

BRAND BUILDING BLUE PRINT

Attract Clients, Make Money, Grow Your Business



**LEARN HOW TO
BUILD a BRAND
THAT WORKS!**

Jasper DAYTON



Introduction: Your Brandstorming Program

Over the past 2 decades BrandWorx Productions has simplified the process of developing brands, starting with an attention grabbing name all the way to the plan that gets your product flying off of the shelf or your services being in high demand. For example, a specific businesses came to us for help because they were losing sales. After I transformed their business their first sale was \$650,000. Then we helped another from closing no contracts to getting a \$100,000,000 contract. The only difference between the two businesses was the size of their vision. How big is your vision? Our signature Brandstorming program will turn your dream into a brand that works hard for you so you wont have to. We can take your brand from something no one wants to buy to something people can not live without!

BrandWorx Productions has assisted 100 + business owner's in making their entrepreneurial visions become a reality. We have learned that small business owners are ambitious, proud, dedicated, resourceful, generous, community-minded, and hopeful. We have also learned that these same amazing people are tired, overwhelmed, underpaid, stressed, and frustrated. Many are disappointed because what they imagined the life of a small business owner to be is not even close to the reality of what they experience every day. Are you one of them?

We have also learned that many successful business owners are interested in making changes in their business to help it be even more successful. For example, they want to increase the number of new leads, attract more clients, make more money or improve the perception of their business to support business growth. Is this the reason you came to BrandWorx Productions?

BrandWorx Productions's Brandstorming Program explores the common challenges and universal concerns facing all types of small business owners today, and presents a rich set of solutions that will not only help you see your business from a fresh perspective, but will enable you to achieve sustainable success -- online, in your business and your life! We also know that you care deeply about the work you do for your clients and in many cases you care more about it than your clients do. And we want you to know that the way you care for them, is the way we care for you.

Brandstorming Overview

The WebWorx Assessment is an in-depth, customized report designed to help you evaluate where you currently are as a leader, the state of your business, and your work-life balance. It is also designed to help you think about how you'd like to improve in these areas. As soon as you have completed the report and worked with BrandWorx Productions with your initial assessment we will be able to strengthen you with valuable insights and practical information you can apply to your business, including:

- Thought-provoking questions to encourage introspection and self-evaluation
- Suggestions and tips for shifting your perspective
- Action items that you can implement right away to jump-start improving your website.
- A rich array of resources, including books and websites for you to further your education and gain inspiration
- And so much more...

Optimize Your Business and Gain More Personal Freedom

As you can see, this process touches on many different topics, but they are all interrelated with the intention of teaching you a new way of seeing your business and it's authentic branding message . The shift begins with you as the leader, and will cascade to affect everyone who comes into contact with your website, your brand and experiences your business -- your employees, your customers, your partners, and your community. Most importantly, developing your website the WebWorx way will enable you to create a website that works hard for you!

Lets get started!

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Interpreting and Applying Your Brand Map Results

Low Scores

If your overall scores are low, it may indicate that your marketing messages, current website and business are not achieving the results you want, or it is still in the development phase. However, do not be discouraged, as this is a valuable opportunity to target these areas and to improve your website and business by building a strong online presence with a strong marketing message that connects with your target audience.

Even a business that is currently performing well may receive low scores. This is because the Brandstorming Program is designed to evaluate your business from the Brand Building Blueprint "Point of View". For example, your business may have the potential to generate profit and satisfy customers, but it may not be serving your life. And if you haven't documented and systematized your online presence performance and marketing processes, you won't be able to ensure continued success.

High Scores

The sections in which you receive high scores also offers you valuable insights. These are your key strengths. How can you leverage these strengths? Think about the way you're operating in these areas of your business. Can you apply similar processes to other areas to achieve better results?

Remember that your business and online presence is an ongoing process. Don't overlook high-scoring sections; they can help you identify your next stage of growth.

Key Findings

The Key Findings describe our observations about your business and your work/life balance, based on your responses to the Brand Building Blueprint process.

Questions to Consider

These questions are designed to be thought-provoking, and to encourage further self-evaluation and creative thinking. Notice which questions inspire you and use that inspiration as a starting point for taking action. Write down ideas that are sparked by the questions -- make a list of more questions, possible innovations, or anything else that comes to mind. Also notice which questions you are unable to answer, as they may reveal areas where you're lacking critical business information about your business perception and online presence.

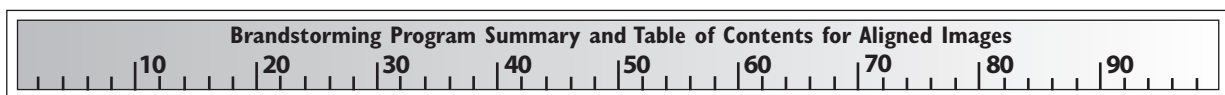
The questions can also help you evaluate the accuracy of the Key Findings. Do your answers to the questions shed light on the Key Findings? Do the questions reveal strengths or weaknesses you weren't aware of?

Shifting Your Perspective

This section takes another look at the Key Findings, this time from the Brand Building Blueprint Point of View. It examines the underlying conditions that contribute to frustrations and problems in your business and it's branding message. By addressing these underlying conditions, you will be able to develop long-term, sustainable solutions.

Action Items

The Action Items are distilled from different business and website development philosophies, marketing processes, and are simplified so that you can implement them more quickly. They are great starting points for you to begin effecting immediate change. The more time, energy, and focus you put into these simple exercises, the more rewarding the results will be. These action items are your first steps in mapping out your plan.



1. Your CoreWorx Program - Values, Passion, Purpose, Vision



2. Your BrandMap - Explorer/Developer/Innovator)



3. Your Brand Map - Work/Life Balance



4. Your Brand Map - Leadership - Self-Awareness



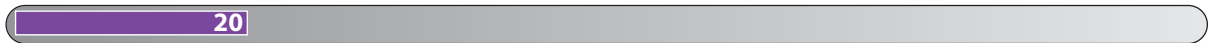
5. Your Brand Map - Leadership - Communication -



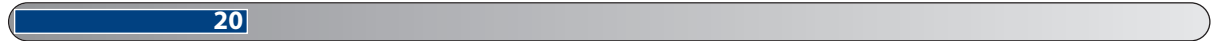
6. Your Brand Map - Leadership - Strategic Skills -



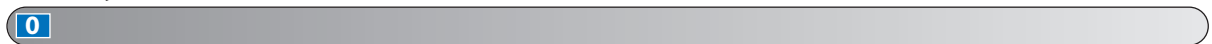
7. Management



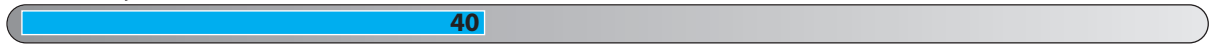
8. MoneyWorx - Marketing



9. MoneyWorx



10. MoneyWorx - Hidden Profits



11. Cash Accelerator - Lead Generation



12. Cash Accelerator - Lead Conversion



13. Brandstorming Systems Strategy





Your Brand Map - Your Assessment (Explorer/Developer/Innovator)

Key Findings

If your business had employees, you could delegate the research and technical work, allowing you to focus primarily on the innovative work. However, because you're the only person in your business, you need to balance all three roles. Based on your responses, your dominant role is the Developer, which is concerned with developing systems to produce consistent results. From your current perspective, you may not be spending enough time as the Explorer, doing the hands-on work of producing your business' product or service, or as the Innovator, thinking strategically.

Questions to Consider -

- *Is the quality or the quantity of your product or service negatively impacted by a lack of time allocated to technical work?*
- *Are there missing elements of your vision for the business' long-term objectives? Yes*

Shifting Your Perspective

The Innovator, the Developer, and the Explorer all have important contributions to make to a successful business. Your dominant role determines how you end up doing business. If you're stuck in the role of the Developer, you may be too focused on planning, scheduling, and organizing the work. You might not be giving enough attention to the quality of your product or service, the work of the Innovator; or you might not be pursuing new opportunities that allow your business to grow, the work of the Explorer. If you can shift your perspective to include the roles of the Innovator and the Explorer your perception of your daily tasks will change. The quality of your product or service will improve, and you'll be able to recognize opportunities for growth. While your responsibilities in the business may remain the same, a balanced approach will enable you to operate more efficiently and profitably.

Action Items

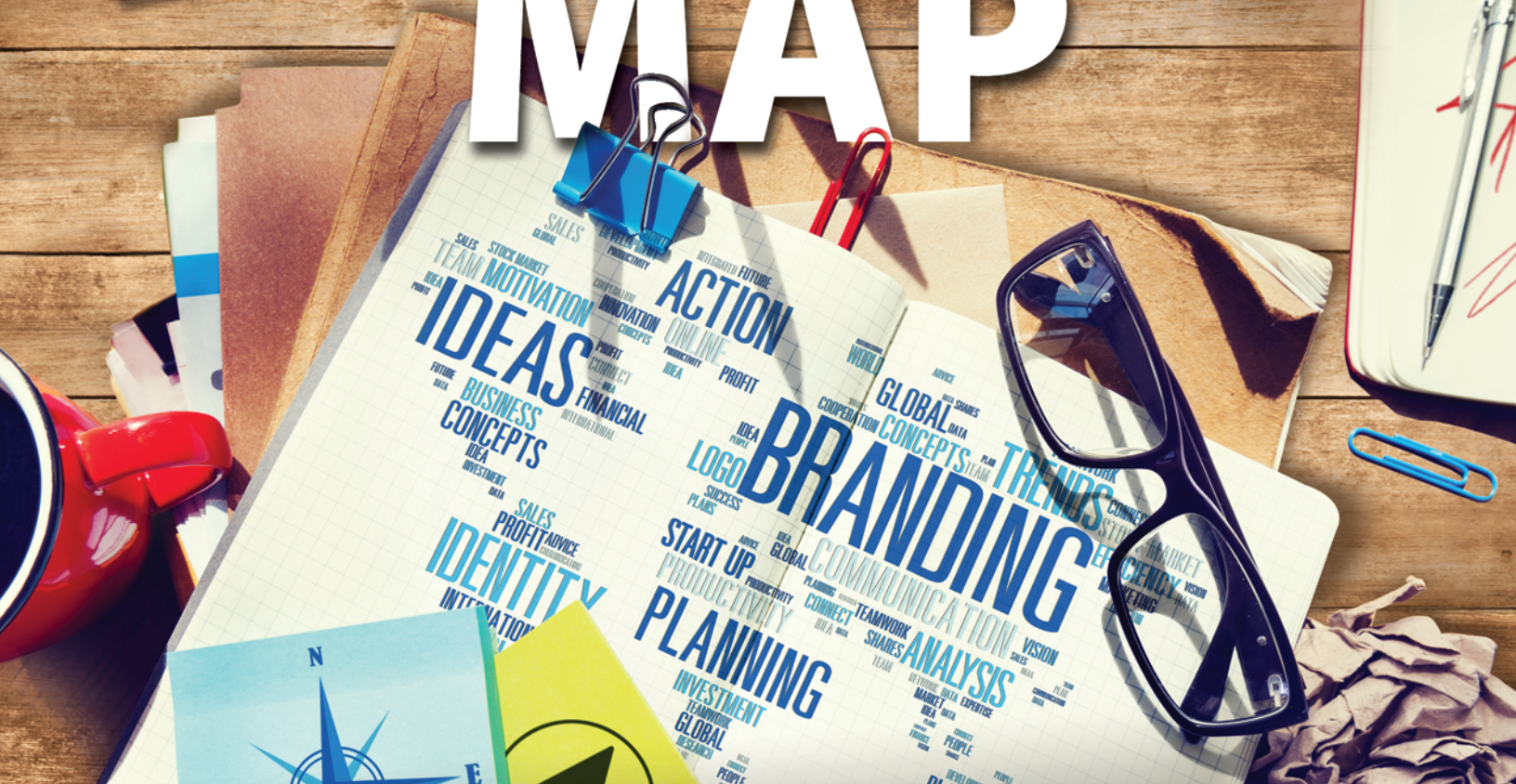
- *Based on your experience, identify one element of your product or service that needs improvement. It may be a part of your business that does not consistently satisfy your customers' needs, or it may be an aspect of your product or service that is not as appealing as a competing offering.*
- *Write a short description of what attributes that element would have if it was above and beyond the current industry standard. Each step is going to have a companion video tutorial for each step that brings the step to life and gives it personality.*
- *Create a simple plan for implementing these improvements.*
- *On the left side of a blank page, make a list of all the technical tasks that you plan to perform.*
- *On the right side, list the position title that could take responsibility of that task. Note that not all tasks can be delegated; some require a level of skill that only you possess.*

