STORY BRAND

THE $400K INDEPENDENT

MARKETING BUSINESS CHECKLIST

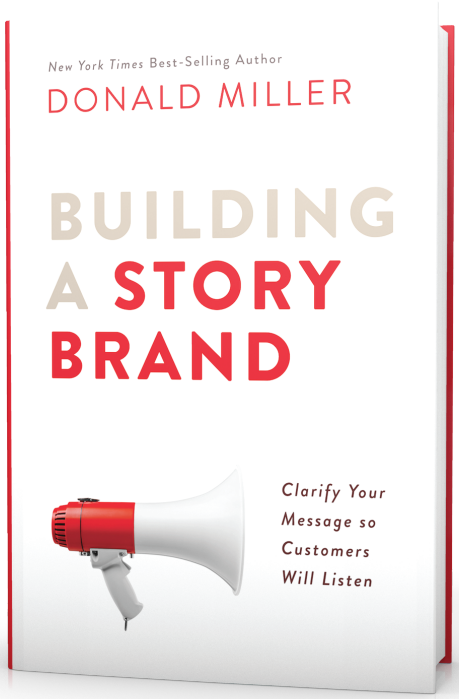
How StoryBrand Certified Guides Build Smarter, More Profitable Marketing Businesses—Without Burning Out

THE EASIER PATH TO $400K

Here's something most solo marketers don't realize: a $400K independent marketing business is actually easier to run than a $150K marketing business. I know that sounds backward, but it's true. When you're winging it at $150K, you're hustling harder, constantly firefighting, pricing randomly, and hoping referrals show up. Every client feels like starting from scratch. You're working evenings and weekends just to keep the lights on.

But when you build toward $400K the right way, you're forced to get your house in order. You install systems. You clarify your offers. You build repeatable processes that work while you sleep. Much of the business starts to run itself. In other words, it's easier to be successful and organized than it is to keep the plates of mediocrity spinning.

When my book ***Building a StoryBrand*** became a bestseller, hundreds of small business owners reached out and asked us to make their marketing collateral for them. Because I didn't want to own an agency, I decided to certify freelance marketers like you and then point the small business owners to them, instead. That turned out to be a terrific move, both for the freelance marketers and the small business owners. That's how the StoryBrand Certified Guide Program was born. Today, the StoryBrand Certified Guide community is a thriving community where independent marketers come together to learn, collaborate, and grow their businesses, all while serving clients at the highest level.



Over the years, we've watched our Guides build incredibly successful businesses and we've paid great attention to what works and what doesn't. One of the core values in the Guide program is generosity and so the Guides love to share best practices. We even have a dedicated wall at StoryBrand headquarters that tracks their progress. We take genuine pride in moving Guides from under $50K up to $150K, then to $250K, and finally to $400K and beyond. At StoryBrand, we have over 30 full-time team members who obsess over moving our Guides up and to the right. That wall isn't just about numbers—it's people building businesses that give them freedom, flexibility, and the ability to do meaningful work with clients they care about.

Through working with hundreds of Guides, we've identified the best practices, systems, and strategies that consistently lead to growth. This checklist represents the best of what we've learned—organized around three phases and 15 proven steps.



Our 3-phase, 15-step journey is designed to help freelance marketers build strong, predictable marketing businesses while getting terrific results for their clients.

THE THREE PHASES

You need to master three critical areas to build a marketing business that consistently generates $400K in annual revenue:

- **ATTRACT LEADS — Build a lead engine that supports a $400K business**
- **CLOSE LEADS — Turn interest into high-value clients**
- **DELIVER RESULTS — Become the Guide clients refer and retain**

Each phase contains 5 steps. Each step solves a specific constraint in your business. And the StoryBrand Certified Guide Program gives you the "done-for-you" assets, templates, and systems to implement every single one. If you join the program, you won't make this journey alone. You'll have coaching, community, and proven tools at every stage. Regardless, though, if you're trying to grow your marketing business, you can consider this checklist a playbook.

Let's walk through the checklist.



