



A-Z Marketing Toolkit Strategic and Tactical Marketing Plan Worksheet

- 1. What You Say**
- 2. How You Say It**
- 3. Who you Say it To**

1. Discovery Questions

1. CUSTOMER VALUE HIEARCHY: What things are important to your typical prospect when buying what you sell (*in order from most important to least important*)?

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

2. HOT BUTTON QUESTION - What emotions or feelings might the typical prospect be having before, during and after the sale (anger, fear, confusion, skepticism, etc. towards their situation, the industry, your company, product, and/or service)?

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

3. HOT BUTTON QUESTION - Under what circumstances does the typical prospect start to think about buying what you sell? Be specific.

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

Summarize: Describe the typical prospect's situation in general terms.

Use This list to help you summarize what things are valuable / important to your typical prospect.

✓	Customer Values
	Better Communication
	Better Service
	Better Warranty
	Easier Payment Terms
	Easier To Use
	Educates The Customer
	Experts In...
	Faster Delivery
	Faster Quoting

✓	Customer Values
	Faster Results
	Friendlier
	Guaranteed Results
	Higher Quality
	Higher Standards
	Less Hassles

✓	Customer Values
	Lower Maintenance
	Lower Prices
	Lower Risk To Try
	Makes More Money
	More Accurate Quotes
	More Advice & Assistance
	More For The Money
	More Honest

✓	Customer Values
	More Results
	Price Is Appropriate
	Quicker Response
	Saves Money
	Specializing In...

2. Customer Surveys

Creating & Conducting Customer Surveys: Each member of the team is responsible for calling a portion of each of the 5 types listed below. It is important that the managers and decision makers participate! DO NOT put this responsibility off onto lower-level staff members.

There are 5 types of calls that will need to be made:

1. Current Clients
2. Past Clients
3. Dissatisfied Clients Who Have Left
4. Not Clients Yet – Stuck In The Process
5. Prospects

Here is what you are trying to accomplish:

- Ask their opinion about potential innovations you're considering
- Ask them about individual STRATEGY Points, as well as your entire business
- Discover needs, problems, desires
- Confirm your assumptions about the decision making process
- Find out what makes them "tick"... or "ticks them off"
- Ask what format they'll accept marketing messages from you in
- Find out what problems or frustrations they'd like to see eliminated
- Ask for referrals

Use this list of Survey Starter Questions to create customer surveys: Check off applicable questions. Once you've created your list, transfer the questions to a separate sheet of paper before calling.

- What is most important to you when doing business in this industry?
- What are the biggest frustrations you have when doing business with a company like ours or trying to find a company?
- When you first start looking for a provider of title services where do you look first? Second?
- Biggest frustrations you have during the process?
- Biggest frustrations you had?
- What made you choose other companies in the past?
- Did the performance equal, exceed, or were they below your expectations?
- What types of materials would help you make a better, more informed decision?
- How much time did you spend studying materials?
- How long did it take you to make a decision after you got serious?
- How long had you been thinking about it before you decided to get serious?
- Who else was involved in the decision?
- What problems would you really like to see solved in this industry?
- What made you finally decide to take action and do something about it?
- How did we answer the phones? What was your immediate response or thoughts?
- How would you describe the appearance of the salesperson, staff, office
- If you had to do it all over again, would you choose us, recommend us, make the same decision?
- What could we do better next time?
- Do you know of anyone who could use our services at this time... or in the future?
- What type of advertising medium would you respond to? How should we communicate our message to you? (make suggestions)
- May we use your comments in our literature?
- If you could change the way our industry does business to make it more convenient for you, what would you change?
- Did you look at other brands, companies, or options before making your decision? How many? Which ones?
- What did you like? Dislike?
- What were you expecting?
- How much more would you be willing to pay for great service?
- What if we offered a bonus of (name of bonus), would that affect your purchase decision? How much?
- Would a guarantee influence your buying decision? What kind?
- What kind of offer would you respond to? (give several options)
- We're thinking about offering (a proposed innovation). Would that make a difference to you?
- Would you like to see (that innovation) developed?
- How much would you be willing to pay for (that innovation)?
- Would you pay \$X for (that innovation)? How about \$Y?
- Create your own questions as appropriate.