Resources

Books:

- The Art of the Start
- Good to Great

BRAND MAP



Work/Life Balance

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Your Brand Map - Work/Life Balance -

The Principal of Life (Work Life Balance)

A business is more than just a job – or it should be. Your business should be a way to get more of what you want out of your life. In order to do that you either have to create a business that frees you to do the things that give you the life you want, or you have to create a business within which you can achieve the satisfaction and sense of fulfillment you want.

In order to create a business that will serve your life, you must first discover your primary aim. It's the source of your energy, your commitment, and your vision.

Key Findings

Based on what you told us, you will likely have some personal time to spend with friends and family and enjoy personal interests, but not as much as you'd like. There's a lot more life to be lived! You may feel frustrated by the constant demands of your business. In order to achieve a healthy balance between your work and your life, you will need to focus on it now and make it a priority throughout your career.

Questions to Consider

- *What's missing in your personal life?*
- *What would need to change in order for you to gain what is missing?*
- *What are the main demands on your time right now?*
- *What areas of your business are taking up the most time and causing the most stress?*
- *What areas of your business are working the least effectively?*

Shifting Your Perspective

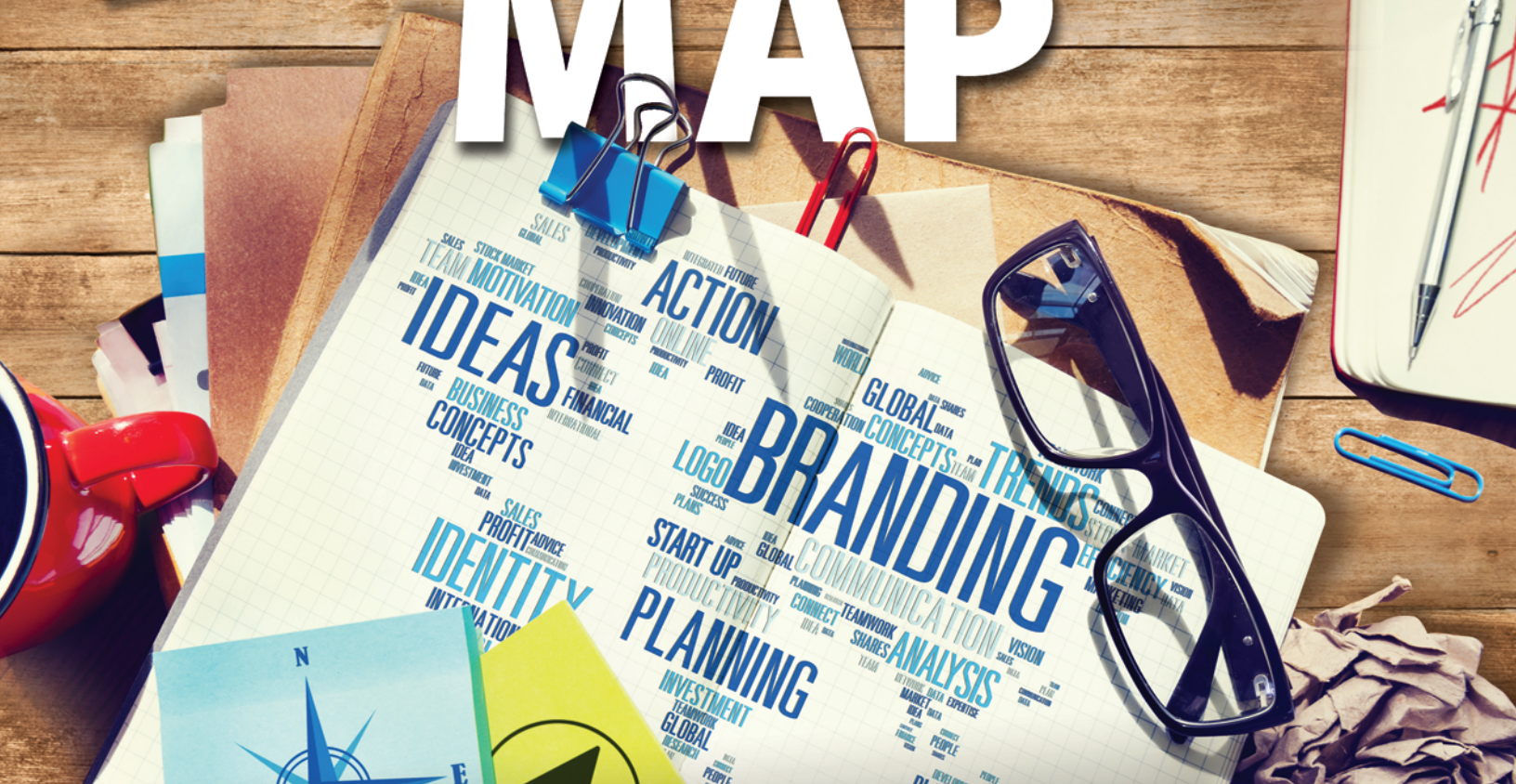
Now is the time to shift your mindset from "survive" to "thrive." Every frustration is the result of a missing or inadequate system. Focus on developing the systems that will enable your business to run more efficiently, giving you more free time. Examine your current systems to see where they need fine-tuning, and identify missing systems.

The path to a better work/life balance lies in understanding what you want for your business and for yourself, and shaping the outcome. One reason you're starting a business is to improve your quality of life. In order to achieve a healthy balance between your work and your life, you will need to focus on it now and make it a priority throughout your career. If you don't pay attention to maintaining a healthy work/life balance, your business may consume you. You will not own a business, you will own a job.

Action Items

- *Write down your most common and costly mistake. Identify current systems that may need adjustment, as well as missing systems.*
- *Choose an area of your business that is taking up too much of your time. Make a list of possible system solutions. Select one solution and implement it for a week, tracking the results to see if it's working.*
- *Make a list of some personal goals that you want to achieve as you're developing your business. Set these goals as your priorities and designate time to work on them regularly. Doing so will set a precedent for sustaining a balanced lifestyle.*

BRAND MAP



Leadership: Self Awareness

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Your Brand Map - Leadership: Self Awareness -

Key Findings -

Although you appear to have a good idea about what you want from your business and life, it may not be in complete alignment with your actions as a leader. You have the desire and the ability to take on new challenges such as starting a business, but you may not be prepared to realize the full value of your strengths as a leader.

Questions to Consider -

- *What are one or two areas of leadership that you would like to further develop?*
- *How can you prioritize your goals to make sure you reach the ones most important to you?*

Shifting Your Perspective -

Your advancement as a leader depends upon creating a deeper connection to that which drives you. Doing so will increase your ability to effect positive change in your business.

Action Items

- *If you have a written statement that describes your internal source of inspiration and what drives you, look at it again and decide if it's still true. Refine it if necessary, asking yourself how well it is integrated into your daily life.*
- *If this description of your internal source of inspiration is not yet documented, take this opportunity to write it down. Post it in a prominent place and review it daily.*
- *Look into on going leadership training. For example Landmark Education. This will keep you on top of your game, while not losing yourself within your business.*

Resources

Books:

- The Art of the Start
- Good to Great

MAP



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Leadership - Communication

Key Findings

You usually express your ideas clearly, but there is an opportunity to improve by refining your communication skills.

You communicate effectively in some situations, but you may have trouble conveying your message consistently, which will have an impact on your business relationships. By identifying your strengths and weaknesses as a communicator and focusing on the areas that need improvement, you can enhance your leadership presence.

Questions to Consider

- *In what situations are you able to communicate well?*
- *In what situations do you struggle to express yourself clearly?*
- *Can you identify a pattern between the two?*

Shifting Your Perspective

Think about the situations in which you're comfortable with the way you communicate. Use those situations as a model for improving the areas in which you struggle to convey your message. Work on improving your communication skills in small increments. Your impact as a leader can improve dramatically through minor adjustments.

Action Items

- *Choose one interaction that is typically positive and productive. The next time this interaction occurs, observe yourself and focus on the way you sound and appear, including your facial expression, body language, tone of voice, and the words you choose.*

Tip: Record your own voice with an app on your cellphone so you can listen to your voice over the phone. This will help you understand how your communication is being received.

- *At the end of the interaction, write down what elements of your presentation worked well. Try to incorporate those positive elements into all of your interactions.*

Leadership: Strategic Skills

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Leadership - Strategic Skills

Key Findings

Although your responses suggest that you are giving some attention to business development and strategic planning, it may not be enough to ensure that your business will achieve the results you want. Your business may become stuck in a cycle of recurring frustrations that will limit your options for growth if things are not thought out and planned for effective results.

While you do spend time on business development and strategic planning, you may not be achieving the results you want. The information you're using to make business decisions may be incomplete, causing your business to miss potential growth opportunities.

Questions to Consider

- *What are some potential growth opportunities for your business?*
- *What are the obstacles to taking advantage of those opportunities?*

Shifting Your Perspective

Strategic work is any work related to planning, tracking, or managing results. Your role as the leader of your business means that it's your responsibility to do the strategic work. The path to improving your business is dependent on your ability to work on it, not just in it.

