

MARKETING STRATEGY

A workbook designed to help you with clarity and organization to set up
and scale your business.



For Small Business Owners,
Affiliates, Associates, Ambassadors, and Influencers



Core Concept

What product or service are you offering?

Who is your ideal customer?

What main pain points are you solving?

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Where and how can you reach your ideal client?

My main value proposition is...

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Core Questions

What problem is this product/service solving?

Who is this product/service for? (target audience)

What are the main aspirations & fears of your target audience?

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How is your product/service help the target audience with their fears & goals?

How will you make your target audience talk about and recommend your product/service?

What assets are you building for your brand?

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Brand Strategy

	Purpose:		Target Audience:		Personality:
BRAND CORE	Vision:	BRAND POSITIONING	Positioning (Premium/Bespoke etc):	BRAND PERSONA	Brand Voice:
	Values:		Generating Awareness:		Tagline:



Ideal Client

PART 01

SECTION: CORE STRATEGY

Name:	Gender:	Age:	Marital Status:	Income:	Education:
Location:		Personality:			
Hobbies:	What does he/she value:		Causes he/she supports:		
Main Goals & Aspirations:			Main Problems & Challenges:		



Ideal Client

PART 02

<p>What does he/she talk about:</p>	<p>What platforms does he/she visit:</p>
<p>Select the 3 most important aspects for your ideal client:</p> <p><input type="checkbox"/> Price <input type="checkbox"/> Speed <input type="checkbox"/> Flexibility</p> <p><input type="checkbox"/> Quality <input type="checkbox"/> Service <input type="checkbox"/> Dependability</p>	<p>Choose the platforms your ideal client uses the most:</p> <p><input type="checkbox"/> Youtube <input type="checkbox"/> Instagram <input type="checkbox"/> TikTok</p> <p><input type="checkbox"/> Facebook <input type="checkbox"/> Pinterest <input type="checkbox"/> Other:</p>
<p>Notes:</p>	
<p>Trusted marketing channels he/she trusts when making a buying decision (google, influencers, niche blogs, reviews etc):</p>	<p>Marketing message that resonated with his/her pesonality and aspirations:</p>



Mission Statement

<p>01. Why does your brand/business do what it does?</p>	<p>Write your companies mission statement - Our company's mission is to (02) and (03) because of (01)</p>
<p>02. What do you want to help your customers to achieve?</p>	
<p>03. What impact do you want to have in the community?</p>	



Vision Statement

<p>01. What would the company be doing so you would consider it a success?</p>	<p>Write your companies vision statement - Mission statement was about "now", in contrast to vision statement, which is what the company aims to be some point in the future</p>
<p>02. What would the company's success look like financially?</p>	
<p>03. What will your customers think and feel about the company?</p>	



Pricing Strategy

01. Cost Based Pricing

A fixed sum or percentage of profit is added to the fixed costs to arrive at the final sale price. This method is perfect for wholesalers and businesses dealing in large quantities as the profit comes from volume.

02. Value Based Pricing

A final price is based on the perceived value for the customer - ex. cost of logo will be higher for a large company compared to a small mom & pop's.

03. Price Skimming

This involves setting high prices when a new product comes out and then lowering them gradually as new competition comes to the market. This strategy aims to get you customers at multiple price points.

04. Bundle Pricing

By bundling your products together into larger packages you provide higher perceived value for your customers - which increases conversion rate and sales numbers. Perfect for digital products.

05. Penetration Pricing

By selling at lower prices compared to your competition you'll be able to gain market share and make up the low sale price with higher volume. This is a good strategy for starting businesses with low fixed costs.

06. Premium Pricing

The holy grail of pricing. By asking higher prices than your competitors you are asserting your company/brand as higher quality. Perfect for niche products.

What is the business pricing strategy will the company deploy? Why?



Marketing Funnel

Awareness & Getting Discovered	
Goal/Outcome: (ex. get more viewers on my website)	Steps to Take: (ex. post more on social media)

Build Trust and Interest	
Goal/Outcome: (ex. share educational and behind the scenes content)	Steps to Take: (ex. offer useful freebies)

Taking Action	
Goal/Outcome: (ex. sell premium course or workbook)	Steps to Take: (ex. create time limited promotions and offers)

Nurture Customers	
Goal/Outcome: (ex. get repeat customers)	Steps to Take: (ex. offer upsells and exclusive affiliate program)



A.I.D.A Model

Awareness	Interest	Desire	Action
How will people get to know about your brand/product/service?	How will you get potential clients intrested in trying your product/service?	How will you get potential clients to try your product/service?	How will you get potential clients to commit and purchase or try out your product/service?