PHASE 1: ATTRACT LEADS

Build a Lead Engine That Supports a $400K Business

1	2	3	4	5
STORYBRAND FOUNDATIONAL SOUNDBITES Break free from generic positioning so premium clients immediately understand your value.	**THE CONVERSION WEBSITE KIT** Stop relying on referrals—turn your website into a 24/7 lead generation machine.	**THE AUTHORITY CONTENT SYSTEM** Build consistent visibility without burnout so you become the recognized expert clients choose.	**THE SMART NURTURE ENGINE** Never lose another qualified lead—stay top-of-mind until prospects are ready to buy.	**THE EVERGREEN AUTHORITY WEBINAR** Scale your authority and close $25K–$125K deals from a single repeatable presentation.

A $400K business requires consistent, qualified demand. You can't rely on referrals alone. This phase installs systems that position you as the obvious expert—and bring the right clients to you.

1 STORYBRAND FOUNDATIONAL SOUNDBITES

Break free from generic positioning so premium clients immediately understand your value.

☐ **STEP 1:** Create Your StoryBrand Foundational Soundbites

The Problem This Step Solves: Unclear, generic messaging keeps capable marketers invisible and commoditized, preventing them from attracting premium clients.

YOUR CHECKLIST

- ☐ Choose the specific problem you're going to own (***example:*** *"I help businesses that struggle to explain what they do"*)
- ☐ Write and practice your conversational elevator pitch—a short, interesting, story-based pitch people remember and repeat
- ☐ Create your "problem soundbite" and place it at the top of your website, in your LinkedIn headline, and in your email signature
- ☐ Write your "solution soundbite" that explains what you do in one simple sentence (***example:*** *"I clarify your message so customers listen"*)

The StoryBrand Solution: The Guide Program walks you through a proven process to create your Foundational Soundbites—complete with templates, fill-in-the-blank worksheets, real examples from successful Guides, and live feedback. You'll leave with 5 soundbites you can use immediately to clarify your message and attract attention to your marketing business.

2 THE CONVERSION WEBSITE KIT

Stop relying on referrals—turn your website into a 24/7 lead generation machine.

☐ **STEP 2:** Build Your Conversion Website

The Problem This Step Solves: Relying on referrals or having a website that doesn't convert means you're constantly hustling for the next client instead of having qualified leads come to you.

YOUR CHECKLIST

☐ Write a clear website headline using your problem soundbite (place it at the top of your homepage)

☐ Add a prominent "Schedule a Call" button in the top right corner of every page

☐ Create a simple 3-step process section showing how you work with clients

☐ Add 3-5 client testimonials with specific results (revenue grown, leads generated, etc.)

The StoryBrand Solution: Phase One, Step Two of the program gives you proven website templates based on Guide best practices and designed specifically for marketing professionals, complete with pre-written copy examples you can customize in minutes. No custom design needed—just plug in your soundbites and go live.

3 THE AUTHORITY CONTENT SYSTEM

Build consistent visibility without burnout so you become the recognized expert clients choose.

☐ **STEP 3:** Launch Your Authority Content System

The Problem This Step Solves: Inconsistent visibility and weak authority make it hard to attract premium clients who trust you enough to pay what you're worth.

YOUR CHECKLIST

☐ Post 3 times per week on LinkedIn (or your primary platform) using the problem-agitate-solve format

☐ Share one client success story per month with specific before/after results

☐ Create a simple content calendar and batch-create posts once per month

☐ Always include your problem soundbite in your profile bio and post signature

The StoryBrand Solution: Phase One, Step Three of the program provides 50+ ready-to-customize content prompts, real post examples from successful Guides, and a simple monthly planning template. You'll know exactly what to post and when—no more staring at a blank screen.

4 THE SMART NURTURE ENGINE

Never lose another qualified lead—stay top-of-mind until prospects are ready to buy.

☐ **STEP 4:** Install Your Smart Nurture Engine

The Problem This Step Solves: Most leads aren't ready to buy immediately, but without consistent follow-up, they forget about you and hire someone else.

YOUR CHECKLIST

- ☐ Set up a simple email collection form on your website ("Download our free guide" or "Get on our newsletter")
- ☐ Write 5 automated welcome emails that go out over 2 weeks (introducing yourself, sharing your story, offering help)
- ☐ Send a monthly email to your list with one helpful tip, one client story, and one call-to-action
- ☐ Manually follow up with any lead who clicks your "Schedule a Call" link

The StoryBrand Solution: Phase One, Step Four of the Guide Program provides done-for-you email templates for the entire sequence—welcome series, monthly newsletters, and follow-up messages. Just plug in your details and the system runs automatically in the background.

