The 'branch & roots' worksheet

Here's a simple self-check tool to help you reflect on your next marketing goals. It's designed to spark ideas, highlight any gaps, and show where creative support could make the biggest difference. We'll pick up on your answers together in our kick-off call.

GAP SPOTTING

- [ ] Do you have a clear brand story everyone in your business could explain in 30 seconds?
- [ ] Is your website up to date and working hard for you?
- [ ] Do you have content ready to roll for the next 3 months?
- [ ] Are you visible where your customers actually hang out online?
- [ ] Do you know what success looks like (metrics/KPIs)?

CREATIVE NEEDS

Score each area from 0–5 (0 = big gap, 5 = strong):

Strategy	○	○	○	○	○
Design	○	○	○	○	○
Content / Socials	○	○	○	○	○
Digital / Web	○	○	○	○	○
PR / Comms	○	○	○	○	○
Visuals (photo / video)	○	○	○	○	○

TOP PRIORITIES

What are your top 3 priorities for the next 3 months:

1)

2)

3)

STOP / START / CONTINUE

Stop: What marketing activities aren't working (time drains, low ROI)?

Start: What new things could make the biggest difference in the next 3 months?

Continue: What's already working well that you should double down on?

WHAT'S ON YOUR PLATE FOR 2026?

THINGS WE LOVE DOING OURSELVES	THINGS WE CAN DO BUT DON'T HAVE TIME FOR	THINGS WE NEED TO DO BUT DON'T HAVE TIME / SKILLS FOR

Cancel anytime with 1 month's notice.

Questions for our kick-off meeting: What's on your mind, or what would you like us to cover first?

Tell me more about your business / creative: Any extra notes?

About your business

Help me step into your world — your brand, your story, and where things are at right now. No homework here, just context, so I can give you the best creative support. Add anything you feel would be useful.

(If nothing springs to mind, use this space as a creative brainstorm with your team — messy notes are always welcome!)

I work as an extension of your team, not outside of it.

INTERESTED?

Sign up!

Business name

Full name

Email

Phone

Website / Socials

Retainer package

- [ ] Starter
- [ ] Growth
- [ ] Partner

Start date:

Preferred billing date:

Services most interested in?

- [ ] Creative consultancy / strategy
- [ ] Design (brand, brochures, social, digital)
- [ ] Photography / video / podcasts
- [ ] Other: _____
- [ ] Website support & updates
- [ ] Copywriting, blogs, PR