

The Marketing Plan Workbook for Independent Professionals by Robert Middleton

A step-by-step guide for attracting more of your ideal clients. This is for self-employed professionals such as management consultants, business coaches, corporate trainers, financial professionals, and marketing professionals who need a reliable system for marketing their professional services with integrity and without hype. Includes detailed instructions and exercises.

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If advice concerning implementing the ideas contained in this eBook is needed, the services of a fully qualified professional should be sought.

Note: This ebook can be viewed online, however, to do the exercises, I advise that you print out a hard copy.

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Want to attract more clients?



Hi, my Name is Robert Middleton and I'm the creator of this eBook you're reading right now.

When I started my business in 1984 helping small business owners get organized, I wasn't a very good marketer of my services. I was hopeless, in fact. I didn't know how to get the word out, differentiate myself or even sell my services. It's really a miracle that I survived those first few years! I struggled a lot but I never gave up.

One marketing method that did work for me was holding workshops at a community college on getting your small business organized. People came up to me after the workshop and asked if I could help them with their businesses. But after helping them get organized, I realized they had a much bigger problem – attracting more clients.

So the things that I struggled with, marketing and selling, I had to learn if I was going to help them. So I read a lot of books, attended seminars and workshops and started teaching my clients what I had learned. Not only was I able to help them, I became so captivated by the art and science of marketing that I created a vision to be the top marketing expert in the SF Bay Area for self-employed professionals. Within a few years I became that expert, not only in the Bay Area but throughout the U.S. and Internationally.

To make a long story short, I've since worked with thousands of Independent Professionals and have developed unique approaches and strategies to attract clients such as my Marketing Ball Game and Marketing Syntax, the language of marketing. This Marketing Plan Workbook is a condensed outline of all of my eight marketing systems.

To get the most from this eBook, just read and do the exercises, and you'll have a head-start over most of your peers. It's not what you know, but what you put into action that counts. The information in this eBook really works; it has been tried and tested with thousands of Independent Professionals, just like you. Enjoy the process; marketing can be fun!

Marketing Plan Workbook for Independent Professionals

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"What you are about to learn will change your life. But only if you take action to apply it."

– Anonymous

The Eight Principles of Action Plan Marketing:

These Eight Principles are the essence of my marketing system to attract more of your ideal clients.

1. **Marketing Ball** – The Game of Marketing

Understanding that marketing is an organized process, not a random series of activities. You'll take your prospects step-by-step through this process.

2. **Marketing Mindset** – The Inner Game of Marketing

What current mindsets are holding you back? You'll learn to create new mindsets that will support you in succeeding with your marketing.

3. **Marketing Messages** – The Language of Marketing

Marketing is communication. And it's not just what you say, but how you say it that generates attention and interest.

4. **Marketing Conversations** – The Heart of Marketing

The conversations you have with potential clients (whether verbal or written) determine your success in the marketing process.

5. **Marketing Information** – The Currency of Marketing

Your written marketing materials – especially your web site – are key tools to educate your prospects about your business.

6. **Marketing Strategies** – The How-To of Marketing

Marketing Strategies consist of activities such as networking, speaking and online marketing. You need to choose the right ones for you.

7. **Marketing Action Plans** – The Structure of Marketing

Ultimately you need to take all the above elements and put them into a step-by-step plan that will turn prospects into paying clients.

8. **Strategy Sessions** – The Selling Process

Strategy Sessions are meetings, held under favorable conditions, with qualified prospects ready to explore working with you.

You'll learn more about these eight principles and fill in the exercises on the following pages until you have a workable Marketing Plan for your business.

Turning Marketing Into A Game

Marketing is a game. The purpose of the game is to turn strangers into prospects, buyers, and clients. Marketing Ball is a model to help you understand this game and play it effectively. (See the model on the next page.)

Marketing Ball starts in the “Locker Room.” This is where you develop your Core Marketing Message that lets your prospects know who you work with, what issues and challenges you address, and the solutions and outcomes you deliver to your clients.

Once you have your marketing message developed, you are ready to “play ball” and step up to Home Plate. Every new prospect you connect with needs to hear or read your Core Marketing Message. If it speaks to their needs, you’ll generate attention and interest.

When your message interests someone, you’re then on First Base. They’re not a buyer yet; but you do have their attention. At this point, a prospect is usually open to knowing more about your services. You need to provide them with Information and build Familiarity.

Once you’re on First Base, the next job is to get onto Second Base. You know you’re on second base when the prospect feels comfortable enough to explore working with you. This usually takes the form of a meeting of some kind where you transition from marketing to selling. We often call these selling meetings, “Strategy Sessions.”

Now that you’re on Second Base, your goal is to get to Third Base. The journey from second to third is the sales process itself. And when you land on third, the prospect is ready to buy; they want to work with you. You’re almost home. Just one more base before the client is actually secured.

From Third Base, your aim is to get back to Home Plate and score a run (a new client). This step is a matter of agreeing to terms (a proposal or a contract), and getting your first payment. When you’ve mastered the complete process of taking a prospect around the bases, you have mastered the game of marketing. In this eBook we’ll go into detail with all of these steps.

1.1 the game of marketing

Marketing Ball Model – The game of marketing



Where are your prospects in the Marketing Ball Game?

Every one of your prospects can be located somewhere on the Marketing Ball Diagram. The following five Marketing Ball positions (between the bases), will give you a better sense of where your current prospects are and what you need to do to move them around the game.

