



W O R K B O O K

How to Build an Effective Marketing Strategy (A Tactical Four-Step Approach)

1. DEFINE YOUR IDEAL CUSTOMER

A. Who is your ideal customer?

Most businesses are suited to serve a narrowly defined market segment best — kind of like a sweet spot. So, work to define the type of customers (businesses) you should be working with. Start by asking yourself the following questions:

Am I focusing exclusively on businesses (B2B), consumers (B2C), or both?

What is the ideal company size?

What industries or specific groups of people are a good fit? Some businesses might have 3-4 segments (think: commercial, public, residential, industrial)

Where are they? Are they local, national, or global?

What type of business is NOT a good fit? (Go back to the quadrant.)

Who is your ideal customer? (Don't worry. We'll come back to this.)

What is their biggest frustration – the thing you're uniquely qualified to fix?

B. What triggers them to contact you?

So let's think about triggers - what pain motivates someone to contact a couples therapist?

A troubled relationship. A crisis point. A need to change.

What about a Plumbing, Heating, and Air company?

What pain motivates someone (a slightly stressed homeowner) to contact a service store like Front Range Plumbing, Heating, and Air? The motivator could be any of the issues below...

- a. My heat pump quit working.
- b. The water pressure in my house just doesn't seem strong enough.
- c. My AC unit is over 20 years old.

Three different reasons why they might contact this company. So, if our contractor simply understands more about their prospect's journey and what triggers them to call, they will be able to think about every stage in the customer journey and build marketing to appeal to that person. Maybe they need a 24/7 support line. Or videos describing what to look for in aging AC units. Or maybe they need to build in post-project surveys to better understand their customer's needs. *We'll get into how to build this into your marketing later.*

But it's important to clearly understand your buyer's intent. What are the triggers that will get someone to contact you?

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

2. CREATE YOUR BRAND MESSAGE (On Your Website)

Build Messaging Focused on Your Customer's Needs

Couples Therapist:

What triggers them to contact you? A troubled relationship. A crisis point. A need to change.

How will you help them (your expertise)? I help couples with relationship issues.

What is the outcome of working with you? Rediscover passion, commitment, and meaning in your relationship. Experience a life-transforming journey that leads to greater love, trust, and personal growth.

What should they do next (Call to Action)? Let's talk (discovery call).

Sporting goods store:

What triggers them to contact you? Need new sporting goods at reasonable price

How will you help them (your expertise)? For men aged 25-50, Creekside Sports is a sporting goods store that provides the lowest prices in the greater Fort Collins area.

What is the outcome of working with you? You'll have the sporting goods you need and some extra money in your pocket.

What should they do next (Call to Action)? Find a store. Shop online.

Plumbing, heating, and air company:

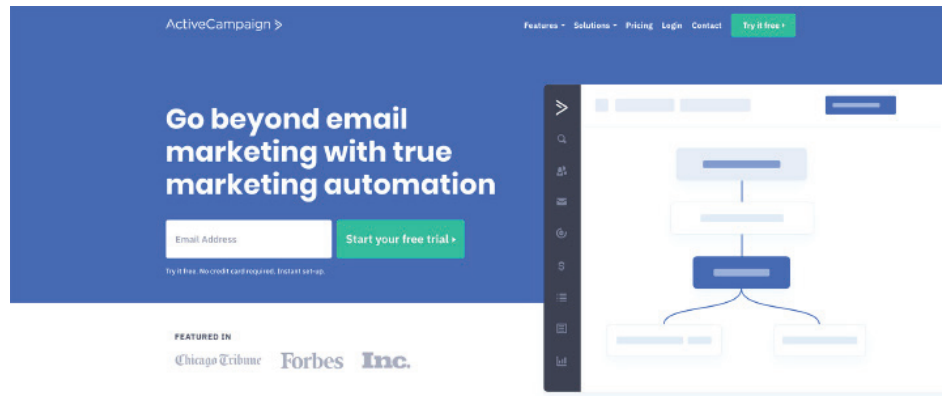
What triggers them to contact you? My heat pump quit working. My AC unit is over 20 years old.

