

## INTRODUCTION

**Marketing** is the art and science of “building your brand” in order to “sell more stuff.” This companion worksheet to **THE MARKETING BOOK** will help you organize your thoughts and create your own step-by-step marketing plan for your business.

- **Tip:** if you’re working in a team, have each person fill out this worksheet INDEPENDENTLY and then meet up to discuss.

Throughout:

- **Brainstorm** what’s unique about your product or service. It’s easier to write a marketing plan for one unique product or service, but you can write one for your business as a whole and a suite of products or services. Let your ideas flow!
- Do **market research**. However, constantly twaggle between your ideas and the realities of the marketplace. Keep an eye out on what might sell (and why), and how you can tailor what you’re selling to what they’re wanting. There has to be a **market** for your product or service; it has to satisfy either a need and/or a desire among a defined **customer segment**.
- Distinguish between the “**reality**” of your product or service and the “**messaging**.” A product like a car has hard reality features like an engine and four tires, and it has soft branding features like whether it’s a sport car, an ecofriendly vehicle, or a hipster transportation device. You can alter both “reality” and “messaging” as you build out your plan.
- Remember that **promotion** is job #1 for the marketer. Who will want what you have to sell? How will you reach them? What will your messaging be? Where will you promote your product or service, and how will you reach your target customers? And, for “extra credit,” how can you encourage customers to “share” their experience with your company, product, or service to their friends, family, and business colleagues?
- **Measure, measure, measure.** Once you’ve drafted your marketing plan, twaggle between your plan and reality. Revise the plan as you learn from reality.

Let's get started!

## I. THE OFFER

In our first Section, we address a key question of marketing: defining what you sell, that they want. A good business sells products, services, or both products and services that real people actually want. A great business sells something that specific customers want, so passionately, that they'll pay top dollar and shout the praises to the rooftops. In this Section, I'll ask you and your team to look deep into your marketing soul and really define your products or services, the customers who want what you sell, and what's so unique about your business that it will ignite a frenzy of demand and social sharing among your customers.

- Refer to **Section 1, Chapters 1-5** for help.

Let's get started!

### YOUR BUSINESS VALUE PROPOSITION

Describe what you sell in just a couple sentences, "as if" you were talking to a potential customer. This is your "elevator pitch," a short, quick summary of what your company offers?

### YOUR BUYER PERSONAS

Who wants what you sell? Write down their **demographic**, **psychographic**, and/or **situational** characteristics. Remember: **demographic** = something (nearly) unchangeable such as man vs. woman, old vs. young, rich vs. poor; **psychographic** = something “in their head” such as a vegan vs. a meat-lover, a Republican vs. a Democrat, a Christian vs. an Atheist; and, **situational** = a situation such as “about to get married,” “having a baby,” or “interested in going on a vacation.

**BUYER PERSONA #1:**

Description:

Demographic characteristics:

Psychographic characteristics:

Situational Characteristics:

**BUYER PERSONA #2:**

Description:

Demographic characteristics:

Psychographic characteristics:

Situational Characteristics:

**BUYER PERSONA #3:**

Description:

Demographic characteristics:

Psychographic characteristics:

Situational Characteristics:

### **YOUR BRAND**

Your “brand” is a unique combination of your company’s skills and your personality. For example, Apple sells phones and computers (their “skills”) that are stylish and easy-to-use (their “personality”). What is your brand? Describe what’s unique about your brand and write a branding statement below:

**Write a “branding statement” for your company, especially what is your “brand personality?”**

**Describe elements of your brand “iconography” such as your color scheme, types of photos or images you will use, or tone of your messaging:**

## POSITIONING

What's unique about what you sell vs. the competition? (Be BRUTALLY honest). You may need to write one "positioning statement" for your company and one for each product or service.

What's unique "in reality"?

What's unique "in terms of your brand or perception?"