5 THE EVERGREEN AUTHORITY WEBINAR

Scale your authority and close $25K–$125K deals from a single repeatable presentation.

☐ **STEP 5:** Create Your Evergreen Authority Webinar

The Problem This Step Solves: You can only scale revenue so far with one-to-one selling. An authority webinar lets you educate and convert audiences at scale.

YOUR CHECKLIST

- ☐ Choose one core framework to teach (the StoryBrand Framework is licensed to all Guides)
- ☐ Create a 45-minute presentation with slides teaching the framework
- ☐ Promote your webinar to your email list and LinkedIn connections
- ☐ At the end, offer a free 30-minute strategy call to attendees who want help implementing

The StoryBrand Solution: Phase One, Step Five of the program licenses you to deliver the proven StoryBrand keynote complete with slides, speaker notes, and delivery training. You can deliver this as a webinar, live presentation, or paid workshop. Many Guides close $25K-$125K deals directly from this.



READY TO ATTRACT BETTER LEADS?

The StoryBrand Certified Guide Program gives you every template, system, and tool you need to build a lead engine that supports a $400K business. You'll have proven assets, live coaching, and a community of successful Guides helping you every step of the way.

APPLY TODAY AT STORYBRAND.COM/GUIDE-CERTIFICATION

PHASE 2: CLOSE LEADS

Turn Interest Into High-Value Clients

10	9	8	7	6
THE CLIENT TESTIMONIAL REFERRAL SYSTEM Capture the proof you've earned and turn client success into predictable word-of-mouth growth.	**THE RETENTION & GROWTH PRODUCT PLAYBOOK** Break the client acquisition treadmill—turn project clients into long-term retainer partners.	**THE DEAL-CLOSING PROPOSAL SYSTEM** Turn boring proposals into persuasive sales assets that accelerate commitments.	**THE OFFER ARCHITECTURE FRAMEWORK** Stop creating custom proposals—package clear offers that speed decisions and increase deal size.	**THE GUIDE PITCH DECK** Eliminate awkward sales conversations and confidently close deals the same day.

A $400K business is built on clear offers, confident conversations, and repeatable sales systems. In this phase, you'll install the infrastructure to go from "hoping" a lead becomes a client to confidently closing deals the same day they reach out.

6

THE GUIDE PITCH DECK

Eliminate awkward sales conversations and confidently close deals the same day.

☐ **STEP 6:** Build Your Pitch Deck

The Problem This Step Solves: Inconsistent, uncomfortable sales conversations kill deals. You need a story-driven framework that builds confidence and moves prospects to commitment.

YOUR CHECKLIST

☐ Build a 10-slide deck: Problem, Stakes, Solution, How It Works, Case Study, Investment, Next Steps

☐ Practice your 5-minute pitch until you can deliver it conversationally (not reading slides)

☐ Include 2-3 photos or visuals of past client results

☐ End with: "Does this sound like something that could help your business?" then stay silent

The StoryBrand Solution: Phase Two, Step Six of the Guide program provides the complete Guide Pitch Deck template, training on how to deliver it confidently, and examples from top-performing Guides. This becomes your standard tool for every high-value conversation and empowers you to close the client fast.

7 THE OFFER ARCHITECTURE FRAMEWORK

Stop creating custom proposals—package clear offers that speed decisions and increase deal size.

☐ **STEP 7:** Structure Your Offer Architecture Framework

The Problem This Step Solves: Unclear or custom offers create confusion, slow down decisions, and lower your average deal size.

YOUR CHECKLIST

☐ Create 3 service tiers: Starter ($5K-$10K), Standard ($15K-$25K), Premium ($30K+)

☐ Name each tier clearly (example: “Brand Clarity,” “Full Campaign,” “Marketing Partner”)

☐ List 3-5 specific deliverables per tier (website, lead generators, emails, ads, etc.)