Action Items

- *Write a sentence describing a particularly frustrating condition in your business. Rewrite the sentence, removing any blame.*
- *Ask yourself a series of questions to help you understand the true cause of the frustration:*
 - *How is my business impacted by my frustration?*
 - *What are the specific examples of when, where, and how this frustration occurs?*
 - *What are the results I'm not achieving in my business because of this frustration?*
- *Continue asking yourself questions until you feel you've uncovered the underlying condition.*
- *Identify a generic system solution that would alleviate the underlying condition.*
- *Create and implement that system.*

MONEY WORK = PROGRAM =



Management

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MoneyWorx - Management -

Key Findings -

Instead of blaming yourself or becoming discouraged by problems in your business (reactive approach), using adverse situations to identify the areas of your business that aren't working (proactive approach) is the hallmark of a successful manager. As you identify individual frustrations and build systems to deal with them, you will be building a business that truly works.

Questions to Consider

- *Do you often find yourself frustrated by recurring problems?*
- *What would be the benefits of working on developing systems for one hour a day over three months? Six months?*
- *Do you have ideas for systems that you haven't yet implemented?*

Shifting Your Perspective -

Instead of blaming yourself or becoming discouraged by problems in your business, use adverse situations to identify the areas of your business that aren't working. This is the difference between a reactive approach and a proactive approach -- the hallmark of a successful manager. As you identify individual frustrations and build systems to deal with them, you will build a business that truly works.

There is additional opportunity to grow your business by increasing efficiency through further systemization. As the only person in your business, the more efficient you can become at the administrative work in your business, the more income you can produce.

Action Items -

- *Write a few paragraphs describing what your business would look like if you spent one hour a day for three months developing systems? What would it look like in six months?*
- *Choose a system that you've been thinking about. Create a step-by-step plan, with a time line and specific dates, for designing and implementing the system.*

MONEY WORX = PROGRAM =



Marketing

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MoneyWorx - Marketing -

Key Findings -

Based on your answers, your Marketing efforts may need improvement. You may need to develop a better understanding of your target market. If you already have a good understanding of who your customers are and why they buy, you may not be using that information to inform and direct your sales and advertising activities.

Questions to Consider -

- *What is your most profitable customer group?*
- *Have you identified what distinguishes your business from the competition?*

Shifting Your Perspective -

Marketing is not advertising. Marketing is understanding who your customers are, why they buy, where they are located, and what your overall strategy is to meet their needs. Marketing informs and directs your sales and advertising activities. Use the information at your disposal to align your brand personality, sales, marketing and advertising efforts with the needs of your target market.

Action Items

- *Draft a demographic profile of your average target customer, noting characteristics such as:*
 - Age -
 - Gender -
 - Household Income -
 - Occupation -
 - Education -
- *If your business serves other businesses, be sure to note business demographics, such as:*
 - Annual revenue -
 - Number of employees -
 - Personal demographics of the primary decision-maker -
- *As you make your list, note what information is missing and focus your market research efforts on those areas.*
- *If you already have a comprehensive profile of your target customer, you'll want to find out the primary reasons they buy from you. Try to see your business through the eyes of your target customer. Create your perfect customer Avatar and try to imagine how they think, how they perceive the world and themselves, and what drives their behavior. Document your observations on an on-going basis as you continue to grow your business.*

BrandWorx Productions's Top Resource Picks:

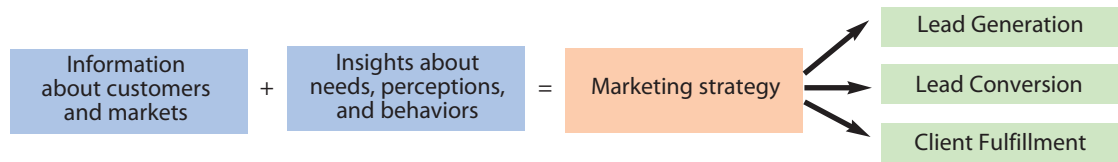
Books:

- **All Marketers Are Liars: The Power of Telling Authentic Stories in a Low-Trust World**
by Seth Godin
- **Guerilla Marketing: Easy and Inexpensive Strategies for Making Big Profits from Your Small Business**
by Jay Conrad Levinson



The First Step Is Information

It starts with the facts – information – and that is the subject of this section. You will be asked to think about your trading area and determine if there's a gap between your *actual* trading zone and your *potential* trading zone. You will then learn about how to identify your most probable customers and describe them in terms of their distinguishing characteristics, called "demographics."



Your Trading Area

Locating Your Target Markets

Your trading area is geography...but geography is the least of it. It's a living organism with movement, moods, and its own way of doing things.

Definitions:

- Your Trading area is the specific geographic territory within which you conduct your business, and from which your customers originate.
- Your actual trading area is the area defined by the locations of customers who actually do business with you.
- Your maximum trading area is the largest area your business could feasibly serve.
- If your trading area is concentrated, location and convenience are of primary importance to your customers and virtually all of them come from nearby.
- If your trading area is dispersed, your customers and prospective customers are widely disseminated and their proximity to your business isn't critical.

Trading Area Analysis Process

1. Survey your customers and prospective customers
2. Map your actual trading area
3. Map your maximum trading area
4. Map the location of your target customers
5. Consider your strategic alternatives

One of the initial steps in defining a target market is to determine the trading area. A trading area is the physical area from which customers and prospective customers are drawn. It can be as simple as a neighborhood or as complex as an internationally dispersed population of people with a common set of needs. For instance, customers of a grocery store are located within the surrounding neighborhood. The store is highly location-dependent, and its survival depends on having a sufficient number of customers within its trading area. By contrast, the customers for an internet software product can be located anywhere in the world.



MoneyWorx - Marketing - Your Trading Area

Concentrated and Dispersed Trading Areas

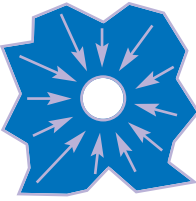
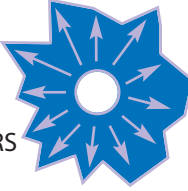
- **Concentrated:** These businesses must be situated in locations that are easy and convenient for their customers to reach or in locations that provide for cost-effective sales and client fulfillment at their customer's homes or work sites. Market analysis and strategy for a concentrated trading area require a detailed understanding of the physical trading area and the company's location in relation to its customers, transportation corridors, competitors, and other major influences. The neighborhood grocery store is an example of a business with an extremely *concentrated* trading area.

- **Dispersed:** Businesses with dispersed trading areas are not location-dependent. Proximity to the business isn't a primary determinant of whether or not customers and prospective customers will do business. The internet software company mentioned above is an example of a business with an extremely *dispersed* trading area.

Inbound and Outbound Businesses

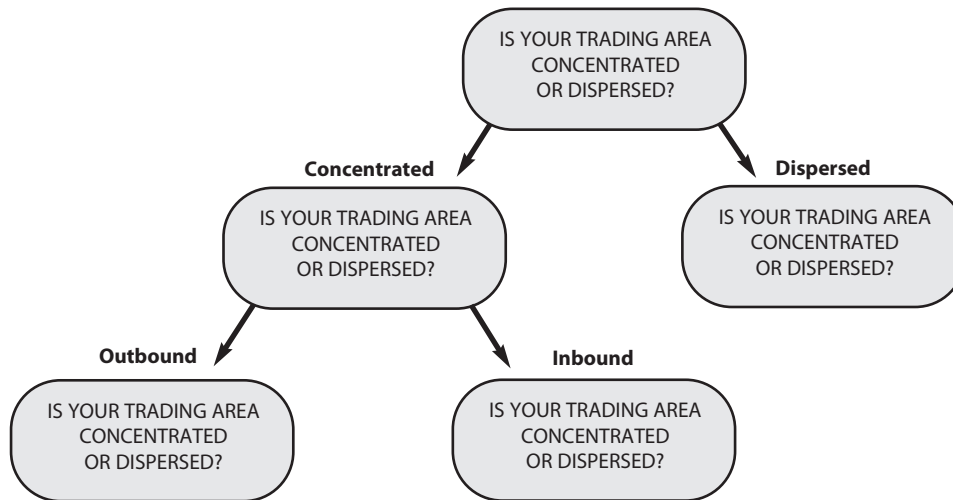
- **Inbound:** Customers come to the business location to buy products or services. Grocers, department stores, medical practices, hospitals, most restaurants, beauty salons, dry cleaners, auto dealers, and the local bank branch are all examples of inbound businesses.

- **Outbound:** Business is done at the customer's location. Electrician's, plumbers, door-to-door sales people, carpet cleaners, delivery services, and insurance agents who make sales calls at customers' homes are all examples of outbound businesses.

CONCENTRATED		DISPERSED	
INBOUND Business is conducted at your location	EXAMPLES: RETAIL STORES RESTAURANTS AUTO REPAIR BEAUTY SALONS GROCERY STORES		EXAMPLES: CATALOG SALES FIRMS TELEMARKETING & INTERNET COMPANIES HOSPITALS
OUTBOUND Business is conducted at the customer's location	EXAMPLES: Electrician's PLUMBERS PIZZA DELIVERY PERSONAL TRAINERS HOME SECURITY		EXAMPLES: CONSULTANTS SURVEYORS & CIVIL ENGINEERS MARKET RESEARCH FIRMS



The short answer is “yes” if your business has a concentrated trading area, and “no” if your business has a dispersed trading area. If your business has a dispersed trading area, your specific location is not a primary determinant of your success, nor is the geography of your customer base critical.



You can specify your geographic scope with simple statements such as:

- The Chicago area
- Manufacturing companies in Ohio, Indiana, and Illinois
- Upscale suburban communities within 50 miles of major metropolitan areas
- Anyone in the world with internet access

If your business has a concentrated trading area, a trading area analysis is *essential*. Not only will it help you better understand the dynamics of your market, but you will gain insights into why your business is doing better or worse than you may have expected. A trading area analysis can uncover opportunities for improvement in marketing, delivery, and customer service, and it will reveal strengths and weaknesses of your present location. It will also give you important guidance for developing your marketing strategy.

- **Inbound:** Customers care very much about the location of the business – its convenience, how easy it is to reach, its neighborhood, and numerous other aspects of its location.
- **Outbound:** Customers don't care much about the location of the business because they never go there, but the business needs to analyze the costs and time efficiencies of going to the customer's location.



MoneyWorx - Marketing - Your Trading Area - Do You Need a Trading Area Analysis?

The Main Requirement For A Trading Area Analysis: Common Sense

The basic approach takes a little work, but it's straightforward for both outbound and inbound trading area analysis. It has five steps:

1. Collect information on your current customers and prospective customers.

To learn where your customers are located, as well as their demographics, either conduct a customer survey or draw from your current customer files.

2. On a map, plot the actual trading area based on the collected information. Each customer gets a dot on the map, then the outermost dots are connected to define the perimeter of the actual trading area.

3. Map the maximum trading area. This is the largest trading area the business could feasibly serve. It requires an analysis of travel times, travel barriers and deterrents, and usually some driving.

4. Map the location of your target customers. Determine where your target customers are concentrated within the maximum trading area.