3. Competitive Surveys

Creating & Conducting Competitive Surveys: You need to find out as much as possible about your competitors so you can gauge their strengths and weaknesses. Use this process:

- A) Gather a list of top competitors – both major and minor competitors.
- B) Create a survey sheet using the sample questions and any questions you can think of yourself. Here is what you are looking for:
 - a. What do your competitors do well? What are their strengths? Anything you could emulate?
 - b. What do your competitors do poorly? What are their weaknesses?
 - c. How do they market, sell, advertise, etc.? Ask them to send you any printed materials they have.
 - d. How is their customer service? How do they answer the phone, handle requests, etc.?
 - e. Look for things that you can copy, exploit, improve upon, etc.
 - f. Ask specific questions that relate to your strategy to see if they compete or how they react. This information will be important in strategy building. For example:
 - i. If you offer a guarantee, ask if they offer a guarantee.
 - ii. If you can do work extremely fast, ask them how fast they do it
 - iii. If you have certain high quality standards, find out what their standards are.
- C) When you call each of the competitors, you will need to pose as a potential customer. Make sure you do your homework before you call so you can ask questions that make sense and won't blow your cover.
- D) Prepare an overview of the survey results to compare with other team members

Sample Questions / Evaluation Points:

- How was the phone answered?
- Was it relatively easy to get information?
- Did the person get your name and phone number for follow-up purposes?
- Did they ask you for any questions to find out what you wanted or needed... your situation?
- Do they have any educational information available? Did they offer to send it to you? Did you have to ask?
- What do they feel makes them the "best deal" in consideration of their competition?
- How do they stack up against you in your STRATEGY points?
- Ask them directly: *"So why would I want to buy this from you instead of one of your competitors?"*
- Find out what their pricing structure is.
- Ask them if they offer certain innovations (that you either currently offer or are considering offering) and test for their response.

Tips For Making Calls

Client Calls

Prepare a list of questions, but be flexible as you ask them. Let the conversation flow naturally.
Have the client participate in making the calls; it can be very revealing for them to get feedback personally.
Respect their time: when you first call, say, <i>"Did I catch you at a bad time?"</i> If so, call back later.
You will be surprised at how willing people are to take the time to answer as many questions as you ask them.
You will quickly start to see patterns develop; talking to 15 or 20 clients will usually be enough.

Competitive Calls

You will likely need to "invent" a scenario to get the info you want—i.e., pose as a prospective customer.
Make multiple calls to each competitor to determine if the sales people handle you differently.
Keep a file on each competitor on an ongoing basis; it's hard to compete against an unknown competitor.
Make competitive calls after your client calls so you can ask competitors about your client feedback.
Train your client on these calls so they can make them on an ongoing basis.

4. Writing Powerful Headlines

Writing Headlines: Write headlines using the headline writing tools. You should write headlines that cover each of the **HOT BUTTONS / ACTIVATORS** from the Customer Value Hierarchy, as well as the general STRATEGY. To make sure you've got enough headlines for each of the STRATEGY points, mark in the space provided which STRATEGY point the headline refers to. If the headline refers to more than one point, write in multiple numbers.

***** Write At Least 5 to 10 Headlines For Each Of The Hot Buttons / Activators! *****

BEFORE Writing—Questions To Ask: Before Writing Headlines, ask these questions to make sure the headlines are appropriate:

- What are the biggest problems people have when trying to buy (HOT BUTTONS)?
- What are the major benefits of buying from you? (STRATEGY points)
- Who is your target market?
- What is the situation that would lead someone to need what you sell?
- What is the decision making process that they go thru?

AFTER Writing—Headline Evaluations: Use these HEADLINE EVALUATIONS for all headlines you write!

- Does the headline match the customer's needs, problems, & level of importance (from Decision Matrix)?
- What are you trying to communicate, in simple terms?
- What **HOT BUTTON** are you trying to hit?
- Can the reader get a good idea from your headline alone what it is that you're selling?
- Does the headline paint a mental picture? If so, of what? If not, why not?
- Would the reader be interested in taking action based on this headline?
- Does the reader even care about what you're saying?
- Would you be willing to mortgage your home to pay for the ad with this headline?

Three Ways to Write Headlines

1. Write it in plain English: Just say what you're trying to say in as many words as it takes to say it.

No.	STRATEGY Point	Headline
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

2. Headline Starters: Use these as ideas to get your mind moving. Typically you will write these headlines in "Plain English".

- | | | | |
|-----------------|-----------------------|-------------------|----------------------|
| 1. News | 4. Questions | 7. Guarantee | 10. Problem/Solution |
| 2. Inflammatory | 5. Who/Which/What/Why | 8. Comparisons | 11. Numbers |
| 3. How To | 6. Testimonials | 9. The Bold Claim | 12. The Offer |

No.	Headline Starter	Strategy Point	Headline
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

3. The Headline Bank: Go thru the list from start to finish and evaluate every headline for usability. First give each headline a "quick glance" and see if it strikes a chord. Then go back and develop the ones that you marked.

