

Tired of struggling to attract clients?

Marketing Plan Workbook

**for Attracting Clients
to your
Professional Service Business**

Robert Middleton

Action Plan Marketing

210 Riverside Drive
Boulder Creek, CA 95006

www.actionplan.com

robertm@actionplan.com

831-338-7790

Proven marketing strategies that work

How can I attract new clients consistently?

2

As a professional service business owner, this is likely one of your most recurring questions. It's vitally important to the success of any business, because without a steady stream of clients, you're out of business!

The Mystery of Marketing

For many of us, marketing is a real mystery. We don't know exactly how it works. We're not sure what will be most effective for us. And we sure have no idea where to start. For many professional service businesses, the most common response is to do the very best job they can and hope they get referrals from satisfied clients. As a result it can often take a long time to get much momentum in attracting new clients.

The Good News

The good news is that the process of attracting new clients and developing and implementing a marketing plan for your professional service business is not nearly as difficult as it may seem. The core of marketing is very simple: It's about communicating the value of what you offer to those who can benefit the most. But even that can seem daunting if you don't know how and where to communicate that value.

A Model That Works

Since 1984 I've been helping service business owners, mostly professionals such as management and technical consultants, trainers, business coaches, financial and employment professionals and others, both develop and then implement marketing plans that worked.

The key to understanding marketing, like many other systems of knowledge, becomes much easier when you have fundamental principles and a model to guide you. When you understand the principles and the model you can start to master marketing.

The model that I use with my clients is called **"InfoGuru Marketing."** Independent professionals are marketing and selling what they know and how to use what they know to produce results for their clients. InfoGuru Marketing is about leveraging what you know to gain visibility and credibility.

This workbook is the companion to the comprehensive manual, **"The InfoGuru Marketing Manual."** The workbook gives the outline of the plan, the manual helps you fill in the spaces and shows you exactly how to implement your plan. To learn more about the manual or to order it online, [click on this link](#).

I wish you all the best in embarking on the adventure of successfully marketing your professional service business.

Robert Middleton

Developing a Core Marketing Message

Central to effective marketing is a message that speaks powerfully to the needs of your prospective clients. This message becomes the foundation of all your marketing. This message is developed by first answering the following questions.

1. Target Market : What clients do you serve? Give a detailed profile of your ideal client including demographics (basic facts such as industry, geography, etc.) and psychographics (values, character, interests).

2. Problem: What problem, issue, pain, predicament or challenge are your clients facing that would make them seek assistance?

3. Solution: What results do you produce when working with clients? Or, in other words, when you've completed working with your clients what can they expect their condition will be? (Before: struggling to do X - After: successful in doing X)

4. Proof: What do you have that can prove you can in fact deliver that solution? Do you have references, testimonials and case studies that make a strong case for your results?

5. Differentiation: What makes you stand apart from your competitors? What makes you unique, special, memorable? What is it about your business that offers a true advantage to your clients?

For more assistance with this, see the [InfoGuru Marketing Manual](#).

When someone asks what you do, how do you respond? Here is a time-tested format that gets the attention and interest you want. You don't start out talking about what you do, but who you work with and what their problem is. This takes the focus off you and onto your clients. This always generates a better initial conversation about your services.

This is a very simple but powerful method for gaining interest and attention for your services. Note carefully that the discussion is always focused on what you do for your clients and what they get from working with you. What people tend to do is talk about what they do, their services, and processes. What's missing when you do that is the "what's in it for me?" factor.

The Question: What do you do? Here's how to respond...

1. Target Market - Say who you work with first. Let your listener know your service is for them, not someone else.

"I work with IT executives in Fortune 1000 companies..."

2. Problem - Articulate the problem or predicament or pain your target market is experiencing in terms that are meaningful to them."

"...who are having difficulties getting their top talent to stay around."

- Pause - Wait for response or question.

3. Problem/Stories - Tell them more about the problem and discuss examples of those you have worked with.

"Many IT managers are losing people because they are so bad at managing people. For instance, a client we worked with was losing 30% of their best technical people every year..."