5. Consider strategies to improve the trading area. This is done by comparing the actual and maximum trading areas, the distribution of target customers, checking to see if there are differences (and reasons why), and determining the best strategy that will get results.

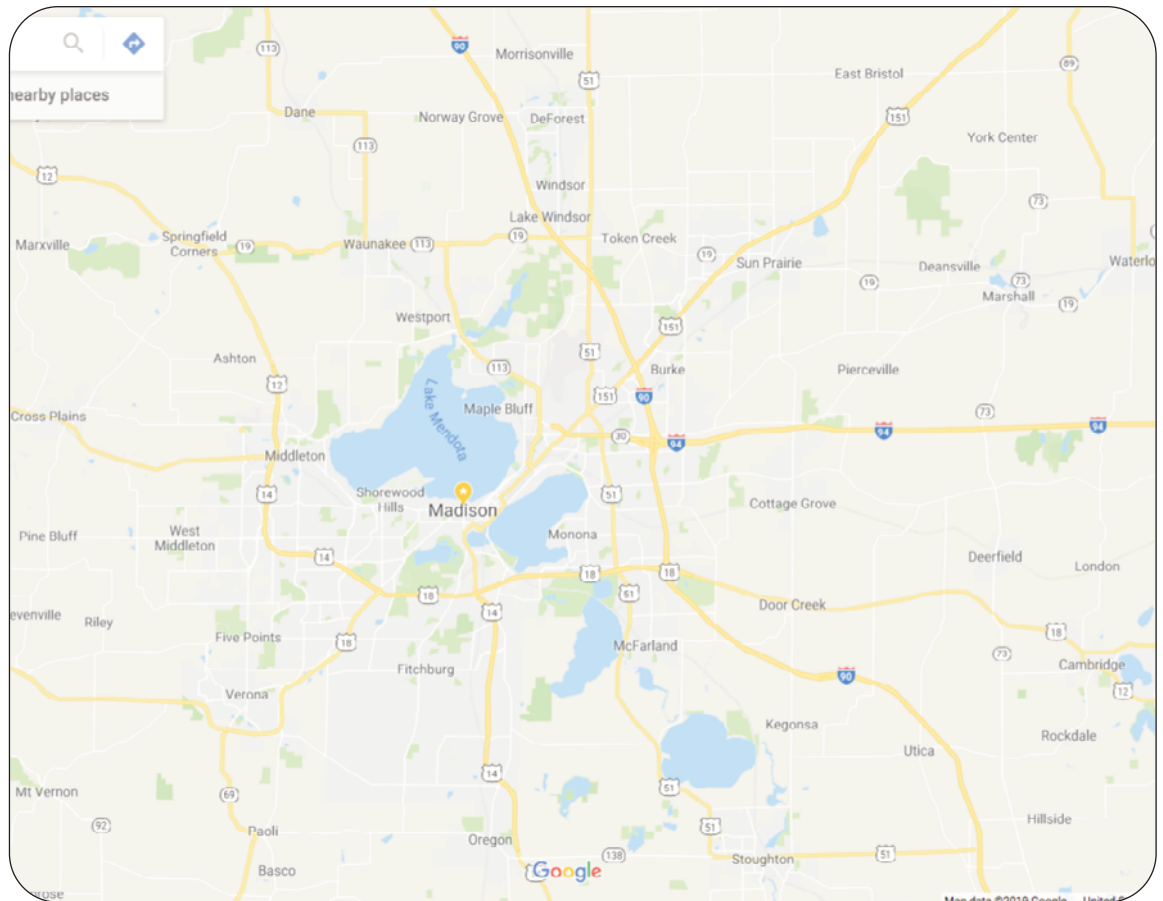
Conduct a Survey

Unless you already have good records of your leads and customers, you may need to conduct a simple survey. To determine the boundaries of your actual trading area, for a 30-day period collect the following information about all (or as many as possible) of your customers:

Customer Information:	
GENDER Femal	
AGE (approximate)	
HOUSEHOLD INCOME (or range)	
FAMILY STATUS (married or single, with or without children)	
OCCUPATION	
INBOUND: Customers At Your Location	OUTBOUND: At The Customer's Location
Day of week, date, time of day	Day of week, date, time of contact
Point of origin type (home, business, or transient)	Address
Point of origin address (or indication of their point of origin)	Type of location (residence, workplace, other)
Mode of travel to your business (by car, foot, mass transit, other)	



MoneyWorx - Marketing - Your Trading Area Analysis



For inbound businesses, you may have to reassure customers that you want the information only for analytical purposes, not for solicitation. If they are reluctant to give their address, ask them for their neighborhood or zip code – anything that will help you put them on the map.

For outbound businesses, collecting address information should be easy if you have kept records. Simply look at your records, copy the necessary information, make a few phone calls to fill in missing data, and you're done in no time. If you only keep records on customers and not prospects, or if you have no demographic information, you'll have to conduct a survey.

Outbound businesses are concerned with the costs and time efficiencies of doing business at the customer's location. An outbound business must balance the size of its trading area against the economics of serving remotely located customers. For instance, transportation to and from the customer, transit times, and scheduling of staff and equipment are critical concerns of doing business at remote locations.



MoneyWorx - Your Most Probable Customer

The Payoff Is Competitive Advantage

For a location-dependent business, there are few activities that will pay better dividends than a solid trading area analysis. It will not only provide you with facts about your trading area, but will also give you a logical and intuitive understanding that lets you feel the pulse of your trading area. That kind of insight, when put into action, gives you an irreplaceable competitive advantage.

In order to do an effective job branding your services and your company, you have to get an insightful understanding of the minds of your customers.

1.a. Ask 3 people on the outside of your company to describe what your company does.

Their comments:

- 1.
- 2.
- 3.

1.b. Now ask 3 current clients that you have good rapport with to describe what your company does.

Their comments:

- 1.
- 2.
- 3.

The following is the script you can email to your client's you feel comfortable asking -

"Hi Folks.

I have been asked by our branding firm to ask three clients and three people from outside of our firm one question as part of our branding research for our business.

I thought you'd be perfect for this one minute job. Please don't feel as though you have to over-think it. In your own words please answer this quick question and send me your responses this week. Thanks much!

The question: What does (your business name) do?

Your help is much appreciated!

(your name)

The question isn't whether you're branded. It's how. Good, weak, exciting or bland? Your company's brand is a mix of your organization's identity and image. It is the relationship that exists between the buyer and the seller, or the client and the business. It is your company's personality, culture, image and relationship with your target audiences. Identity is how your organization defines the brand's meaning. Image focuses on the way something is perceived by the audience. A good brand marries the two concepts.



MoneyWorx - Define Your Products as Your Customers View Them

Your business is your product. It's important to keep this perspective in mind as you build your business's identity. However, at the ground level, your company sells products – which can be goods, services, or combination of both. To define your products, you need to describe what they are and what they do.

Let's take a man who sells donuts, for example. One product. Simple, right? Well, not really. Does he sell donuts over the counter for walk-in customers? Does he sell packaged donuts to grocery stores for them to sell to their customers? Does he sell bulk donuts to restaurants for resale to their customers? Does he sell coffee and donut setups for business meetings?

You get the point. It's not enough to say you sell donuts and let it go at that. You have to identify each product that is distinctly different from the others you offer from the customer's viewpoint.

What are the specific detailed services/products your business provides?

- a.
- b.
- c.

The only products or services that succeed are those that offer a benefit to consumers that is greater than their cost. Businesses frequently confuse features and benefits. Features are elements of a product that deliver a benefit. A quick look at the following table will help you remember the difference

FEATURE	BENEFIT
Airbags	Lowered risk of serious injury
Large Type	Ease of reading
Digital recording	Hiss-free listening
Soft leather sneakers	More comfortable walking
Mercedes Benz logo	Increased self-esteem based on status

Think about the last time you went to buy a new car. You probably thought about what you wanted: safety for your family, low operating costs, lots of room for the kids, etc. It's not too hard to translate these benefits into features: airbags, good gas mileage, an extra-large trunk, etc. But it's the benefit, not the feature, that sells the car. .



MoneyWorx - Target Marketing

The next series of questions will help us nail down what is important to your customers.
If it's not important to them, it's not important to you.

For each service you listed, list beside it what type of customer will need that service.

Example - Service – Benefit of Service - Type of customer that will need service.

- a.
- b.
- c.
- d.
- e.
- f.

What are the 4 most important benefits that a customer gets from using your company?

- 1.
- 2.
- 3.
- 4.

What customer needs do your services/products fill?

What problems do your customers have that need to be solved?

How do they want them solved?

What is it worth to them to have their problems solved?

How will you make the customer's life better?

What is your company's niche? What makes your company/services/products unique or different? What are you the best at?

What are three services/products you offer that differentiate you from your competition?

- 1.
- 2.
- 3.



MoneyWorx - How Many Prospects Do Your Need?

1. How much gross revenue would you like to obtain over the next year?

\$ _____

2. What is your typical yearly revenue per deal/client? (your average sale)

\$ _____

3. How many deals do you need?

Divide revenue needed

by typical deal size

_____ deals needed

4. What is a reasonable estimate of your closing ratio? (your average sale)

1 out of 4 = 25% (.25); 2 out of 4 = 50% (.50);

1 out of 10 = 10% (.10); 2 out of 10 = 20% (.20);

Close ratio _____

5. What is the total number of prospects you need?

Deals you need (#3) _____

divided by Closing ratio (#4) _____

Prospects needed _____

6. What is a reasonable estimate of the time it takes to close a deal?

_____ # of weeks

7. What is your sales cycle estimate?

52 weeks divided (#6) _____ 4 weeks needed to close deal

_____ sales cycles per year

8. What is the total number of prospects needed in your pipeline at all times?

prospects needed (#5) _____ divided Sales cycle estimate (#7)

_____ # of prospects in pipeline

9. How many prospects are in your pipeline now?

prospects needed (#5) _____ divided Sales cycle estimate (#7)

_____ # in present pipeline

10. How many do we need to add to that?

Number you need (#5) _____ minus number you have (#9)

_____ # of prospects to add

11. How many prospects do you need each week?

How many you need to add (#10) _____ divided by 48 weeks you plan on working (give or take, remember vacations and holidays)

_____ prospects per week

12. What is the value of an appointment to you

Average sale (#2) _____ x your closing percentage (#4) _____
x the number of years of the lifetime of your most probable client
(#4) _____

_____ Value of an appointment



Competition can be the spice of your life or the bane of your existence. Your competitors will drive you crazy if you let them, but they can get your competitive juices flowing and inspire you to greater achievements than you would otherwise reach.

Who do your target customers buy from when they don't buy from you? And what do they buy? That's your competition. Your competition isn't always in the same business you are. Keep alternatives and substitutes in mind. Once upon a time railroad companies dominated the transportation market. Competition was other railroads, or so they thought. It turned out that the *real* competition was the automobile and, later, airplanes. Now railroads are an afterthought in the transportation industry. Movie theaters compete with the fitness centers. Plumbers compete with hardware stores.