If a customer asked you, what's truly unique about your product or service, what would your answer be? Be specific and compare yourself against the competition:

The competition is:

And we are different in these ways:

And you should choose us over them, because:

## II. PROMOTION

How do people find you, or how “will” they find you once you get your marketing plan up and running? How will they learn about your product or service? Will they search for it (and find you), or will they share it (and their friends, family, and business colleagues will get excited because of this “referral”?) In this section, we’ll dive into your promotion strategy.

- Refer to **Section 2, Chapters 6-13** or help.

Let’s get started!

### THE CUSTOMER JOURNEY

Customers go on a journey, from Awareness to Interest to Design to Action. First, describe the typical customer journey of one (or each) of your Buyer Personas. Then identify places along that journey where you can insert your marketing message.

The typical customer journey of one of your customers is as follows (Describe):

First, they...

And we can reach them at this step, by doing the following:

Second, they...

And we can reach them at this step, by doing the following:

Third, they...

And we can reach them at this step, by doing the following:

Fourth, they....



And we can reach them at this step, by doing the following:

Sometimes, they zig and zag as follows....

And we can reach them at this step, by doing the following:

Finally, they become sales lead or a small sale as follows:

And we can reach them at this step, by doing the following:

Then, they become a customer by making a real purchase....

And we can encourage them to “stay in contact” with our brand, by doing the following:

After the purchase, they may share their experience (or not)....

And we can encourage them to “share” their experience, by doing the following:

### THE FIVE DISCOVERY PATHS

How do customers “discover” you? This is perhaps the most important question in marketing.

1. **SEARCH.** Customers pro-actively search for you on search engines like Google, Yelp, industry directories, or other pro-active methods to “seek you out”. Circle where you fall on the continuum for search:

**not important** < ----- medium -----> **vey important**

**Explain**, especially what search engines or other methods of search matter to you

- Google
- Yelp
- Other industry-specific search engines such as Amazon, VRBO, etc.
- Other ways that customers search

**Keywords or Content Themes.** Briefly state keywords that will matter to you. What words or phrases, specifically, do customers use to search for you? (More research may be needed, here!)

2. **TRUST.** Customers rely on online reviews, the recommendations or others, and other “trust indicators.” Circle where you fall on the continuum for review / recommend / trust:

**not important** < ----- medium ----- > **vey important**

**Explain**, especially what “trust indicators” matter to your customers and why:

How will you influence trust indicators in your favor? For instance, how will you prompt “happy customers” to review you on Google, Amazon, or Yelp? How will you garner industry awards? What can you do to “grow” your trust indicators? Be specific.

3. **SHARE.** Here, customers are heavily influenced by friends, family, business colleagues or other influences to make a decision. Circle where you fall on the continuum for eWOM / Share / Influencers:

**not important** < ----- medium -----> **vey important**

**Explain**, especially which types of shares matter and which types of influencers:

What will your outreach strategy be to –

Encourage social sharing / social shares

Reach out to influencers

Work with superfans

- 4. INTERRUPT.** You have a product or service that they are not pro-actively looking for, and which isn't really highly shared. You'll have to "push" your message out. Circle where you fall on the necessity of "interrupt" marketing:

**not important** < ----- medium -----> **vey important**

**Explain**, especially how you will "push" your message out in an effective way and where:

Email marketing / push emails

YouTube advertising

Telemarketing

Direct / unsolicited physical mail

What will the “**hook**” be that will get them to “listen in” and “pay attention” rather than hang up, click away, or tune out?

What will the “**carrot**” be that will get them to move down the sales funnel? For example, you might offer an eBook, free webinar, free consult? Explain your “carrot”:

5. **BROWSE.** Here, you know that your customers read certain blogs, watch certain TV shows, or hang out on key social media. You work to get your message “adjacent” to them. Circle how useful “browse” marketing might be to you:

**not important** < ----- medium ----- > **vey important**

**Explain**, especially identify where your customers hang out that you can get your message adjacent to, such as specific blogs, social media, YouTube channels, etc.

What will the “**hook**” be that will get them to “listen in” and “pay attention” rather than hang up, click away, or tune out?

