

A SOUL PROPRIETOR GUIDEBOOK



How to Have Your Best Business Year Yet

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Make warmth and humanity part of your written marketing plan

“The highest form of public relations is human relations,” declares Jay Conrad Levinson, author of the Guerrilla Marketing series of books. “People like to buy from friends, so it is crucial to make the human bond before you can make a lasting business bond.

“If you really can’t see the connection, perhaps marketing is not your strong point, and you should become involved with something that doesn’t involve human beings! The more humanity prospects experience from your company, the more involved they’ll be with you — and they’ll prove it with repeat and referral business.

“Your prospects are going to have to buy you before they buy what you’re selling. Humanity that is sincerely added to a cold business situation warms up the transaction. You can add humanity by asking questions, listening attentively to the answers, respecting your prospect’s time, being easy to do business with. Don’t underestimate the importance of a warm, sincere smile, clear eye contact, and using the person’s name. It feels human, it feels comfy, and it makes the person feel good. When the customer feels good, the customer connects you with that good feeling. That’s why good feelings lead to good business.

“The personality of your company, as heard on the telephone, can turn your customers on, or it can turn them off. A warm, friendly person answering the phone can lead to a warm, friendly relationship. A cold, unfriendly response can make the caller feel intrusive, like an interruption of work rather than the very reason you exist.

“No matter how good your marketing is, it can rarely bring customers back if they were disappointed in their first go-round with you. It can’t generate profits for your if your word of mouth works against it. Make warmth and humanity part of your written marketing plan.”

— Jay Conrad Levinson, author
Guerrilla Marketing International
www.gmarketing.com

Five Secrets to Finding All the Clients You'll Ever Need

Do less instead of more:

1. Choose a set of simple, effective marketing activities that you like to do and that work for your particular business and then, do them consistently.

Put the "Persistence Effect" to work:

2. Marketing is not magic, nor is it trying to persuade people to buy something they don't want. Find the people who want what you sell then persistently stay in front of them until they realize you are the one that can solve their problems.

Put the "Attraction Effect" to work:

3. Choose a niche and become the recognized authority for it. Know who your perfect clients are and they will be attracted to you.

Sell the sizzle, not the steak:

4. Market the results of your work, not the processes you use. Always talk about the problems you solve, not how you solve them.

Get some help:

5. Take classes, attend workshops, learn everything you can about your niche, your perfect clients, and about marketing. You can also hire a good coach or consultant.

There are 5 Key Attraction Marketing Focal Areas

1. A Marketing-Optimized Website (includes blogging)
2. Networking (includes speaking and online social media)
3. Writing (includes publicity)
4. E-Mail Marketing (includes ezines, autoresponders)
5. Printed Materials (includes direct mail)

Do you have more time than money? Circle one: Time Money

Do you have money but not much time? Circle one: Money Time

The 5 Key Attraction Marketing Focal Areas

1. A Marketing-Optimized Website

These days, you not only *must* have a website but your site must be optimized for maximum marketability. You may actually prefer to have more than one website, perhaps several mini-websites, instead of just one. You may or may not want a blog but blogging is one of the best ways to get noticed online.

Your Marketing-Optimized Website must have, at the minimum:

Information about your target audience. Welcoming text that lets the visitor know immediately if they are in the right place or not and a page describing your perfect client.

Descriptive text of what your site is all about including the keywords and meta tags you've chosen to help with SEO that also describe the problems you solve for your clients.

A page describing the benefits you offer and the problems you solve.

A way to capture the email addresses of visitors to your site. And the appropriate autoresponders in place to welcome them and to stay in touch with them once they've signed up.

A premium that you can give away to entice people to want to leave their email address.

A way to contact you. Preferably, *all* the ways to contact you including an email form on your site so you don't have to publish your actual email address, your phone number, fax number, toll-free number if you have one and any other means you use for communicating with prospects and clients.

Testimonials (if you have them). If not, you'll get them.

On your home page, at least one **Next Action Step** you want your visitor to take.

2. Networking

Networking isn't just about attending social gatherings and asking for business cards. While that has its place and is a very effective marketing tool if done correctly.

Other avenues of networking these days include:

Social Media. Having an active presence on sites such as Facebook, Twitter, Linked-In, and others.

Speaking. Being the center of attention as the speaker at any event gives you lots of visibility and credibility as the expert in your field and gives you abundant opportunity for outreach to prospects.

Teleclasses and Workshops. As the presenter, you are the center of attention.

Trade Shows. Must be planned carefully but can be a great way to meet a lot of potential clients in a short amount of time.