How will you help them (your expertise)? Serving homeowners in Fort Collins, Loveland and Greeley with plumbing, heating and cooling services for over 20 years. We are the most trusted plumbing, heating, and AC repair company for homeowners in the greater Fort Collins area. This is because we only hire and train technicians that meet our high standards. Our company ethos is built on dependability, trust, and professionalism. We've streamlined our business to provide the absolute best service and the proof comes in the hundreds of positive reviews you'll find online.

What is the outcome of working with you? We'll keep your family comfortable.

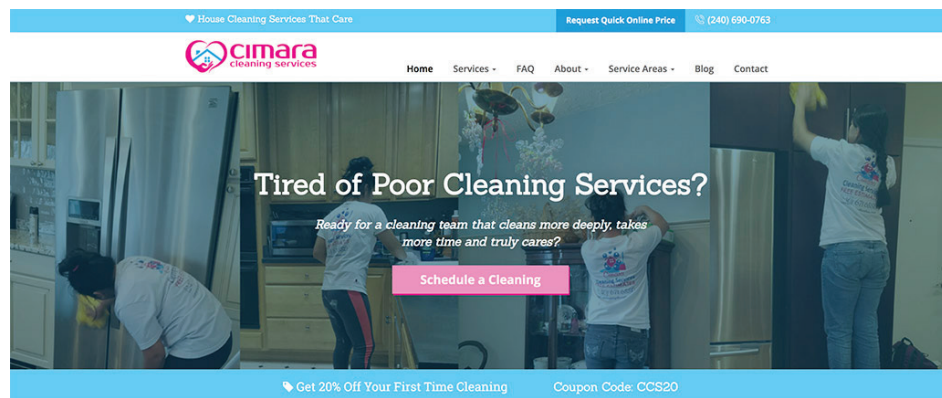
What should they do next (Call to Action)? Request service.

Use these website home page samples to guide you...

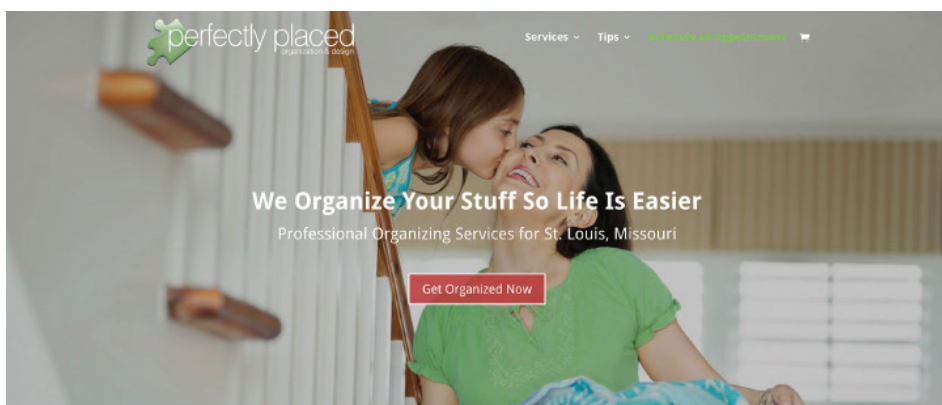


Email Marketing. Marketing Automation. Sales CRM. Messaging.

All the tools you need to make meaningful connections and grow your business.



House Cleaning With Care



Hire a professional organizer and find a place for everything

Life is full of long work days, unexpected road blocks and every day challenges. It is these things that fill our time and keep us from getting what our hearts long for—a place to rest.

Craft your website messaging around your customer's needs

1. What triggers them to contact you (problem, need, pain)?

2. How are you uniquely suited to help them (your expertise)?

3. What is the outcome of working with you?

4. Create a call to action for them to get started.

Guide: A basic template for your website

Using the template below a guide to create your initial copy ideas based on everything we've discussed up to this point. Also think about the primary image you will use.

Logo	Top navigation/links	Contact
<div></div>		<div></div>
<p>Primary "above the fold" message</p> <div></div>		
<p>Call to Action button</p> <div></div>		
<hr/>		
<p>Secondary message</p> <div></div>		

3. START ON SEO BASICS (off-site and on-site)

Claim and Optimize Google My Business

- ☐ Setup a new Google account or sign into one you have.
- ☐ Visit Google My Business: <https://www.google.com/business/>
- ☐ Type your business name. As you start typing, the autocomplete feature will suggest the names of local businesses (if there are any that have the same name). If you've previously set up your business listing, your business name will be one of the suggestions that populate the field.
- ☐ Type your business address. This needs to be a physical location where you interact directly with your customers.
- ☐ (For Service Area Businesses): Enter information about the areas your business serves.
- ☐ Select your business category.
- ☐ Enter your business phone number and website URL.
- ☐ Complete your Google My Business Verification.
- ☐ Provide additional details about your business to help a user find what they're looking for. Add photos and videos, write an engaging business description, Add services.

