

Marketing & Sales Development Worksheet

Use the instructions provided to lead you to creating a plan for attracting your ideal clients to your door.

UNDERSTANDING THE PROCESS

There are three distinct steps to attaining a new customer – and really that is the purpose of marketing and sales.

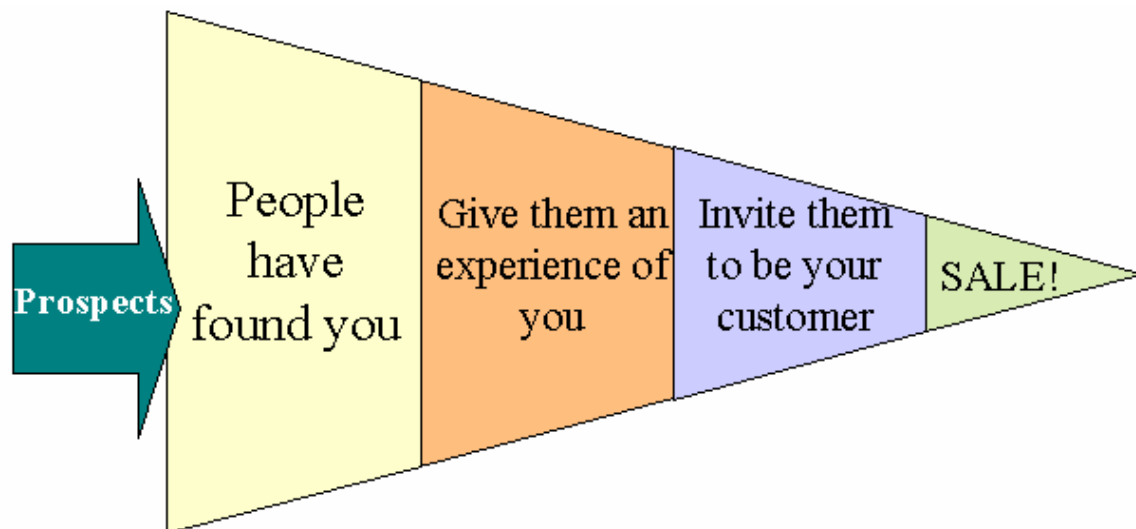
1. Create a way for potential clients to find your business
2. Once they find you, allow them to experience your business
3. Once they experience you and your business, invite them to be your customer

In step one, you bring your prospects to your door.

In step two, you filter out and find the prospects that are most likely to become your customer (they become a *qualified prospect*).

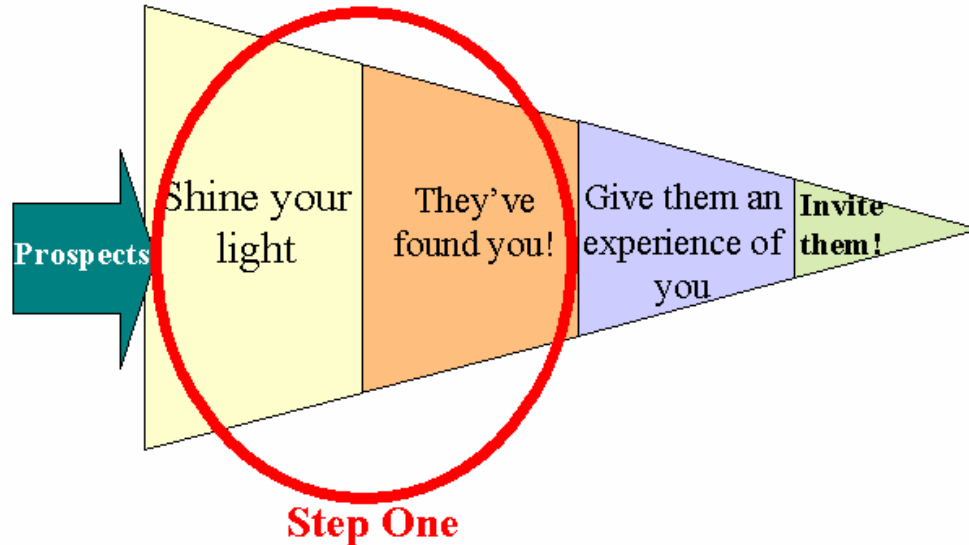
In step three, you convert the qualified prospect into a customer.

This three-step process is your Sales Funnel.



Let's break down the three steps a little further.

Step One – Create A Way for Potential Clients to Find Your Business



Think about how you can bring your ideal client to your door. How you do this is through a marketing channel. Channels would include things like websites, networking, grassroots marketing, or advertising.

