



The CEO Hat Switch

DIAGNOSE THE REAL GROWTH GAP, CHOOSE THE RIGHT ROLE,
AND TURN CLARITY INTO ACTION.

*Determine whether you need to wear your
Marketing, Sales, or CEO Hat*



Jillian Conley

VP of Marketing, Communications,
& Strategies

*"The business you build
tomorrow is determined
by the hat you choose
to wear today"*

— Jillian Conley

Your business does not need more busywork.



One Workbook. Three hats. One clear next move.

Complete this in one focused sitting, or use one section each morning this week.

THE PROMISE

By the end, you will know whether your current bottleneck is belief, commitment, or leadership - and exactly what to do next.

YOUR 15-MINUTE PATH

Diagnose. Score what is actually happening - not what feels urgent.

Switch. Circle the Hat for the moment.



Marketing



Sales



CEO

Decide. Select one more with the highest business impact.

Do. Build a 30-day rhythm and track the right signals.

Do not solve the loudest problem first.
Solve the problem that changes the next decision.

Growth is a sequence, not a pile of tactics.



Marketing

Before the decision

BUILD BELIEF

How do I help People Believe?

I help people believe through Story Trust Awareness Relevance



Sales

At the decision

CREATE COMMITMENT

How do I help Someone Decide?

I help people decide through Listening Value Fit Invitation



CEO

Above the decision

CHOOSE WITH CLARITY

What does my business need now?

The main thing I need to focus on is Priority Evidence Cause Impact

The customer is the hero.
Each hat simply serves her at a different moment.

5-minute Growth-Gap Diagnostic.



Read each statement. **Check every one that is true right now.** Do not answer for the business you wish you had.

A BELIEF GAP

- ☐ Ideal clients do not quickly understand who I help
- ☐ My message focuses more on me than on the client.
- ☐ I post inconsistently or without a clear story.
- ☐ People engage, but few describe my value accurately
- ☐ Trust-building proof is thin or hard to find

Total Checks: ____/5

B COMMITMENT GAP

- ☐ People show interest but rarely take the next step.
- ☐ My offer or call-to-action feels unclear.
- ☐ I avoid directly inviting people to work with me.
- ☐ Common objections surprise me on sales calls.
- ☐ Prospects leave without a clear follow-up plan.

Total Checks: ____/5

C CLARITY GAP

- ☐ Check this if you are treating symptoms, changing priorities weekly, or cannot explain which action matters most right now.

Read your results.



Your highest score points to the hat to wear first.

A tie means CEO Hat first: Choose the bottleneck



MOSTLY A WEAR THE MARKETING HAT

Your audience needs a clearer reason to believe

YOUR FIRST MOVE

For 14 days: Sharpen the story, publish proof, and help the right person feel seen.



MOSTLY B WEAR THE SALES HAT

Belief exists, but the next step is weak or missing

YOUR FIRST MOVE

For 14 days: Clarify the offer, practice the invitation, and follow up with intention.



MOSTLY C WEAR THE CEO HAT

The first job is choosing the right problem

YOUR FIRST MOVE

Pause tactics: Gather evidence, name the constraints, and select one measurable priority

Write The Diagnosis

Right now, my business does not need more _____

it needs more _____

because _____

Run any tempting project through this page before spending time, money, or energy.

WHAT OUTCOME AM I TRYING TO CHANGE?

Name the result, not the activity

WHAT EVIDENCE SAYS THIS IS THE CONSTRAINT?

Use numbers, patterns, or direct client feedback

IS THIS A BELIEF, COMMITMENT, OR CLARITY PROBLEM?

Choose the hat before choosing the tactic

WHAT IS THE SMALLEST MOVE THAT COULD TEST THIS?

Prefer a convention or experiment over a rebuild

WHAT WILL I STOP, DELAY, OR DECLINE?

Priority without a tradeoff is only a wish.

THE ONE-MOVE DECISION

The highest-impact move I will make next is

Use this before a campaign, website rewrite, event, or week of content

1 WHO

The person I want to feel seen is....

2 BEFORE

Right now, she believes / fears / assumes...