Build Local Citations

A citation is basically a mention of your business's name, address, and telephone number online. You can create citations on a variety of platforms including your local chamber of commerce, Facebook, Yahoo Local, Yellow Pages and potentially hundreds more.

- ☐ Make sure you've completed your Google My Business profile before you do this.
- ☐ Use a tool like MozLocal <https://moz.com/checkout/local/check> to check your online presence. You can then proceed to update your listings manually or...
- ☐ Do a citation burst using a citation building service like [BrightLocal](#), [WhiteSpark](#), or [MozLocal](#). This will help you clean and suppress any inaccurate, inconsistent, and incomplete information. (This is what I recommend.)

Focus on Online Reviews

Getting more online reviews from happy customers is one of the most important business-building strategies you can employ. And you can start today!

- ☐ Send your current customers an email asking them to leave your business an online review. Most often people want to help, especially if they like doing business with you.
- ☐ If you have a brick and mortar location, use reminders in your store to encourage customers to leave reviews. If you have a Google My Business profile, Google offers free marketing materials to help with this: <https://marketingkit.withgoogle.com>
- ☐ Ask for a review after a customer purchase. After they buy from you simply ask for a review. Point them to your Google My Business page, Yelp, or Facebook and/or follow up with an email.

3. START ON SEO BASICS (off-site and on-site)

And start fleshing out your content...

Focus on the keywords your ideal customer will type in a Google search

Think about your ideal customer's wants and needs. When someone types a keyword into a search bar and your website shows up on page one this is called organic SEO. Organic SEO MUST be a key element of your marketing. And finding the keywords potential customers are searching for is step one.

Ask questions (They ask, you answer):

- Take 30-60 minutes to write down the questions you think ideal customers would ask. Don't stop until you have at least 20 questions. These questions and your answers become the foundation of your content. Think about core keywords most pertinent to your brand. This list will change as you dive deeper into this process.

Create a spreadsheet and continue to build it out. These questions and answers might become...

- Blog posts, a detailed Q&A section on your website, website pages, videos, and more.

Start your list of customer questions:

How will you get links back to your site?

Start building out keywords on your website. Start with your home page.

Ask yourself: Which keywords will I target for my home page?



← **Location copy**

← **Focused above the fold messaging (talking to her ideal customer)**

← **Specific call-to-action**

← **Key services descriptions**

- [Service #1](#)
- [Service #2](#)
- [Service #3](#)
- [Service #4](#)

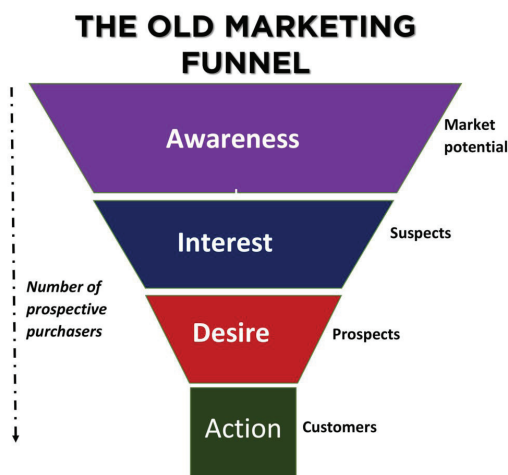
← **Customer reviews**

← **A blog section**

← **A detailed footer** showing your location (with an embedded map, especially helpful if you're trying to rank locally), address and contact info, social media links, hours, and navigation. And more.

