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CHARTERED ACCOUNTANTS



CRANLEYS' CUNNING PLANS · No. 15 · GROWING

Marketing, Brand and Your Footprint Checklist for Growing Businesses

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



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

Your footprint is everywhere customers find you: Google, your website, reviews, LinkedIn and referrals. Keep your details consistent, ask for reviews and referrals, and work out how much a customer is worth, so you know how much you can spend to win one.

THE KEY FIGURES

The key facts	What to know
Footprint	website, Google profile, reviews, LinkedIn, referrals
Customer value	annual spend times years times margin
Consistency	same name, address, phone everywhere

The checklist, box by box

	The check	What to do	Keep as evidence
☐	**Is your brand consistent?**	Same name, look and message across every channel.	Brand guide
☐	**Is your website built to be found?**	Clear pages for each service, location and question customers ask.	Site map
☐	**Are reviews growing?**	Ask after every job. Reply to all reviews.	Review log
☐	**Do you ask for referrals?**	Make it easy and thank people.	Referral process
☐	**Do you know customer lifetime value?**	What a customer is worth over time sets your marketing budget.	Calculation
☐	**Is follow up consistent?**	Most sales come after several contacts.	CRM or pipeline



MY PRO TIP

ask every happy customer for one review and one referral.

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A worked example

A customer pays £500 a year for three years at a 30% margin. Lifetime profit is £450. You could spend up to about £150 to win that customer and still keep a good return. Without the number, you guess.

The trap to avoid

Changing your name, number or address across channels. Search engines and customers lose confidence.

The Rufus test

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

If someone searched for what I do tonight, would they find me, and would they trust what they saw?

What has changed recently

- Start with the basics. See the brand and marketing checklist.
- Price shapes brand. See the pricing checklist.
- Systems keep it going. See the systems and delegation checklist.

Questions I get asked

What is a brand footprint?

Everywhere a customer can find or hear about you, online and offline.

How do I get more Google reviews?

Ask every happy customer at the right time and make it easy with a link.

What is customer lifetime value?

The total profit a customer is expected to bring over the relationship.

Does referral marketing work?

For many businesses, yes. Ask directly and thank people.

The 9 CAD Keys link: Differentiation

Differentiation grows when your footprint repeats one clear message everywhere.

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

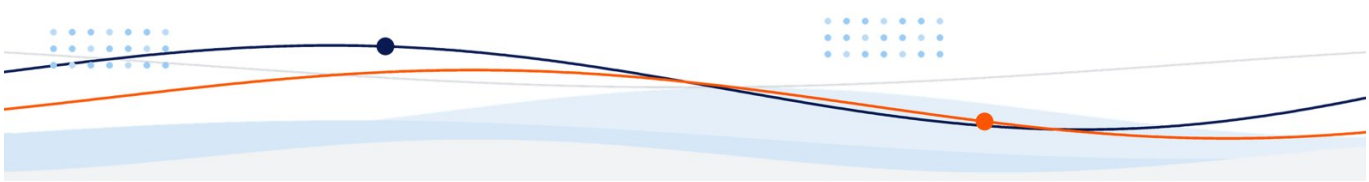
Business checklist 07
Brand, Marketing and Sales Checklist for Small Businesses

Business checklist 11
Pricing, Margins and the 80/20 Customer Review Checklist

Business checklist 16
Systems, Delegation and Getting Out of the Way Checklist

Go deeper: my books

For this topic, start with **Business Growth 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.



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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.

Leave a clear trail.

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



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