- Conversation about various problems and challenges.

4. Solution/Uniqueness - Tell them your solution and what makes you different.

"We've had very good results in turning around the attrition problem for clients. Typically we can cut their attrition in half in less than six months."

- More conversation about solutions and results.

Getting Past First Base

Once you engage a prospect in a conversation where they are showing interest in your services, you're on first base. The trick then is getting onto second base. You're on second base when they are ready to explore working with you. [See the article on Marketing Ball](#) on our web site for more detailed information on this model.

Getting onto second base is what InfoGuru Marketing is all about. It's about providing the information, the ideas, the value and the proof that you can indeed help your prospect solve their problems and achieve satisfactory solutions.

To get onto second base, there are a number of strategies and tools that InfoGurus use. We'll be going over these in more detail in this workbook. They include:

Information about your services:

- An Executive Summary that gives a one-page snapshot of your business

- Detailed marketing materials, either printed or on a web site

- Case studies and stories about successful projects

Additional education and information in the form of:

- Articles, reports and studies

- Talks and presentations

- Newsletters and email newsletters (eZines)

Relationship-building with existing clients and new prospects

- Strategies for generating more referrals from existing clients

- Networking to expand your visibility and credibility

- Directly reaching out to new prospective clients

In the following pages we'll give you an outline of these activities and a basic plan for you to put them into action. Detailed how-tos and action plans for these marketing activities can be found in the [InfoGuru Marketing Manual](#).

Executive Summary of Your Business

Every business needs some kind of written materials to communicate what they offer and the advantages of doing business with them. This format, called “An Executive Summary,” can be the first page of your brochure or web site. It communicates the essence of what you offer.

1. Core Solution Statement - Simple phrase that communicates the essence of your solution.

“We help IT companies retain their best talent.”

2. Problem - Discuss the problem, pain or predicament as to make it crystal clear that you both understand the problem and you understand their industry.

“These days the biggest challenge in big IT departments is keeping talented staff. In a survey of the 20 largest IT departments in banking, for instance, the average attrition rate is 27% per year, costing each organization over 3.8 million in recruitment costs annually.”

3. Solution - Discuss what's possible if you solve this problem.

“Research also proves that the top reason for attrition is not poor compensation or lack of challenging work, but poor management by those directly above them. The good news is that when management approaches change, people stay, saving companies hundreds of thousands, if not millions each year.”

4. How come? - Discuss why companies are stuck in #2 and not doing #3.

“Highly competent technical people are the ones most often promoted to management positions, however they only receive in-depth management training 16% of the time. This leaves 84% of those in technical management positions with few skills in the area of people or project management.”

5. What you need to do - Discuss the steps necessary to resolve this issue.

“The best investment IT departments can make is providing in-depth management training and coaching. It is the number one defense against attrition, low productivity and declining morale. Such training needs to be seen as an investment, not as an expense as it can show a return of 500% or more.”

6. Why us? - A statement of why you are qualified to provide the above solution.

“Since 1987, **IT Management Solutions** has been helping some of the largest IT departments in America attract and retain top talent by developing top management and teams through our guaranteed consulting and training services.”

Executive Summary Worksheet

PACKAGING

7

1. Core Solution Statement (headline)

2. Problem

3. Solution

4. How come?

5. What you need to do.

6. Why us?

Marketing Materials or Web Site Outline

This outline can be used for any written materials or for a web site. Your aim is to communicate, from several different angles, the advantages of your services. The key is to be clear, concise and complete in outlining what you do and the benefits that you offer.

1. Executive Summary/Home Page - A brief outline of the essence of your business.

2. Who We Work With - This page goes into more depth about who your clients are and the problems and challenges they face. It also gives the profile of an ideal client - "We are most likely to be successful working together if..."

3. How We Work - This page gives a sense of what it's like to work with you - beliefs, values, philosophy, etc. It also discusses the kind of results you produce for your clients.