Strangers – right after Home Plate

Which prospects don't know you yet or have any current connection with you who could potentially be future clients? At the moment, these prospects are "pure potential." What can you do to build affiliations with these strangers? (Join chambers of commerce, professional and networking groups, service organizations, etc.)

Affiliation – approaching First Base

Which prospects, such as member of organizations you've joined, do you currently have some affiliation with but you're not yet very familiar with each other? What can you do to build that familiarity? (Networking activities, individual get-acquainted meetings, etc.)

Familiarity – after First Base

Which prospects are currently familiar with you, such as those you've met though networking at an organization, but don't yet have a lot of information about your services? What information can you provide to these prospects? (Articles, reports, videos, web content, social media, etc.)

Information – after First Base

Which prospects now have information about your services but do not yet have a real experience of what you can do for them? What can you do to give them that experience? (Talks, teleclasses, webinars events, etc.)

Experience – approaching Second Base

Which prospects have had an experience of you, and what you can do for them, but who have not yet had a sales conversation with you? What can you do next? (Personal follow-up calls, invites for sales meetings.)

Next let's look at where your actual prospects currently are in the Marketing Ball Game. Fill in the form on the next page.

Identifying Your Prospects

Marketing Ball Diagram Location	Prospects – Who and where are they?
Prospects or groups who are strangers and with whom you want to create an affiliation or connection.	
Prospects or groups who you have an affiliation with but need to become more familiar with you.	
Prospects or groups who are familiar with you but need information about your services.	
Prospects or groups who have information about your services but need an experience of your services.	
Prospects who have an experience of your services but need to set up an appointment with you.	

What Marketing Mindsets Shape Your Current Results?

Marketing starts with how we think about marketing. A great many Independent Professionals have mindsets about marketing that are hindering their marketing efforts much more than helping them. A marketing mindset, is an established set of attitudes about marketing.

Mindsets are our thoughts, beliefs, expectations, fears, fixed positions, assumptions, and limitations. You could say that our marketing mindset is like the “water that we swim in.”

Mindsets affect us profoundly, but we don’t see it because they’re so close to us. What we focus on, what we believe, think, and assume, shapes our actions. And if these beliefs, thoughts and assumptions are negative, we will see marketing as unpleasant, as something to avoid.

Here are a few of the beliefs, thoughts and assumptions I’ve heard from Independent Professionals over the years. Do any of them sound familiar to you? Do you operate from any of these as if they were the gospel truth?

- Marketing leads to rejection
- It probably won’t work anyway, so why bother?
- If I ask for referrals it will sound like I’m begging
- People won’t be interested in what I offer
- I don’t have the time to market myself
- Marketing is a complete waste of time and resources
- Only people with sub-standard services need marketing
- I can’t start until I know exactly what to do
- Marketing is a bother and an interruption to people
- No one will read my writing – I’m a lousy writer
- I can’t network – it’s too embarrassing
- I’m not a good speaker – nobody will listen to me

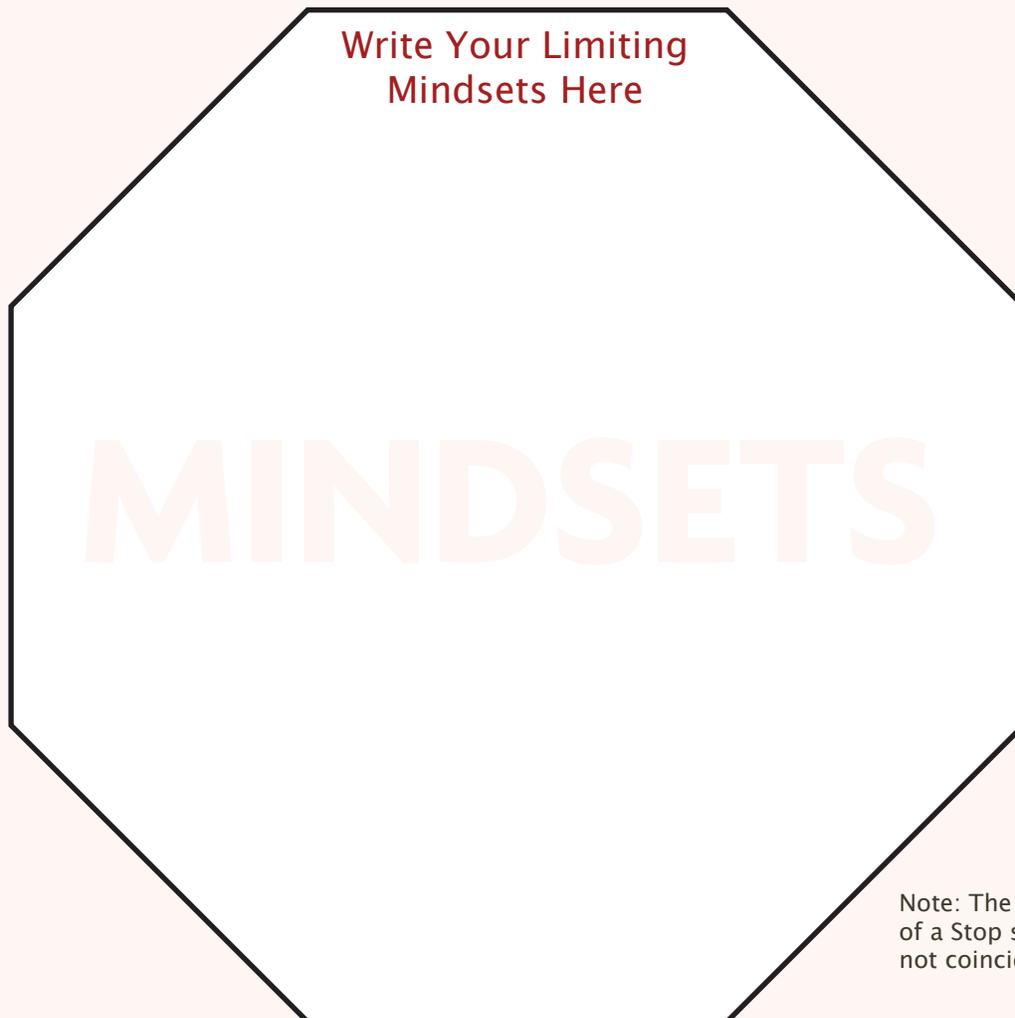
How many of these are true for you? Go to the next page to articulate your most prominent Marketing Mindsets.

