chosen marketing channels are [list them]. My 90-day marketing goal is [describe it]. My current or planned tech stack is: Website [platform], Email marketing [tool], Social media scheduling [tool], Design [tool], Booking or scheduling [tool], Project management [tool], CRM if relevant [tool]. Review this stack against four things. First, are there any obvious gaps given my channels and goals. Second, which of these tools connect natively to each other without needing a third party integration tool like Zapier, and which ones will require one. Third, are there any tools in my stack that overlap in functionality meaning I may be paying for the same capability twice. Fourth, is there a simpler or more cost effective combination that would cover the same ground with fewer moving parts.

AI Prompt 2: First week setup checklist

My confirmed tech stack is [list everything]. My primary marketing channels are [list them] and my 90-day goal is [describe it]. Give me a prioritised setup checklist for my first week. For each item tell me what to set up, why it matters, roughly how long it will take and whether it connects to another tool in my stack. Flag anything that needs to be done in a specific order because another tool depends on it. Also tell me which connections between my tools are native and free, and which ones would require Zapier or a similar paid integration tool so I can factor that into my budget before I commit.

Review and Tracking Templates

Use these templates to build the review habit that keeps your marketing on track.

Template 20: Weekly Marketing Check-In

Fifteen minutes every Monday. Update your numbers and answer these three questions.

Date	_____
Activity metric e.g. posts published	_____
Awareness metric e.g. website visits or reach	_____
Results metric e.g. enquiries received	_____
One thing that worked well this week	
One thing to adjust or improve next week	
My focus for next week	

Template 21: Monthly Marketing Review

Around one hour at the end of each month. This is where you look at the bigger picture.

My numbers this month

Metric	This month	Last month	Trend
Revenue			↑ ↓ →
Enquiries received			↑ ↓ →
Conversion rate			↑ ↓ →

New clients			↑ ↓ →
[Your metric]			↑ ↓ →
[Your metric]			↑ ↓ →

Monthly review questions

Question	Your answer
What worked well this month?	
What did not produce the results I expected?	
What do I want to do more of next month?	
What do I want to stop or change?	
My one focus for next month:	

Template 22: 90-Day Strategy Review

Use this at the end of every 90-day cycle to assess whether your strategy is working and set your next goal.

Review date	_____
My 90-day goal was	
Did I hit it?	Yes / Partially / No
What drove the result?	
Where did any gap come from?	
My three biggest learnings	1. 2. 3.
My next 90-day goal	
The one thing I am changing	
The one thing I am keeping	

AI Prompt 1: Metrics and roadmap sense check

I run a [type of business] and here is my marketing setup: My business KPIs are [list them with current and target numbers]. My chosen marketing metrics are [list across activity, awareness and results levels]. My 90-day roadmap is [describe Month 1 foundations, Month 2 activation, Month 3 optimisation]. My foundation statement is [paste it]. Review this against four things. First, does each marketing metric connect clearly to one of my KPIs and if not, which ones are disconnected. Second, does my roadmap feel well sequenced for a business at my stage or are there activities in Month 1 that should come later. Third, if I am consistently hitting my activity targets but my results metrics are not moving, what are the three most likely reasons based on my setup. Fourth, is there anything missing from my 90-day plan that a business at my stage would typically need to address in the first quarter.

AI Prompt 2: Foundation statement writer

I run a [type of business]. Here is everything I have defined across my marketing foundations: Primary audience [describe], their main problem [describe], what makes me different [describe], my brand manifesto core belief [paste it], my brand voice [describe using your four dimensions], my 90-day goal [describe], my chosen channels [list], my key results metrics [list]. Using this, write my foundation statement in this format: I help [primary audience] who struggle with [their main problem] by [what makes me different]. I stand for [brand manifesto core belief] and my voice is [tone summary]. Over the next ninety days my marketing will focus on [90-day goal] through [chosen channels] and I will know it is working when [key results metrics]. Write it in my brand voice. Make it feel like a real person wrote it rather than a template being filled in. It should be something I want to read every morning, not something that sits in a folder.

A FINAL NOTE

From Natalie

Every template in this document is a starting point. The businesses that get the most from these are the ones that use them as a framework and then make them completely their own. Change the language, adjust the tone, add your specific context and use the AI prompts to generate versions that actually fit your business.

The AI prompts work best when you bring your specific context. The more detail you give, the more useful the output. Run Prompt 1 to generate the material and Prompt 2 to pressure test it. That combination will always produce something stronger than either prompt alone.

If you want help working through any of these templates or prompts in the context of your specific business, Ask Nat is available to work through them with you. Bring your context, your voice and your audience profile and she will help you build something that genuinely fits.

Good luck with it all.

Natalie x