Marketing channels can be broken down into three types:

- **Active Marketing Channels**
- **Passive Marketing Channels**
- **Stay-In-Touch Marketing Channels**

Your active marketing channels are most important. They are from where the majority of your business will come. The active marketing channels enable you to provide the strongest light from you – the lighthouse.

Active Marketing Channels:

- Speaking (talks, workshops, teleclasses)
- Forming Strategic Alliances
- Leveraging your existing network
- Networking
- Website (only if is optimized for web traffic – *otherwise* it becomes passive)

I recommend that you select **one or two active marketing channels** for the next year, and really develop them really, really well. More than that is likely to be overwhelming and not effective.

It is also important that you develop a strong, **well-coordinated stay-in-touch channel**. Considering that it usually takes repeated exposure to your product before a prospect will buy, you want to make sure that you provide more than one interaction with prospects.

Stay-In-Touch Marketing Channels:

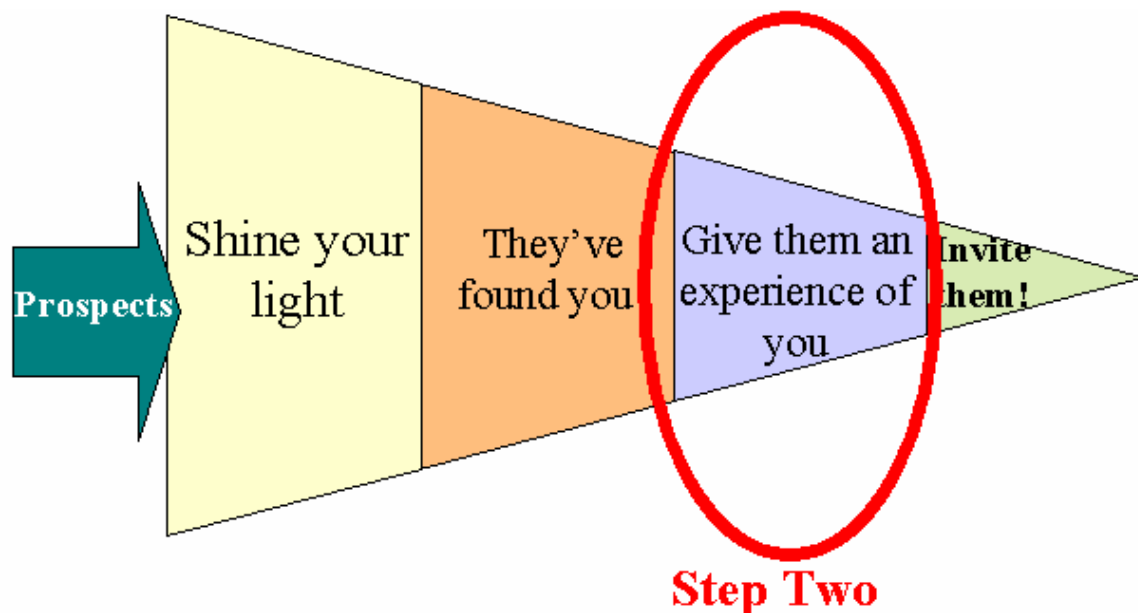
- Ezine
- Printed Newsletter
- Using a carrot – eCourse, free reports, assessments – where you require them to provide contact information in order to get a freebie
- Making regular follow-up phone calls
- Mailing periodic announcements

Last, consider which **passive marketing channels** are important for you and will best support the key active marketing channels you've selected. I recommend putting little or no energy toward these items, unless it strategically supports the active marketing channel you've selected. Too often small business owners spend valuable time and money creating brochures and letterhead, which are nice to have, but on their own won't bring you new customers.

Passive Marketing Channels:

- Brochure
- Logo, letterhead
- Business cards
- Website (unless it is optimized for web traffic – *then* it becomes active)

Step Two – Once they find you, allow them to experience your product/service



Now that a prospect has found you – whether they have shown up for one of your speaking events, called you up because someone referred them, or they have landed on your website – it's time for them to allow them to experience you, so they can make a buying decision.

Why would you want a prospect to experience you first?