Articulate Your Marketing Mindsets

Many mindsets are useful: They give us a common reference point and structure that enables us to do the work we do. Don't worry about these!

Many mindsets are limiting. They define the box we work from and which we cannot work outside of, limiting our possibilities.

What Mindsets shape your current marketing actions and results?
Write in the ones you've noticed that tend to stop you or hold you back from marketing yourself effectively. You might start with the list on the previous page.



Note: The shape of a Stop sign is not coincidental!

Is it Really True?

The big question to ask about all these Mindsets, beliefs and thoughts is the following: Are they really true? Or are they just ideas you've bought into and taken on as inflexible marketing mindsets? What if they weren't true but you were operating as if they were? Wouldn't that impact your actions and results?

The way to change a marketing mindset is to first tell the truth about the mindset. The following four questions and turnaround, developed by Byron Katie and adapted by me for marketing, are the most effective way to do this, in my experience.

Working on Your Marketing Mindsets

First choose a thought or belief that is opposing your intention to be a successful marketer of your services. This might be: "I don't have the time to market myself."

Now ask yourself this first question:

1. Is this thought/belief true?

Answer with a yes or no. Then answer the next question if you answered Yes.

2. Can you absolutely know it's true?

Answer with a yes or no. Then answer the third question.

3. How do you react when you believe that thought/belief?

List all of the things that you do (or not do), and other thoughts and feelings you have when you attach to the thought/belief you are working on.

Then answer the fourth question:

4. Who would you be without that thought/belief?

If that thought was impossible for you to think, how would things be different? Next The Turnaround.

5. Now turn the thought/belief around to its opposite.

A turnaround to this thought would be: "I do have time to market myself."

And then ask if the turnaround is just as true or truer than the original thought.

That's the process. Now you are looking at your original thought in a whole new light. You will find you are less attached or identified with this thought and have new options. The thought loosens its grip. The thought is no longer "thinking you."

You now have the choice of what thought would serve you better to achieve your goals. Now do this exercise for yourself on the next page. **Don't skip it!**

Doing The Work on Limiting Beliefs

This is a sample worksheet to work on an limiting mindset you might have about marketing yourself. This is a very common one, by the way.

Your limiting mindset or thought/belief:

“People won’t be interested in the services I’m offering.”

Is it true? (Yes or No?) – Yes, it seems to be true

Can you absolutely know it’s true? (Yes or No?) – No, not absolutely

How do you react or behave when you believe this thought?

“I feel worried about rejection. I feel a lack of confidence and second-guess myself. I find myself avoiding doing the marketing activities necessary to get the word out. Instead, I procrastinate by doing less important things. I keep thinking I’ll get around to it someday, but that day never comes.”

Who would you be and what would you do if you could no longer attach to this thought/belief?

“I’d stop worrying and just start putting the word out there. If I couldn’t think that people weren’t interested, I’d do a lot more work to make what I do even more interesting through improving my marketing and getting in front of more prospects, instead of waiting for someone to call me.”

Turnaround the thought/belief to its opposite. And then ask if the turnaround is just as true or truer than the original thought?

“The turnaround would be: ‘People *are* interested in my services!’ And the thing is, when people learn what I do, they show genuine interest. So the turnaround is truer than the original thought. How about that!”

What are three examples of how this turnaround is true for you?

“When I talked to a prospect last week about my services, when I gave a talk last year where I generated a lot of interest, and when someone called because he was referred by a past client who loved my work.”

Doing The Work Worksheet

Use this worksheet to work on an limiting mindset you might have about marketing or about marketing yourself.

Your limiting mindset or thought/belief:

Is it true? (Yes or No?)

Can you absolutely know it's true? (Yes or No?)

How do you react or behave when you believe this thought?

Who would you be and what would you do if you could no longer attach to this thought/belief?

Turnaround the thought/belief to its opposite. And then ask if the turnaround is just as true or truer than the original thought?

