

MODULE 6 LESSON NOTES

DISCOVERY & QUALIFICATION

DIAGNOSE FIRST. PRESCRIBE SECOND.

Discovery is where you stop guessing and start understanding the business. Qualification determines whether the prospect is a realistic fit for American Marketing.

USE THE CONSULTANT DASHBOARD

The dashboard helps you conduct an initial marketing audit while you are speaking with the prospect.

- Follow variable scripts based on the prospect's answers.
- Use prompts to investigate advertising, targeting, conversion, and tracking.
- Learn the framework now so the questions eventually become second nature.

AUDIT THE CUSTOMER JOURNEY

- TARGETING:** Were the right people seeing the ads?
- INTENT:** Were they actually in the market?
- ABILITY:** Could they realistically become customers?
- MESSAGE:** Did the creative get attention and create a reason to care?
- POSITIONING:** Did the business build Know, Like, Trust, Useful?
- CONVERSION:** What happened after the click or call?

START WITH WHAT HAPPENED

If a prospect says, "We tried Facebook and it did not work," do not argue and do not accept that as the full diagnosis.

ASK:

Who was targeted? What did the ad say? What happened after someone responded? Was conversion tracked?

LOOK FOR FRICTION

- Does the website make the business easy to understand?
- Is it easy to call, submit information, or buy?
- Does somebody answer the phone?
- Are leads followed up with quickly?
- Do reviews or reputation create resistance?
- Is conversion tracking showing where opportunities are lost?

THE MARKETING SCORE FEEDBACK LOOP

The Marketing Score reviews the broader system: campaign performance, targeting, messaging, conversions, reputation, website performance, friction, lead handling, and follow up.

EXECUTE

Launch the focused Meta system.

MEASURE

Track what actually happens.

IDENTIFY

Find where performance breaks.

ADJUST

Improve our side or the client's side.

MEASURE

Repeat and improve again.

QUALIFY THE OPPORTUNITY

- Is there a real customer acquisition problem or growth opportunity?
- Can the business support the marketing investment?
- Can it handle more customers?
- Are expectations reasonable?
- Is the owner willing to participate when necessary?
- Are you speaking with someone who can influence the decision?

MOVE TO THE RECOMMENDATION

New clients currently start with Meta. Discovery explains why that starting system makes sense for this specific business.

"Based on what you told me, I think there may be an opportunity for American Marketing to help. We would start with Meta advertising and put a lot of emphasis on targeting, tracking, and measuring what actually happens."

KEY TAKEAWAY

UNDERSTAND THE SYSTEM BEFORE YOU RECOMMEND THE SOLUTION.

TARGETING. MESSAGING. CONVERSION. TRACKING. QUALIFICATION.