

clear.
simplified.
your own.

Module 4: Creating Your Personal Marketing Plan the marketing and messaging class



DEVELOP YOUR 3-STEP
MARKETING PLAN

EXERCISE #2

INTRODUCTION

This exercise will walk you through creating your own 3-step marketing plan.

The 3 steps are:

- 1) **Making Initial Connections:** This is about reaching more people and expanding your network.
- 2) **Creating Ongoing Engagement:** This is about building relationships with people and building your “know, like, and trust” factor with them.
- 3) **Presenting Your Offer:** This is about consistently and regularly letting people know how they can work with you or buy your product.

In order for your plan to work for you it needs to:

- ✓ Expand your visibility.
- ✓ Stretch your gently.
- ✓ Be do-able.
- ✓ Align with you.
- ✓ Build connection.
- ✓ Bring you business.

We'll be checking in on all these points as we go forward.

For each way you've listed above, answer the following questions...

Do you like it? Is it easy and enjoyable for you? Is it a struggle or overwhelming for you?

For each way you've listed above, answer the following questions...

Is it working? Are you getting new business? Does it seem worth the effort?

For each way you've listed above, put a checkmark by the ones that you can imagine being:

- ✓ *Easiest for you*

For each way you've listed above, put a checkmark by the ones that you can imagine being:

- ✓ *Enjoyable, aligned with your energy, values, business, and message*

For each way you've listed above, put a checkmark by the ones that you can imagine being:

- ✓ *A bit of a stretch, but not too far out of your comfort zone*

For each way you've listed above, put a checkmark by the ones that you can imagine being:

- ✓ *Do-able, something you would and could execute*

For each way you've listed above, put a checkmark by the ones that you can imagine being:

- ✓ *A good way to build connection for you*

 *Add the 3 ideas with the most checkmarks to your option list on p. 8.*

If you have more than 3 options on your list, ask yourself which 3 will be:

- ✓ *The easiest for you*
- ✓ *The most enjoyable, aligned with your energy, values, business, and message*
- ✓ *Raise your visibility the most (most bang for the buck)*
- ✓ *Feel the most connected*

Choose 3 new marketing activities and write them in below.

(You can expand on this later. For now, we want this to be simple and do-able.)

1

2

3

STEP #2: CREATING ENGAGEMENT

Once you've made a new contact, you'll need to develop a way to stay in touch with them and continue to engage with them. For each of the "making an initial connection" marketing activities from above, you will build an engagement plan.

- ✓ How often will you do that activity?
- ✓ How will you stay in touch? Name 3 ways.
- ✓ How often will you do each of these activities.

Here's are a few examples:

- 1 I will use Facebook to make real connections. *(Daily)*
 1. I will post about things that matter to me, share my personal perspective. *Once a week.*
 2. I will look for opportunities to have real conversations with people and respond thoughtfully, generously. *Daily.*
 3. I will seek out opportunities to be helpful and share my professional expertise in a least 3 groups. *Daily.*

2 I will go to the *monthly* Women In Business networking event.

1. I will look to reconnect with at least 3 women I've met before, asking them about something we spoke about previously.
Monthly.
2. I will follow-up with personalized, nice to meet you emails after each meeting. Bonus for sending them a pertinent article, link, or introduction. Be helpful. *Monthly.*
3. I will invite one woman I've met out to coffee or lunch to get to know them better. Bonus for being in complementary fields.
Monthly.

3 I will ask existing and past clients for referrals. (*One person a week.*)

1. I will send a handwritten thank you card after each referral.
(Within 2 days of the referral.)
2. I will provide something special and extra the next time I see the referrer and express my thanks again. *TBD.*
3. I will send an email with something helpful or just to say hi to my top 10 referrers. *Monthly.*

Now it's your turn.

- ✓ What are your 3 initial connection methods?
- ✓ How often will you do that activity?
- ✓ How will you stay in touch? Name 3 ways.
- ✓ How often will you do each of these activities.

1

(Write in your first "making the initial connection" marketing activity here + how often you will do it.)

I will continue to engage with them by doing the following
(include frequency):

A

B

C

2

(Write in your second "making the initial connection" marketing activity here + how often you will do it.)

I will continue to engage with them by doing the following
(include frequency):

A

B

C

3

(Write in your third "making the initial connection" marketing activity here + how often you will do it.)

I will continue to engage with them by doing the following
(include frequency):

A

B

C

STEP #3: PRESENTING YOUR OFFER

Once you've created a relationship with someone, you'll need to take the next step and suggest they work with you or buy your product. For each of your marketing strategy, ask yourself:

- ✓ What can I offer them? *Decide which of your products or services to suggest to them.*
- ✓ How will I present this to them? *What means of communication? Am I making it easy for them to take action? Links? Buttons? Clear instructions?*
- ✓ When and/or how often will you do this?

1

Connect on Facebook

(Write in your second marketing strategy here.)

- ✓ What will I offer them? *Decide which of your products or services to suggest to them.*

Free 30 minute consultation.

- ✓ How will I present this to them? *What means of communication Am I making it easy for them to take action? Links? Buttons? Clear instructions?*

Private chat with link.

- ✓ When and/or how often will you do this?

Offer one a week.

Now it's your turn:

1

(Write in your first marketing strategy here.)

- ✓ **What will I offer them?** *Decide which of your products or services to suggest to them.*

- ✓ **How will I present this to them?** *What means of communication? Am I making it easy for them to take action? Links? Buttons? Clear instructions?*

- ✓ **When and/or how often will you do this?**

2

(Write in your second marketing strategy here.)

- ✓ **What will I offer them?** *Decide which of your products or services to suggest to them.*

✓ How will I present this to them? *What means of communication Am I making it easy for them to take action? Links? Buttons? Clear instructions?*

✓ When and/or how often will you do this?

3

(Write in your third marketing strategy here.)

✓ What will I offer them? *Decide which of your products or services to suggest to them.*

✓ How will I present this to them? *What means of communication? Am I making it easy for them to take action? Links? Buttons? Clear instructions?*

✓ When and/or how often will you do this?

NEXT STEP: CREATE A PERSONAL IMPLEMENTATION PLAN

1) Create a checklist. I highly suggest going back through your answers and decisions and creating a checklist. Organize it by what you've decided to do daily, weekly, monthly, and so on.

- Print out your checklist.
- Get in the habit of referring to it daily, at the end of the week and month.
- Add the activities to your calendar. Set reminders.

2) Check in on your checklist.

- Does it feel do-able? Are you being reasonable? Is there anything that feels like too much of a stretch? Or something that's going to be too stressful? *Adjust your plan.*
- Does it feel too small, like not enough growth? *See how you can stretch yourself.*

3) Test and tweak. Evaluate your plan as you go along.

- Is it bringing you new clients? *(Have you given it enough time? Have you created deep enough relationships? Are you executing frequently and consistently enough?)*
- Is it still fun? *What would need to change to make it fun or easier?*
- Do you need to switch anything out?
- Is it time to add things to your plan?
- Do you need to get help? *What kind of support and help could you find?*

★ CONGRATULATIONS!
YOU NOW HAVE A
3-STEP MARKETING PLAN! ★