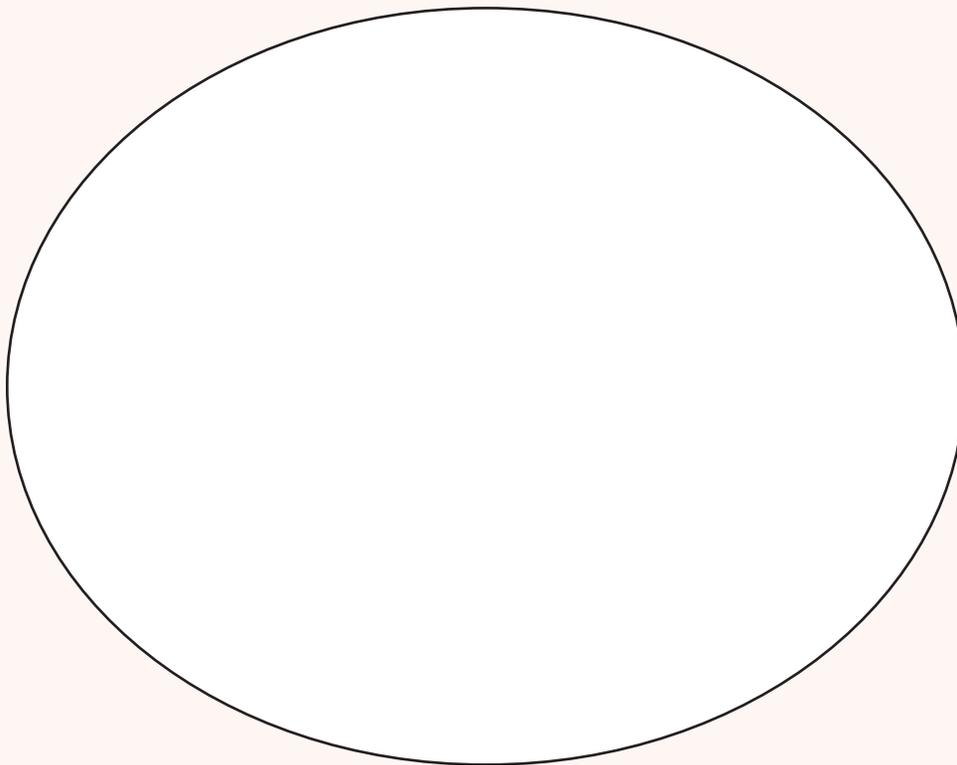
What are three examples of how this turnaround is true for you?

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Your New Marketing Mindset

What's a new Marketing Mindset or Turnaround that would actually empower you to move forward with your marketing?

My new Marketing Mindset is: Make it a clear, concise statement:



What else would support this new mindset?

Thoughts and ideas:

Feelings:

Plans:

Actions:

Marketing Syntax – The Language of Marketing

Marketing has a language. The purpose of this language is to get attention, generate interest, arouse desire, and stimulate action.

But most of us don't understand this language or even realize that it exists. I call this language "Marketing Syntax" and this is how it works: It's simply a matter of putting your marketing communication in the right order. When your marketing ideas follow this order, they more clearly answer the question, "What's In it for Me?" to your prospective clients.

Marketing Syntax for verbal communications:

1. **Target** – These are who my ideal clients are.
2. **Problem** – This is the problem or challenge they experience.
3. **Outcome** – This is the ultimate outcome I help them achieve
4. **Story (Proof)** – Here is a story or case study that proves that I help my clients get the results and outcomes I promise.

Continuing Marketing Syntax for written communications:

5. **Benefits** – Here's everything clients get when they work with me.
6. **Process** – This is the process I use to deliver those results.
7. **Credibility** – About my background and experience.
8. **Call-to-Action** – What I recommend you do next, if interested.

By playing Marketing Ball and using Marketing Syntax, your marketing effectiveness will increase automatically. You now have a language that you can use to communicate about your services with impact.

Correctly used, Marketing Syntax is what gets you to First Base. It's the language that makes sense out of your offering; it interests prospects in what you have, and makes them want to know more.

The best way to understand Marketing Syntax is through developing and practicing your own marketing messages. On the following pages you'll develop your Core Marketing Message, develop an "Audio Logo" and be taken through the steps of a "Marketing Conversation."

Creating a Core Marketing Message

Your Marketing Message is More than a USP or Value Proposition. It is the complete message that needs to be consistently communicated to your prospects and clients. It answers the following four key prospect questions:

1. Is this service for me? (target/ideal client)
2. Why do I need this service? (problem/issue/challenge)
3. What do I get from this service? (solution/outcome)
4. Does this service really work? (proof/story)

Answer these questions to get to your Core Marketing Message:

Target Market/Ideal Client

Who are the ideal clients for your service? What are the demographics and psychographics – industry, position, needs, values, etc? What's the "personality profile" of an idea client?

Problem/Issues/Challenges

Why do your ideal clients need this service? What's not working or could work better? What's missing? What's broken? What's frustrating or what are they struggling with?

Ultimate Outcome

What actual results will your clients be left with when they use your service? What ultimate outcome will make them happy? Ask, "If they got that result, would that be enough?"

Success Stories (Proof)

Who else has used your services and what were the results? What's an actual story of working with a client and moving them from where they were to your ultimate outcome?

Core Marketing Messages are used every time you communicate about your business. This includes verbal conversations, on your web site, in presentations and talks, and in articles and newsletters. Now, it's your turn to develop a Core Marketing Message for your business. You'll write out the main components of this message on the next page based on the questions above.

Summarizing Your Core Marketing Message

Target Market/ Ideal Client (Demographics + Psychographics)	
Problem/Issue/ Challenge	
Solution/Results/ Outcome	
Success Story/ Case Study	

The “Audio Logo”®

What do you say when someone asks you what you do? This is a great opportunity to use Your Core Marketing Message, utilizing Marketing Syntax. The combination of Target – Problem – Outcome – Story will typically get more attention, interest and response than talking about your label, process, benefits, and features.

The formula is:

What do you do?

I work with _____ (People in this Target Market) _____

Who _____ (Have this Problem or Challenge) _____

How do you do that?

I help them get _____ (Ultimate Outcome) _____

Tell me more

A good example is _____ (Success Story) _____

Construct your own Audio Logo:

What do you do?

I work with _____

Who _____

How do you do that?