No.	HB Number	STRATEGY Point	Headline
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

The Headline Bank

1. The Secret of Making People Like You
2. A Little Mistake That Cost A Farmer \$3,000 A Year
3. Advice To Wives Whose Husbands Don't Save Money -- By A Wife
4. How To Get Your Cooking Bragged About
5. Are You Ever Tongue-Tied At A Party?
6. How A New Discovery Made A Plain Girl Beautiful
7. The Most Important Bible News In 340 Years
8. Free! Our Latest Opinion On Any 3 Of 1,200 Widely Held Stocks
9. Who Else Wants A Screen Star Figure?
10. Do You Make These Mistakes In English?
11. At 60 Miles An Hour The Loudest Noise In This New Rolls-Royce Comes From The Electric Clock
12. Hands That Look Lovelier In 24 Hours -- Or Your Money Back
13. You Can Laugh At Money Worries -- If You Follow This Simple Plan
14. Why Some People Almost Always Make Money In The Stock Market
15. When Doctors 'Feel Rotten' This Is What They Do
16. It Seems Incredible That You Can Offer These Signed Original Etchings -- For Only \$5 Each
17. Five Familiar Skin Troubles -- Which Do You Want To Overcome?
18. Which of These \$2.50 to \$5 Best Sellers Do You Want -- For Only \$1 Each?
19. Who Ever Heard Of A Woman Losing Weight -- And Enjoying Delicious Meals At The Same Time?
20. How I Improved My Memory In One Evening

21. The Secret of Making People Like You
22. A Little Mistake That Cost A Farmer \$3,000 A Year
23. Advice To Wives Whose Husbands Don't Save Money -- By A Wife
24. How To Get Your Cooking Bragged About
25. Are You Ever Tongue-Tied At A Party?
26. How A New Discovery Made A Plain Girl Beautiful
27. The Most Important Bible News In 340 Years

5. Risk-Lowering Strategies & Offers

Risk Lowering Strategies & Creating Offers

Create an offer that your prospects can't refuse. An offer makes the prospect TAKE ACTION. This will solidify the emotion they are feeling from your marketing and cement it into their brains. To do this, first decide on your Risk-Lowering Strategies:

1. Use Risk Lowering Strategies: Check off any offers that might be appropriate, and then describe those offers:

✓	Risk Lowering Strategy	How Could You Use This Risk-Lowering Strategy?
	Free Samples	
	Free Offers	
	Free Trials	
	Guarantees	
	Pay If/When You Like It	
	Bonuses With Purchase	
	Keep Extras Even If You Cancel	
	Contingency	

2. Putting Together Your Offer:

- Your offer allows you to get immediate response from your advertising efforts, and makes tracking your results clear and precise
- Make your offer Risk-Free (using
 - Call for a *FREE* report, video, tape set, sample, preferred customer packet, etc.
 - Avoid the "talk to a salesperson" offer
- Make the offer obvious and easy to understand and make it easy to see. (coupon)
- Use "handles" when creating names and titles for your offers. Handles assign a tangible name to an intangible idea. Be powerful.

✓	Sample Handles	Write Some Handles For Your Offer
	World's Easiest Title Order Form	
	Real Estate Seminar Preview Pack	
	HUD-1 Worksheet	
	Settlement Worksheet	
	Settlement Information Kit	
	Pro-Active Assured Attendance Program	
	Fast Fax Order Form	
	Title Industry Report	

3. Decide On A Format For The Offer: Make sure you match this against what customers said during surveys.

✓	Format	Write Your Entire Offer Including Handle and Format
	Audio CD	
	Book	
	eBook	
	Brochure	
	Video / DVD	
	Website	
	Comparison Charts	
	Reports	
	Worksheets	

6. Writing Guidelines & Evaluations

Writing Guidelines: As you write your Master Letter, lead generators, & hopper system pieces, use these basic guidelines to ensure maximum power:

1. Use **plain talk** (don't try to be an English professor). Write like people talk:

*"Let's say you've got \$1,000,000 tied up in your company and suddenly, for reasons unknown to you, your advertising isn't working and your sales are going down. And everything depends on it. Your future depends on it, your family's future depends on it. I walk into this office and sit down in this chair. Now, what do you want from me? Fine writing? Do you want masterpieces? Do you want glowing things that can be framed by copywriters? Or do you want to see the *&#@! sales curve stop going down and start moving up?" --Rosser Reeves*

2. Use **short sentences** (average 17 words, 25 is difficult):

-Don't try to stick two thoughts into one sentence. Use two short ones instead.