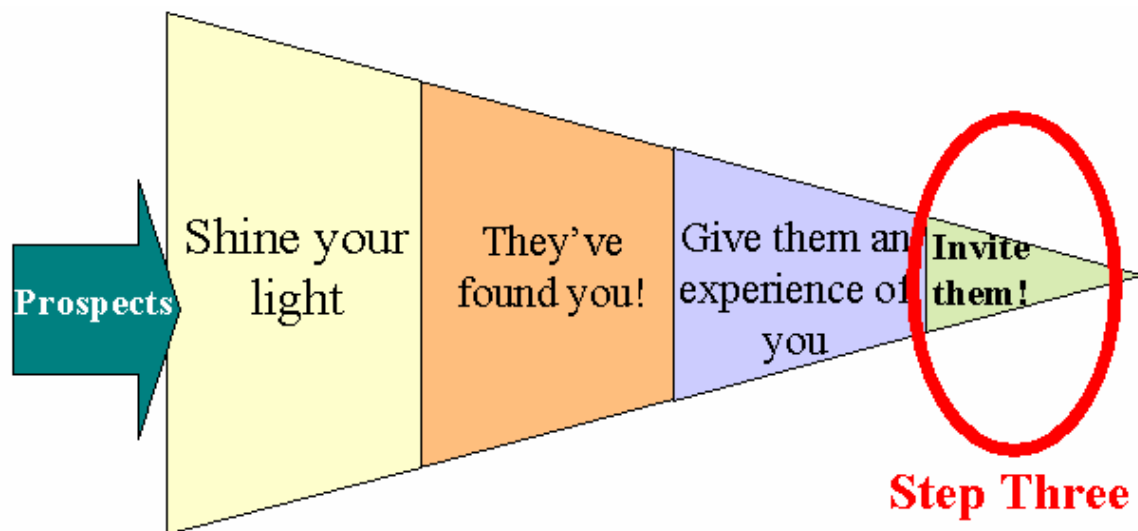
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- Allows them to overcome objections to buying
- Allows them to experience what's in it for them
- It leaves them wanting more – creates a craving for your product or service
- It builds trust
- It enables you to provide value – which is easy – versus try to sell, which can be hard

The purpose of step two is to bring your prospects closer to you, so they can decide they want your product or service.

People make buying decisions based on two voices in their heads – the emotional voice and the rational voice.

The important thing to remember is that it's always the emotional voice that makes the decision. But having the rational voice appeased and satisfied only makes that choice easier and faster.

Step Three – Once they experience you and your business, invite them to be your customer



This is the stage that people typically don't like. It brings up all kinds of connotations about the sleazy car salesman. But I invite you to seek out alternative perspectives.

The important thing here is that you stand in your power and ask. Empowered, courageous people who make a difference in the world aren't afraid to ask for what they want.



You already know you have something valuable and important to give to your clients – something that only you and your business can provide.

What are some things you could say to invite people to be your customer?

- “When would you like to get started?”
- “I’d love to work with you. How would you like to be my client? / Are you ready to be my client?”
- “How can I support you from here?”

So you will want to create a marketing and sales system, using the marketing channels as your tools.

1. Create a way for potential clients to find your business
2. Once they find you, allow them to experience your business
3. Once they experience you and your business, invite them to be your customer

To create your own Sales Funnel, begin with the end in mind.

CREATE A VISION FOR YOUR MARKETING & SALES

Creating a Vision for your products and services will enable you to think strategically about the services and products you bring to the world.

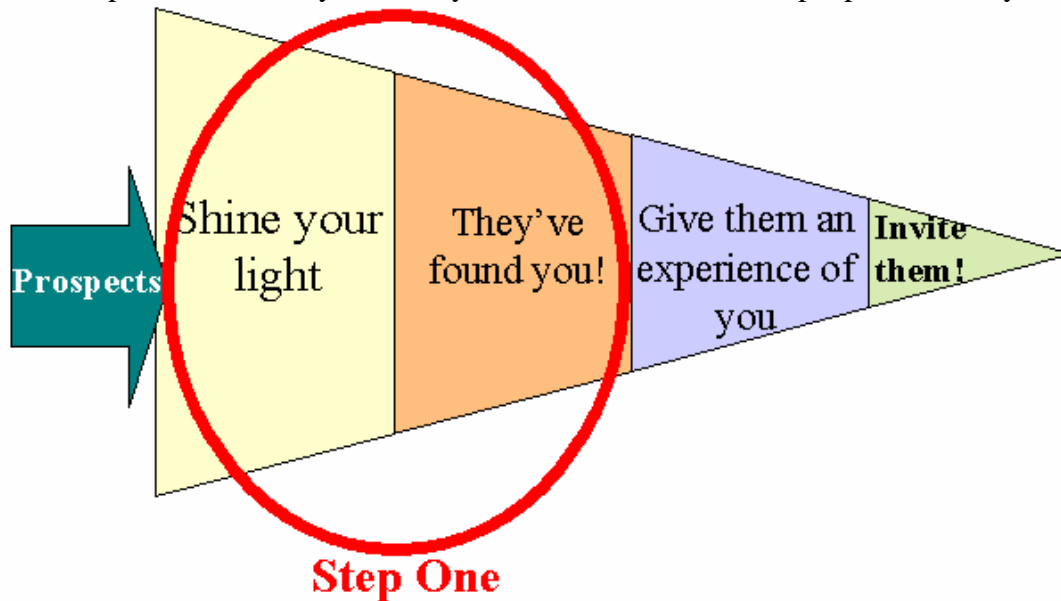
1. Bring to mind your Decision Statement and the company Core Values, Core Purpose, and Long-Term Inspired Goal:

