

THE SURRENDER MARKETING DIAGNOSTIC

Are you leading growth — or *surrendering* it?

A 20-question assessment to reveal where strategy is strong, where it's drifting, and where it may have been surrendered — measured across the four principles of Upstream Marketing.

THREE LEVELS OF VULNERABILITY

Strategic Discipline

85–100

You lead with insight, differentiate with clarity, innovate with purpose, and integrate strategy into action.

Strategic Drift

70–84

You're making progress, but inconsistencies are limiting your ability to grow with confidence and conviction.

Surrender Marketing

below 70

Marketing has been handed to platforms, processes, or pressure. You're optimizing activity — not shaping the future.

WHAT YOU'LL LEARN

- Where your organization **stands** across the four principles of Upstream Marketing.
- What's **fueling growth** — and what's putting it at risk.
- Where to **focus your energy** to strengthen strategy and performance.
- How to move from **Strategic Drift to Strategic Discipline**.

20 Questions · 10 Minutes

One leadership conversation that can change your trajectory.

HOW TO USE THIS DIAGNOSTIC

- 1 Read each statement and rate how strongly it describes your organization *today*.
- 2 Use a 1–5 scale — 1 = Strongly Disagree, 3 = Neutral, 5 = Strongly Agree.
- 3 Total your score and identify your overall level of vulnerability and priority areas.

SCORING YOUR RESULTS

Add up your total points (20–100) and use the three levels at left to determine your overall standing.

Your **lowest-scoring principle is your priority area** — that's where upstream marketing delivers the greatest impact.

THE DIAGNOSTIC

Rate all 20 statements

1 = Strongly Disagree · 3 = Neutral · 5 = Strongly Agree

Write your score (1-5) in the space provided.

01 Insight

Deep customer, market & technical understanding drives strategic choices.

- 1 We deeply understand the real problems, needs, and motivations of our best customers. _____ / 5
- 2 We have clear insight into market dynamics, trends, and competitive forces. _____ / 5
- 3 We use data and research to challenge assumptions and inform our strategy. _____ / 5
- 4 We understand the operational and technical realities that impact our market. _____ / 5
- 5 Our insights directly shape our strategic priorities and decisions. _____ / 5

INSIGHT TOTAL _____ / 25

02 Identity

A clear, differentiated brand creates preference and guides every decision.

- 6 Our value proposition is clear, compelling, and differentiated. _____ / 5
- 7 Our brand positioning is well-defined and consistently expressed. _____ / 5
- 8 We make strategic trade-offs to reinforce our identity. _____ / 5
- 9 Our messaging connects with the right audience in meaningful ways. _____ / 5
- 10 Our brand guides decisions across marketing, product, sales, and service. _____ / 5

IDENTITY TOTAL _____ / 25

03 Innovation

A disciplined approach to opportunity creates the future, not just reactions.

- 11 We have a clear point of view on where the market is going. _____ / 5
- 12 We proactively pursue opportunities for growth and differentiation. _____ / 5
- 13 We invest in ideas that create long-term advantage, not just short-term results. _____ / 5
- 14 We test, learn, and adapt faster than our competitors. _____ / 5
- 15 We turn insights and ideas into meaningful innovation. _____ / 5

INNOVATION TOTAL _____ / 25

04 Integration

Strategy and execution stay connected through alignment and learning.

- 16 Our strategy is clearly understood across the organization. _____ / 5
- 17 Our teams are aligned around shared priorities and goals. _____ / 5
- 18 Execution reinforces our strategy; it doesn't dilute or distract from it. _____ / 5
- 19 We measure what matters and learn from what we see. _____ / 5
- 20 We continuously adapt our strategy based on feedback and results. _____ / 5

INTEGRATION TOTAL _____ / 25

OVERALL
SCORE

_____ / 100

85-100

<70

70-84

Your lowest-scoring principle is your priority area.

AFTER YOUR
SCORE

Your score is a starting point – not a verdict.

The number tells you where you stand. A conversation tells you what to do about it.

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