The idea is to understand who your competitors are, how effective they are, and your competitive standing in your target markets. Then you can determine how to better compete.

The first step is to identify your main competitors – the five or ten who do the best job of attracting the customers you want to attract. Then you need to evaluate their positioning as well as their major strengths and weaknesses. Finally, you'll determine your own competitive effectiveness and decide where you rank among them. This competitive analysis, plus the insights you have already gained from studying your target markets, will enable you to select the marketing mix you'll need to excel in your markets.

Who are your top 3 competitors?

- 1.
- 2.
- 3.

How are your competitors saying that they are better than you?

- 1.
- 2.
- 3.



MoneyWorx - Target Marketing

What feedback have you received from current customers regarding your services/products?

List the three best and three worst comments that you have heard about your organization.

Best 1.

Best 2.

Best 3.

Worst 1.

Worst 2.

Worst 3.

What are your strengths/advantages as a company?

Is it a positive strength – one of the ways people gain by doing business with you?

Are you the only one that offers it? Or so your customers think because you are the only one talking about it.

Can your advantage be communicated with a few, well-selected words?

Do people know it's you when they hear it or see it?

What is the one thing you would like your current customers to say about you that they aren't saying?

Does the look and feel of your company positively impact the unconscious minds of your target market?

What new products or services, or extensions of current products or services do existing customers want?



MoneyWorx - Target Marketing

Do you offer these products or services?

What is the demand in the market for these products or services and how do you know?

What is the expected growth in the market and what is your reference?

Have you completed any market research or use any published research?

Who is your target market?

Why?

Who are your clients? Individuals, or other businesses?

Describe their characteristics.

- Age
- Gender
- Occupation
- Boss
- Income
- Education
- Employment Status

Who is the buyer? Influencer? Gatekeeper? Technician? Other?



What is the typical investment of a customer over the life with that customer?

Why is this statistic so important? Because it helps you determine how much you might be willing to spend to acquire a new customer. And, just as important, it forces you to realize how much it costs you to lose a customer once you've got him. To compute the value of a customer, answer these simple questions:

a. If you continue to provide acceptable service and quality, how long will the customer patronize your business?

b. How much will the customer buy in the average year (make sure you include sales increases due to growth on your part or the customer's)?

It's a Way to Work Smarter

Too often business owners ignore the power behind identifying their most desirable customers and targeting sales and marketing efforts to draw those customers to them. As a business owner, your responsibility is to make your business work for you and your employees in a way that provide the best possible return on your investment. Knowing who your best customers are gives you a head start in working smarter, not harder.

Who have you been selling to successfully? Why? Same as target market?

(Review your customer list and describe them)

What is the awareness of the company/product or service among customers?

Among non-customers in your target market?

What is your experience with repeat sales or expanded sales?

What % of your customers are repeat customers, how do you measure?

What does a typical sale look like - products(s) and/or service(s).

"The Anatomy of a Sale"



MoneyWorx - Your Most Probable Customer

What does the sales process look like from start to finish?

What sales methods have you been using?

Presentation is sometimes called "execution," this element comprises of creating the copy, layout, graphics, artistic design, and images - in general those items that give the communication its feel and emotional impact.

What promotion and advertising have you used?

What have been the results?

What kind of customer referral network have you used?

What type of customer tracking system or sales lead system do you use?

What does your front-line sales team look like?

What training have they had?

What have their successes been?

What is the typical sales cycle?

What sales support material do you currently use?

Describe your business in 10 words or less.

What works about your current identity?

Is there anything (historically, politically, or culturally) that should be specifically included or avoided?



Hidden Profits

BRAND BUILDING BLUE PRINT

Attract Clients, Make Money, Grow Your Business



MoneyWorx - Reveal Your Hidden Profits

Key Findings -

Money problems are the most common frustration for most small business owners. It appears that your business may experience financial problems, such as poor cash flow or insufficient profits, because of inadequate accounting systems. It may become a significant source of stress for you.

As soon as you put your accounting systems in place you will want to work on having accurate financial statements, but you may need a more in-depth understanding of how to use the information to make sound business decisions. Always know the score. If you don't know the score how do you know if you are winning?

Questions to Consider -

- Do you plan to use an accounting system?
- Do you plan to work with an accounting professional?
- Do you know how to review and analyze financial statements?
- Are you planning on producing budgets for your business?
- Are you setting financial goals?
- What area of your financial management system would you most like to improve?

Shifting Your Perspective -

Money management is intimidating when you don't understand it. Learning some basic accounting terminology and principles will take the mystery out of the numbers. This knowledge is the minimum requirement for successfully managing a business. Consider consulting an accounting professional, who can provide critical insight into developing and managing your finances.

Money is the best tool for measuring your business' performance and value. As your financial management skills become more advanced, you will learn to quantify more areas of your business. This will enable you to make increasingly objective and powerful management decisions.

Action Items -

- Create a plan with due dates for setting up your accounting system.
- The basic elements of an accounting system are:
 - Source Documents
 - General Journal
 - General Ledger
 - Chart of Accounts
 - Financial Reports
- Schedule a meeting with your accountant and discuss the following financial strategies to help you shift your focus from technical to strategic.
- Maximize company value by:
 - Optimizing your investments
 - Optimizing revenues
 - Optimizing borrowing
 - Maximizing value added from business systems
 - Minimizing expenses
 - Minimizing taxes



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- 2.
- 3.
- 4.
- 5.
- 6.

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MoneyWorx Plan - Your Most Probable Customer

For each service you listed, list beside it what type of customer will need that service.

Example - Service – Benefit of Service - Type of customer that will need service.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6

What are the 4 most important benefits that a customer gets from using your company?

- 1.
- 2.
- 3.
- 4.

What customer needs do your services/products fill?

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How do they want them solved?

What is it worth to them to have their problems solved?

How will you make the customer's life better?

What is your company's niche? What makes your company/services/products unique or different? What are you the best at?



MoneyWorx Product Market Grid Worksheet

Is your company's product or service a "true" product--one of a kind with little competition? Or is it a commodity where customers perceive it as just like all the rest? Or is it a brand where there is substantial competition, but your product or service is differentiated from the rest?

The Product Market Grid is a simple device. You set up a grid with products/services on one axis and market segments (customer types) along the other. The information in each box usually includes estimates of sales, the number of units sold, and the profit margin for each segment. But you are not constrained to those three pieces of information. In the donut shop example, the figures are actual numbers from the most recent full year. A blank chart has been provided for you to fill out on your own. We will be using this a starting point for our kick-off meeting.

The donut shop owner sells to walk-in customers, to local businesses, and to grocery stores, but unless you know which product he offers to which market segment, you really don't know enough about his markets. The basic item is the same – donuts – but the product depends on how it is perceived by the customer. It's of no use to think about your markets unless, at the same time, you think about the products you provide to those markets.

It's clear from the grid that this company's sales have been concentrated in two product market sets – packaged donuts to grocery stores (their primary target market) and single donuts to walk-in customers (their most productive flanker market).

Finding the right combination for your Product Market Grid may take several tries. To define your markets, experiment with various demographic indicators (such as revenue, location, gender, etc.) This process can be extremely helpful in revealing more about who your target market really is, or should be.

		MARKETS		
		Walk-In Customers	Grocery Store	Local Business
PRODUCTS	Donut & Coffee Special	# Sold: 38,000 \$38,000	No Market	# Sold: 65,000 \$65,000
	Single Donut	# Sold: 370,000 \$185,000	No Market	No Market
	Packaged Donuts	# Sold: 5,600 \$28,000	# Sold: 56,000 \$280,000	# Sold: 7,000 \$35,000
	Bulk Sale Donuts	# Sold: 1,250 \$10,000	# Sold: 9,375 \$75,000	# Sold: 5,625 \$45,000



MoneyWorx Product Market Grid Worksheet (continued)

Process for Identifying Your Target Markets

Step 1: List your company's products/services down the left side, and the markets (types of customers) your company serves across the top. If you need more room, make copies of the worksheet or construct a larger one.

Step 2: Map out the dollar amount you brought in last year out of the \$590,000, for each market segment

SERVICES	MARKETS							



Cash Accelerator

BRAND BUILDING
BLUE PRINT

Attract Clients, Make Money, Grow Your Business



Cash Accelerator - Client Fulfillment -

Key Findings -

It is clear that Client Fulfillment is a strength of your business. You are meeting some or all of your customers' expectations, but you might not be giving enough attention to other areas of the Client Fulfillment process.

Questions to Consider -

- *How would you rate your Client Fulfillment process in comparison to that of the leader in your industry?*
- *How would you rate the overall quality of your customers' experiences with your company?*
- *In what area would you most like to improve your Client Fulfillment process?*
- *How would you rate the overall quality of your customers' experiences with your company?*
- *In what area would you most like to improve your Client Fulfillment process?*

Shifting Your Perspective -

Client Fulfillment is about delivering on your promise to satisfy your customers' needs -- on time, every time, exactly as promised. Exceptional Client Fulfillment is a strategic asset for your business. If you have not yet documented your Client Fulfillment processes, you run the risk of being unable to repeat them. If you have developed and documented your systems, you must continue to innovate with the intention of constantly improving your customers' experiences.

Client Fulfillment is not only about customer service. If you aren't meeting your customers' expectations, you won't have a business. If you do meet and exceed their expectations, they will come back to you again and again.

Action Items

Managing the quality of your product or service begins with determining what your customers think about it:

- *Select a competing product and research it thoroughly.*
- *Look at it from a customer's point of view and list its attributes.*
- *Pay close attention to the positive attributes of the competing product.*
- *Would your product be enhanced if you added some of these attributes to your offering?*
- *Examining the competition may give you insights that refine your perceptions of your place in the market.*



Creating Exceptional Customer Experiences

Excerpted from FastTrac GrowthVenture-

Generally, there are two ways to grow your business: selling more to the same customers or finding new customers and selling to them. As an experienced entrepreneur, you've probably already figured out that it's a lot easier to sell something to a current customer than to a new customer. One of the best ways to grow is to provide customers with such a great experience that they return again and again.

Providing exceptional products, services, and interactions has the added advantage of attracting new customers as well. You may have heard of the concept of *viral marketing*. That's when a product or service becomes so popular among current customers that they word spreads from them to others like a flu germ at the height of flu season. The point is that there's nothing better for growth than customers who sing your praises to all their friends and colleagues – and the only way to get that kind of momentum is by making a conscious decision to create exceptional customer experiences. Attention to your customers will reap more business from their friends and colleagues.

Sales and customer service strategies can build the reputation you desire for your business as well as for your products or services. You may already have effective sales strategies that focus on attracting and retaining customers. Maybe you have policies, warranties, guarantees, terms and conditions, or procedures for dealing with customer complaints. One of the key things to remember is that every interaction with a customer is an opportunity to create an exceptional experience. From the first time a potential customer hears about your company, goods, or services to their experience long after the sale has been made, everything matters.