Marketing Checklist

SECTION: CORE STRATEGY

Offline Marketing

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|---|--|
| <input type="checkbox"/> Informative Flyer | <input type="checkbox"/> Networking Events |
| <input type="checkbox"/> Trade Shows | <input type="checkbox"/> Radio/TV Ads |
| <input type="checkbox"/> Newspaper/Magazine Ads | <input type="checkbox"/> Direct Mail |
| <input type="checkbox"/> Fairs/Live Events | <input type="checkbox"/> Telemarketing |
| <input type="checkbox"/> Billboards | <input type="checkbox"/> Word of Mouth |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |

Online Marketing

- | | |
|---|--|
| <input type="checkbox"/> Website/Blog | <input type="checkbox"/> Linktree for profiles |
| <input type="checkbox"/> Email Newsletter | <input type="checkbox"/> Social Media |
| <input type="checkbox"/> Influencer/Affiliate Marketing | <input type="checkbox"/> Webinars |
| <input type="checkbox"/> Google Ads | <input type="checkbox"/> SEO |
| <input type="checkbox"/> Facebook Ads | <input type="checkbox"/> Sales Funnels |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |

Notes:



Go to Market

01. What are we selling? 01	02. Who are we selling to? 02
03. When should we launch? 03	04. Why do clients need this? 04
05. How do we sell? 05	06. Where can we reach them? 06



Marketing Channels

Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	
Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	
Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	
Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	



Marketing Tactics

Awareness	Marketing Tactics	Monthly Cost
Paid Ads		
Social Media		
Blog Content		
Email Marketing		



Messaging Strategy

PART 01

SECTION: CORE STRATEGY

Main Value Proposition:	Target Audience:	Key Benefits:	Elevator Pitch: (A 30 Second summary of main value you provide, key benefits, proof of competence and company mission)
Company Mission:			
Slogan:			



Messaging Strategy

PART 02

SECTION: CORE STRATEGY

<p>Product/Service:</p>	<p>Customer Needs:</p>	<p>Differentiating Message: (How you're different. 1-2 sentences)</p>	<p>Main Message: (A Tagline or Headline you can use in messaging to describe how you're different from competition and how you solve a customers need.)</p>
<p>Target Audience:</p>	<p>Key Benefits:</p>	<p>Slogan:</p>	

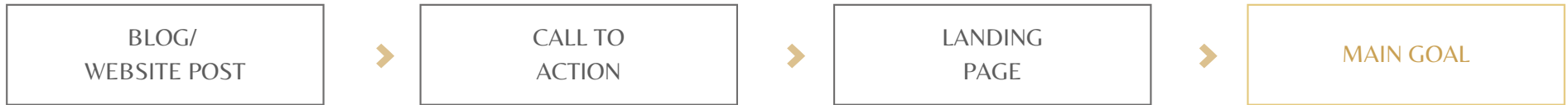


Competitor Analysis

Competitor Name:	How are they reaching customers?	How are they pricing their product/service?
Product/Service:		
What problems are they solving for their clients?	How are they actively marketing?	What are they good at?
	What kind of content are they producing (blog posts, social media etc.)?	What's a take-away you got from this analysis?



Web & Blog Goals



- 01** It's important to keep in mind what the main purpose of your website is. By knowing your end goal, you can design all the content on your website to serve the main purpose. The end goal can be anything from making a sale to getting visitors to sign up for a newsletter.

What do you want to happen when you get a visitor to your website?

- 02** Before getting your visitors to the main goal of your website you must attract them with compelling content. That's when your blog comes into play. Write down below how your blog is going to be useful for your readers. What are you offering that they can't get anywhere else?

How is your blog (or social media pages/newsletters/emails) going to serve its readers? What unique, helpful and entertaining content will you share?