3. Use **simple language**:

-Prefer the familiar word to the far-fetched.

-Prefer the concrete word to the abstract.

-Prefer the short word to the long word.

-See examples to the right →

Instead of this...	Use this...	Instead of this	Use this...	Instead of this...	Use this...
Encourage	urge	As to	about	Prior to	before
Continue	keep up	For the reason	since	With regard to	about
		that			
Supplement	add to	In order to	to	Accordingly	so
Acquire	get or gain	In the event of	if	Likewise	and, also
Along the lines of	like	In accordance	by, under	Nevertheless	but, however
		with			

4. Use **personal references**: examples: names, pronouns & human interest words. The best word you can use is.... **YOU**.
5. Use **live words** – *verbs*. Most writing contains nothing more than nouns and adjectives, glued together with the prepositions *is, was, are, and were*. Here are some examples of better verbs to use:

Bear	Carry	Do	Get	Keep	Pick	Set	Split	Take	Touch
Blow	Cast	Draw	Give	Lay	Pull	Shake	Stand	Talk	Turn
Break	Catch	Drive	Go	Let	Push	Show	Stay	Tear	Walk
Bring	Come	Drop	Hang	Look	Put	Skip	Stick	Throw	Wear
Call	Cut	Fall	Hold	Make	Run	Slip	Strike	Tie	Work

6. Evaluate all claims; be **specific and quantify** everything:

Writing Evaluations:

Well I Would Hope So...

Who Else Can Say That?

Well, Whoop-Dee-Do!

Do You Really Believe That? Prove It.

What Conclusion Do You Want Me To Draw?

Cross-Out / Write-In

Six Things To Avoid At All Cost

•Cute	•Play on Words	•Company Name
•Profound	•Snoozer	•Ego

Quantification Helpers:

What Specifically?

Why Specifically?

How Much Specifically? Typically?

Where Specifically?

When Specifically?

Compared To What?

According To Whom?

Give Me An Example...

7. Use powerful **headlines**: Use headline starters or headline bank; use headline evaluations found in Step10.
8. Use the word "**FREE**" effectively.
9. **Long copy vs. short copy**: Say as much as needs to be said, then quit; a good, easy-to-read format will allow you to use more text; use video or audio to say what might be too burdensome to read.

10. **Features vs. benefits:** Talk about benefits as much as possible—example: #2 pencil

FEATURES:		BENEFITS:		FEATURES:		BENEFITS:	
Six inches long		Lasts an average of five months		Silver-embossed pencil name		Easy to remember when reordering	
Clay/Graphite composition		Lead won't break, even under high pressure		Silver-embossed manf. Name		Reinforces brand awareness	
Pre-fired graphite		Produces dark, legible line		Silver-embossed hardness #		Won't use wrong pencil on test	
"E-Z-rase" additive		Easily readable, yet won't smudge		Silver-embossed lettering		Nice to look at; reasonably classy	
Core-locked		Lead won't break inside of pencil		"Core locked USA" embossed		Encourages ordering American made	
Hexagonal shape		Won't roll off a desk; easy to hold		Grooved in two directions		Easy to hold while erasing	
Lead is cradled evenly		Sharpens quickly and reliably		Seamless aluminum construction		Prevents nicking / snagging on seam	
Bright yellow paint		Easy to see / find		Bonded to wood w/ pressure molding		Eraser is secured, stays rigid	
Both paints are non toxic		Can chew without danger of poisoning		"Flex-o-rub" composition		Erases quickly & cleanly	

11. Use **emphasis tools** to allow the reader to "hear" your voice tone and inflection while reading:

-**Bold**, *italics*, underlined, ALL CAPS, (parenthesis)

12. Use **punctuation** to allow reader to "hear" your pausing and pacing while reading:

	<u>Between words</u>	<u>Between sentences</u>
Normal pause	White space	Period
Shorter pause	Hyphen	Semicolon
Longer pause	Dash	Paragraph

10-B) Writing Evaluation Worksheet: Use this worksheet to grade any marketing piece you write. If the grade comes back “L-3” or lower, you will need to re-work it—but you will know exactly where to make it stronger.