☐ Set pricing based on deliverables, not hours worked

The StoryBrand Solution: Phase Two, Step Seven teaches you to structure tiered offers, price confidently, and present packages that buyers understand immediately. Clear offers create confident buyers.

8 THE DEAL-CLOSING PROPOSAL SYSTEM

Turn boring proposals into persuasive sales assets that accelerate commitments.

☐ **STEP 8:** Implement Your Deal-Closing Proposal System

The Problem This Step Solves: Stalled or lost deals often happen because proposals don’t reinforce value or create urgency.

YOUR CHECKLIST

☐ Use a 1-page proposal format (not a 20-page document)

☐ Include: Their problem, your solution, what’s included, timeline, investment, next step

☐ Add your problem soundbite in the header

☐ Send via email with subject line: “[Company Name] Marketing Proposal - Review & Next Steps”

The StoryBrand Solution: Phase Two, Step Eight provides done-for-you proposal templates with proven narrative structures that make your proposals persuasive sales assets, not boring documents. The result: faster closes and fewer stalled deals.

THE RETENTION & GROWTH PRODUCT PLAYBOOK 9

Break the client acquisition treadmill—turn project clients into long-term retainer partners.

☐ **STEP 9:** Build Your Retention and Growth Product Playbook

The Problem This Step Solves: Revenue stalls and client relationships end prematurely because Guides don't have a structured way to turn one-off projects into ongoing monthly engagements.

YOUR CHECKLIST

☐ Design a menu of monthly deliverables clients choose from (email campaigns, social content, landing pages, video scripts, lead generators)

☐ Create 3-month, 6-month, and 12-month engagement structures at a fixed monthly rate

☐ Establish a weekly or biweekly check-in rhythm that keeps you embedded in the client's business

☐ Build a scope document that protects your time while giving the client clear expectations

The StoryBrand Solution: Phase Two, Step Nine provides a done-for-you retainer playbook with engagement templates, deliverable menus, and scope documents that turn successful projects into predictable monthly revenue. The result: fewer one-off clients and a business that grows from the inside out.

THE CLIENT TESTIMONIAL REFERRAL SYSTEM 10

Capture the proof you've earned and turn client success into predictable word-of-mouth growth.

☐ **STEP 10:** Launch Your Client Testimonial & Referral System

The Problem This Step Solves: Weak social proof and inconsistent referrals leave money on the table. You need systematic testimonial collection and referral generation.

