

Lead or Bleed: The Complete Marketer's Toolkit

Expanded and updated workbook based on the complete edition of Lead or Bleed by Tom Parsons.

Includes key takeaways, actionable checklists, templates, and exercises for every chapter.

Chapter 1: Make Your Vows (What is Your Brand?)

Key Takeaways

- A brand is a promise you can keep, not just your logo or vibe.
- Clarity beats broadness. Specificity builds trust and growth.
- Your promise should reflect what people actually care about.

Do This Now Checklist

- List three promises your company makes today.
- Cross out those you cannot deliver consistently.
- Circle the one that inspires belief and trust.
- Rewrite your elevator pitch to feature that promise.

Template

We help [customer type] solve [problem] by delivering [unique promise], so they can [benefit].

Quick Win Exercise

Ask three customers to describe your business in one sentence. Compare it to your promise.

Chapter 2: Two Roads Diverged (Why Customers Buy)

Key Takeaways

- Buyers are either relational (trust/value) or transactional (price/convenience).
- You can't serve both equally well—choose which to optimize for.
- Messaging should speak directly to your chosen buyer type.

Do This Now Checklist

- List five reasons customers choose you.

- Mark which are relational and which are transactional.
- Choose your priority buyer type and align your marketing accordingly.

Template

Relational: 'We know you. We'll take care of you.' / Transactional: 'Get it faster, cheaper, now.'

Quick Win Exercise

Audit five recent ads. How many appeal to trust vs. price? Adjust your next ad accordingly.

Chapter 3: Grit Over Gravity (The Funnel is a Climb)

Key Takeaways

- Funnels are uphill climbs, not easy slides.
- The journey includes Awareness, Consideration, and Intent.
- Each funnel stage has its own 'mini-funnel' inside it.

Do This Now Checklist

- Sketch your funnel as an inverted triangle (mountain).
- Write three customer questions per stage.
- Match one media channel to each stage.

Template

Awareness → Consideration → Intent — each with a tailored message and call-to-action.

Quick Win Exercise

Ask three customers what first made them notice you. Map their answers to funnel stages.

Chapter 4: From Chaos to Constant (Life is Plinko)

Key Takeaways

- Modern life is chaotic; your job is to create familiarity and peace.
- Advertising success comes from planting seeds early.

- Your message should bring calm and confidence to distracted buyers.

✅ Do This Now Checklist

- List three ways your customer's life feels chaotic.
- Brainstorm two ways your brand can bring clarity or relief.
- Find one channel to plant familiarity seeds consistently.

📄 Template

'When the world feels like [chaos], we're the [calm solution].'

🎯 Quick Win Exercise

Write your story in seven words or less and test its memorability with others.

Chapter 5: We Want It Now (Impatience & the 95/5 Rule)

🔑 Key Takeaways

- Only 5% of your market is ready to buy now; 95% are future buyers.
- Most companies overspend on the 5% and ignore the 95%.
- Brand-building earns future leads while sales ads close current ones.

✅ Do This Now Checklist

- Estimate your current spend split between 5% and 95%.
- Shift 20% of spend to awareness-building campaigns.
- Design one long-term message that nurtures loyalty before need.

📄 Template

5% Media = Search/Offers | 95% Media = Brand/Awareness

🎯 Quick Win Exercise

Identify one ad aimed only at ready buyers. Rewrite it to plant seeds for future ones.

Chapter 6: How Did We Get Here? (Dating Apps & Funnels)

🔑 Key Takeaways

- Online ads are like dating apps: measurable but short-term.
- Traditional ads are like in-person relationships: slower but lasting.
- The best strategy balances trackable clicks and long-term connection.

✅ Do This Now Checklist

- List your 'dating app' ads (fast conversions).
- List your 'long-term relationship' ads (trust builders).
- Rebalance your mix to avoid over-relying on one approach.

📋 Template

'We don't just match you—we're built for forever.'

🎯 Quick Win Exercise

Write your next ad as if wooing a lifelong customer, not a one-time transaction.

Chapter 7: Over-Indexing on One Format (The Video Advantage)

🔑 Key Takeaways

- Video dominates all forms of media consumption.
- Broadcast and cable TV build trust; streaming builds intimacy.
- Each video platform should serve a unique purpose in your funnel.

✅ Do This Now Checklist

- Audit your current media mix for video share.
- Add one communal video format (TV, cinema) this quarter.
- Design content for both mass reach and personal relevance.

📋 Template

Communal Video = Shared moments | Intimate Video = Personalized moments

🎯 Quick Win Exercise

Ask five people what recent ad they remember seeing. Could your brand run in that setting?

Chapter 8: Familiarity Seeds Intent (Awareness Media)

Key Takeaways

- Familiarity wins when buyers enter the market.
- Awareness media builds trust before intent forms.
- Your goal: stay visible enough to be the first recalled option.

Do This Now Checklist

- List three awareness channels you use today.
- Ensure each delivers clarity, brevity, and repetition.
- Pair each awareness campaign with one consideration touchpoint.

Template

'When you finally need [product], remember [brand promise].'

Quick Win Exercise

Design a seven-word billboard and test comprehension with a stranger.

Chapter 9: Consideration Media (Bridging Awareness and Intent)

Key Takeaways

- Consideration media builds proof between recognition and purchase.
- Balance urgency with reassurance to avoid sounding desperate.
- Use testimonials and trust signals to close emotional distance.

Do This Now Checklist

- List three top buyer questions before purchase.
- Create one asset per question (video, FAQ, case study).
- Check each ad for a calm, credible tone—avoid 'buy now' pressure.

Template

'Why choose us? Because we [proof point] and [benefit].'