3 AFTER

I want her to believe this is possible...

4 STORY

A true story or proof that makes it credible...

5 BRIDGE

The one helpful next step I can offer before asking for a sale...

BELIEF STATEMENT

After experiencing my marketing, she should think:

"You understand where I am, and I believe a different result is possible."

Sales is not pressure. It is a clear, human path from interest to a confident decision.

1 LISTEN

What is happening now - and what is it costing her? *"Tell me what made this important now."*

2 CLARIFY

What outcome matters most, and what has she tried? *"What would a great result change for you?"*

3 MATCH

Which solution fits? What does not fit? *Based on what you shared, here is what I recommend."*

4 INVITE

Make the next step explicit and safe. *"Would you like to move forward together?"*

5 FOLLOW UP

Resolve uncertainty; never create ambiguity. *"What information would help you decide confidently?"*

The invitation audit

My offer is: _____

The best next step is: _____

I will make the invitation by: _____

Use the Five Whys lightly: Keep asking what is underneath the visible problem until you reach something you can act on.

THE VISIBLE PROBLEM

I think the problem is...

WHY 1 WHY IS THAT HAPPENING?

WHY 2 WHAT EVIDENCE SUPPORTS THAT?

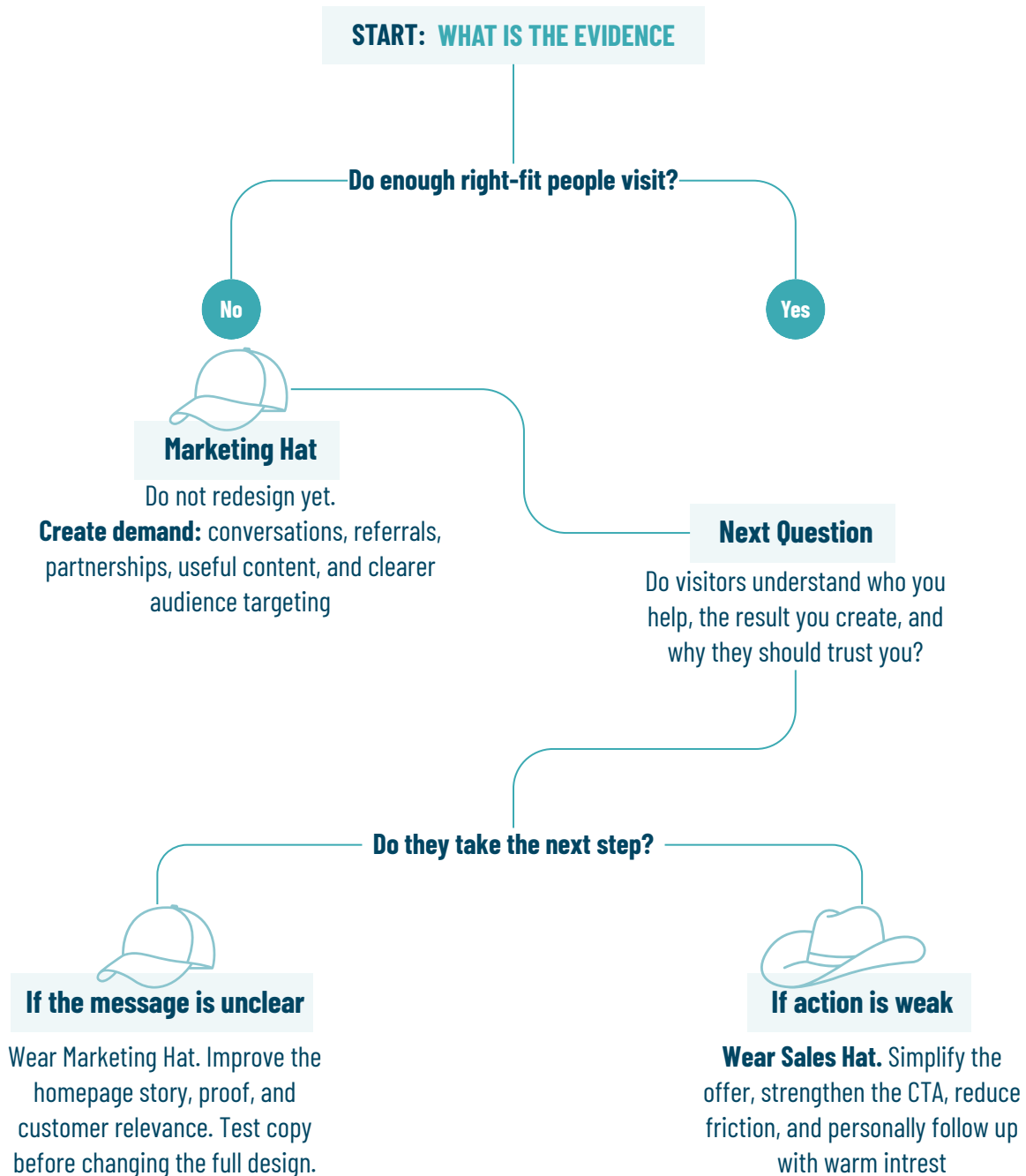
WHY 3 WHAT HAPPENS IMMEDIATELY BEFORE IT?