YOUR CHECKLIST

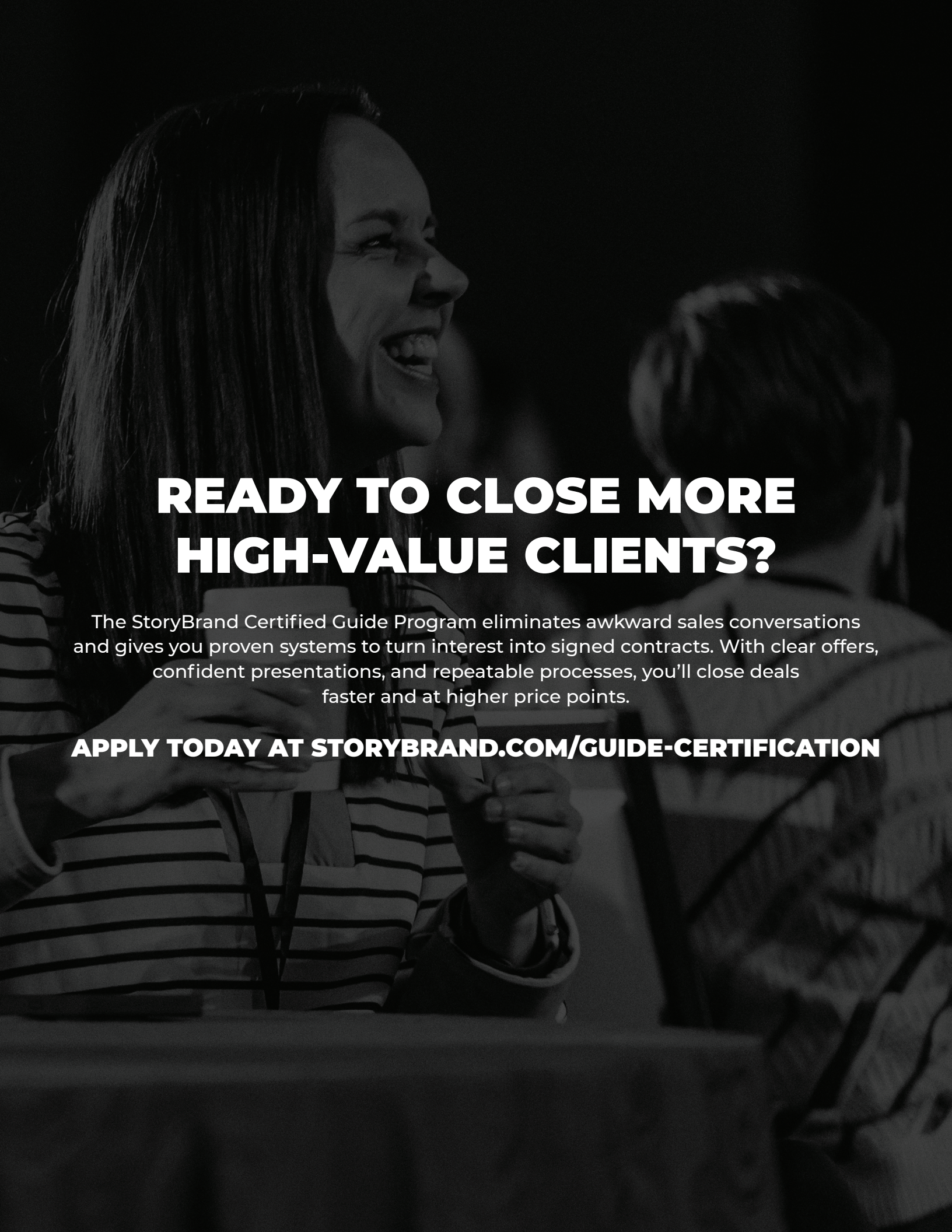
☐ Email clients 30 days after project completion: "Quick favor - would you mind sharing your experience?"

☐ Ask 3 specific questions: What problem did we solve? What results did you see? Would you recommend us?

☐ Post testimonials on your website homepage (not buried on a testimonials page)

☐ Ask happy clients: "Who else do you know who struggles with [problem]?" and offer a referral bonus

The StoryBrand Solution: Phase Two, Step Ten gives you templates, scripts, and systems to capture compelling testimonials and turn satisfied clients into your best salespeople. Word-of-mouth becomes predictable, not accidental.



READY TO CLOSE MORE HIGH-VALUE CLIENTS?

The StoryBrand Certified Guide Program eliminates awkward sales conversations and gives you proven systems to turn interest into signed contracts. With clear offers, confident presentations, and repeatable processes, you'll close deals faster and at higher price points.

APPLY TODAY AT STORYBRAND.COM/GUIDE-CERTIFICATION

PHASE 3: DELIVER RESULTS

Become the Guide Clients Refer and Retain

11	12	13	14	15
THE STORYBRAND SALES FUNNEL LICENSE Build complete marketing systems using a proven framework that clients understand, trust, and pay premium fees for.	**THE FRACTIONAL LEADERSHIP POSITIONING SYSTEM** Position yourself as a Fractional Marketing Director or CMO commanding premium retainers.	**THE STORYBRAND MESSAGING KEYNOTE AND WORKSHOP** Get paid to speak while elevating your authority and feeding your client pipeline.	**THE "OWN A NICHE" PLAYBOOK** Claim category authority in a specific niche to become the obvious choice and scale faster.	**THE AGENCY GROWTH PLAN** Build a structured agency so you can scale past $400K with the right team and profitability from day one.

Results create retention. Retention creates predictable revenue. In this final phase, you'll install the delivery systems that turn you into the marketing partner clients keep, refer, and rave about.

11 THE STORYBRAND SALES FUNNEL LICENSE

Build complete marketing systems using a proven framework that clients understand, trust, and pay premium fees for.

☐ **STEP 11:** The StoryBrand Sales Funnel License

The Problem This Step Solves: Underpriced, undefined marketing work keeps you stuck. You need flagship offerings with licensed, familiar, and heavily promoted products that command premium fees and deliver measurable outcomes.