3. Writing

Articles. You can repurpose one article in a variety of ways including using it as an e-course series, a free premium offer, in various publications and online article distribution services, plus as blog posts or content for your website, newsletter or ezine. Articles also make a great follow-up tool.

Media/Publicity Kit. You must have a publicity (or Media) kit updated and ready to go at all times. Your kit should include a cover letter, an article about you and your business, your photo, a biographical sheet, a

services sheet, a brochure (if you have one), your business card, a freebie premium such as a pen or pad of paper with your contact info included, and any recent publicity you may have received. It is also a good idea these days to include a CD that has your cover letter, article, photo, etc. on it so that an editor can easily retrieve your information without retyping it.

Blogging. Having a blog as part of or separate from your website allows you to write frequently providing fresh content for your site on a regular basis. This not only provides value to your site visitors, but it improves your rankings in the search engines.

4. E-Mail Marketing

Sending an email is an excellent way to follow up with a prospect that you've met, but still, it is easy to be perceived as a spammer, so you must be sure that you have permission before you email to anyone for any reason.

eZine. At the minimum, you'll want to send out an ezine at least once a month. More often if your schedule permits and you are able to keep it up. Any less frequent than that and people will forget who you are. An ezine does not have to be complicated, in fact, the shorter the better. People are inundated with ezines and email but it is still one of the best marketing tools you can use. (And it's cheap!)

Autoresponders. The beauty of the autoresponder is that it can be set up once and then it takes over making sure that your site visitors hear from you on a regular basis. You can use an autoresponder in a variety of ways including sending your ezine, sending a welcome message, follow up messages at timed intervals, an ecourse, and a "just checking in with you" type of email sent from time to time. A variety of autoresponder services are available.

5. Printed Materials

In addition to all of the marketing actions you can take online, marketing your business offline is a very important — and necessary — component of any successful marketing plan.

Postcards. A relatively inexpensive way to stay in touch with prospects and clients through the regular postal service. People will look at postcards because they have nothing to open. An eye-catching picture or graphic is helpful in grabbing their attention, but people will read a postcard, or at least look at it, more than they will any other type of direct mail.

Newsletters. A printed newsletter, sent through the mail, is a portable document that people will keep, read, and share. It is easy to take with them where ever they go — on the bus, the train, or the bathroom. If you provide valuable content your prospects will look forward to getting it and reading it. It is also a subtle way to sell things and promote programs without being too "in your face."

Letters and Thank You Notes. People love getting personal mail because they get so little of it these days. Using a personal letter or a nice thank you note as a means of following up or making an introduction will get you noticed and remembered.

Premiums and Give Aways. Having an advertising premium such as a pen or a personalized pad of paper to give to prospects and clients keeps your name in front of them longer than most other types of direct mail. If you mail a premium it will make the mail lumpy, and lumpy mail always gets opened. People love to receive gifts, but choose something that has some relevance to your business.

Steps to a Marketing Plan

1. Pre-Planning

Complete the Pre-Planning exercise by answering the series of questions beginning on page 9 of this guidebook.

2. Who is the specific audience for your marketing?

This is generally your Perfect Client. But you may decide to do specific promotions that would target a particular segment of your audience such as women 40-45, or families who earn more than \$40,000 annually, or lawyers, or people in a certain zipcode. The key is to know who you are marketing to.

3. Decide on the marketing activities you will pursue for the entire year (or at the very least, the next quarter).

Examples include:

- Publish an ezine on the 3rd Thursday of each month
- Attend 2 networking events each month
- Be the guest speaker somewhere once each month
- Write and publish 3 articles each month
- Write a special report to give away
- Mail a postcard newsletter once each quarter
- Send thank you notes after each transaction
- Send a "nice to meet you" letter or card after each event to people I meet that might be prospects
- Call all prospects the day after I meet them
- Add an email capture/sign up form to my website
- Create an autoresponder series

4. Decide on your objective or outcome for each marketing action you undertake.

Specifically: what do you want to accomplish with your marketing (be very specific). You can have more than one objective or several small objectives.

5. How much is it going to cost to implement this action (and do you have enough money on hand to do it)?

6. Decide on a do-by or completion date for each item.

Examples include:

- Publish an ezine on the 3rd Thursday of each month (ongoing)
- Attend 2 networking events each month (To Be Determined)
- Be the guest speaker somewhere once each month (To Be Determined)
- Write and publish 3 articles each month (Write for 3 hours every Tuesday)
- Write a special report (have completed by Feb. 16, 2009)
- Mail a postcard newsletter once each quarter (send out the first one on April 1, 2009)

7. Break down each item into actionable steps

Determine first how much time is required to complete this marketing action, then work backwards to determine when you'll need to accomplish each step.