I help them get _____

Tell me more

A good example is _____

Steps in the Marketing Conversation

Marketing Conversations are discussions with prospective clients that get you closer to working with them. Here are the main components of those conversations:

- 1. Audio Logo** – We just covered this on the page above. The Audio Logo is a conversation starter and a tool to generate attention and interest. An Audio Logo gets you onto First Base. But you don't want to follow an Audio Logo with a long monologue all about you and your business. You want to learn about the prospect and start moving them towards Second Base.
- 2. Questions** – What will you ask the prospect to learn if they are qualified to be a client and purchase your services? The more you know about the prospect, the better you can determine if they are indeed an ideal client for you. You won't learn this if you are doing all the talking.
- 3. Answers** – What are the answers to the typical questions a prospect asks you about your business and services? And what are the follow-up questions to ask the prospect? Then, if your prospect asks you a question, you need to answer their question concisely and then turn the conversation back to the prospect by asking more questions.
- 4. Call-to-Action** – If you get a sense through this conversation that you are speaking to a qualified prospect, you need to set up an opportunity for follow-up. One of the best ways is to offer an article/report or other information related to your services. Then you can make a request to follow-up, usually by phone and email, to explore further.
- 5. Follow-up** – A call to explore what the next steps might be, including setting an appointment for a selling conversation. Making follow-up calls is one of the biggest fears of Independent Professionals. We don't follow-up because we assume if they were interested they would follow up with us. We're concerned that if we do follow-up, we'll be seen as pushy and might be rejected. The truth is, this is usually not the case. If someone shows interest in your service, a follow-up call is usually welcomed.

Create Your Marketing Conversations

Now below, create your own marketing conversation. Write this out as if you were speaking directly to a prospect for your services.

1. **Your Audio Logo** – to get attention and interest
2. **Questions to ask the prospect** – to determine if they are qualified
3. **Answers to questions prospect asks** – and your follow-up questions
4. **Call-to-Action** – making an offer for information and follow-up
5. **Follow-Up Call** – exploring next steps and setting an appointment

Marketing Information is the Currency of Marketing.

Marketing Information is currency. It's what prospects want more of once you have their attention and interest. If you give prospects the right information, at the right time, you buy their time, their trust, and their engagement.

What Marketing Currency Actually Does

Marketing Currency moves your marketing forward. If you have good marketing currency, you'll see the following results from prospects:

- ✓ They will become more interested in your services, as it communicates the benefits of what you offer.
- ✓ They will understand how your services relate to them and their issues and challenges, and they'll want to know more.
- ✓ They will see the results your services deliver and want to have the same kind of results themselves.
- ✓ They will feel you are credible and experienced and feel more comfortable doing business with you.
- ✓ They will know what to do next to take the steps to contact you and work with you.

Without marketing currency, you have none of this. Marketing Currency is your primary marketing tool and is used with every marketing strategy.

Marketing Currency can be presented in the following formats:

- Web Site Content
- Articles and Reports
- Brochures and Flyers
- Surveys and Scorecards
- Newsletters and eZines
- Presentations and TeleClasses
- Audio and Video Recordings

Your job as a marketer is to conceive, design and develop all of this Marketing Information. Below, we discuss the content of your Marketing Currency.

The Content of Your Marketing Currency

What information do you need to give in your Marketing Currency?

You want to provide information that answers eight key marketing questions. These eight questions and the information needed to answer them are outlined below as web pages on your website.

1. What exactly is this service and why should I be interested?

Home Page of a web site gives a concise overview of your business.

2. Is this service for me? Will it work for me and/or my business?

Is This You? Page. Talks about the needs and problems your clients face. This page is about your clients, their needs and issues, not about you.

3. What kind of results can I expect with this service?

How We Work Page. Gives information on the results they can expect, plus other information about how you work to produce results.

4. Who else has used this product or service and what were their results? **Case Studies Page.** Includes several case studies or stories of successful clients projects or engagements with specific outcomes.

5. How exactly do your services work? What's the process and structure? **Services Page.** Explains in detail how your services work. What will your services do for the client and how are they structured?

6. Are you credible? Do you have the experience to help me?

About Us Page. Tell about your background and experience and why you are qualified to do what you do. Why should someone hire you?

7. What do I have to do next to find out more about your services?

Contact Us Page. Explain the steps a client will take in working with you and what will happen first when they contact you.

8. What valuable free information can I get from you right now?

Free Stuff Page. Give away a free article or report and capture their name and email by signing them up for your eZine (email newsletter). Use an email list management service such as AWeber or MailChimp.

Answer these questions about your services:

1. What exactly is my service about and why should anyone be **interested**?
2. Why does anyone need the service I offer? What **problems** does it solve?
3. What kind of **outcomes** can my clients expect if they use this service?
4. What are the most important **benefits** of this service?
5. What **stories** or case studies can I use to prove the value of this service?
6. How exactly is this service **structured**? What are the **deliverables**?
7. What makes me **uniquely qualified** to offer this service?
8. What do I want my prospects **to do** when they learn about my service?
9. What free information can I **give away** right now to those prospects?
10. How will I **follow up** with those who respond?

Selecting Your Marketing Strategies

A marketing strategy is a marketing activity that attracts clients to your business. In Marketing Ball terms, it defines how you will move your prospects from Home to Second Base.

The Marketing Strategy you choose will depend on where your prospects are located on the Marketing Ball Diagram. You will use very different strategies to get the attention of strangers than you'll use with prospects who already have an experience of you.

Strategies can't usually be completed in a single-step. Instead, they are multi-step plans that are broken down into a series of tactics.