YOUR CHECKLIST

- ☐ Master the 14 licensed StoryBrand Sales Funnel assets across 3 phases
- ☐ Choose your engagement model: Foundation ($15K-$35K), Complete Funnel ($35K-$75K), or Premium Partnership ($75K-$150K+)
- ☐ Always start with the Soundbite Strategy, never build without clear messaging first
- ☐ Package assets strategically based on client diagnosis, not their requests

The StoryBrand Solution: Your certification licenses you to deliver the complete StoryBrand Sales Funnel, proven assets that take prospects from Curiosity → Enlightenment → Commitment. These products are promoted through Donald Miller's StoryBrand platform to hundreds of thousands of business owners, giving you instant credibility and a competitive moat no other marketer can offer.

THE FRACTIONAL LEADERSHIP POSITIONING SYSTEM 12

Position yourself as a Fractional Marketing Director or CMO commanding premium retainers.

☐ **STEP 12:** StoryBrand Fractional Services Framework

The Problem This Step Solves: Clients want more than just your work—they want your wisdom. This step allows you to upsell your fractional services and sell them with proven marketing and sales collateral.

YOUR CHECKLIST

☐ Position yourself as their "Fractional Marketing Consultant" using our landing page and marketing campaign template.

☐ Offer a monthly "Fractional CMO or Fractional Marketing Director" retainer for $2K-$5K/month

☐ Deliver: coaching and consulting sessions clients appreciate

The StoryBrand Solution: Phase Three, Step Twelve of the program provides a playbook to sell and deliver Fractional CMO and Fractional Marketing Director services along with pricing and delivery coaching that will give you knowledge and confidence to upsell your wisdom as a consultant.

THE STORYBRAND MESSAGING KEYNOTE AND WORKSHOP 13

Get paid to speak while elevating your authority and feeding your client pipeline.

☐ **STEP 13:** Deliver The StoryBrand Messaging Keynote & Workshop

The Problem This Step Solves: One-off speaking opportunities don't create ongoing business. You need to turn keynotes into paid strategy sessions and retainer services.

YOUR CHECKLIST

☐ Deliver the StoryBrand keynote to local business groups or chambers of commerce

☐ At the end, offer a free "Brand Clarity Session" to interested attendees

☐ Convert 10-20% of attendees into paying clients

☐ Charge $2K-$5K to deliver the keynote as a paid workshop

The StoryBrand Solution: Phase Three, Step Thirteen of the program provides a protected license to deliver the famous StoryBrand keynote that's been seen by millions. Complete training and presentation materials are included. Once you deliver this to key clients, they see you as their local marketing expert forever.

14 THE "OWN A NICHE" PLAYBOOK

Claim category authority in a specific niche to become the obvious choice and scale faster.

☐ **STEP 14:** Own Your Niche with The Niche Authority Playbook

The Problem This Step Solves: Diluted positioning and price resistance. Specialists command premium fees and close faster than generalists.

YOUR CHECKLIST

☐ Pick one industry you understand well (healthcare, real estate, B2B SaaS, etc.)

☐ Update your website headline: “I help [industry] companies clarify their message”

☐ Create 3 case studies specifically from that industry

☐ Join industry-specific groups and associations to build authority

The StoryBrand Solution: Phase Three, Step Fourteen of the program walks you through niche selection, positioning strategies, and implementation playbooks. Many Guides have scaled from $400K into the millions by niching down. Going small is often the fastest way to go big.

15 THE AGENCY GROWTH PLAN

Build a structured agency so you can scale past $400K with the right team and profitability from day one.

☐ **STEP 15:** Scale With The Agency Growth Plan

The Problem This Step Solves: Growing past $400K solo is hard. If you want to scale further, you need proven systems for building a team and running an agency.