Every time your client thinks about your company, your people, your products, or your services is an opportunity to make them happy or disappoint them. John Nordstrom, founder of the national department store chain Nordstrom created a culture on the retail floor that epitomized the right attitude. He didn't emphasize a long set of rules for his sales people but rather a few simple principles: *Listen to the customer. Provide them with what they want. Appreciate the fact they came to your store, and do everything within your power to ensure that they are satisfied when they leave.* Another Nordstrom secret is to instill this attitude in everyone throughout the chain of command, empowering each employee to make decisions on their own about how to satisfy customers.

If you've ever been annoyed at the local supermarket when you have to wait five minutes for the manager to hit a key on the cash register after the cashier makes a simple mistake, you'll know why empowering employees to make customer-satisfaction decisions is so important. You can't just will these exceptional customer experiences into existence. You have to inspire your people, train them, and empower them. The more you empower your employees to act on behalf of the customer, the more likely your strategies will build a competitive advantage in the marketplace. When employees respond quickly to customer issues, recognize and reward them for doing so.



Watch Out for the “Fatal Assumptions” - Client Fulfillment

“I’m of Two Minds”

There are two aspects of your mind called “Impulse” and “Reason”. They do all your thinking, your feeling, and all of your perceiving. And they couldn’t be more different from each other.

Impulse is pure passion, emotion, and instinct. It wants gratification and avoids pain. It feels desire and fear. It is always completely honest and straightforward - and there’s no deception. Impulse wants everything *now*.

Reason is logical and rational. It seeks facts, information, knowledge, understanding. It makes unemotional judgements about good and bad, should and shouldn’t, can and can’t, valuable and valueless. Reason *judges*, but doesn’t *feel*.

The most interesting thing is that “Impulse” is the decision maker of the two. Believe it or not, every decision you make is made by Impulse. But even though “Impulse” makes the decisions, “Reason” has a lot to say about it. The two of them work together in a very productive way. They both perceive through the senses – sight, sound, touch, smell, and taste. “Reason” takes whatever meaning is inherent in what it perceives and logically processes it, adding no emotion and drawing conclusions. The result is passed along to “Impulse” who interprets the result in terms of expected gratification or pain, and reacts emotionally. “Impulse” provides the emotional response to Reason’s rational conclusions and judgements. Meanwhile, “Impulse” is also using sensory perceptions to make associations with past experience and bringing forth the emotions they trigger.

The Conscious Mind and the Unconscious Mind

Reason is your conscious mind and Impulse is your unconscious mind. They are the key to the way we think, perceive, and make decisions. And they are the key to understanding and communicating with your customers and prospective customers.

If your marketing is to be successful, you have to communicate to *both* of them. Most businesses fall short because they communicate mostly with “Reason” and not the decision maker – “Impulse”!

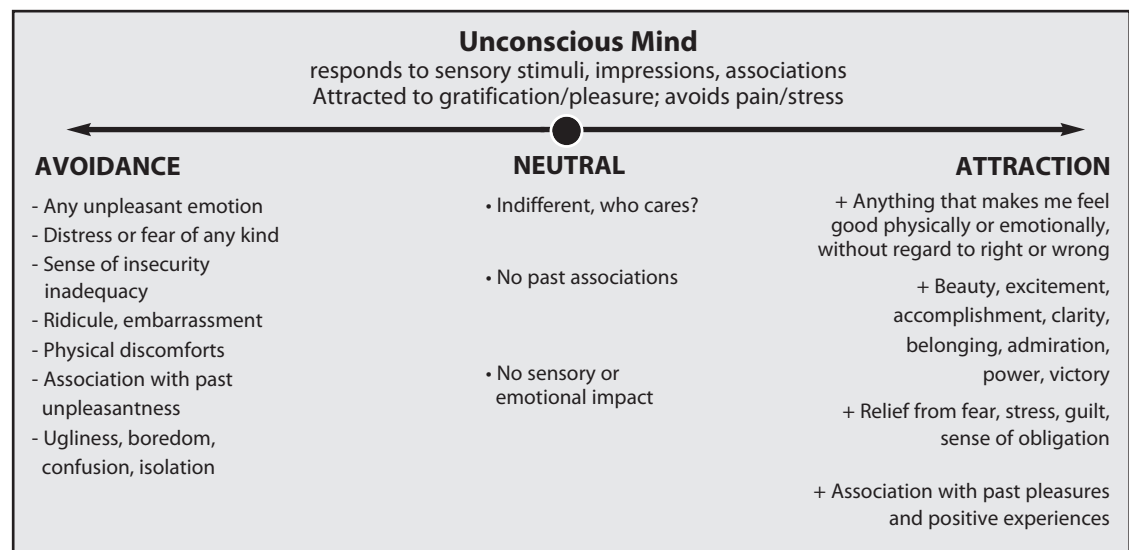
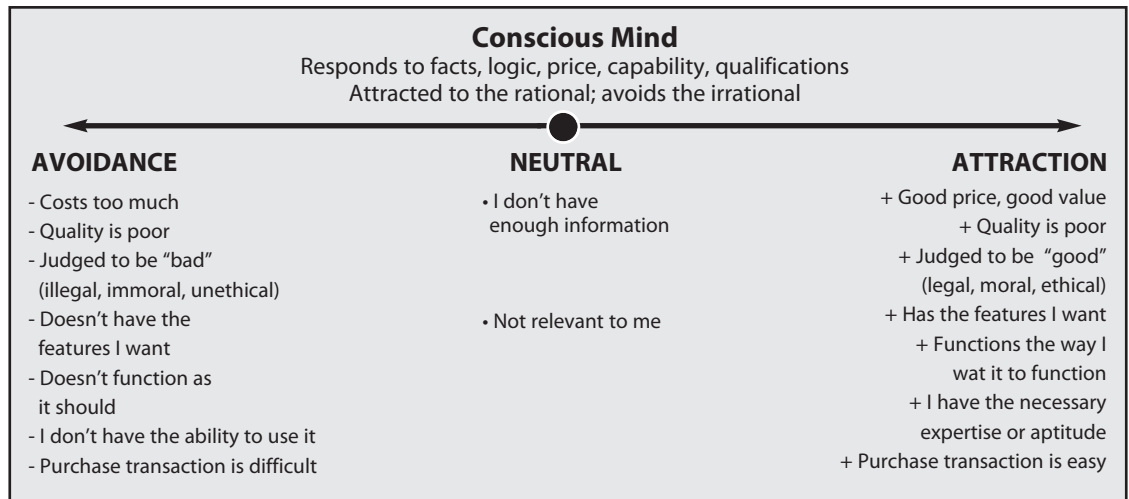
You never know exactly what associations your advertising, your product, or your sensory package are going to trigger with any specific individual – people, their experiences, and their perceptions are much too varied. But you can tap into the common experiences and perceptions of *groups* of similar people. You need to understand your target markets in as much depth as you can. Who they are will inform you about the kinds of things most likely to have positive associations. And this gives you insights into the kinds of messages and images your advertising should carry, the way you should interact with customers, and the kind of sensory experience your customers need to have when they do business with your company.



Unconscious Associations - Client Fulfillment

Attraction and Avoidance – the Essence of Purchase Decisions

A purchase decision, or any decision for that matter, is simply the emotional response to all the rational and not-so rational activities in the conscious and unconscious mind. It's all a matter of attraction and avoidance. The conscious mind drawn to purchases that make sense, are rational, and have objectively desirable results. It is repelled by purchases that are irrational and have objectively undesirable results. The unconscious mind is drawn to purchases that result in emotional gratification. It is attracted by pleasant associations, pleasant sensory perceptions, and the promise of good results based on the conscious mind's conclusions and judgments. It avoids anything unpleasant.





Psychographics and the Central Psychographic Model - Client Fulfillment

Psychographics are the mental and emotional characteristics that typify the people in markets and market segments; specifically, their self-perceptions, their drives, their perceptions and expectations of the world around them, and their emotional associations.

There are six types of psychographic characteristics you should know to better understand your customers:

1. Self-perceptions (how your customer sees themselves)
2. External perceptions (how they see the world around themselves)
3. Drives (what a product does to satisfy them)
4. Emotional associations (what makes them happy, what turns them off)
5. Gratification mode
6. Purchase preference

1. Self-perceptions.

People's self-perceptions have to do with two items - their personal image and values. If they are satisfied with their self-perceptions, marketing messages that reinforce *satisfaction* are likely to hold the promise of emotional gratification and create attraction for your products and your business. If they are not content with their self-perceptions, messages that promise *improvement* are likely to generate a sense of emotional gratification and create attraction. There are two categories of people's self-perceptions:

- **Personal image** relates to the question of, "What kind of person is your customer?" It includes perceptions of their role in life, social status, economic class, special abilities, intelligence, and distinguishing characteristics.

- **Personal values**

"What's important to your customers in life?"

What level of importance do your customer's place on these values -

integrity -

honesty -

thrift

sense of responsibility

loyalty

generosity

love

family

friendships

career

material possessions

physical and emotional well-being

community

faith

and the environment



2. External perceptions.

People perceive the world around them in different ways. Knowing customers perceptions, both good and bad, tells you a lot about their expectations. This helps you position your business in their minds and develop the most effective methods of interacting with customers and prospects.

Three categories of external perceptions are:

• **Environment.**

- Do they expect the best or the worst?
- Do good things or bad things tend to happen to them?

• **Behavioral.**

- Do they view business people as helpful friendly, and useful or cold, unfriendly, and incompetent?

• **Motivational.**

- Do they expect salespeople to be helpful and interested or just after their money?
- Are businesses caring and ethical or cold and greedy?

3. Drives.

Drives are the physical and emotional needs, desires, and fears that drive an action. It is important to acknowledge these needs and make sure your products and services satisfy them. The two different types of drives are:

• **Functional needs** are what the *conscious* mind understand. They are satisfied by the tangible aspects of your products and services.

- What must your products *do* for your customers?
- What functions must they perform?
- What physical features must be present?
- How must they work?

• **Emotional/internal needs** drive the *unconscious* mind. They are the impulse for emotional gratification (and buying). More powerful than functional needs, emotional needs underlie every functional need. For instance, hunger is the functional need for food – but also fulfills an emotional need for pleasure and satisfactions.

4. Emotional associations.

What emotional associations are likely within this market segment, and what is likely to trigger them? Be careful. Sometimes what is joyful for one market segment is unpleasant for another. Shopping for clothing is a happy, stimulating activity for some, and unpleasant labor for others. Attending an opera can be entertaining for some, boring for others.

• **Positive associations** are those that trigger emotional gratification.

Communications and sensory impressions that remind people of joyful events in their lives, or of wonderful sensory experiences (food, music, sex, athletics, luxurious comfort, etc.), or of achieving cherished fantasies.



- **Negative associations** are those that trigger emotional discomfort. If you are not attentive to communications and sensory impressions, you run the risk of inadvertently triggering negative emotional responses, creating avoidance rather than attraction for your products and your business.