These tactics usually include actions that: generate attention and interest, provide information, increase engagement (with various types of marketing currency), provide an experience (such as a presentation) and include some kind of follow-up that leads to a Strategy Session.

Depending on your situation, you may just use a few of these strategies. You need to determine which of the strategies below are most appropriate for you and your business.

Most common Marketing Strategies used by Independent Professionals:

- 1. Networking, Industry Affiliation, Conferences:** connect with potential prospects (affiliates) directly, provide information and follow up.
- 2. Referrals (Word-of-Mouth, Viral Marketing):** request referrals from clients and strong affiliates, and set up appointments with those who are qualified.
- 3. Articles/Publishing** (offline and online): get attention of strangers/affiliates, deliver information, offer an experience, and get responses directly.
- 4. Online (Web site, blog, social media):** get attention of strangers, maintain familiarity, deliver information, offer an experience, and get responses directly.
- 5. Speaking, Presentations, Teleclasses, webinars:** get attention of strangers/affiliates, maintain familiarity, deliver information, offer an experience and follow up with attendees.

6. Keep in Touch (Newsletter or eZine, postcard mailings): maintain familiarity, deliver information, offer an experience, and get responses directly.

7. Social Media: Keep your name and ideas in front of your community on Facebook, Twitter and LinkedIn. I personally use social media as a supplement and support to my other marketing activities.

The below are used less often, but can also be effective.

8. Direct Outreach (Setting appointments., letters or email, follow-up calls): get attention of affiliates, maintain familiarity, deliver information, offer an experience, and make appointments.

9. Strategic Alliances /JVs: get attention of strong affiliates by marketing to each others' associates and clients through email and events.

10. Advertising: get attention of strangers/affiliates, maintain familiarity, deliver information, and get responses directly.

11. PR: get attention of strangers/affiliates, maintain familiarity, deliver information, and get responses directly.

Choosing Your Strategies

Some services may utilize several strategies, while other services may utilize only one strategy. In many cases, completely different strategies need to be used for different services. One way to think of marketing strategies is as “marketing recipes” with a specified number of ingredients and processes.

Each Marketing strategy includes all the previous five steps: The process of Marketing Ball, Marketing Mindset, Marketing Syntax, Core Marketing Message, and Marketing Currency. Finally, each Marketing Strategy requires a separate Marketing Action Plan.

Choosing your strategies: You want to choose three or four of the above marketing strategies you think would work best for your business. After you've picked your strategies, create a quick summary for each of them as outlined on the next page.

Four Marketing Strategy Summaries

Marketing Strategy #1 – Networking and Referrals

Join a chamber of commerce, one professional group, and a weekly networking group. Attend meetings, get known, send information on my services and ask to put on keep-in-touch list. Get to know their businesses, send invites for speeches and teleclasses. Provide value and pursue some as clients and some as referral sources.

Marketing Strategy #2 – Speaking

Research local business organizations and offer to give talks and presentations on my topic. Offer my report to those who attend, and collect business cards. Ask to put on keep-in-touch list. Invite them to take advantage of Strategy Session. In addition, give teleclasses as I build my e-list.

Marketing Strategy #3 – Email Newsletter (eZine)

Work on building my keep-in-touch list through networking and speaking and also by optimizing my website home page. Offer my “10 Mistakes Report” and send a series of autoresponder messages with valuable ideas. Send out my e-newsletter twice a month. Follow up with invites to my teleclasses and Strategy Sessions.

Marketing Strategy #4 – Blogging and Social Media

Get more visibility and credibility by writing blog articles and articles for other websites. Get listed in article directories. Find a few sites that would like me to submit regular articles. When I write articles, post them on my primary social media platforms, Facebook, Twitter and Linked In.

Write Your Own Marketing Strategy Summa-

Marketing Strategy #1

Marketing Strategy #2

Marketing Strategy #3

Marketing Strategy #4

Developing Your Marketing Action Plans

Each marketing strategy needs to have a specific Marketing Action Plan that includes the following components:

Service you are offering: Name of your service or program

Marketing Strategy: Marketing outreach strategy you've chosen

Target Market: Description of your ideal clients for this service

Primary Marketing Objective: Your big goal for this marketing plan

Additional Outcomes: Additional list of desired outcomes. (5 or more)

Marketing Materials: What marketing materials will you need for this plan, including online, print, audio and video?

Resources: What time, money, and people are required for success?

Calls to Action: What actions will you ask your prospects to take?

Action Steps and Timeline: What you'll do and by when.

This Marketing Action Plan is your ultimate marketing blueprint. Once you know exactly what you are offering, it is relatively easy to create Marketing Action Plans. You now have all the principles and components to implement a plan that is in alignment with your primary marketing objectives.

A true marketing plan for any organization is simply a collection of detailed Marketing Action Plans that are developed, tested, implemented, measured, and fine-tuned. When you have a Marketing Action Plan that is working, it is doing one thing consistently: Moving prospects through the marketing process until they have become paying clients.

A Marketing Action Plan needs to be developed like a gourmet recipe or a finely tuned machine. If you follow the steps like you follow a recipe, you can expect to get excellent results over and over again.

On the following 4 pages are templates for creating Marketing Action Plans. First you'll include all the components of a "webinar marketing strategy." Then you'll detail the step-by-step actions that lead from initial contact with your prospect to your selling conversation or Strategy Session.

