Cranleys
CHARTERED ACCOUNTANTS



CRANLEYS' CUNNING PLANS · No. 07 · STARTING UP

Brand, Marketing and Sales Checklist for Small Businesses

Tick it, print it, pin it up. Every box you cannot tick is a conversation worth having.

A fox that hides in the bush is safe, and also hungry. Be seen, lawfully.



By Colin Davison FCA, Managing Partner, Cranleys Chartered Accountants. In practice since 1998. Reviewed 15 November 2026 against the 2026/27 rules.

THE QUICK ANSWER

Choose who you serve and why you are different, then make yourself easy to find on Google, your website and LinkedIn. Follow the law on claims, data and email marketing. Build a simple sales process and track where each customer came from, so you spend on what works.

THE KEY FIGURES

The key facts	What to know
Positioning	one customer, one problem, one promise
Online basics	website, Google Business Profile, LinkedIn
Legal basics	truthful claims, GDPR, email consent rules
Company website	must show name, number, registered office

The checklist, box by box

	The check	What to do	Keep as evidence
☐	**Is your positioning one sentence?**	Who you help, with what, and why you. If it takes a paragraph, it is not clear.	Positioning statement
☐	**Is your Google Business Profile complete?**	Accurate name, address, phone, hours, services and reviews. Ask happy customers for honest reviews.	Profile, review log
☐	**Does your website carry the legal details?**	Limited companies must show name, number and registered office on the website and emails.	Website footer
☐	**Is marketing lawful?**	Claims must be truthful and provable. Personal data needs a lawful basis, and marketing emails need consent or a valid exception.	Privacy notice, consent records
☐	**Is there a simple sales process?**	Enquiry, conversation, proposal, decision, follow up. Know where each customer is.	Pipeline sheet
☐	**Do you track where customers come from?**	Ask every customer and record it. Stop spending on what does not work.	Source log

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MY PRO TIP

pick one customer and talk to them, not to everyone.

A worked example

This is an illustration. If one in ten enquiries becomes a customer worth £1,200 profit, each enquiry is worth £120. Paying £60 to get an enquiry is sensible. Paying £150 is not. Knowing your own numbers turns marketing from a hope into a decision.

The trap to avoid

Buying leads and mailing them without consent. Data protection and email marketing rules apply, and a complaint to the regulator is not the publicity you wanted.

The Rufus test

One question that tells you if you have the right adviser:

In one sentence, why would a stranger choose me over the next supplier?

What has changed recently

- Customers search online first. See the brand and footprint checklist.
- Marketing needs the right structure behind it. See the systems and bookkeeping checklist.
- Price your offer properly. See the pricing and cashflow checklist.

Questions I get asked

How do I market a small business?

Choose one customer, be clear on your promise, be findable on Google and keep a simple sales process.

Is a Google Business Profile free?

Yes, setting one up is free and it helps local customers find you.

Can I email people to market my business?

Only within the rules on consent and exceptions. Business to business rules differ from consumer rules.

What must my website show?

For a limited company, its name, registration number and registered office, plus VAT number if registered.

The 9 CAD Keys link: Differentiation

Differentiation is giving a stranger a clear reason to choose you.

Colin's 9 CAD Keys. CORE: Clarity, Capability, Consistency. ADVANCED: Analysis & Positioning, Alignment, Acceleration. DYNAMIC: Differentiation, Dexterity, Development. Score each key 1 to 5 in the free Business Value Assessment Scorecard, total out of 45. *Freedom is built. One CAD Key at a time.*

Tick these next

Business checklist 01
Business Idea, Market and Business Model Checklist

Business checklist 15
Marketing, Brand and Your Footprint Checklist for Growing Businesses

Business checklist 04
Pricing, Cashflow and Funding Checklist for New Businesses

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Go deeper: my books

For this topic, start with **Starting Up Secrets**, part of The Cranleys Business and Tax Secrets Series: Property Tax Secrets, Inheritance Tax Secrets, Business Tax Secrets, Starting Up Secrets, Business Growth Secrets and Business Exit Secrets. The books are launching soon. Join the launch list at cranleys.online/books and I will tell you the moment each one is released.

YOUR NEXT STEP

Ring me. Free draft plan, no hard sell.

I will build you a free draft tax plan or business plan on my 9 CAD Keys: a scorecard, a 12-month cashflow forecast, a 90-day action plan and a review with me. **1** Get in touch. **2** Short intro call. **3** Your free draft plan in plain English. You decide what happens next.

Tick the boxes, fill the pipeline.

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Scan to read online, tick it on screen and take the Scorecard



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