<p>Your Decision Statement Values:</p> <p><i>[List here]</i></p> <p>The high-energy feeling it brings you:</p> <p><i>[List the feeling here and take a moment to connect to that feeling now.]</i></p>
<p>Company Core Values:</p> <ul style="list-style-type: none">• <i>[List them here]</i>
<p>Company Core Purpose:</p>

<i>[List here]</i>
Company Long-Term Inspired Goal:
<i>[List here]</i>
<p>Take a moment and connect to the vision of what’s possible for you and your business one year from now. Paint a picture with words, images, and phrases of what’s possible just 12 months from today:</p> <p><i>[Describe your one-year vision here.]</i></p>
<p>One-year from now, imagine that you are out there providing your products and services to an abundance of your ideal clients. What will be the value your business provides to others?</p> <p><i>[Describe the value here.]</i></p>
<p>One-year from now, imagine that you are surrounded by an abundance of happy, satisfied customers. Imagine your future customers smiling. what is it they are smiling about? What benefits did your products and services bring to your customer? How did your business, your products, your services help them?</p> <p><i>[Describe the specific benefits here.]</i></p>
<p>Now take a moment and imagine what their life was like <i>before</i> they met you. Imagine how they would look before meeting you and receiving the support and benefits from your business. Notice what’s different about them before they receive your services or products.</p> <ul style="list-style-type: none"> ▪ What are their complaints? ▪ Their struggles? ▪ Their wishes? ▪ Their dreams? ▪ Their pain? ▪ What is missing in their life that you can help them discover? ▪ What are their unmet needs and desires that your products and services can help to fulfill? <p><i>[Describe the specific needs and desires here.]</i></p>

ENVISION HOW YOUR FUTURE CLIENTS WILL FIND YOUR BUSINESS

Now take a moment and let yourself feel how important your work is. Let yourself understand why your services and products are so necessary in this world. Let yourself see how important it is that you make yourself available so these people can find you.



Acknowledge for yourself that somehow each of these people need to locate you. Somehow they need to be able to find you among the crowd. So take a moment and imagine a way that they could find you – a way that feels totally effortless and joyful for you. Let yourself imagine a way that feels completely aligned with your authentic path.

Imagine that you are like a lighthouse shining your light, and each of them find their way to you through one channel or another. All you do is shine your light in the ways that feel most enjoyable, fun, and exciting to you – and they easily come to you. Let yourself feel how important it is to make your light be available where your future customers can happen upon it.

0. Let yourself imagine all the possible ways in the next year that your future customers will be able to locate you and your business.

How might your future customers find you? Brainstorm all the possible ways. Just let all the possibilities get out on the page.

- Perhaps some of your future customers find you on the internet.
- Perhaps some of them have found you through referrals – maybe a friend or colleague gives them a glowing recommendation of you.
- Specifically, who will be telling others about all the amazing work you're doing in the world?
- How else are you shining your light, so that they can find a clear path to your

door?

- Do they meet you on the street? If so, where are you when you meet them, and what are you doing that invites them to ask about you and your business.
- Maybe you are giving a talk to a group of people?
- Maybe you are leading a meditation circle?
- Maybe you are leading a free teleclass?
- Maybe you are at a networking function?
- Maybe you are providing services to a volunteer group or non-profit association?
- Were you speaking at an association meeting?
- Did they find you through a friend?
- Did they read one of your articles on the internet?
- Did they meet you at a conference?
- Maybe they visited your booth at a trade show?
- Maybe you were the key-note speaker at an industry event?
- Maybe they respond to your newsletter?
- Maybe you've started a community or networking group?
- Maybe they attended a quarterly gathering, party, or reception that you throw?