WHY 4 WHAT WOULD STILL BE TRUE IS I FIXED THE SYMPTOM?

The likely root cause:

The smallest evidence-based test:

Follow the signal. A redesign is only one possible answer.



CEO CHECK:

Would ten conversations create more learning than ten hours of redesign?

A healthy content rhythm helps people believe and gives them a clear way to commit

BUILD BELIEF

Teach Encourage Prove Relate

Suggested starting rhythm: 3 of 4 posts

CREATE COMMITMENT

Invite Explain Launch Follow up

Suggested starting rhythm: 3 of 4 posts

1 BELIEF

What will I help her understand?

2 BELIEF

What proof or story will I share?

3 BELIEF

What practical win can I give?

4 INVITE

What specific next step will I offer?

BALANCE CHECK:

Am i asking strangers to buy before earning trust - or educating forever without making an invitation?

Marketing and sales can happen in the same room just not at the same moment



IN THE ROOM

WEAR THE MARKETING HAT

BE CURIOUS.

Ask: "What are you building?"
"What feels hardest right now?"
"What would make this year a win?"



WHEN FIT APPEARS

WEAR THE SALES HAT

CHANGE HATS.

Say "That is exactly the kind of challenge I help with.
Would a short follow-up conversation be useful?"



AFTERWARD

WEAR THE CEO HAT

CHOOSE DEPTH OVER VOLUME.

Identify the five relationships worth nurturing
and schedule the next touch.

My five follow-ups

- | | |
|----------|-------------------|
| 1. _____ | Next Touch: _____ |
| 2. _____ | Next Touch: _____ |
| 3. _____ | Next Touch: _____ |
| 4. _____ | Next Touch: _____ |
| 5. _____ | Next Touch: _____ |

Your 30-day hat switch sprint.



Pick one primary hat for the month. The other hats support it; they do not compete with it.

MY PRIMARY HAT: **MARKETING / SALES / CEO** *Circle one.*

WEEK 1

OBSERVE

Capture evidence. Interview, review numbers, and name the real gap.

Signal I will track:

WEEK 1

BUILD

Create the smallest asset, message, or process that addresses the gap.

One thing I will make:

WEEK 2

BUILD

Put it in front of real people. Invite responses and record what happens.

Experiment I will run:

WEEK 2

BUILD

Keep, improve, or stop. Choose based on evidence, not attachment.

Decision I will make:

Freedom Boundary

For the next 30 days. I will stop/delay _____

so I can protect _____

Measure movement, not motion. Review every Friday in ten minutes

SIGNAL	THIS WEEK	NEXT WEEK	NOTE
Right-fit conversations			
Trust-building touches			
Clear invitation made			
Follow-ups completed			
Decisions/ conversions			

Friday Review

What created the most movement? _____

Where did people get stuck? _____

Which hat did I avoid? _____

What is next week's one move? _____

Your business does not need every answer today
it needs the right hat, the right question, and one intentional next move.