5. Gratification mode.

These are three ways that people get gratifications in their lives:

- **Extroverted:** primarily through interactions with other people.
- **Objective:** primarily through interacting with inanimate objects or data.
- **Introverted:** primarily from interacting with ideas in a solitary fashion.

Everyone gets gratification in all three ways, but usually one gratification mode dominates for any individual. For instance, even the most strongly extroverted types occasionally take time to be alone with their thoughts or do something by themselves.

People with different dominant modes of gratification tend to settle into occupations that provide opportunities for their preferred mode. You can use occupation as a fairly reliable indicator until you are able to complete additional market research. Since occupation was one of the demographic characteristics in your CDM, it's a simple matter to look at your demographic data, see which occupations are prevalent in your target markets, and determine from that which is the dominant gratification mode. Here's a sample listing of the occupations that tend to correlate with each of the gratification modes:

Gratification Modes

Extroverted

Actors, performers
Athletes in team sports
Attorneys who litigate
Consultants
Homemakers
Marketing executives
Physicians: lots of people contact
Salespeople
Secretaries
Teachers

Objective

Accountants
Bankers
Career military officers
Corporate attorneys
Data processors
Engineers
Insurance executives
Investment and stock brokerage personnel
Managers
Physicians: little people contact
Researchers

Introverted

Artists
Athletes in individual sports
Dedicated hobbyists
Designers (non-engineering)
Entrepreneurs
Inventors
Writers



Psychographics and the Central Psychographic Model - Client Fulfillment

6. Purchase preference.

There are three purchase preferences that indicate why customers buy and how customers rationally justify the purchases they make:

- **Experimental:** want products and services that are new, revolutionary, innovative. Most commonly associated with Extroverted buyers.
- **Performance:** want something reliable, dependable, of proven quality. Usually associated with Objective buyers.
- **Value:** want something “worth the money.” They either want the best price or the best sense of value. Most often associated with Introverted buyers.

As with the gratification modes, everyone is concerned with all three preferences to some degree, but one preference usually dominates. And again, the best way to discover the prevailing purchase preference for any market segment is through market research. As it happens, occupation is also a fairly good indicator of purchase preference, and you can do the same kind of occupational analysis of your target market segments for purchase preference as you did for gratification mode. Here is a sample listing of occupations that tend to correlate with each of the purchase preferences:

Purchase Preferences

Experimental

Actors, performers
Artists
Athletes
Consultants
Dedicated hobbyists
Designers (non-engineering)
Homemakers (middle and high income)
Inventors
Marketing executives
Salespeople
Secretaries
Writers

Performance

Attorneys
Bankers
Career military officers
Data processors
Engineers
Insurance executives
Investment and stock brokerage personnel
Managers
Physicians
Researchers
Teachers

Value

Accountants
Entrepreneurs
Homemakers (low income)
Manual laborers

It's important to keep in mind that the type of product or service can have a significant influence on the purchase preference. For example, pet owners want assurance that a veterinarian is dependable, reliable, and well qualified. In other words, they are most interested in Performance. This holds true no matter how Experimental they might be with other products and services



Purchase Preference and Gratification Mode Grid - Client Fulfillment

Purchase Preference			
	Extroverted	Objective	Introverted
Experimental	<ul style="list-style-type: none"> • Image and status conscious • Like being first, unique and different • Fantasy oriented • Wanted to believe new product claims, trust sales people, like to be "sold to" 	<ul style="list-style-type: none"> • Results are important but so is the process • Want tangible rewards vs. recognition • Concerned with what a product will do for them vs. the status it will give 	<ul style="list-style-type: none"> • Drawn to new concepts & ideas • Have a superior self-image • May be slow to trust people • Have creative, idealistic, dreams
Performance	<ul style="list-style-type: none"> • Want to be known as reliable, dependable • Goal oriented • Like to associate with successful people • Expect results & reliability from others • Opinionated but open to influence 	<ul style="list-style-type: none"> • Need reliable structures & systems • Decisions based on objective data • Like predictability • Moderately impatient • Can be influenced by those they know and respect 	<ul style="list-style-type: none"> • Usually poor listeners • Take pride in making up their own mind • Do not want to be "sold to" • Very independent • Can only be influenced by a few, very close associates
Value	<ul style="list-style-type: none"> • Predisposed with finding a "good value" • Prefer to buy from trusted "friends" • Can be influenced within the range of perceived value 	<ul style="list-style-type: none"> • Enticed by innovation & technology, but will only respond if presented as a value or savings over existing products • Introductory rebates/coupons may be effective short term 	<ul style="list-style-type: none"> • The consummate distrustful "penny-pincher" • May expend much energy to realize nominal savings



Lead Generation

BRAND BUILDING
BLUE PRINT

Attract Clients, Make Money, Grow Your Business



Lead Generation -

Key Findings -

Your lead generation activities may not be delivering enough new leads to your business. You may also be having trouble quantifying the return on your lead generation investment. Another issue may be deciding what lead generation channels will be most effective. Developing a systematic approach to lead generation will enable you to improve upon your current results.

Questions to Consider As You Build Your Business' Brand

- *Are you currently tracking the effectiveness of your lead generation activities?*
- *Are you getting new leads by word-of-mouth?*

Shifting Your Perspective

There could be several reasons why your business isn't attracting enough new leads. Your lead generation message may not be aligned with your prospects' needs. Or, your message may be compelling, but the channels you've chosen are not reaching your potential customers. Finally, dissatisfied customers may be creating negative impressions about your business based on their experiences. Right now your business is in its infancy and there has not been a lead generation campaign set up for your specific needs. With all of the different social media channels and online communities for you to tap into the possibilities are endless. We will want to look at several list building and lead generation strategies that will be the most effective in creating qualified leads that will want to enroll in your online program.

Action Items

- Evaluate the effectiveness of your current lead generation activities to determine what's working and what's not. Having a lead generation system in place is an on-going process that will evolve over time as you learn more about what your customer wants and where you can find them.
- List each lead generation channel you plan to use, such as social media, online communities, trade shows, your website, and online series.
- Document how much each channel costs, and how project how many leads you would like it to generate. This process was started for you with the Website Grader and the Monthly Marketing Report. We will want to add the cost of the lead generators. Social Media is free by theory, but there is a cost. The cost is time, unless you are spending money on ads.
- Divide the cost by the number of leads to determine the cost per lead. This tells you which channels are giving you the highest return on your lead generation investment.

Resources

Books:

- *Creating Customer Evangelists: How Loyal Customers Become a Volunteer Sales Force*
- *The Ultimate Sales Letter: Attract New Customers, Boost Your Sales*



Lead Conversion

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Lead Conversion -

Key Findings

It appears that you might be having trouble converting leads into customers. You may be experiencing stagnant or decreasing sales. Your sales presentations may be inconsistent and you may not know how to address customers' questions and concerns.

Questions to Consider

- *On average, how many leads do you convert to customers?*
- *How does this ratio compare to your industry standard?*
- *Are you working strategically to develop better lead conversion processes?*

Shifting Your Perspective

Selling, in the traditional sense, focuses on your need for more sales and revenue. It's time to stop thinking about your need for sales, and start thinking about your customers' needs. In this new approach, you position yourself in a partnership role with the customer. To be successful, your lead conversion process must be systematized and documented. With your new perspective in mind, create scripts to ensure your sales presentations are delivered consistently.

Action Items

- The heart of a successful lead conversion process is determining the customers' needs, then offering a solution that satisfies those needs.
 - *Decide on three questions you can ask each customer to determine their needs.*
 - *Based on your experience, identify three customer concerns and create responses that offer your product or service as the solution.*
 - *Incorporate these responses into your lead conversion presentation.*



Set The Stage and Manage Expectations

Connection Calls and Enrollment Conversations are a great way to find out if both you and the prospect are a good fit. The primary purpose of this call or one - 2 - one in person conversation is for you to find out more about your prospective client – and answer any questions they may have before they make the investment to work with you.

What this call or in-person conversation is not – is a ‘free coaching’ session. The outline has been designed **for you to customize** so it can really help you run your Breakthrough and Enrollment Sessions that get the **YES** you’re looking for – from the right client for your programs.

At BrandWorx Productions we are not a fan of the scripted or automated call. We believe in you finding your own voice that connects with your perfect client. A script that does not sound like you that feels like you are reading will never convert the person you are having a conversation with. Scripts do not create a connection with you and the other person. Also you do not want to be doing all of the talking. Leave room and space for the other person to be heard and do not talk over them.

I often like to compare my connection calls to a dance... you are the leader, with the only mission to help guide your partner across the dance floor, where they will make a decision as to whether or not they want to continue to dance (work with you).

There are 4 areas to visit:

1. Current pain point
2. Desired state
3. Challenges faced
4. Urgency to resolve
5. The Offer - which ends the dance (if it's right). If they do not find the value in your offer you start the dance over and take them back to step one and two and remind them of their current pain point and the desired state.

At the end of this outline, I'll provide you with a high-level guide – so you can have it printed out on your desk, to help you stay on track. You will want edit it into your voice with your offers that connect with your perfect client.

STEP 1. SET THE EXPECTATION

Hey NAME!

Thanks for taking the time to talk with me today – I'm really looking forward to getting to know you (and your business) better!

Just before we start, I wanted to let you know how I usually run these calls – is that okay?

(PAUSE for agreement)

I like to start these calls off first getting to know you – what you do, what your business currently looks like and the goals that you want to achieve.



Lead Conversion - Connection Conversation

Then we talk about the obstacles/ challenges / things that are stopping you getting there/ reaching those goals right now.

And then after that, if it feels right, I'll share how we can potentially work together in future. How does that sound?

(By asking the prospective client if that works for them, you've a) clarified that they're listening, b) managed their expectations that this is going to be a call to discover more about them and how you can potentially work together and c) got their permission to offer them to work with you – only if it feels right.)

(PAUSE for agreement)

Great! Let's get started.

So, NAME tell me more about you (and your business) ...

STEP 2. IDENTIFY THEIR CURRENT SITUATION

You are ready to start your dance... and you can do that by taking a confident step with discovering more about your client. Here is where you will gather information about what this person's business/ health/ relationship looks like... and the current pain/discomfort/dissatisfaction that they are experiencing.

There are a variety of questions that you can use to gather information. Here are a few example questions:

- What does your business/ health/ relationship etc. look like right now?
- Tell me more about your business/ health/ relationship etc.?
- What areas of business are causing you the most stress/anxiety right now?

STEP 3. IDENTIFY DESIRED STATE

With a quick turn of the feet, you will usher your prospect to what their ideal business/ health/ relationship state would be.

Here are a few example questions:

- What's do you want to achieve in the next 90 days? 12 months?
- How much would you like to earn each month in your business?
- What results would you like to see if we were working together? Which results would be most important/ make you happiest / be the best for your lifestyle and business?
- If I could give you a magic wand, what would your business / health / relationships etc. look like in the next 90 days?