[Your answer]

Now ask yourself, how would you *like* them to find you? What way would be fun and easy for you? Maybe they respond to your newsletter or an article you've written. Maybe you've started a community or networking group. Let yourself identify the ways that feel fun and exciting for *you*.

[Your answer]

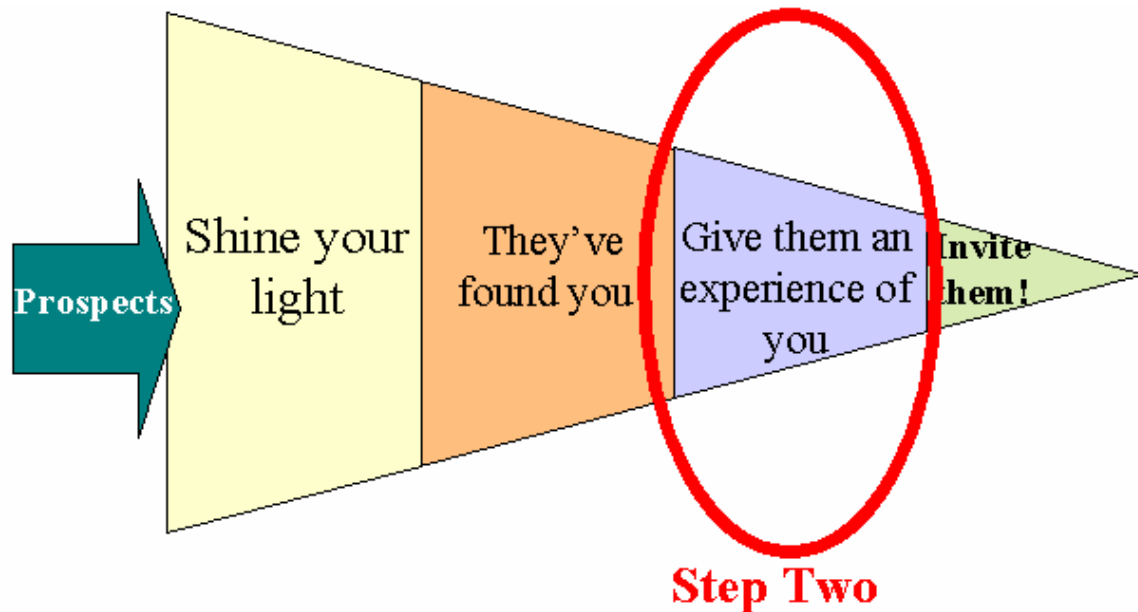
Again, return to that vision of you and your business one year from now. Let yourself see all those happy, satisfied, grateful customers. Let yourself see your own authentic path – your own authentic way of making your light available. What are the top three ways you would like your clients to find you?

1. [Your answer]
2. [Your answer]
3. [Your answer]

Of those top three ways – which one is the #1 path that leads customers to your door? Which way would be most fun and easy for you?

[Your answer]

GIVE THEM AN EXPERIENCE OF YOU AND YOUR BUSINESS



- 1.** Now that your customers have found you, it's important to allow them to experience you. Remember, people aren't simply going to buy, unless they have had the opportunity to understand what it is you can offer them. So it is important to imagine what happens next, after the prospect has found you (or some representation of you, like your website or an article). They are at the door, so imagine how you would like to invite them in to experience for themselves what your business has to offer.

Imagine that your customer has taken that #1 path that leads them to your business – whether it's through the internet, they've arrived at your speaking engagement, or they have read your article. What do you want them to do *next*?

[Your answer]

How do you make it easy for them to take that next step with you? What are the specific things you do, say, or provide so that they will decide to take the next step? Let yourself see how you could invite them to participate in some way with you. Let yourself see what happens after potential clients have found you. How do you help them experience you, your company, and the value they will receive working with you. Let yourself see the next logical step. Based on what your #1 path to you and your business is, what could you make sure happens to give them an experience of

you?

- Do you invite them for a complimentary session?
- Do you invite them to try out a free product?
- Do you offer them a free email newsletter or free assessment?
- Do you have lunch with them and discuss ways you could work together?
- Do you provide a report, a proposal, a recommendation or document to them?

[Your answer]

What is a specific value you could provide to a potential client right away – either on your website, in a free report, in a session with you, or during a lunch meeting? What would be something you could easily, effortlessly, wantingly provide to them right away at no cost to them?