For example:

- Publish an ezine on the 3rd Thursday of each month (ongoing)

- Decide theme for the February newsletter
- What action do I want readers to take after reading this issue?
- Write articles
- Buy photos from iStockphoto.com
- Sign up for ezine delivery service such as Aweber or Constant Contact
- Layout ezine
 - Learn how to use Constant Contact
 - Decide on photos to use; buy them
 - Send test ezine to myself for proofing; send to editor to proof for typos
- Mail ezine on Thursday, February 19, 2009

Note: As in Layout ezine above, each of these steps may need to be broken down even further into more steps.

8. Implement the marketing action (do it!).

9. Track your results.

For example:

- Publish an ezine on the 3rd Thursday of each month (ongoing)
 - I had 150 click throughs back to my main site
 - I had 116 people click through on the link to the program I'm offering in April
 - I had 6 unsubscribes
 - I got two calls from prospective clients as a direct result of the ezine

Creating Your Marketing Plan

Pre-Planning

For your marketing plan to be one that really works for you throughout the year, just as you would before going on a trip, you must do some pre-planning so that you have a firm idea of where you are starting from. So, before you start creating a marketing plan for the first time, there are some things you will need to figure out ahead of time. By answering the following questions first, you'll have the information you need to take you through the rest of your planning journey.

You may find it helpful to complete the *Year in Review* form found on page 25 in the Appendix of this guidebook before doing anything else.

By taking the time to plan, you are going to be adding a new level of focus and structure to your marketing that will not only make it more likely that you'll succeed, but you'll be giving yourself the gift of peace of mind that only comes when you have clarity and direction for your business. *(Use additional paper if you need more room.)*

1. Why are you in business? _____

2. Describe where your business is right now: _____

3. How do you feel about where your business is right now? _____

Write a Marketing Scenario for Clarity

While we've provided a number of forms for you to use to help in your planning, planning can be as simple as writing out a scenario of what you'd like to accomplish and each of the steps necessary to achieve it, as in the example below. You can follow the scenario or you can do like I do, and use that as a basis for more in-depth planning.

Typically, I write out a scenario like this one, then I use the forms to plan out each step in detail, gathering supporting information or documents, and any other material or information I need to create an effective detailed plan. The forms allow me to keep it all in easy to see and read format until each task is completed.

For many of your ongoing marketing activities, like creating an ezine, the planning can be done once and the steps followed issue after issue. The only thing that would change would be the dates you schedule into your calendar.

Writing a scenario is really like writing a story. It doesn't even really matter what order you write your "marketing story" because the idea is to just get all your thoughts and all the parts that you can think of down on paper. You can then add to it if you think of more things you'll need to do and you can re-order the steps in the best ways for you.

For example:

Coaching Program St. Patrick's Day Promotion

Even though a lot of people aren't Irish, St. Patty's Day seems to always be a big-time celebration for a lot of people. Folks enjoy the fun of all things "green" including beer and since my new coaching program is also going to be fun as well as educational, I'd like to tie into the St. Pat's theme to promote it. I'll do other promotions, too, but this will be the big one for this program.

I'd like to clear at least \$5000 for this program. Since I want to offer my clients the incentive to get into my new coaching program early and if they sign on during St. Patrick's Day, then I will give them about 25% off the total cost. The program is \$297 regularly, they'll get it for just \$225. I'll need to attract at least 32 participants for this to really work. Hopefully, more. My program starts the second week of April on the 7th and St. Patrick's Day is Tuesday, March 17th. The special promotional pricing will end on March 31st.

First, I need to finish writing the promotional copy and I'll do that by January 16th. I want a great photo that I can use for all of the promotions so I'll need to go to istockphoto.com and find something suitable. I'll have the photo by January 20th or sooner. Cost of photo: \$10 or less. I need a higher resolution because I'll also be doing some printing as well as online promotions. While at istockphoto, I'll add a few St. Pat's images to my lightbox so if I want additional photos or art for the promotions I do, like for my ezine, I can quickly go back and buy them without having to search again.

Postcard

I want to produce a postcard that I can mail to all my list and I want them to get that in the few weeks before St. Pat's Day. So I know the printer will need at least 10 days to print them once they're designed and printed so I'll need to get the finished art to the printer no later than Feb. 3rd. I want the postcards in the mail during the week of February 16th so I'll have all the labels all ready to go and stamps purchased by Feb. 16th. Since I'm mailing the postcards first class, most them will be delivered within 3 or 4 days. I may order twice as many postcards so I can do another mailing just a few days before St. Patrick's Day in case I feel the need to have the second reminder to my list.