Sample Marketing Action Plan – Intro Webinar Plan

Planning Steps	Planning Content
Program/Service you are offering:	Leadership Team Breakthrough Program
Marketing Strategy:	Introductory Webinar offered to those on e-list
Target Market:	C-Level Executive Teams
Primary Marketing Objective:	4 new clients, worth total of \$200K in one year
Additional Outcomes:	<ul style="list-style-type: none"> • Get known for offering high-end programs • Build my email list • Develop prospects for future programs, • Hone my webinar skills • Increase my marketing confidence
Marketing Materials:	Online sales page, promotional emails, video, presentation outlines, free report, webinar Power Points, worksheets, closing script
Resources:	3 hrs per week for 9 weeks, web page designer, writer, and admin. support.
Calls to Action:	1) Learn more about program, 2) Attend introductory talk, webinar or teleclass, 3) Take advantage of a one-to-one Strategy Session. 4) Take advantage of a one-to-one Strategy Session.

Sample Marketing Action Steps – Intro Webinar Plan

Date	Action Steps	Currency Needed
2/7	1. Be clear about the service/ program I'm offering.	Written overview of service
2/14	2. Write an online sales letter/description of program.	Written program description
2/15	4. Get a copywriter to help improve sales letter copy.	Improved web copy
2/28	5. Add promo video to sales letter page.	Introductory video
3/7	6. Develop an intro webinar. Promote on website.	Webinar Power Points
3/14	7. Give free report to increase sign-ups to webinar	10-page report on leadership teams.
3/21	8. Create worksheets or Power Points for webinar.	Webinar worksheets
3/28	9. Promote webinar to my list three times by email.	Promotion email letters
4/5	10. Promote to social media and to affiliates.	Social media blurbs
4/15	11. Offer free Strategy Session after webinar.	Script to offer Strategy Session

Your Marketing Action Plan – Strategy:

Planning Steps	Planning Content
Program/Service you are offering:	
Marketing Strategy:	
Target Market:	
Primary Marketing Objective:	
Additional Outcomes:	
Marketing Materials:	
Resources:	
Calls to Action:	

Converting Prospects into Clients with Strategy Sessions

Selling and Closing are the final steps of the Marketing Process. You might say that the aim of all your marketing activities is to move prospects around the bases until you get them to a selling conversation. We often call these meetings Strategy Sessions. Below are the most important components of a Strategy Session.

1. Learning about your prospect's current situation

The first three parts of a strategy session are asking questions of your prospects. In the first part you want to learn as much as possible about your prospect's situation. What's working, what's not working? Essentially, you want your prospects to tell you their story from past to present.

2. Learning about your prospect's goals and vision

Next you want to look toward the future and discover your prospect's goals and vision. Ultimately you don't sell your service, you sell the promise that you can help your clients to achieve their most important goals.

3. Learning about your prospect's challenges

What is stopping your prospects from achieving their goals?

4. Presenting how your services work

What exactly will your services do for your prospect, what are the deliverables, and what is the structure and timing of these services?

5. Closing for commitment

Ask if your prospect can see the value of your services and if they can see your services as a solution to their problems and a way to reach their goals.

6. Closing for price

If you learn the cost of the prospect's problems and the possible opportunity if they achieve their goals, you can make a persuasive argument for the price of your services. Don't talk price until they are clear about these, and if you're selling to a business, don't put a price tag on your proposal until you mutually agree to the services you have proposed.

Scripting for your Strategy Session

Questions about Situation

Can you tell me a little about your current situation? What's working for you? What's not working? What have you done up to this point? Tell me more about...

Questions about Goals and Vision

What do you want to achieve/accomplish? Tell me about your biggest goals. What's the vision for your company. Tell me what's most important and why...

Questions about Challenges

What gets in the way of achieving the goals we discussed? Ask about their clarity direction, the plans they've created, skills that may be missing and issues of attitude and mindset.

Present your Services

Can I explain how my services work? Here's the main outcome that I achieve with my clients. Here are the other things they get. Here's what you can expect to see once we're done. Here's how I structure these services. Here's how I usually start.

Close for Commitment

Do you have any questions about what we've covered so far? (other than price; that's a separate conversation). Based on what you've heard so far, does this service sound like something you can see yourself doing and succeeding with?

Close for Price

My fee for providing this service is \$XX. Can you make that work for your budget right now?

Write your own Strategy Session script

Questions about Situation

Questions about Goals and Vision

Questions about Challenges

Present your Services

Close for Commitment

Close for Price

Implementing Your Marketing Action Plans

There's a lot of information in this workbook. The first thing to remember is that just reading the ideas it contains will do nothing for you. If you haven't done so yet, go back and do the exercises for each section.

Here's a checklist for you to track your progress.

The Game of Marketing	9	<input type="checkbox"/>				
Marketing Mindset	11	<input type="checkbox"/>	14	<input type="checkbox"/>	15	<input type="checkbox"/>
Marketing Messages	18	<input type="checkbox"/>				
Marketing Conversations	19	<input type="checkbox"/>	21	<input type="checkbox"/>		
Marketing Currency	24	<input type="checkbox"/>				
Marketing Strategies	28	<input type="checkbox"/>				
Marketing Action Plans	32	<input type="checkbox"/>	33	<input type="checkbox"/>		
Selling Conversations	36	<input type="checkbox"/>				

In the final part of the workbook, learn about our More Clients Club where you can go into much more depth about each of these marketing principles.

In addition, read about the difference these ideas have made to other Marketing Consultants. On the second to last page read more about Robert Middleton's background, and on the final page find other links to more resources on the Action Plan Marketing website.

Finally, good luck. But if you put these ideas into action your luck will be much better!