What will the “**carrot**” be that will get them to move down the sales funnel? For example, you might offer an eBook, free webinar, free consult? Explain your “carrot”:

### III. DEPLOYMENT

I would argue that we marketers are all really “content marketers,” and so in Section III, we turn to deployment with a heavy emphasis on “content marketing.” You need a lot of content for your marketing, whether in the “real world” or in the digital universe.

- Refer to **Section 3, Chapters 14-15** for help.

Let’s get started!

#### YOUR CONTENT MAP

At both a high level of generality and a specific piece of content, you need to define the purpose, message, and medium for your content. Building a content map means mapping out what content you can create cheaply and efficiently, what is the purpose of each type of content, and where that content will live. The easiest way to do this is to chart your content to be produced against each discovery path, and articulate whether it will be your own content, other people’s content, UGC (user-generated content), or interactive content such as the back-and-forth on social media.

1. **SEARCH.** Customers pro-actively search for you on search engines like Google, Yelp, industry directories, or other pro-active methods to “seek you out.”

Content to be produced, such as:

- Listings on Google My Business, Yelp, etc.
- Listings on other industry directory sites
- SEO-friendly content such as the website, landing pages, blog posts

- Ads such as those for Google, Bing, Yelp, etc.
- Other, explain:

The four content types – explain their relevance for your search strategy:

- Your own content:
- Curated content / other people’s content:
- UGC / User Generated Content
- Interactive Content

2. **REVIEW.** Customers rely on “trust indicators” such as reviews. Accordingly, you need to create a content marketing plan to grow your “trust indicators.” Explain how:

3. **SHARE.** What will customers share and why? Who is an influencer or superfan and how can you get him or her to “share your message.” Explain.

Ideas for highly shareable content.

Of which, the four content types – explain shareable content for each

- Your own content:
- Curated content / other people’s content:
- UGC / User Generated Content
- Interactive Content

**4. INTERRUPT.** Here, you are “interrupting” what they’re doing with some type of push advertising.

You will place “interrupt” advertising on –

- YouTube
- Unsolicited email
- TV
- Radio
- Telemarketing
- Other, explain

The “hook” will be:

The “carrot” will be:

**5. BROWSE.** Here, your message is adjacent to what they’re looking at, as for example a blog or on social media. Usually (but not always) this means that your content marketing is advertising. So you have to plan out what your ad will say, starting with a textual and/or visual hook and leading to a landing page offering a “carrot.”

You will place “browse” advertising on –

- YouTube
- Key blogs or publications (such as):
- Unsolicited email
- TV
- Radio
- Telemarketing
- Other, explain

The “hook” will be:



The “carrot” will be:

### **CONTENT TYPE / CONTENT PRODUCTION**

You need a lot of content to do marketing. Map out what type of content you will produce, who will produce it, and when, where, and how:

Website content:

Landing pages on your website:

Blog posts or articles:

White papers, case studies, customer success stories:

eBooks

Brochures or datasheets:

Signage:

Menus:

Webinars, eCourses, Real-World Seminars, Podcasts:

Personal selling:

FAQs or Long Form Content:

Email / Email Newsletters:

Infographics / Instructographics:

Ads on Google:

Ads on Social Media:

Curated Content / Other People's Content:

Demos, Instructional Videos, How Tos:

Datasheets or Product Brochures:

Quizzes or Personality Tests:

Giveaways, Discounts, or Special Offers:

“Challenges” or “contests” (especially on social platforms like YouTube or TikTok)

PSAs / Public Service Announcements:

Live Streams:

Photos:

Social Media Posts:

Memes:

Presentations:

Customer Banter:

Telemarketing or Cold Calls:

Quotes:

Press Releases:

Apps:

Contests:

Testimonials and Customer Reviews:

Video:

Podcasts:

### FOUR TYPES OF CONTENT

As you plan out your content marketing strategy, remember that there are four types of content as evaluated by who will produce it. Brainstorm your strategy for efficiently producing each type:

**Your own content.** Who will produce what, when, where and how?

**Other people's content / content curation.** Who on your team will curate content to be shared and to position your brand as a "helpful expert?"

