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AN INTEGRITY COMPANY



From the Ground Up

Grassroots Marketing Workbook

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Introduction

Welcome to our Grassroots Marketing Workbook. This workbook is designed to walk you step by step through the process of building a thoughtful, cohesive grassroots marketing plan that feels authentic, intentional, and achievable.

Inside, you'll find guided activities, reflection questions, and practical exercises that help you take stock of your current marketing efforts. You'll identify which grassroots tactics you're already using, understand what's working well, and pinpoint opportunities to strengthen or refine your approach.

This workbook also encourages creative thinking and forward planning. As you work through each section, you'll brainstorm new ideas, uncover gaps, and explore ways to level up your grassroots marketing in a way that aligns with your goals, resources, and community connections. By the end, you'll have a clearer strategy and a stronger foundation for consistent, effective grassroots marketing.



Activity One:

What do you think marketing and branding can do to help grow your business?

One of the ways you can fortify your marketing strategy is by identifying **Centers of Influence** in local communities and building relationships with those people and/or organizations.

Centers of Influence are organizations and/or people who have influence in a community and can provide easier access to the market through word of mouth and referrals.

Let's brainstorm some of the things you may need to think about before approaching one of these **Centers of Influence.**



What are some of the problems they may bring up about working with you?

What are some of the talking points you could prepare beforehand to address some of these?

Sales Outreach Method

The Sales Outreach Method is a proactive strategy in which agents reach out to prospective clients with the goal of generating new business opportunities. Rather than waiting for leads to come in, agents take initiative by identifying potential prospects and engaging them through direct methods such as calls, emails, text messages, social media outreach, networking, and referrals.

This approach is relationship-driven and relies heavily on consistency, personalization, and follow-up. Effective sales outreach focuses on understanding the prospect's needs, providing value during each interaction, and positioning the agent as a trusted resource, not just a salesperson. When executed well, this method helps agents build stronger pipelines, increase brand awareness in their local communities, and create sustainable, long-term growth.

Sales outreach is especially powerful when paired with good tracking, messaging refinement, and a clear follow-up process, allowing agents to measure what works and continually improve their results.

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Activity Two:

Evaluate your current lead generating community outreach efforts. Identify a few things that are working for you right now.

What are some things you could improve to strengthen your current outreach strategy?

What questions are you currently asking and what questions could you start to ask in your approach?

Activity Three:

Lets do a dry run. Say you are walking into a community organization looking to build a co-beneficial relationship.

What do you say to start the conversation?

Now lets make it a specific organization! This time lets say it is your local Senior Center. How do you start the conversation with this group?

Provider Outreach

Each provider is different and it is important to know what those differences are when approaching providers. Write down as many of the providers in your community as you can.

Approaching Providers

When you are approaching providers to build these relationships, your network, and book of business there are certain questions you will want to answer about each provider individually. Think about some of those questions and write them here.

What are some things you can do to maintain a relationship with the providers you reach out to?

Activity Four:

Lets do a dry run again. This time imagine you are going to one of the providers you listed earlier. How would you go about starting that conversation?

Social Media

Social Media is a great place to get seen and interact with your clients! What are some of the advantages of Social Media Marketing that you can think of?

Compile all of the social media your business is currently using to reach clients and all of the social media that you would like to start using to build your business below.

Activity Five:

What are a few of the things you think are essential in creating a marketing plan?

Lets try a **SWOT Analysis Activity** to help you think critically about your marketing plan.

Strength

What are some of your strengths? (Things you do well)

Weakness

What are some of your weaknesses? (things you need to improve on)

Opportunities

What opportunities are available to you in your community?

Threats

What are some of the road blocks/challenges that might slow you down as you reach for your goals?

SMART Goals

SMART goals are a good way to lay out your plan and make sure you are hitting the milestones you want to hit when you put your plan in action. SMART goals are:

S **Specific:** What will you achieve? What will you do?

M **Measurable:** What data will you use to decide whether you've met the goal?

A **Attainable**: Are you sure you can do this? Do you have the right skills and resources?

R **Relevant:** How does the goal align with broader goals? Why is the result important?

T **Timeframe:** What is the deadline for accomplishing the goal?

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