Content Ideas

SOCIAL MEDIA

Share a Portfolio Item

Share Behind the Scenes

Share What Inspires You

Share a Client Testimonial

Share a Helpful Tip in your Niche

Share a Positive Affirmation

Share a Story of Your Struggle

Do a "Ask me Anything" Session

Share a Customer Photo of Your Product

Share a Story of How You got Started

LEAD MAGNETS

PDF Guide

eBook

Planner

PDF List
(ex. "50 Best email Headlines")

Useful Worksheet

Discount Code

Assesment Test

Useful Resouce List

Quiz / Survey

Free Trial

BLOG CONTENT

No blog? This can be used for newsletters and emails

Write About Your Process

Create a Tutorial

Share Your Insights

Do a Comparison Post

Use Quora Questions as Inspiration for Blog Post Ideas

Write "Top 10" Style Blog Posts

List Hacks & Time Savers

Write a Helpful Review

Share a Portfolio Item

Use Youtube videos for Inspirations for Your Blog Posts



Buyer's Journey

People will reach your website/blog in different stages of their buyer journey and therefore their willingness to commit to buying is different. That's why each stage of the buyers journey requires different types of content - from educational and comparisons to case studies and webinars. At the end of this worksheet, come up with specific content ideas for each stage of the journey. What can you teach your audience? What useful content can you give away for free?

O1 Awareness

Content Ideas:

People are looking for different options for their problem or for the goal they have.

e.g. searching for "What is branding?"

Types of Content:

- Educational Posts
- How to Videos
- Tutorials
- Social Media Posts

O2 Consideration

Content Ideas:

People are comparing multiple options to choose the right one.

e.g. searching for "What is the difference between branding and a logo design?"

Types of Content:

- Infographics
- Webinars
- Educational Posts
- Social Media Posts

O3 Decision

Content Ideas:

People know what they need and are looking for a specific solution to their problem.

e.g. searching for "Best personal branding experts in New York"

Types of Content:

- Demos/Trials
- Case Studies
- Customer Reviews
- Educational Posts



Keyword Research

Determine what topics you want to rank for in the search engines. You can look at what your competition is ranking for and with what content to give yourself a head start. Think of what people looking for your product/service are searching for in Google? What do they want to know? What problems are they looking to solve?

Make a list of topics that are related to your niche and relevant for your audience

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-

For the next section write down some keywords related to the above topics. You can do this by typing the topics (also try adding questions such as how, what etc.) in google search box and then let google autocomplete the sentence (these are some high volume keywords that you can use). You can also search for a certain keyword and then scroll down to "related searches" for more ideas. Or you can use google keyword planner. Aim for the long tail keywords (3+ words)