Overall:

- L-0: Totally wrong concepts, try again
 - L-1: Does not interrupt (or False-Alphas); does not engage, gets no results (what most people write)
 - L-2: Basic ad structure is there; can't be fixed with “red-line”
 - L-3: Good ad that interrupts and engages; lacks power in articulation and building the case
 - L-4: Engages prospect and builds case well; needs help with wordsmithing (for power)
 - L-5: Well articulated, powerhouse ad engages prospect, gives him control, and gets him to take immediate action
-

Interrupt: Headlines

- Points** _____
- L-0: No headline at all
 - L-1: Company name or play on words; does nothing to beg the reader to continue
 - L-2: Headline exists; ACTIVATORS not connected to HOT BUTTONS; False Alpha Alert!
 - L-3: Hot Buttons Activated; not articulated well; but says in basic terms what needs to be said
 - L-4: Good headline, draws reader's interest; work on articulation—generally passes headline evals.
 - L-5: Powerhouse! Headline is powerfully worded and hits major HOT BUTTONS

Engage: Once Reader is Successfully Interrupted

- Points** _____
- L-0: If Headline score is L-0, L-1, or L-2...then automatic score of L-0 here.
 - L-1: Nothing in ad to make reader want to continue listening...no sub-headlines; no add'l info at all
 - L-2: Contains sub-headlines that are NOT connected to ACTIVATORS...reader gives up
 - L-3: Reader can tell from scanning ad that there may be decision-facilitating info ahead
 - L-4: Use of ACTIVATOR-based sub-headlines gives reader promise of useful info in the ad
 - L-5: Engaged! Reader quickly scans and becomes enthralled based on excellent sub-headlines

Control: ASA & Case Building

- Points** _____
- L-0: No ASA present; maybe cute or institutional
 - L-1: Some features generically listed; not quantified, no compelling; perhaps wrong points
 - L-2: ASA points at least listed; builds no case; poorly quantified
 - L-3: ASA points listed with some quantification; does not pass Level-2 writing evals; builds some case
 - L-4: Builds a good case, passes some writing evaluations; still lacks power and articulation
 - L-5: Builds solid, well-quantified case; passes all evaluations, prospect truly controls information and says, “*I would have to be an absolute fool...*”

Decision: The Offer

- Points** _____
- L-0: No offer at all
 - L-1: Contact info present; nothing specifically mentioned as an offer
 - L-2: Tells prospect to call for more information or to speak with a representative
 - L-3: Offer easily detectable; no handle, offer not as motivating as it should be
 - L-4: Good offer, gets prospect to take action—still does not capture widest possible audience
 - L-5: Excellent offer with handle that draws in all NOW and FUTURE buyers; causes them to take immediate action!

Interrupt & Engage: Format

- Points** _____
- L-0: A total mess; try again
 - L-1: Does not flow, no logical reason for any placements; haphazardly done; not professional
 - L-2: Basic structure is in place; lacks power due to poor articulation, spacing, thought flow, etc.
 - L-3: Structurally sound, flows reasonably well, some parts are still done poorly
 - L-4: Proper use of type fonts and sizes on headlines, sub-headlines; spacing well done, etc.
 - L-5: Reader can quickly scan and understand main points; knows exactly what action to take
-

Total Number Of Points: _____ **Divided By 5 =** _____ **This Is Your Marketing Writing Level**

7. Testimonials

Write powerful testimonials that you can use to build your case. Follow this simple 4-step formula:

Determine Scenarios

What:	Determine which strategy points (specifically) you want praised; determine what situations or backgrounds your customers come from.
Comment:	Should come straight from Customer Value hierarchy. Be specific: You don't want your customers to say, "We love XYZ Title Corp. They're the best!" Instead, make sure that all testimonials pass the writing evaluations. Decide which points are most important and come up with some scenarios.
Sample Scenarios:	• Used a competitor in the past but then found out how XYZ Title Corp. does..
	• Never realized they need a (product) until they found out about ...
	• Used (company) and it performed (Strategy Point) exactly as we said it would
	• Has lots of experience in the field, but has never found anything like
Your Scenarios:	1.
	2.
	3.
	4.
	5.

