

# Your Marketing Gap Audit Report

**The SERVE stage is your top priority right now.**

Hey friend,

Out of the 8 stages of the Trail to the Sale™, the one giving you the most trouble right now is Serve.

This isn't a verdict — it's a starting point. **Serve is one of those neglected back-end stages, where loyalty and referrals get built.** That's why fixing this stage tends to move the needle fast. Let's start here.

## What the Serve Stage Actually Is

Serve is the stage where the relationship is either strengthened or quietly broken. It's everything that happens after someone buys — the onboarding, the delivery, the communication, the experience. This is the stage where loyal advocates are made (or where one-and-done customers slip away).

Your job at this stage? Make working with you so smooth and supportive that customers tell other people without being asked.

The key question your customer is asking: *"Was this worth it?"*

**\*A quick honest note:** *this is based on a short quiz, so think of it as my strongest hunch, not your final diagnosis. Use it as the place to look first.*

# What It Usually Looks Like When the Serve Stage Is Leaking:

Some honest signs your Serve stage needs work:

- Onboarding is different every time because there's no real process.
- You're not sure how customers actually feel during the work (you find out at the end, if at all).
- You have no system for collecting feedback, so problems surface late or not at all.
- Customers finish working with you and disappear — no relationship, no advocacy, no referrals.
- You sometimes hear "I wish I'd known that earlier" or "I wasn't sure what was supposed to happen next."

If any of those gave you an *oh my gosh that's me* moment, that is the one to work on first.

## 3 Things To Do First:

These are directional next steps, not the whole solution. Just use these as the place to start in the next 30 days.

### 1. Document your onboarding — even a rough version.

Write down exactly what happens in the first week (or first few days) when a new customer signs on. What emails they get. What calls they have. What they need to send you. What they should expect from you. Doesn't have to be fancy — it just has to be consistent. Inconsistency is the #1 Serve killer.

### 2. Build in regular check-in points.

Don't wait until the end to find out how it went. Build feedback into the middle of the engagement — a mid-project check-in, a quick "how are we doing" email, a 10-minute call to course-correct. People feel cared for when you actively ask, not when you passively wait.

### 3. End every engagement with a real wrap-up.

Most service businesses just kind of trail off when the work ends. Don't. Build a real off-boarding moment: a wrap-up call or email, a summary of what you accomplished together, a clear "here's what comes next" recommendation. This is where loyalty is sealed — and where testimonials become natural to ask for.

## Where This Fits In The Bigger Picture:

The Trail to the Sale™ has 8 stages — Awareness, Consider, Compare, Evaluate, Sell, Supersize, Serve, and Send. Every stage feeds the next. Strong Serve turns customers into raving fans who keep working with you AND tell other people. Weak Serve means you're constantly refilling the top of the Trail — because the bottom keeps leaking.



## The Bigger Fix (when you're ready):

Serve is one piece of a bigger system. If you want the full roadmap — not just for Serve, but for connecting every stage of your customer's journey into one strategy that actually works — that's exactly what I built **Modern Marketing Mastery** to do.

It's an 8-week course built around the Trail to the Sale™ framework, with Module 6 covering Serve & Send — turning the customer experience into your strongest marketing asset. If this PDF resonated, that module is your roadmap.

### Join the VIP List



I'm Janice — marketing strategist, fractional CMO, podcast host of *My Weekly Marketing*, and someone who's spent 30+ years figuring out how to turn scattered marketing into a clear path to more clients.

The reason I built the Trail to the Sale™? Because most marketing advice teaches tactics without context — and I watched too many smart business owners burn out doing "all the things" without a system underneath. The Trail is the system. This audit is the starting point.

If we haven't met yet, come find me on the podcast — *My Weekly Marketing* — for weekly conversations on building a marketing system that actually pulls its weight.

Talk soon!