YOUR CHECKLIST

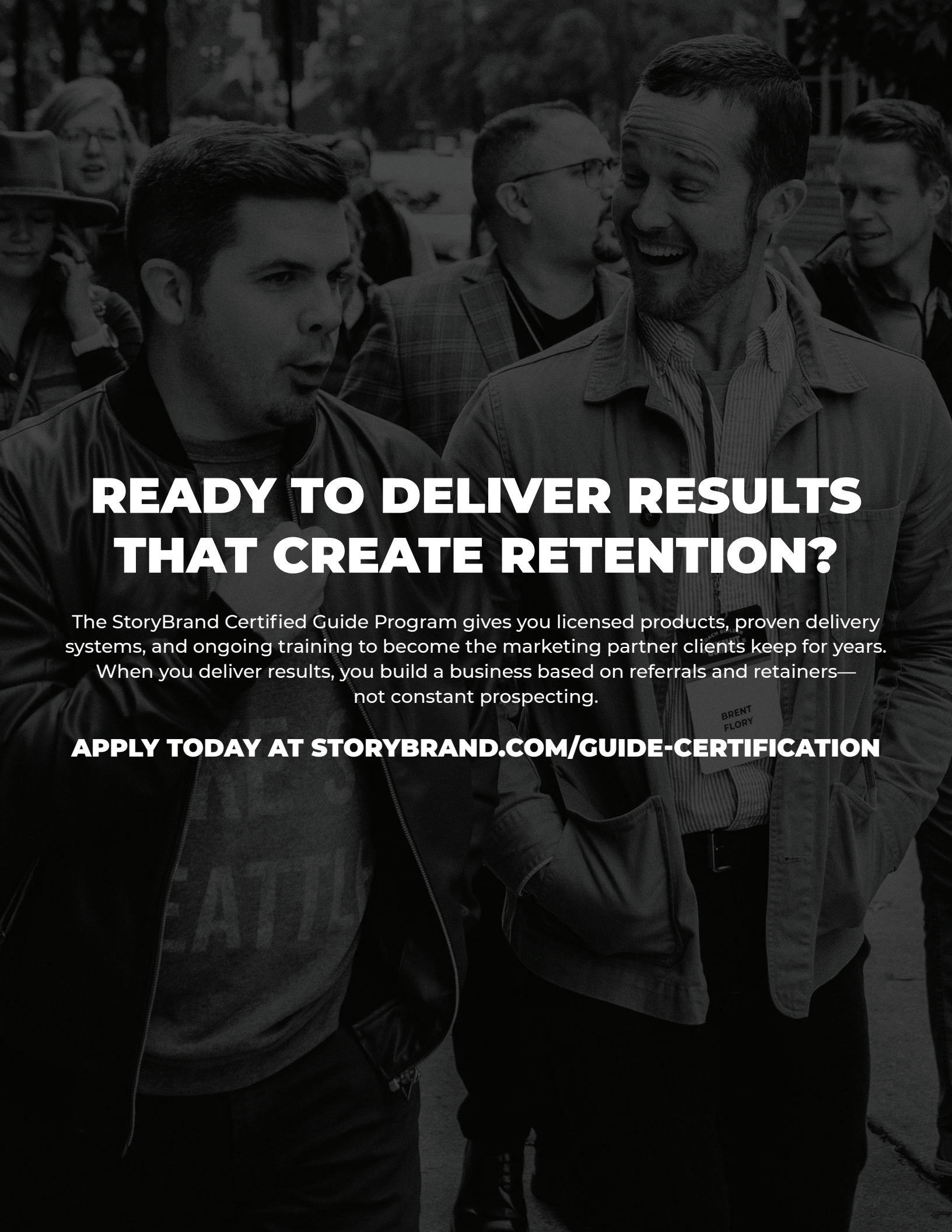
☐ Hire your first contractor when you’re consistently billing $20K+/month

☐ Start with a part-time designer or copywriter (not a project manager)

☐ Document your processes in Google Docs or Notion

☐ Grow to 3-5 team members before calling yourself an “agency”

The StoryBrand Solution: Phase Three, Step Fifteen of the Guide program includes playbooks and best practices for scaling beyond solo. You’ll also gain access to the StoryBrand Agency community and mastermind for ongoing support and inspiration.



READY TO DELIVER RESULTS THAT CREATE RETENTION?

The StoryBrand Certified Guide Program gives you licensed products, proven delivery systems, and ongoing training to become the marketing partner clients keep for years. When you deliver results, you build a business based on referrals and retainers—not constant prospecting.