[Your answer]

In providing an experience of you, make sure you help them understand exactly what's in it for them if they choose to be your customer. Help them identify with what they want. What do they want logically, rationally, *and* emotionally? What might be their response?

[Your answer]

Consider how it is they've found you (your #1 channel). Assuming that's how they've found you, how will you help them connect with what they want?

- Will you ask them directly and provide a way for them to give a response?
- Will you pose the question, and then give a selection of possible answers (like you just answered in the question above) so they can connect with their needs and wants?

[Your answer]

Next, you will want to help them identify how they will feel if they get what they want (remember that people buy because they want the *feeling* that's available from having a service or product). How will you help them identify that desired feeling?

[Your answer]

Next, you will want to help them identify how they will feel if they don't get what they want. What would be some examples of that unwanted feeling? How will you help them recognize this unwanted feeling?

[Your answer]

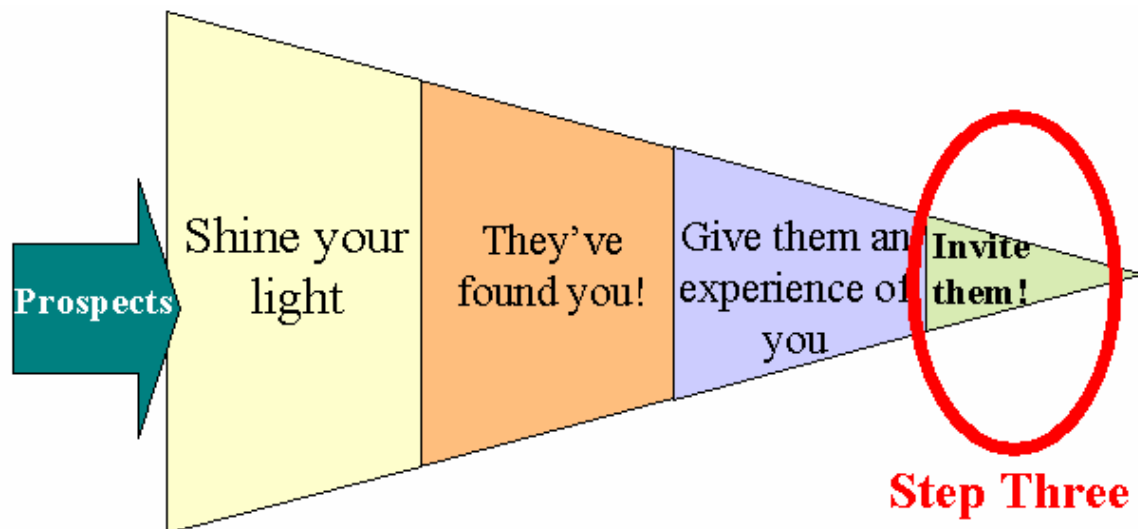
How will this process enable you to capture their contact information? Make sure that you build into your process a way to collect their contact information *before* you provide the free offer to them. *This is essential.*

Most people need to be exposed to a product or service at least three times (and on the web, seven times) before they will make a purchase. Therefore, having a systematic way to capture the contact information, and then later, reconnect with them is critical.

[Your answer]

INVITE THEM TO BE YOUR CUSTOMER

Could there be a more important step?? And yet, this is the step that is most often fudged up. The common mistakes are (1) to ask for the sale too soon – before you’ve given them a chance to experience your product or service and (2) not ever actually extending the invitation. If you never ask them to be your customer, chances are, they never will be.



2. Invite them to be your customer.

Again, return to that vision of you one-year from today. See yourself surrounded by all those wonderful, satisfied clients. Let yourself feel how it would feel if you

already had more than enough clients. You no longer feel desperate or wanting. Let yourself see, how would you feel instead?

[How you will feel]

Let yourself imagine that you are already in that place where you have all the clients you could possibly need. You have a waiting list, in fact. You get to *choose* which clients you work with. So imagine that a potential client approaches you – someone you would *love* to have as your customer. Someone who inspires you. Someone that you *know* will greatly benefit from your product or service. Imagine them standing in front of you smiling, waiting for you to make the invitation. Standing in your power, what would you say to invite them to be your client?

- “I’d love to work with you. When would you like to begin?”
- “I’d love to be your coach/consultant/dentist/hypnotherapist! When would you like to begin?”
- “Are you ready to get started?”
- “How can I support you from here?”
- “So what do ya say? Would you like to hire me?”

Find the words that are authentic for you and write them below.