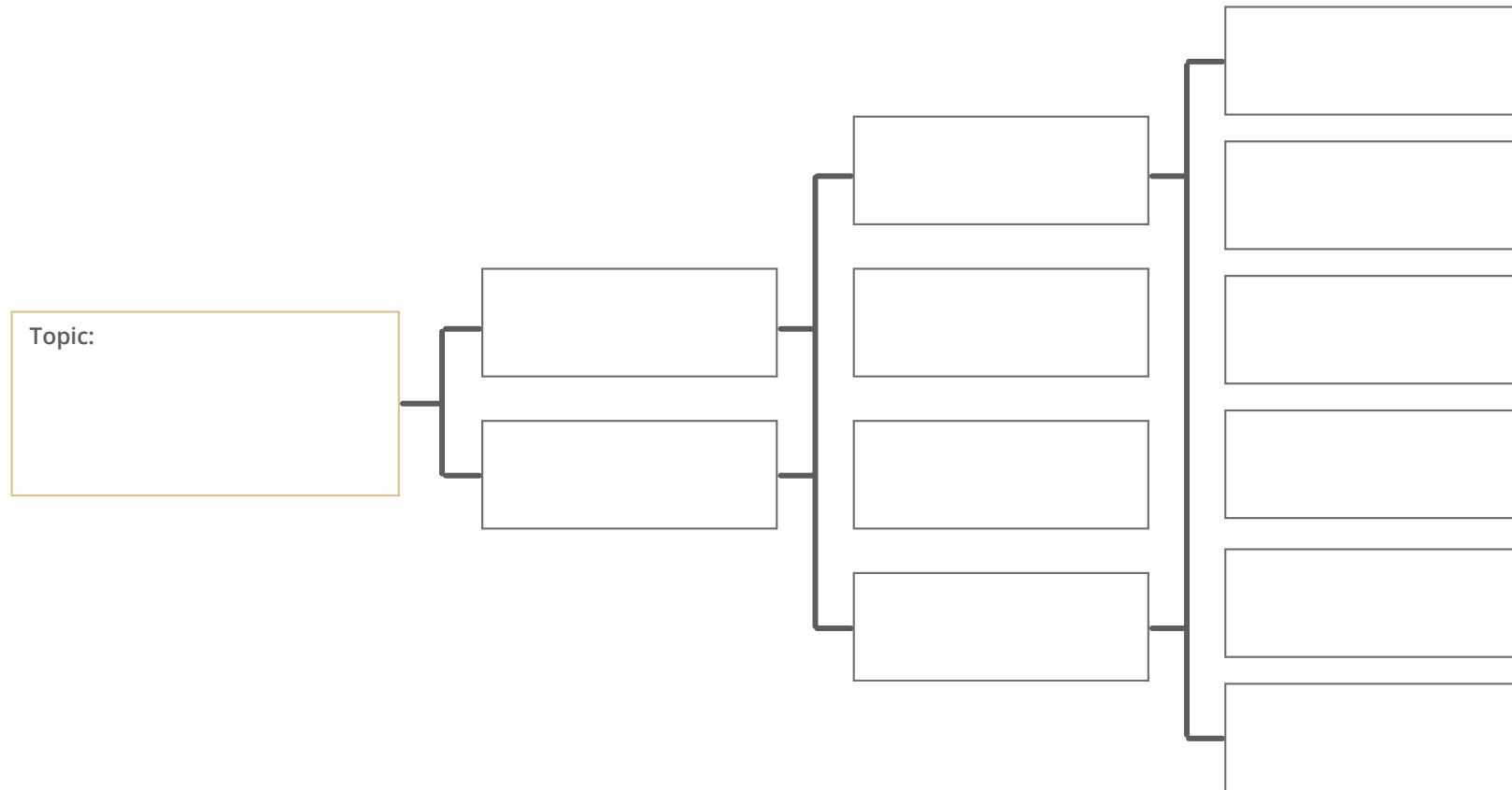
Make a list of keywords related to your service/product

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-
-
-
-
-



The Keyword Tree

This is a worksheet for brainstorming lots of relevant long tail keywords & topics (or questions that people search for) related to your specific niche. Use google keyword tool, google autofill, relevant searches, competitor's content and quora questions as your guide.



Competitor Keywords

Use this worksheet to research what keywords and topics is your competition using and trying to rank for. This exercise is designed to just give you some ideas about what keywords and topics you could use on your own website. Think of what resources and articles you could write to provide more value to readers compared to your competition.

Competitor Name/Details:	Keywords/Topics:	How can I provide more value?
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Content Planner

You can use these content planners for both social media posts and blog posts. The little prompts will help you come up with the general idea for your content (what's it about, what value does it offer, who needs it etc.) and a rough timeline for posting.

Post Title:
Date to Post:
Keywords:
Content Ideas:

Post Title:
Date to Post:
Keywords:
Content Ideas:

Post Title:
Date to Post:
Keywords:
Content Ideas:



Monthly Content PLANNER

SECTION: CONTENT STRATEGY

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

<p>My Priorities:</p>
<p>Notes & Ideas:</p>



Email Marketing PLANNER

SECTION: CONTENT STRATEGY

Email Title:
Main Goal:
What content will be included in the email: (How is it relevant to your audience)
Call to Action:

Email Title:
Main Goal:
What content will be included in the email: (How is it relevant to your audience)
Call to Action:

Email Title:
Main Goal:
What content will be included in the email: (How is it relevant to your audience)
Call to Action:



Email Campaign PLANNER

SECTION: CONTENT STRATEGY

Campaign Name:
Target Group:
Main Goal of the Campaign:
What Content will be included in the sequence of emails? (How is it relevant to your target audience)

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Target Group:
Main Goal of the Campaign:
What Content will be included in the sequence of emails? (How is it relevant to your target audience)



Social Media Strategy

Social Media Channel:
Main Goal:
Strategy / Content Ideas (How are they relevant to your audience?):
Keywords / Hashtags to use:

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Main Goal:
Strategy / Content Ideas (How are they relevant to your audience?):
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