**UGC / User-generated content.** What ideas do you have to encourage your customers, fans, superfans, and influencers to "spontaneously" create content that supports your brand?

**Interactive content.** How can your employees and team members interact with customers and potential customers, whether in the real world or online?

Once you have the basics of your content, it's time to get specific. Thus we will "twaggle" over to specific venues or platforms. :Let's briefly plan out where we'll put our marketing and promotion efforts. Which one seems to have the highest potential ROI?

- Refer to **Section 3, Chapters 16-23** for help.

### SEARCH ENGINES: SEO AND GOOGLE ADS

Google, of course, is the world's largest search engine. But there's also Amazon, YouTube, Yelp and industry-specific niche search engines. Then, within each, there are free "organic" opportunities and paid "advertising" opportunities. SEO and Google Ads are largely the "search" path.

How **relevant** do you see search engines to your marketing efforts?

not relevant at all | medium | highly relevant

Your strategy is thus:

**SEO** / Work to capture "free" or "organic opportunities.

not relevant at all | medium | highly relevant

**Advertising** / use paid advertising like Google, Yelp, or Amazon ads to get placement

not relevant at all | medium | highly relevant

To-dos are:

- Learn** the tricks of the trade, such as SEO and/or Google Ads.
- Deploy** your content such as organic SEO content and/or paid advertisements
- Measure** whether this is working in terms of brand-building and/or selling more stuff.

## SOCIAL MEDIA MARKETING

Social media marketing uses networks like Facebook, YouTube, LinkedIn, Snapchat, Yelp, etc. to promote your brand as well as products and services. As with SEO, there are both free “organic” opportunities and paid “advertising” opportunities. Social media is largely the “share” path as well as “influencer marketing.”

How **relevant** do you see social media (in general) to your marketing efforts?

not relevant at all | medium | highly relevant

And specifically for each (you may have to do some research), how relevant is:

### **Facebook**

not relevant at all | medium | highly relevant

### **Instagram**

not relevant at all | medium | highly relevant

### **Twitter**

not relevant at all | medium | highly relevant

### **LinkedIn**

not relevant at all | medium | highly relevant

### **YouTube**

not relevant at all | medium | highly relevant

### **Pinterest**

not relevant at all | medium | highly relevant

### **TikTok**

not relevant at all | medium | highly relevant

### **Yelp / Google My Business / Review Marketing**

not relevant at all | medium | highly relevant

Your strategy is thus:

**Organic/** Work to capture “free” or “organic opportunities, especially efforts to increase sharing and/or leverage influencers:

not relevant at all | medium | highly relevant

**Advertising /** use paid advertising on a network

not relevant at all | medium | highly relevant

To-dos are (for each network):

- Learn** the tricks of the trade, such as Facebook, Twitter, LinkedIn marketing, etc.
- Deploy** your content such as organic content and/or paid advertisements
- Measure** whether this is working in terms of brand-building and/or selling more stuff.

## REMARKETING

Remarketing and its twin, retargeting, are advertising tactics to show and reshow your message to customers who did not convert at the first attempt. It’s “following them around” the Internet via the Google Display Network and Facebook Pixels.

It works best for high value products or services with a long sales cycle such as vacation cruises. Thus question are:

1. Do you sell a high value product or service? Yes, no, maybe:
2. Does it have a long sales cycle from awareness to action? Yes, no, maybe:
3. Is it “outside” of sensitive topics like healthcare that do not allow remarketing? Yes, no, maybe:



How **relevant** do you see remarketing (re-showing ads to website visitors on other sites like YouTube, Facebook, blogs, etc.)?

not relevant at all | medium | highly relevant

How **relevant** do you see retargeting (purchasing demographic targets via Google Display Network, Facebook audiences, or networks like AdRoll)?

not relevant at all | medium | highly relevant

To-dos are (for remarketing and/or retargeting):

- Learn** the tricks of the trade, such as how to set up remarketing and/or retargeting
  - On Google via the Google Display Network and Google remarketing
  - On Facebook via the Facebook Pixel
  - On third-party networks like AdRoll
- Deploy** your ads using remarketing and/or retargeting
- Measure** whether this is working in terms of brand-building and/or selling more stuff.