[How you will feel]

PRICING AND PAYMENTS

3. Provide them pricing and get them started.

Do you offer more than one option for your product or service? If so, consider giving each of these options a name. It could be a name that reflects the “way” the product/service is offered – The Joy Teleclass, The Joy eCourse, The Joy Home Study. Or it could be different derivations of the same basic product or service – standard, premier, or premium. Take a moment and write down the options.

[Your answer]

What is the price of each option? Is it a set price, or is do you provide a customized

quote?

If you provide a customized quote, imagine an “average” client and come up with pricing for them; itemize exactly what they get for that price (include all your assumptions). This will help you build pricing in the future, as well as create clear understanding with your clients about what they can expect to receive from you.

[Your answer]

If you don't know what to charge, take some time to do some homework and see what other businesses are charging for a similar product or service. List 3-4 examples for each option below.

[Your answer]

What are the terms of payment? Do you want your clients to pay you before you ship the product or deliver the services? Or perhaps they pay 25% right away, and the balance at a later time. Take a moment and write down your payment terms.

[Your answer]

How do you (or will you) receive payments? Do you take cash, check, or credit card or some combination?

[Your answer]

Do you already have a payment system in place, or do you need to take actions to set up the process? Some of the common steps are below:

- **Set up legal business entity (Incorporate, Limited Liability Partnership, Sole Proprietorship, etc.)**
- **File for Tax ID number**
- **Open a business checking account**
- **(Optional) Set up QuickBooks**
- **If you want to take credit cards:**
 - **Paypal****OR**
 - **Set up a merchant account (ClickBank is a good one.)**
- **If you want to take online payments:**
 - **Set up a shopping cart (I recommend CartVille.com)**

[Your answer]

4. Provide them pricing and get them started.

Do you offer more than one option for your product or service? If so, consider giving each of these options a name. It could be a name that reflects the “way” the product/service is offered – The Joy Teleclass, The Joy eCourse, The Joy Home Study. Or it could be different derivations of the same basic product or service – standard, premier, or premium. Take a moment and write down the options.

[Your answer]

BUILD YOUR SALES FUNNEL

Now that you’ve gone through the process of planning out your marketing and sales process, it’s a good idea to consider where you want all of this to lead.

A good sales funnel attracts and converts prospects to customers. The better your sales funnel is, the more efficient it will be at bringing you customers.

Simply having the elements of the funnel in place are great, but tying it all together will bring your effectiveness to a whole other level.

Let’s use Mary as an example.

Let’s say Mary wants to bring 20 customers to your door, and on average, she receives \$1,000 per customer.

The question to ask is, *what will be required of Mary and her business to convert this number of customers?*

To find out the answer, consider what would be required to convert just one customer.

Think backwards, using the three steps of the Sales Funnel. In order to convert a customer from a prospect to a customer, you will have to attract them to you, give them an experience of you, and invite them to be your client. It’s probably fair to assume that not every single person who learns about your business will become your client, right? So you will likely need to approach more than one person to get one sale. Make sense?



Let's assume Mary's sales funnel looks like this:

- Step One – Shining her light and allowing people to find her

Mary uses a beautifully designed website that has been optimized to bring her lots of traffic.

- Step Two – Giving an experience of her product

Mary offers a free assessment and follow-up phone consultation that a visitor can get by signing up (and providing their contact information) on Mary's website. The assessment helps Mary identify the specific needs and desires of the prospect, so that she can provide excellent value and service during the phone consultation.

- Step Three – Invite the customer to be her client

About three-quarters of the way through the consultation, Mary asks the prospect if he would like to be her client. Feeling excited and inspired, the prospect asks about options and pricing and then immediately says yes.

Let's also assume that she has tracked her success along the way:

Mary has found that of the people who make it to her website, about 3% decide to sign up for the free assessment and consultation.

Out of those, about 30% decide to become her client.

**Hence for 1 customer, Mary must conduct 3 consultations.
To get 3 consultations, 100 people must visit Mary's website.**

Out of that, Mary generates \$1,000 in services revenues.

Therefore, in order for Mary to get 20 customers and \$20,000 in revenues, she must conduct 60 consultations, and 2000 people must visit her website.

Now she can see the value of each prospect ($\$20,000 / 2000$) is \$10.

This information helps Mary a great deal. If her goal is to have 20 customers, then she knows exactly how many prospects she must attract in order to get the results she wants. She can increase her number of clients by doing one or a combination of the following:

- Optimizing her web traffic to get more unique visitors
- Improving the content of her website to get more people to sign up for the free assessment and consultation



- Improve her effectiveness on the consultation and get a higher percentage of conversions

5. Consider what you'd like to get out of your marketing & sales system.

Imagine that it's twelve months from today, how many customers would you like to serve per month?