4. Services - This page gives an overview of the various services you offer, how they work, and the advantages and benefits of those services.

5. Clients/Case Studies - This page provides list of clients you've worked with, testimonial quotes and case studies of various successful projects.

6. About us - This page contains background material on the company and principal(s) of your company. It must answer the question, "How are you qualified to help me?"

7. Articles - Published or unpublished articles on areas related to your field of expertise. The more you prove what you know, the more credibility. Don't hold back here.

8. Resources - Any other relevant material that would be of interest to a client - links to other web sites, a booklist, questionnaire, etc.

9. FAQ Page - Frequently answered questions are often useful in summarizing what you do and the benefits you offer.

10. Contact Us - What they need to do to be in touch with you and how you start working with clients. Make sure this information is easy to find!

Six Core Promotional Strategies

The following six promotional strategies are the most effective for professional service businesses. You need to develop and implement strategies in each of these areas. The following pages give you outlines for each strategy.

Strategies for educating and informing your prospects. These three are core to InfoGuru Marketing.

1. Writing Strategy - How can you gain credibility by communicating your expertise?

2. Speaking Strategy - How can you stand out as an expert?

3. Keep-in-Touch Strategy - How can you stay in touch with clients and prospects?

Strategies for building relationships with existing clients and new prospects. These three ensure that you have a continuous flow of new prospects.

4. Referral Strategy - How can you build on the network of those you already know?

5. Networking Strategy - How can you gain visibility and credibility in a network of peers?

6. Direct Outreach Strategy - How can you best approach highly qualified new prospects?

Writing articles is a powerful way to build credibility and visibility. Your aim is to educate your prospective clients about your ability to apply what you know to their situation.

1. Titles and Topics - What is of most interest to your target audience?

2. Headlines - How can you get attention and interest and lead readers into reading the body of the article? Make sure you target your audience and offer a benefit.

3. Writing an Article - How can you most efficiently and effectively produce a good article, suitable for publication?

4. Getting Published - How and where can you get your articles published?

5. Leverage - How can you use the articles you've written to leverage your business?

Action plans for writing and publishing articles in the [InfoGuru Marketing Manual](#).

Talks or speaking engagements are even more powerful than articles for gaining immediate credibility for you and your business. They can attract clients immediately.

1. Titles and Topics - What is of most interest to your target audience?

2. Headlines - How can you get enough attention and interest to attract people to your talks?

3. Outline a Talk - Practice a Talk - How can you most efficiently and effectively prepare a professional and persuasive presentation?

4. Getting booked for a talk - How and where can you get booked to give talks?

5. Leverage - How can you use the talks you've given to leverage your business?

Action plans for speaking engagements in the [InfoGuru Marketing Manual](#).

Keep-in-touch marketing simply means any method to stay in front of clients and prospective clients so they do not forget you when they need your services.

1. Content Strategies - What is the best type of content to include in your keep-in-touch marketing? Tips and techniques, what we're doing, info from other sources, etc?

2. Formats - What are the best keep-in-touch formats for your kind of business? Newsletters, letters, calls, postcards or eZines?

3. eZine Strategies - How can you best use eZines (e-mail newsletters) to keep-in-touch?

4. Technical side - What are some of the technical challenges and solutions for really effective eZines?

5. Leveraging your keep-in-touch - How can you leverage your keep-in-touch marketing for the best results?

Action plans for keep-in-touch marketing in the [InfoGuru Marketing Manual](#).

Referrals

Referrals come from both satisfied clients and those who know you through your reputation and the message you communicate through your marketing.

1. Performance - How can you provide the highest level of work and exceptional service?

2. Communication - How can you communicate clearly, concisely and completely about your solution, services and overall business?

3. Just Ask - How and when can you ask for referrals and testimonials so your clients will be more than willing to provide them?

4. Rewards - How can you best acknowledge and reward referrals?

5. Partnerships - How can you partner or joint-venture with others who offer non-competitive services to your target clients?

Action plans for generating referrals in the [InfoGuru Marketing Manual](#).