APPLY TODAY AT STORYBRAND.COM/GUIDE-CERTIFICATION

BONUS OPPORTUNITY

The StoryBrand Lead Referral Program

Once your systems are installed and you've proven your ability to deliver results, you may apply to join the elite Lead Referral Program (LRP).

LRP Guides receive one pre-qualified Lead Referral Report per week directly from StoryBrand HQ. Each lead has already requested an introduction to a StoryBrand partner and filled out an extensive questionnaire, making it easier for you to close the deal.

This is reserved for the most experienced and capable Guides—but it's absolutely within reach once you've completed the playbook.

YOUR NEXT MOVE

If you've read this checklist and recognized your own challenges—and your own potential—you already know the truth: you don't need more tactics, hustle, or guesswork. You need systems.

The StoryBrand Certified Guide Program gives you a proven path, done-for-you assets, and ongoing support to build a marketing business that's profitable, respected, and sustainable. Hundreds of marketers have already installed these systems and changed the trajectory of their businesses—and their lives.

The only real question left is timing.

You can keep circling the same revenue ceiling, or you can decide to build the infrastructure that supports long-term growth, premium clients, and meaningful work.

If you're ready to stop piecing things together on your own and start following a proven playbook, now is the time to join the StoryBrand Certified Guide Program.

BEFORE YOU APPLY

The StoryBrand Certified Guide Program Vision & Values

Before joining the StoryBrand Certified Guide community, we want you to understand who we are and what we stand for. Our vision and values aren't just words on a page—they define the culture and character of our community.

OUR VISION

To support a global network of the most trusted marketing professionals in the world—StoryBrand Guides who help small businesses grow through clear, effective, story-driven marketing. When a business owner works with a StoryBrand Certified Guide, they don't just get marketing collateral—they get a committed partner who helps them win.

OUR VALUES

CLEAR: Clear Beats Clever
We believe confusion costs money and clarity creates customers. While we appreciate creativity, we never sacrifice clarity for cleverness. We create simple, straightforward, narrative-driven campaigns that actually work. Our clients shouldn't have to think hard to understand what we've created—they should immediately see how it helps them grow.

EFFECTIVE: Outcomes Over Outputs
Our clients don't pay us for websites, emails, or social media posts. They pay us for results. We are committed to growing our clients' businesses—not just delivering assets and moving on. When campaigns underperform, we follow up, adjust, and keep working until we get them wins. We measure success by client growth, not project completion.

GENEROUS: Community Over Competition
We do not see other Guides as competition. We see them as collaborators, allies, and friends. We share what we've learned—how we price, how we deliver, and how we win. We refer business to each other. We celebrate each other's wins. We believe there is more than enough business to go around, and we support fellow Guides even at personal cost, trusting that generosity creates opportunity for everyone.

OPTIMISTIC: Positivity Over Cynicism
We fight cynicism and negativity. We choose optimism, encouragement, and constructive problem-solving. We do not complain publicly about StoryBrand leadership, fellow Guides, or clients. When we have concerns, we address them privately and professionally. We protect this community by refusing to let negativity take root. The Guide program is a family, and families show up for each other with respect and support.

DRIVEN: Motivated to Grow
Marketing is always evolving, and so are we. We are committed to continuous learning and constant improvement. We stay sharp, we study what works, and we push ourselves to be the absolute best at what we do. Our clients deserve Guides who are not just certified—but exceptional.

OUR COMMITMENT TO EACH OTHER

By joining the StoryBrand Certified Guide Program, I commit to upholding these values and contributing to a culture of trust, excellence, and mutual support.

I understand that StoryBrand reserves the right to address behavior that violates these values. In most cases, this will include a private conversation and an opportunity for restoration. However, StoryBrand may immediately dismiss a Guide whose actions create harm to clients, fellow Guides, or the integrity of the community.

I am honored to be part of this network, and I commit to showing up as the kind of Guide I would want to work with.









If these values resonate with you, we'd be honored to have you in our community.



READY TO BUILD YOUR $400K MARKETING BUSINESS?

We'd be honored to help you build your $400K marketing business—
one smart system at a time.

The next StoryBrand Certified Guide training begins soon in Nashville, Tennessee.
Limited spots are available.

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