Quick Win Exercise

Share one short customer success story on social media this week.

Chapter 10: Intent Media (Closing the Deal)

Key Takeaways

- Intent media is where action happens—don't waste it.
- Price is a tactic; trust and urgency are strategies.
- Visibility and simplicity win conversions.

Do This Now Checklist

- Search your main keywords. Do you show up?
- Test your CTA for clarity and immediacy.
- Add a small bonus or guarantee to your main offer.

Template

'Ready today? [CTA] + [Bonus Guarantee]'

Quick Win Exercise

Perform a test search on your product. Are you visible? Fix it if not.

Chapter 11: Measurement & Adaptation

Key Takeaways

- What gets measured improves; what's ignored decays.
- Metrics should track outcomes, not vanity numbers.
- Adaptation is the new advantage.

Do This Now Checklist

- Define your top three KPIs: leads, CPL, ROI.
- Review performance monthly and cut underperformers.
- Double down on what drives profitable outcomes.

Template

KPI Tracker → Leads: ___ | CPL: ___ | ROI: ___%

Quick Win Exercise

Kill one low-performing channel today and reallocate its spend.

Chapter 12: Post-Sale Funnel (Delight & Word of Mouth)

Key Takeaways

- Your funnel doesn't end with the sale—it begins again.
- Delight fuels referrals and repeat customers.
- Happy customers are your best marketing channel.

Do This Now Checklist

- Map your follow-up process for new customers.
- Add one small, unexpected delight post-sale.
- Create an easy, fun way for referrals.

Template

'Thanks for choosing us—share with a friend [referral link].'

Quick Win Exercise

Call one happy customer today and request a short testimonial.

Chapter 13: The Modern Media Ecosystem


Key Takeaways

- Local media now spans digital, social, and streaming environments.
- Omnichannel awareness multiplies effectiveness when coordinated.
- Each platform has a unique role in your funnel.

Do This Now Checklist

- Map your presence across all local media types.
- Identify overlap and blind spots in coverage.

- Plan one integrated campaign using at least three platforms.

 Template

‘Meet [brand] wherever [customer] spends time—online, on air, or on the go.’


 Quick Win Exercise

Design a small omnichannel test linking social + radio + web tracking.

Chapter 14: The Attention Economy

 Key Takeaways

- Attention is the new currency of marketing.
- Creative quality decides whether your message survives the scroll.
- Consistency beats volume—stay relevant over time.

 Do This Now Checklist

- Audit your last five posts or ads for emotional engagement.
- Eliminate clutter—focus on one clear message per creative.
- Create a recurring theme or hook across formats.

 Template

‘In a world of noise, we say [simple truth].’

 Quick Win Exercise

Test one short-form video under 15 seconds that holds full attention.


Chapter 15: Building Local Trust

 Key Takeaways

- Local presence and human connection are unbeatable advantages.
- People trust faces, not faceless brands.
- Show proof of real community investment.

 Do This Now Checklist

- Add at least one real customer face to every campaign.
- Sponsor or participate in one local event this quarter.
- Show behind-the-scenes stories from your team.

 Template

‘Neighbors first. Business second.’


 Quick Win Exercise

Film a 30-second video from your location introducing your team.

Chapter 16: Automation and Authenticity

 Key Takeaways

- Automation saves time, but authenticity builds relationships.
- Use tech to scale, not replace, human touch.
- Personalization should feel real, not robotic.

 Do This Now Checklist

- List all automated communications in your funnel.
- Rewrite one to sound conversational and human.
- Add one authentic signature or touchpoint.

 Template

‘Hey [Name], I thought you’d appreciate this [personal note].’

 Quick Win Exercise

Record a voice note or short video follow-up instead of an automated email.

Chapter 17: AI and the Future of Local Marketing

 Key Takeaways

- AI can amplify creativity and efficiency in marketing.
- Human intuition still drives empathy and message resonance.

- Use AI to enhance strategy, not to replace your storytelling.

✅ Do This Now Checklist

- Experiment with one AI tool for copy, design, or data analysis.
- Compare its output to your best human work.
- Document where AI saves time without sacrificing quality.

📄 Template

‘Human + AI = Faster ideas, deeper impact.’

🎯 Quick Win Exercise

Use AI to draft a campaign, then humanize it before publishing.

Chapter 18: The Death of the Funnel (The Customer Loop)

🔑 Key Takeaways

- Funnels are no longer linear; they’ve evolved into customer loops.
- Each purchase should feed into a cycle of advocacy, feedback, and reactivation.
- Retention and referrals now drive more growth than first-time conversions.

✅ Do This Now Checklist

- Map your full customer journey from awareness to advocacy.
- Identify one point where customers could re-enter your funnel.
- Create a reactivation plan for past customers.

📄 Template

Loop Framework → Awareness → Consideration → Intent → Purchase → Delight → Advocacy → Return.

🎯 Quick Win Exercise

Interview one loyal customer and one lost customer. Compare what pulled one back and pushed the other away.

Chapter 19: Lead or Bleed (The Choice Ahead)

Key Takeaways

- Every business must choose: evolve or erode.
- Complacency kills lead flow; curiosity keeps it alive.
- The best marketers stay adaptable—testing, measuring, and improving endlessly.

Do This Now Checklist

- Review the last 12 months of marketing actions and outcomes.
- Highlight one risk you avoided that you should've taken.
- Commit to one bold test or experiment this quarter.

Template

'If we want to lead, we must [specific action]. If we don't, we'll [specific consequence].'

Quick Win Exercise

Hold a 30-minute team session to define one area where you'll 'lead or bleed' this year—and set accountability dates.