Networking is a powerful way to be seen, get known and build trust amongst those who might use your services or refer you to others who need what you have to offer.

1. Where to Network - How can you pick the most appropriate places to network?

Chambers of Commerce

Professional Groups

Leads Groups

2. How to Network - How can you leverage networking activities to attract new clients?

Find Groups

Participate

Leverage Contacts

Action plans for networking in the [InfoGuru Marketing Manual](#).

Direct outreach marketing means approaching a prospective client directly. This can be an effective method if you have a strong referral or have a service that is highly and obviously beneficial to your potential client.

1. Targeting - How will you target which prospective clients to contact?

2. Research - What must you find out about these prospects before you contact them?

3. The letter - What must you say in a letter to gain their attention, interest and response?

4. Follow-up - How can you make sure you connect under the most favorable conditions?

Action plans for direct outreach marketing in the [InfoGuru Marketing Manual](#).

An integrated promotion strategy means combining and intertwining the various parts of your marketing for the best overall impact and results. The diagram on the following page illustrates an integrated promotion strategy with your web site as the hub of your marketing.

1. Core Marketing Message - This is the foundation of all of your marketing. It needs to be communicated through all your marketing materials and outreach vehicles. Your message needs to be visible to your target market and must communicate value and benefits.

2. Web Site - Have all the information on your services instantly available. This is a place where new prospects can discover you and current clients can visit for additional information. People get to your site from both offline promotional efforts (speaking, writing, referrals, etc.) and online promotion (search engines, directories and your eZine).

3. Speaking and writing - Establish both credibility and visibility. Make sure these vehicles always lead people back to your web site for more information.

4. E-zine - Make sure nobody forgets who you are and what you do. Once people visit your web site, encourage them to sign up for an eZine subscription. Your eZine keeps prospects and clients informed about what you are doing and the results you are producing.

5. Referrals and networking - Build trust through long-term relationships. Doing a great job is what generates positive word of mouth. When people hear about you, often the first thing they will do is visit your web site before they give you a call.

Integrated Promotion Strategy Map

This diagram illustrates an integrated promotion strategy with a web site as the hub or center of your marketing.



The Persuasion Process

Persuasion starts where promotion leaves off. For our purposes we will consider persuasion or selling as the one-to-one verbal part of the marketing process. When someone calls you, interested in your services, then persuasion begins. But persuasion is actually happening anytime you are communicating about your services, verbal or written.

There are frequently many “conditioned aversions” to the selling process:

1. Attitudes - What attitudes do you have about persuasion and selling?

2. Feelings - What feelings do you have about persuasion and selling?

3. Beliefs - What thoughts and beliefs do you have about persuasion and selling?

You might consider selling as the process of discovering if there is a match between what the prospective client needs and what you have to offer. Selling is simply a conversation to determine how you can help your prospects attain their goals. It is very delicate indeed.

Where do you need to come from to sell and persuade successfully?

1. Curiosity - What do you need to be curious about?

2. Caring - What do you need to care about?

3. Commitment - What do you need to be committed to?

Over-the-Phone Persuasion

Your effectiveness on the telephone can spell the difference between success and failure. You must master the art of turning telephone calls into appointments or sales.

1. Categories of Calls - Three important categories: Call-ins, warm calls and cold calls. How must you approach each differently?

2. Telephone Psychology - People behave predictably over the telephone. You need to know how and why they do what they do to engage them successfully.

3. Telephone Master Skills - You must master these four skills to turn interest into sales.

Opening - What do you say to get attention?

Qualification - What do you ask to learn about wants and needs?

Listening - How do you tune in to your prospect?

Closing - What do you say to get a commitment?

Action plans for telephone selling can be found in the [InfoGuru Marketing Manual](http://www.actionplan.com).

When you meet with a prospective client face-to-face you are engaged in a conversation to determine how you can help this person achieve their goals. You are also engaged in a conversation to build a case for you and your services. You need to know how to balance these two in order to emerge with a win/win relationship.