Cheers,

Robert Middleton

The Action Plan More Clients Club

In this workbook you received the basic outline of what you need to do to market your professional services more effectively. If you want to take this a step further, you're going to need more information and support. You can find this information in books, audio and video programs, workshops and through individual consulting. Or you can get it all in one place for a fraction of the cost.

The Marketing Club is a one-stop resource to teach you all the how-tos you need know to attract more clients through marketing approaches and strategies that work for Independent Professionals.

The More Clients Club Includes:

Online marketing training tutorials with both audio and written materials. This includes the 8-Module Fast Track to More Clients Program and the WebSite ToolKit. These courses give you detailed hands-on instructions on how to market your professional services.

Marketing Expert Interviews. I interviewed over 60 top marketing experts on their detailed strategies for attracting clients. Audio recordings + written transcripts.

PDF Copies of my two books: "The InfoGuru Marketing Manual" and "Marketing Ball - Lessons on Attracting Clients from the Marketing Coach."

Live Coaching Calls. Monthly live marketing coaching calls and tutorials. If you can't attend these calls live, they are all recorded for your use.

Marketing Forum. Our private forum enables you to ask any marketing question and get personal feedback from me and other Club members.

Marketing Action Plans. We have an in-depth section with step-by-step marketing action plans you can adapt to your own marketing.

The More Clients Club is for you if you are serious about taking your marketing to the next level but don't have a huge budget. The Club will provide the proven ideas and strategies to get your marketing on the right track.

The Club contains all this and much more. [Click for Complete Details.](#)

What other marketers say about action plan marketing

Samantha Hartley – Enlightened Marketing



As far as the 8-Step process, Marketing Ball was something that I thought I wouldn't need. But it totally transformed my clients. I really learned more about Marketing Ball by teaching it to my clients, but I didn't realize how impactful it would be for them. I've really seen it rock people's world. It's amazing for them. They really get it and they have a terrific time learning that. I can really see that it has been very impactful for them and it has really transformed my own point of view. It's a model that allows people to focus their work.

Jaco Grobelaar – Broadvison Marketing



I use the Marketing Ball model extensively with clients. One of their first AHA moments is – “I'm on first base! I'm already there! I don't have to try and do it again!” It's amazing. I have never had so many hugs as I have had over the past few months. My South African culture is a bit conservative. You don't just hug women. I've had a few occasions where ladies would say, “Can I just hug you?” Those are the moments when you realize that you have contributed to their lives and to them as a person, not just to their knowledge. Not just to their marketing. That is the big satisfaction I get out the material. I know I really contribute on a different level to people's lives.

Mark Silver – Heart of Business



I started business in about 1999 or so, but it was probably about 2004 when someone I knew told me I should check out Action Plan Marketing. I had tried a lot of different things and struggled with a lot of the things that most people have struggled with in their marketing. I signed up for Robert's e-zine and started reading it. I don't know what it was, but I really felt I could trust him. And then I participated in his Marketing Action Groups. I do remember looking back over the year after I had taken the program and I realized our courses were selling out really consistently, our revenue had basically doubled from the year previous, and that's pretty cool. I don't remember the exact moment, but I do remember that sense of, ‘Huh! That works!’

From Struggling Marketer to Marketing InfoGuru



Robert Middleton started working with Independent Professionals seeking help with their small businesses in 1984. He struggled a few years with marketing himself, but studied the best marketing gurus such as Jay Conrad Levinson, Jay Abraham, and Alan Weiss. He successfully applied their ideas to his own marketing and the marketing of his clients to help them generate more attention and interest for their businesses.

Before long, he was working with thousands of clients through workshops, teleconference programs and individual coaching and consulting. In 1997 he launched his email newsletter, More Clients that now goes out to 35,000 self-employed professionals every week. Robert has always emphasized common-sense marketing approaches, avoiding gimmicks and hype.

InfoGuru Marketing Author and More

In 1999 Robert wrote the online bestseller, “The InfoGuru Marketing Manual” that outlined his strategy for giving away value to attract better clients. He followed that with the online tutorial, “The WebSite ToolKit,” and in 2012 wrote “Marketing Ball – Lessons on Attracting More Clients from the Marketing Coach.” Thousands of self-employed professionals have benefitted from his ideas and have praised him for making their marketing easier, with less struggle.

How Robert’s Experience Serves You

Robert has always maintained a low profile in the marketing world. He applies very effective marketing strategies to his own business and teaches these to his clients and readers through his online membership program, the More Clients Club. “The thing people forget about marketing,” says Robert, “is that it’s not fancy, flavor-of-the-month marketing that produces results, it’s very clear communication about the value you offer, delivered consistently to your prospective clients. And the good news is that any Independent Professional can learn these marketing approaches without resorting to hype, and while maintaining their integrity and professionalism.”

Action Plan Marketing Resources

If you'd like to find out more about How Action Plan Marketing can help you attract more of your ideal clients, here are a few resources.

The More Clients eZine – Published every week, since 1997, this free email newsletter and blog contain a wealth of how-to information on marketing for professional service businesses. Every week it goes out to about 35,000 self-employed professionals looking for ways to market themselves with integrity and without hype.

<http://actionplan.com/free-stuff>

More Free Stuff – In the Free Stuff section of the website you'll find more valuable information including a Marketing Scorecard, Videos and Articles.

<http://actionplan.com/free-stuff>

The Action Plan More Clients Club – A comprehensive online membership site that gives you all the information, resources and support to help you attract more of your ideal clients.

<http://actionplan.com/fasttrack>

Action Plan Marketing Programs and Services – You'll find a number of recorded programs on the website, plus information on my coaching services and group programs.

<http://actionplan.com/services>

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