Remember that remarketing tends to be more effective than retargeting!

### **WORD-OF-MOUTH, EWOM AND INFLUENCER MARKETING**

They say that “sharing is caring.” This medium is all about growing your shares either spontaneously or via influencers.

How relevant do you see, the following:

**Word-of-mouth** (in the “real world”):

not relevant at all | medium | highly relevant

e-Word-of-mouth (**eWOM**) (in the “digital world”):

not relevant at all | medium | highly relevant

**Superfans**, that is customers who really love your product or service:

not relevant at all | medium | highly relevant

**Influencers**, that is paid promoters:

not relevant at all | medium | highly relevant

**Journalists** or **bloggers**, that is non-paid organic coverage:

not relevant at all | medium | highly relevant

Explain the content you will create that will be “highly shareable:”

Explain your outreach strategy to nurture:

Word-of-mouth:

eWOM / social sharing:

Superfans:

Influencers:

Journalists / bloggers:

### EMAIL MARKETING

Email marketing, the “Rodney Dangerfield” of digital, often gets no respect. But it can be extremely high value. Can email marketing work for you? Email marketing to you is:

not relevant at all | medium | highly relevant

Assuming you see potential in email marketing, then, first, do you have content that your customers truly care to receive via email? This can be a truly interesting monthly or weekly eLetter, eBooks or one-time offers, webinars or other learning opportunities, etc. Explain, briefly, the content that will be on your email system:

Second, how can you build your email list? What are the mechanisms by which you will promote sign ups to your list? And which provider will you use (e.g., ConstantContact, AWeber, Mailchimp, etc.)? Explain:

### PERSONAL SELLING

Personal selling is alive and thriving in high value, complex industries such as professional services, especially B2B. How relevant do you see personal selling to your marketing plan:

not relevant at all | medium | highly relevant

Will you use lead generation, that is using webinars, eBooks, and other “carrots” to acquire leads for follow up? If so, explain, how leads will be collected and the follow up process after a lead is acquired:

If you will use cold-calling or other forms of cold personal selling, explain:

What are the –

**Hooks** that sales people will use to get the prospect to listen:

**The pitch.** How will they pitch what you’re selling in such a way that the customers will continue to listen:

**Common objections** from customers and strategies by which your sales staff will overcome them? (This might become a very detailed role-playing exercise or sales training for your staff).

Will your personal selling be truly face-to-face, over the phone, or involve email? Identify all the relevant contact points between your salesperson and the customer:

### **TRADITIONAL MARKETING**

While most everything has “gone digital” when it comes to marketing, there are still opportunities in traditional media. Personal selling (as explained above) is certainly one. Trade shows are often another. Review your traditional media opportunities, and if you see opportunities, include them in your marketing plan.

#### **Print media**

not relevant at all | medium | highly relevant

#### **Yellow Pages**

not relevant at all | medium | highly relevant

#### **Telemarketing**

not relevant at all | medium | highly relevant

#### **Direct Mail**

not relevant at all | medium | highly relevant

#### **TV**

not relevant at all | medium | highly relevant

#### **Radio**

not relevant at all | medium | highly relevant

**Trade Shows**

not relevant at all | medium | highly relevant

**Personal Selling**

not relevant at all | medium | highly relevant

**Public Relations**

not relevant at all | medium | highly relevant

**Word-of-mouth**

not relevant at all | medium | highly relevant

For each, if you see opportunities, then deploy your marketing messaging into that medium. Measure your results, and if it's working, keep doing it. If not, stop.

## EPILOGUE

It's not enough to just "think about" your marketing. You have to go DO your marketing. And, while you DO your marketing you have to measure it. What's working? That is, what's a) building your brand, and/or b) selling more stuff? Do MORE of that. What's not? Do LESS of that. Along the way, NEVER STOP LEARNING.