MODULE 10: EMAIL, CRM AND FOLLOW-UP

List audit and growth plan

Lesson: Your list is the asset you own · about 15 minutes

Find the contacts you already have and plan how to grow a list you own.

Your business (name, service, main city):

1. List every place your contacts currently live: inboxes, spreadsheets, booking platforms, phones. Estimate how many contacts are in each.

2. Count your contacts in each group: past clients, open inquiries, subscribers, partners and corporate contacts.

3. Describe your sign-up offer: its title, the problem it solves and where you will promote it.

4. Write the fields you will store for each contact, and the sentence that tells people why you are collecting them.

5. **Estimate how many bookings came from email last year and what each contact was worth.**

Check: can you now

- Explain the difference between an audience you rent on a platform and a list you own
- Identify the list sources available to your business and design one sign-up offer
- Decide which fields to store for each contact and how to keep the list clean

One change you will make this week