Identify & Ask

What:	Identify customers who fit your scenarios and ask them to participate in your testimonial project.
How To Do It:	• Choose customers who you know will help you out upon request; identify 5 to 10 PER SCENARIO.
	• Call them on the phone; don't leave this important task to e-mail.
	• Quickly interview them while on the phone to get the details of their scenario; remember to ask quantifying questions and gather as much info as possible.
Sample Dialogue:	<i>"Hey Steve, you've been a good customer of ours for a long time now, and I was calling to ask if you could do me a quick favor. We're working on a new marketing program so we can get the word out to as many people as possible about our (strategy points). I know that you (come from this scenario) and was hoping you could help me by signing a testimonial letter saying that (we perform on strategy points). Don't worry; you don't have to actually write anything. I'm going to make this extremely simple. In fact, if you have just 1 or 2 minutes right now, I'd like to ask you a few questions, and I'll actually write the letter for you. Then, I'll e-mail it over and you can check it out. If you want to make any changes, you can do it; otherwise, just print it out on your letterhead, sign your name on it, and mail it back to me. I'll even send you a prepaid addressed envelope so you don't have to think about it. It's just that easy."</i>

Scenario # / Customer Name		Scenario # / Customer Name	

Write Testimonials (pg 2 of 2)

What:	Write specific testimonials based on the individual customer situations identified in step 11-B.
How To Do It:	• Yes, you should write the testimonials. Never rely on the customers to write them because they won't understand how to be specific and strategy-oriented.
	• You will need to interview the customer to find out the details and then actually WRITE the letter (with details) for him
	• Send it over via email (or fax)
Sample Testimonial:	"I've been in this industry for 23 years, and during that time I've used at least 10 different title companies. Never once during that time have I found a company that could provide (strategy point) like I've been hoping for. I saw on XYZ Corp's website that they could (perform strategy point) and quite frankly I didn't believe it, so I gave them a small test settlement order. When (performance happened), I immediately sent them all of my business. That was 15 months ago, and they still (perform on strategy point) every single time."
Write Some Testimonials	

Give A Reward

What:	Offer them a reward for helping you out.
How To Do It:	• The reward is intended to get the customer to follow thru; it gives them a tangible reminder that they owe you this favor.
	• Don't tell them what the reward is when you first call, just tell them you'll send something to say "thanks."
	• Make the reward something useful and of high perceived value. Don't be afraid to spend a little money; think how much money a powerful testimonial will be to your business.
	• Suggestions: gift certificates, useful promotional products, free products or services.
	• Send the gift along with the prepaid return envelope immediately, so it arrives within one or two days.

Sample Dialogue:	Add this on to the end of the initial call: <i>"Steve, I know you're busy, and I know this won't really make much difference, but I'm going to send you a small gift for helping out. It's not much, just a token of appreciation for taking time out of your busy day to help us out."</i>	
What Reward Could You Give?	Idea 1:	Idea 2:
	Idea 3:	Idea 4:



8. Identify Target Market & Appropriate Media

Identify Your Target Market: You have already identified your various target markets in Step 1.

Identify Your Target Market

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Identifying Appropriate Media:

Remember...

- You should have asked your customers during survey questions which media they would respond to
- If you're not sure about a particular medium, check it out to see if it has ads from other similar kinds of companies; remember, in advertising, it's better to be one of the pack than the lone dog.

Then do this...

1. Check off each medium that seems to be a good fit in the first column
2. Rate the Relative Importance (R.I.) of each of the media you have checked... 10 being extremely important, 1 being not that important. More than one medium may share the same Relative Importance rating.

✓	R.I.	
		Newspaper – Local Daily
		Newspaper – Specialized
		Newspaper – Free Distribution
		Radio
		Television – Broadcast
		Television – Local Cable
		YouTube
		Facebook
		Twitter
		Pinterest

✓	R.I.	
		Seminars & Workshops
		Telemarketing
		Internet – Banner Ads
		Internet – Search Engines
		Email
		Signs – Trucks, Movie Screens, etc.
		Billboards
		Cross Promotions
		Yellow Pages
		Flyers, Door Hangers

✓	R.I.	
		Public Relations
		Trade Shows
		Fax Broadcasting
		Mail – Letters
		Mail – Postcards
		Mail – Piggyback
		Mail – Card Decks
		Magazines
		Trade Journals
		Classified Ads

9. Advertising Media Competitive Intelligence

Purpose:	To find out how well certain advertising media are working for others who are currently spending money
What You're Trying To Find Out:	• How many leads/inquiries do they get per week (month)?
	• How long have they been advertising there?
	• How long do they plan on continuing their advertising there?
	• What percentage of the leads they get are actually converted to sales?
	• Does the ad pay for itself?
	• What percentage of their ad budget does this medium represent?
	• Overall, are they satisfied?
How To Call:	<i>"Hello, this is Chris over at SMG. We're a marketing research firm doing a quick customer courtesy survey for (name of advertising medium) to see if you're satisfied with how good your advertising is working. How many calls would you say you get from your ad in a given week (month)?"</i>
Notes:	• Don't ask up front who the person is who handles the advertising. Just start the above dialogue with whoever answers the phone.
	• The person who answers the phone will often put you directly thru to the advertising person there.
	• If they say they don't know how many leads they get a month, ask them <i>"Would it be more like 50 calls or more like 500 calls."</i> This will generally force them to give you a good number.
	• They might not know many of the numbers you're asking about; gather whatever information you can