4. MAP OUT THE CUSTOMER JOURNEY (and create a plan of action)

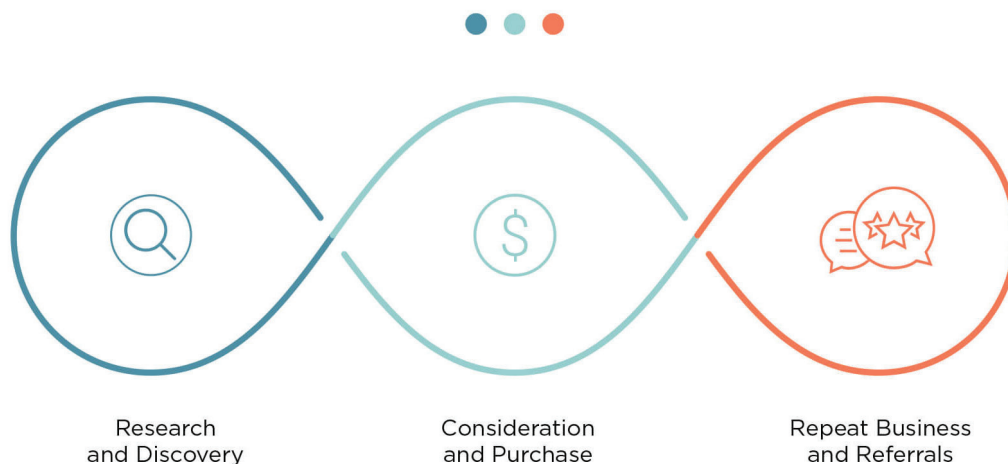
You may have heard about the marketing funnel. I prefer to think of your relationship with customers as something more like a continuous loop. The way people make buying decisions has dramatically changed. So we need to think through how we're moving people through the following stages below: Research and Discovery, Consideration and Purchase, and Repeat Business and Referrals.



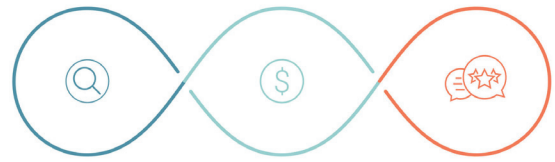
Old marketing funnel vs.

- The Marketing Hourglass
- The 3 Loops of Modern Marketing

The 3 Loops of Modern Marketing



Think about your ideal customer's discovery and buying process? How do they evaluate all options and make a purchase? Then work on filling in the stages below to form the framework of your marketing strategy.



Research and Discovery (the Know, Like and Trust phase):

Advertising, networking, referrals, website, customer reviews, social media, blog content, SEO, local SEO, marketing materials.



Consideration and Purchase (the Try, Decide, Buy phase):

Workshops, demos, training, eBooks, your service team, welcome kit, video training.



Repeat Business and Referrals (the Repeat, Refer phase):

A review funnel so happy customers can easily leave reviews, referral partners, post project reviews, customer follow up, surveys.

4 Steps to Build an Effective Marketing Strategy

Helpful links:

More in-depth list: <https://mcbreenmarketing.com/workshop-resources/>

My posts/pages (for each of the 4 steps):

1. **Ideal Customer:** <https://mcbreenmarketing.com/how-to-create-ideal-customer-persona/>
2. **Core Message:** <https://mcbreenmarketing.com/develop-core-marketing-message/>
3. **SEO basics...**
 - Local SEO Guide for Small Business:** <https://mcbreenmarketing.com/guide-local-seo/>
 - SEO Strategy:** <https://mcbreenmarketing.com/modern-seo-strategy/>
4. **Map Out Customer Journey:** <https://mcbreenmarketing.com/build-marketing-system-in-4-steps/>

Duct Tape Marketing | ducttapemarketing.com

Branding and Ideal Customer:

- **StoryBrand (Donald Miller)** | storybrand.com
- **Buyer Persona Institute (Adele Revella)** | buyerpersona.com

Content/Customer Journey:

- **We Don't Sell Saddles Here (Stewart Butterfield)** | medium.com/@stewart/we-dont-sell-saddles-here-4c59524d650d or just search "We Don't Sell Saddles Here, Stewart Butterfield."
- **"They Ask You Answer" (Marcus Sheridan)** | marcussheridan.com/they-ask-you-answer/

SEO/Keyword research:

- **Answer the Public** | answerthepublic.com
- **Keyword Planner** | ads.google.com/home/tools/keyword-planner/

Local SEO:

- **Local SEO Guide for Small Business** | <https://mcbreenmarketing.com/guide-local-seo/>
- **MOZ** | moz.com/blog/category/local-seo
- **Bright Local** | brightlocal.com
- **Whitespark** | whitespark.ca
- **Yext** | yext.com



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