1. Tone of a sales meeting - How do you set the tone for interest and receptivity? How do you build immediate trust so your prospect will open up?

2. Questions and Listening - When and how do you ask questions and what questions must you ask to best help your prospective client?

3. Presenting Your case - How and when do you explain the benefits of your service? How do you avoid telling more than you need to tell?

4. Win-Win Closing - When and how do you ask your prospect to make a commitment?

Action plans for selling can be found in the [InfoGuru Marketing Manual](#).

Pricing Your Services

Pricing your services can be one of the most confusing areas of marketing. What are you really worth? What will they pay? Should you set fees by time and materials or by value and how do you hold the line on your fees?

1. What are you worth? - How do you determine the basis for setting your fees?

2. Pricing by time - If you price by time, how do you determine the going rate?

3. Pricing by value - If you price by value how do you come up with a total fee?

4. Negotiation - How do you negotiate fees, especially if the prospect wants to lower them?

5. Choice of yeses - How do you make it easier for the prospect to choose your services?

Action plans for pricing can be found in the [InfoGuru Marketing Manual](#).

Proposals are, ideally, a summation of what you have agreed to in the sales process, not an exploration of what you might do. Successful proposals adhere to the following seven main sections. Good proposals are focused and succinct.

- 1. Situation Summary** - How do you best define the prospect's situation?
- 2. Objectives** - How do you outline the objectives the prospect wants to achieve?
- 3. Value** - How do you establish the value of your services?
- 4. Measure of Success** - How do you define what success will look like?
- 5. Methodology** - How much should you say about what you're actually going to do?
- 6. Joint Accountabilities** - How do you outline who is responsible for what?
- 7. Compensation** - How do you present your fees in the best possible light?

Action plans for proposals can be found in the [InfoGuru Marketing Manual](#).

Performance and Service

Like beauty, performance is in the eye of the beholder. Doing a great job, providing quality service and delighting clients is a matter of understanding expectations and then exceeding them. There are three powerful models for doing just that.

1. Expectations - How can you communicate with clients so that their wants and needs are explicit, not implicit? What does it take to effectively manage expectations?

2. Raving Fans - How can you go beyond satisfied clients to create “raving fans,” people who will actively spread the word about your services?

3. Erin Brockovich Effect - What does it take to build real loyalty from clients that could not possibly be eroded by a competitor?

Action plans for performance and service can be found in the [InfoGuru Marketing Manual](#).

This **Marketing Plan Workbook** is the starting point for developing and implementing a marketing strategy that starts to attract new clients consistently.

In your marketing you want to accomplish these five things:

- 1.** Get the attention of your ideal prospective clients through communicating a powerful "Core Marketing Message." If you don't get attention then nothing else will happen.
- 2.** Get the interest and buy-in from prospective clients once you have their attention. This is accomplished through well-written marketing materials, which these days often includes a web site.
- 3.** Keep the attention and interest of your prospective clients by keeping your name and message in front of them on a consistent basis. This is keep-in-touch marketing. You want to build trust through familiarity and credibility.
- 4.** When prospects respond to your marketing and explore doing business with you, then you need to convert that interest into commitment. In other words, you need to make the sale.
- 5.** Finally, you need to take care of your clients and deliver the solution you promised if you ever want to get repeat business or receive referrals from satisfied clients.

This workbook gives you a structure to work from to develop this complete marketing strategy. But it doesn't contain all the answers to implement your strategy.

If you want to move the process along at a faster rate you need to have the know-how to put all those marketing ideas into action. That's why I wrote the "[InfoGuru Marketing Manual](#)." InfoGurus are independent professionals who are not only knowledgeable, but use that knowledge to market themselves with impact.

This manual is a complete guide to attracting new clients to your business. I won't go into detail about everything it contains. You can read about that on the [Action Plan Marketing web site](#).

If you have any questions or comments for me you can contact me at: robertm@actionplan.com. And yes, you can even reach me by phone at 831-338-7790.

All the best,