Advertising Medium: _____

	Company	Ad Size	Lead Flow	How Long There?	Sticking Around?	Conv. Ratio	Pays For Itself?	% of Budget	Comments...
1									
2									
3									
4									
5									
6									
7									
8									
9									

10. Creating Lead Generators

Hit as many ASA Points as you can to reach the widest possible target

- Hopper System can focus in on individual ASA points later (see Step 19)

Headline is most critical part: make sure it passes ALL HEADLINE EVALUATIONS!

Second most critical is the OFFER.

Master Letter will be the basis for all Lead Generators

Master Letter may be one of your Lead Generators

Formulate 5 to 10 Lead Generators for each medium you will use for testing purposes

- Use a wide variety of formats if possible
 - Read thru Archives binders for ideas on layouts
 - Look at other ads in that medium for ideas of layouts

For additional assistance, call Y2M Corporate

Use Writing Evaluation Worksheet to grade ALL pieces before money is spent!

BIG, INFLAMMATORY HEADLINE THAT Paints A Mental Picture Goes Here.

**You Can Put A Sub-Headline That Accentuates
Your Point Here.**

**Powerhouse Headline Here Makes The
Reader Want To Continue.**

Type in your text here that helps support and build your case. Use as much specific detail as possible; but don't worry too much about the text because your **headlines will really do your selling** for you. Your average paragraph should be *about this long*. A little longer won't hurt.

**Your Next Awesome Headline Goes Here.
One Line Or Two Is Fine.**

Make sure that as you write your text that you remember to use the writing guidelines. Write like **people talk**; it makes you seem more relatable. Use *simple words* and *short sentences*. For example, instead of saying 'with regard to,' just say 'about.' Don't attempt to be cute; it won't work. And most of all...**DON'T try to be an English professor!**

Short Statement Here.

**Now You're Really Getting Them
Excited... Make This Headline Good!**

Now you're in the home stretch! Make sure that all of your text supports your case... and remember to **quantify all of your claims**. Also, *use emphasis tools and punctuation*; there's several examples in this letter. But don't overuse them or else it will throw your readers for a loop. Oh yes, one other reminder. The word **YOU** is the *second* most powerful word in marketing. *Use it!* (The *first* most powerful word is **FREE**).



FREE!

State Your Offer
(with handle) For
FREE Stuff

Name: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Fax: _____

Please Fax This To (555) 555-1212 or Call (555) 555-1212

11.

Marketing tools help increase the effectiveness of the entire sales process by giving the prospective customer a powerfully stated, well-articulated case. Marketing tools can cover as much or as little of the case as time or space will allow (aka, "the accordion principle").

Remember...

- You should have asked your customers during survey questions which marketing tools they would respond to.
- If you're not sure about a particular marketing tool, see what competitors are using. If other companies are consistently using a particular marketing tool, that's a good sign.
- If you need help on this step, call corporate for advice and assistance.

Then do this...

1. Check off each marketing tool that seems to be a good fit in the first column.
2. Rate the Relative Importance (R.I.) of each of the media you have checked... 10 being extremely important, 1 being not that important. More than one medium may share the same Relative Importance rating.

✓	R.I.	
		CD's
		DVD's
		Online Video Access
		Written Reports
		Online Reports
		Checklists
		Recorded Messages

✓	R.I.	
		Sales Scripts
		Secretary's Scripts
		In-Store Signage
		Brochures – traditional
		Brochures – oversize
		CD-Rom's
		Websites

✓	R.I.	
		On-Hold Messages
		Info Packs
		eBooks

Remember...

Once you have identified which marketing tools you need to create, start with the ones with the highest relative importance.

Use your strategic plan (what you say, who you say it to, where you say it) as the basis for every marketing tool; either condense it or expand it to fit your immediate needs—the "accordion principle."

Use the templates for each of the marketing tools to construct them.

Budget enough time for creating marketing tools—some of them could take awhile to put together.

12. Create The Hopper System Pieces

Nurture your prospects along the Educational Spectrum until they're ready to take action.

Make sure headlines and offers are powerful.

- You should have 2 to 5 different offers that rotate in your hopper system.

Individual Hopper System pieces can focus on a single strategy point.