[The number]

On average, how much would you like each customer to pay you each month for your products or services?

[The dollar amount]

Imagine that it's six months from today, how many customers would you like to serve per month?

[The number]

On average, how much would you like each customer to pay you each month for your products or services?

[The dollar amount]

Imagine that it's three months from today, how many customers would you like to serve per month?

[The number]

On average, how much would you like each customer to pay you each month for your products or services?

[The dollar amount]

6. Now consider the conversion rates of each component of your sales funnel.

State your sales funnel here.

- **Step one -- [The main channel you intend to use to help people find you]**
 - **Step two – [How you give them an experience of you]**
 - **Step three – [How you invite them to be your customer]**

Of the people who experience STEP TWO, what percentage of them agree to become your client?

Step Two Conversion Rate = [Your estimate]

Of the people who experience STEP ONE, what percentage of them participate in STEP TWO?

Step One Conversion Rate = [Your estimate]

How many customers would you like to have in one month?

[The Number of Customers You Want]

In order to have that many customers, how many people would you need to provide and experience of you (STEP TWO)?

**[# of Customers You Want] / [Step Two Conversion Rate]
=
[#prospects You Want to Bring Through STEP TWO]**

In order to bring that many people through STEP TWO, how many people would you need to find you (STEP ONE)?

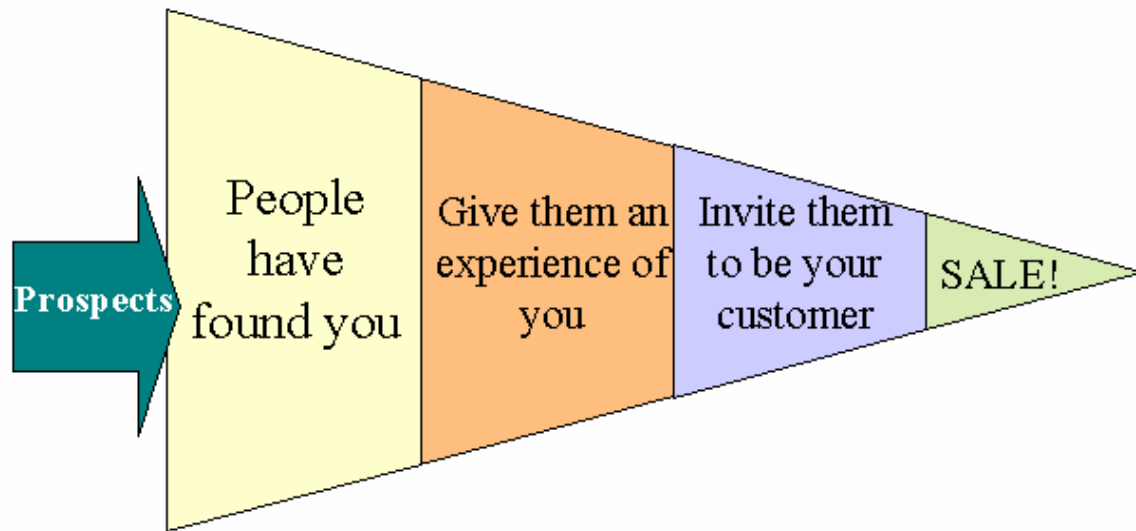
**[# Prospects You Want to Bring Through STEP TWO] / [Step One Conversion Rate]
=
[# Prospects You Want to Bring To STEP ONE]**

On average, what do you expect your customers to pay you?

[The dollar amount]

What's the value of each prospect (even if they never buy from you)?

**[The dollar amount] / [# Prospects Bring To STEP ONE]
=
[Value of each Prospect]**



7. Using the information you just calculated, create a plan for how to bring your ideal customers to your door.

**What are specific ways you could get the desired number of prospects to Step One?
Define the actions you would need to take.**

- [Your answer]

**What are specific ways you could get the desired number of prospects who've reached Step One to move onto Step Two?
Define the actions you would take to set up this system.**

- [Your answer]

**What are the specific ways you could get the desired number of prospects who have reached Step Two to move onto Step Three?
Define the actions you would take to set up this system.**

- [Your answer]

**What are the specific ways you could track the metrics of this system?
Define the actions you would take to set up this system.**

- [Your answer]



8. Update your *Strategic Operations Plan* to include what you discovered in this worksheet.