STEP 4. IDENTIFY THEIR CHALLENGES

As we continue our tour of the dancefloor, we will now identify their current challenges. This is where you talk about any obstacles / challenges that they may be facing and pre-empt any objections nice and early. This is an important step in having a successful sales call.

Part of the success is related to helping you understand whether you are the right coach to support this potential client with their challenges – and give you some great information for objection handling (if necessary!) later on.

Here are some questions you can ask:

- So, what do you feel is stopping you from achieving XYZ goal?
- Have you worked with a coach before? How was that experience?
- If you were going to change anything about your life/ business/ relationship/ health etc. right now, what would you change?
- What do you think is the biggest factor / reason for you not hitting your goals right now?

STEP 5. CREATE URGENCY

Onto the final part of the dance... you have a clearer understanding of their business, their desired state, and the challenges/obstacles they face. Now is the fun part... helping identify how quickly they want to solve their problem.

By helping them do this, you help create a real sense of urgency... This will also help you understand how committed this prospective client is to making changes – and seeing results. Here are some questions you can ask:

- If you don't solve XYZ issue, what do you think will happen in your life/business/ relationship/health etc.?
- Where did you hear about me/ my business – and what about it resonated with you?
- Why do you feel like now is the right time for you to work with a coach in these areas?
- How committed are you to achieving XYZ goal?
- How quickly would you like to see XYZ results? Is it something that you want right now – or are you happy to wait until next year?



STEP 6. SUMMARIZE AND MAKE YOUR OFFER

You are winding down the dance. You have a TON of information, and believe it or not, you have all that you need to summarize and sell! You now know your prospective client's goals, challenges, and timeframe by which they want results!

How you do that is by summarizing what they have communicated. This shows them that you have been actively listening, and then offer them a solution that will help to solve their problem.

For example:

"Great NAME, I want to summarize everything I've heard so far, so I'm sure that I've got everything right. You currently have a coaching business that you'd like grow and scale, so you can start making consistent 5 figure months and spend more time with your family. Does that sound right?"

(PAUSE for agreement)

Great, so what I'm hearing from you is that to do this, you feel like you need help to nail down who your ideal client is, get clarity around your offers, and then accelerate your sales to get the bottom line results you're looking for. And you're looking for a coach who can do that, as well as keeping you accountable and give you the 1:1 attention/support that you need to make those dreams a reality. Is that right?

(PAUSE for agreement)

Now that you've summarized what your prospective client has told you – if you feel that what you do, and your offer is the right fit, you can share / sell the service that you feel would be the best fit – and how they would meet your prospective client's needs.

This is the ONLY time during the Breakthrough Session that you should be talking to the prospective client rather than gathering information from them.

This means that you now regain full control of the conversation and can make a solid recommendation. You could try something like:

Fantastic – now I really understand your goals and the challenges that you're facing, I believe I could help you hit those consistent five figure months. To do that we would first identify the money opportunities in your business to get a cash infusion in our business, then we'd streamline your offers so that they are irresistible and congruent with your strengths, and then accelerate your sales by increasing your leads and pool of qualified buyers – all in a way that is authentic to you and your sales style.

Or you could also try something like this:

NAME, I'm so excited about your business! Based on what we've covered today, I think that my XYZ program would be the best fit for you. This program allows us to work together 1:1, gives you voxer access and would allow us to propel your productivity, streamline your offers, and accelerate your sales, so you can see your profits increase faster than ever before.

You could say something like:



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I'm really pleased that you feel that this program is a good fit for you. I feel like the XYZ (voxer support/ accountability/ streamlined offers/ regular check-ins) will really benefit you and help you see results really fast! So, this 90-day program with the 1:1 weekly calls, voxer support and the accountability – as well as the workbooks/ pdfs/ whatever else you may offer is \$xxxx. I do offer installments – so you could also choose to do a 3-pay of \$xxxx.

How would you like to proceed?



STEP 1. SET THE EXPECTATION

Hey NAME!

Thanks for taking the time to talk with me today – I'm really looking forward to getting to know you (and your business) better!

Just before we start, I wanted to let you know how I usually run these calls – is that okay?

(PAUSE for agreement)

I like to start these calls off first getting to know you – what you do, what your business currently looks like and the goals that you want to achieve.

Then we talk about the obstacles/ challenges / things that are stopping you getting there/ reaching those goals right now.

And then after that, if it feels right, I'll share how we can potentially work together in future. How does that sound?

(PAUSE for agreement)

Great! Let's get started.

So, NAME tell me more about you (and your business) ...

STEP 2. IDENTIFY THEIR CURRENT SITUATION

Question to ask (pick one):

- ☐ What does your business/ health/ relationship etc. look like right now?
- ☐ Tell me more about your business/ health/ relationship etc.?
- ☐ What areas of business are causing you the most stress/anxiety right now?

Notes: Keep notes to use for the offer and the follow up campaign.



STEP 3. IDENTIFY DESIRED STATE

Question to ask (pick one):

- ☐ What's do you want to achieve in the next 90 days? 12 months?
- ☐ How much would you like to earn each month in your business?
- ☐ What results would you like to see if we were working together? Which results would be most important/ make you happiest / be the best for your lifestyle and business?
- ☐ If I could give you a magic wand, what would your business / health / relationships etc. look like in the next 90 days?

Notes: Keep notes to use for the offer and the follow up campaign.

STEP 4. IDENTIFY THEIR CHALLENGES

Question to ask (pick one):

- ☐ So, what do you feel is stopping you from achieving XYZ goal?
- ☐ Have you worked with a coach before? How was that experience?
- ☐ If you were going to change anything about your life/ business/ relationship/ health etc. right now, what would you change?
- ☐ What do you think is the biggest factor / reason for you not hitting your goals right now?

Notes: Keep notes to use for the offer and the follow up campaign.



STEP 5. CREATE URGENCY

Question to ask (pick one):

- ☐ If you don't solve XYZ issue, what do you think will happen in your life/business/ relationship/health etc.?
- ☐ Where did you hear about me/ my business – and what about it resonated with you?
- ☐ Why do you feel like now is the right time for you to work with a coach in these areas?
- ☐ How committed are you to achieving XYZ goal?
- ☐ How quickly would you like to see XYZ results? Is it something that you want right now – or are you happy to wait until next year?

Notes: Keep notes to use for the offer and the follow up campaign.

STEP 6. SUMMARIZE AND SELL

Great NAME, I want to summarize everything I've heard so far, so I'm sure that I've got everything right. You currently have a coaching business that you'd like grow and scale, so you can start making consistent 5 figure months and spend more time with your family. Does that sound right?"

(PAUSE for agreement)

Great, so what I'm hearing from you is that to do this, you feel like you need help to nail down who your ideal client is, get clarity around your offers, and then accelerate your sales to get the bottom line results you're looking for. And you're looking for a coach who can do that, as well as keeping you accountable and give you the 1:1 attention/support that you need to make those dreams a reality. Is that right?

(PAUSE for agreement)

NAME, I'm so excited about your business! Based on what we've covered today, I think that my XYZ program would be the best fit for you. This program allows us to work together 1:1, gives you voxer access and would allow us to propel your productivity, streamline your offers, and accelerate your sales, so you can see your profits increase faster than ever before. How does that sound to you?

(PAUSE for agreement...typically they'll say something like "that sounds really great")



Lead Conversion - Connection Conversation

(Typically, they will ask the price)

I'm really pleased that you feel that this program is a good fit for you. I feel like the XYZ (voxeer support/ accountability/ streamlined offers/ regular check-ins) will really benefit you and help you see results really fast! So, this 90-day program with the 1:1 weekly calls, voxeer support and the accountability – as well as the workbooks/ pdfs/ whatever else you may offer is \$xxxx. I do offer instalments – so you could also choose to do a 3-pay of \$xxxx.

How would you like to proceed?

Wait for them to speak.

There are three objections you may get. Be prepared to help them overcome their objections

1. Time - share with them how save them time
2. Money - they did not find the value in your program
3. Spouse - Invite their spouse to be part of the conversation.

Be prepared and take them back to step 1 and 2. Remind them of their pain and their desired result that your program will deliver.

Attract Clients, Make Money, Grow Your Business



BrandStorming System Strategy -

Key Findings

Every business has some systems in place. Your business is achieving consistent results in the areas where you have implemented systems. However, you may not be getting the maximum value from your business systems because not all systems are documented. Your business may not be reaching its full potential, and its current market value may be limited, because it's not fully systematized. Every process in your business -- from how coffee is made, to how a customer is greeted, to how the financial statements are used -- is an opportunity to develop a system.

From what you've told us about your understanding of the value of systems, your business will be positioned to achieve consistent results. To realize maximum value from your business systems, document them and make sure the employees you are going to hire are trained to use and improve them. Your business may not reach its full potential and market value if it's not fully systematized. Every process in your business -- from how coffee is made, to how a customer is greeted, to how financial statements are used -- is an opportunity to develop a system.

Questions to Consider

- *What areas of your business are not performing well?*
- *Which of your business activities are producing inconsistent results?*
- *Do you have a plan to document your business processes?*
- *How much time have you spent looking at your business from a systemic perspective?
Have you written down your observations and ideas?*
- *Do you plan to regularly review the performance of your business systems?*

Shifting Your Perspective

Effective systems are the foundation for the franchise prototype model. Whether or not you intend to franchise your business, you need to build systems that allow the business to operate in a consistent and repeatable manner. Building your business as if it were a franchise is the key to creating a business that works, one that provides you with financial rewards and the free time to enjoy your life. If and when you decide to get free of your business, it will continue to run smoothly without your involvement.

Action Items

- *List and identify the systems you feel will have the greatest impact on your business.*
- *List all of the systems in your business and identify which of them are working well and which need to be improved. Also identify the areas where systems are missing.*



Congratulations!

BRAND BUILDING BLUE PRINT

Attract Clients, Make Money, Grow Your Business



Congratulations! You have completed your Brand Building Blueprint

Now that you have completed the Brandstorming assessment for your business you have three basic choices:

1. You can do nothing;
2. You can take the information you've learned here and apply it to your business as you see fit; OR
3. You can decide now to take the next step with Walker Creative Design to help you brand your company properly and attract your most profitable clients.

If you want to achieve your goals faster, stay on track, and go much farther than you could on your own, take the next step with BrandWorx Productions. Take full advantage of our 20 years' experience, our dedicated team of experts, our proven ROI, and resources.

This report will provide you with immediate next steps to improve your business and your brand. What can you do today to begin applying the Brandstorming principles to your life? Which one of the thirteen areas are in most need of improvement in your business? Choose one and think about what would happen if you applied some of the principles you've learned here. These are your thinking and action items. Use what you've learned in this WebWorx program as a starting point for creating a online business that serves your life.

Please call Jasper Dayton from BrandWorx Productions at 608-334-5480, if you have any questions.

Enjoy your new insight into your business and we are looking forward accomplish your business goals and dreams.