Relatively important strategy points should carry most of the weight in your Hopper System.

Three main formats:

- Mail: Postcard is inexpensive, easy, and effective; mailers with marketing tools also effective.
- E-mail: Headline is paramount; newsletters via e-mail are good too.
- Fax: Large headline format is preferred; newsletters are also effective.

Can also integrate promotional products (especially within a knock-down list).

Create 10 to 20 pieces for each applicable format.

- Each piece should carry a consistent look with other pieces of that format (see examples below):

Schedule you Hopper System



13. Hopper System Schedule

Schedule your Hopper System out for the next six months. If you want to send pieces out more frequently than once a week, create a separate sheet. This will give you a snapshot of what will be sent out at a glance.

Week #	Date	Medium	Strategy Point	Headline
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				

14. Maximize & Optimize

Lifetime Value Of The Customer: Determine how much a customer is worth over the course of his buying lifetime. This will help you determine how much money can be spent accruing new customers.

Average Purchase Amount	X	Number of Repeat Purchase Per Year	X	Number of Years As A Client	=	Lifetime Value Of Customer	+	Value of Referrals	=	Total Lifetime Value Of Customer
	X		X		=		+		=	

15. Pro-Active Referral Systems: Gain new business through contacts with existing customers.

Referrals are one of the greatest sources of new business for any company. Those who are referred by excited clients have a built-in trust and confidence in the company already. The problem with traditional methods of generating referrals is that you have no control over the process. Therefore referrals come in sporadically (if at all), only when the clients gets into a situation conducive to talking about (product or service). Most referral programs leave it up to the salespeople to generate referrals, which rarely happens. Without a **PROACTIVE** system for gathering referrals, very few referrals are ever generated, even though your clients likely have a large number of friends and associates who are qualified prospects.

The object of the referral program is to get customers excited so they'll let us access their database/rolodex of friends and associates who fit our target market, and allow us to use the customer's name when introducing our company. If we can get 2-10 referrals per client (even first-time-call-in prospects) we can greatly and immediately increase our prospect base.

How To Do It:

Identify A Premium	Decide on a premium that's of high perceived value (but relatively low cost) that you can send to your customers. The premium should be either what you sell (i.e., free stuff or gift certificate), or related to what you sell (i.e., free reports, audios, videos—"in other words" - marketing tools) that can educate and benefit your customers and/or prospects.	
	1.	3.
	2.	4.
Send It Along To Your Customers	Create a letter that tells your customers that you're sending them this free gift as a token of your appreciation for being your customer. Take this time to reinforce all of your most important strategy points; let them know that you've innovated your business specifically to (help them, make their life easier, eliminate frustrations, etc.). Tell them that because of the tremendous value that you offer to the marketplace, you would be willing to send the same free gift (or different gift, as appropriate) along to any of their (friends, associates) who might benefit from (strategy point.) as well.	
Offer To Send To Referrals On Their Behalf	Create a form that your customers can use to fill out and send/fax back to you. Also give them the opportunity to email the referrals if they prefer. When the referrals come in, send the package with the free (premium) to the referral along with a letter identifying their friend/associate as the one who was kind enough to think of them.	

16. Marketing Plan Overview / Cost Worksheet: Get a quick snapshot of the entire marketing plan from an execution and cost standpoint.

Type	Specific Type	Quantity	Cost	Starts When?	Duration
Lead Generators					
<i>Total Lead Generator Cost:</i>					
Marketing Tools					
<i>Total Marketing Tools Cost:</i>					
Hopper System					
<i>Total Hopper System Cost:</i>					
Other Costs	Consulting Fees				
<i>Total Other Costs:</i>					

Total Costs:	
---------------------	--

17. Return On Investment Worksheet: Calculate break even and potential profit to be earned from a given marketing activity.

Advertising Return On Investment (ROI) Form

Company: _____ Address: _____

Contact: _____ City: _____

Position: _____ State: _____ Zip: _____

Average Sale Price \$ Phone #: () _____ - _____

Gross Profit \$ Fax #: () _____ - _____
 Email: _____ @ _____ . _____

Advertising Medium

Cost of Advertising	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Sales to Break Even	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gross Profit	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
# of Sales to reach Goal	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Close Ratio	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>
No of Leads Needed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cost Per Lead	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

NOTES:

Tactical Marketing Plan

1. Sales Automation System
2. Seminars
3. Info CD's
4. Events
5. Reports
6. Flyers
7. Websites
8. Trade Publications
9. Ads
10. Email
11. Yellow Pages
12. Fax
13. Etc