So this means I need to get the postcard copy written and the design created no later than January 23rd. The designer said she'd need 3 to 5 days to complete the art preparation so that will work out fine

for sending the artwork to the printer on the 2nd. The printer needs a hi-res PDF. (And I need to ask the designer how much she's going to charge for this project. I might be able to do it myself to save some money.)

Since I'm doubling the postcard order, I'll order 1,000 pieces and with shipping, that will cost approximately \$400.00. Each mailing will cost approximately \$130 in postage, plus the cost of the labels.

I'll also add a special discount code for the shopping cart to put on the postcard so I can track where the orders come from. (I'll use a separate discount code for other promotions so I can track each one. If this promotion works well, I can then do the same thing next year but with knowledge of what promotions worked best.)

eZine

I'll announce my program and the St. Patrick's Day promotion to my eZine list in the issue that goes out on February 3rd and I'll mention it in each issue until right up to St. Patrick's Day. If I don't get the number of responses I hope for, and I want at least 32 paid participants, then I can always "extend" the offer for as long as I like over the next couple of weeks before the program starts.

Special email promotions

I'll also send out two special email promotions separate from the ezine and only about the program and discount offer. Since I use Constant Contact for my mailing list distribution, I can use one of their special St. Patrick's Day promo designs and include a coupon with the discount code they'll need to plug into the shopping cart order form. Since I have the copy already written, all I'll need to do is look at the calendar and decide on which days would be best to send the separate promotional emails. I'll plan on two of these but can send one or two more if I need to (keeping in mind that I don't want turn off my list with too many emails from me).

Set up the shopping cart

I'll get the shopping cart set up and send the html code to my webmaster no later than January 27th.

Set up the sales page

I'll also need to set up a special sales page for this promotion separate from the sales page I already have for the program or I may just decide to combine the promotion within the existing sales page. Yes, that might be a better idea. I'll talk to my webmaster to schedule getting that done but need to make sure it is complete before that first ezine goes out on Feb. 3rd. I'll call the webmaster on January 21st. (Maybe it's time I learned how to set up my own web pages but there's no time for that now. I'll just put that on my someday/maybe list and do that sometime this year or next.) Get an estimate from the webmaster for the cost of doing this.

Article

I'll write a short, 500 word or less article about the benefit people get from this program and in the bio I'll include the URL for the sales page. I can use this article in my own ezine and I can also post it at several of the article distribution services for other's to pick up and run in their ezines.

Advertising

I'll check in with some of my favorite ezines that cater to the same crowd that I do but who might not have the same people on their lists and see how much it costs to run ads in their ezines. If it is less than \$40 per issue I might consider it. We'll see.

Tracking Costs

I need to make sure that I track all costs for this promo so that I don't go overboard and cut into my profit of \$5000, plus I need to know if spending the money in the areas where I spend it will actually be money well-spent. If I spend a lot of money on direct mail for the postcard mailing I'll need to be sure that it generates enough response to justify doing something like that in the future.

Testing

Once the promotions have started I'll check to see what mailings and promotions are getting the most response, not just in sales, but in feedback. If I notice a lot of people leaving my list it might be because I've sent out too many promotions, but I know my list pretty well and I think they'll be okay with the volume. I'll track the various codes I've used in the various promotions and if I talk to someone on the phone or if they email me about it, I'll be sure to ask them where they heard of my program.



There could be lots of other marketing activities you'd want to do to promote this event and the discount such as speaking and networking but this will give you the idea of some possibilities and a way to get them on to paper.

This scenario was written for a very specific program and promotion, but you can just as easily write a scenario for any marketing situation including figuring out what you want to do all year or for the next quarter, or for the next month.

It's a fun way to get totally clear on what you want to accomplish. And since no one but you will see it, there's no need to be too precise or to worry about punctuation and spelling. Just get those thoughts out of you and onto paper (or into your word processing program).

And, if you read it, you'll notice that in this style of planning you'll think of other things you might want to do later on either related to this project or for other projects that you're anticipating. As those things come up, just be sure to write them down somewhere so you can remember that you want to do them — and get them out of your head for now. I use a steno pad for Projects, another one for Someday/Maybe items. You might prefer a loose-leaf notebook or a spiral bound notebook.



Now, you can use the forms in the Appendix starting on page 24 that best suit your way of working, or simply write out your plan on a few sheets of paper. Just be sure to create something that you will come back to again and again for review throughout the year.

As you plan out each action item you will undertake, write it on your calendar and put it in your day planner. When you're stuck for what to do next, simply review your plan and choose another action activity to pursue, create a new plan as necessary, and be sure to track your results. I have a notebook that contains only my marketing plans and paper calendars. It keeps everything in one place and I can refer to it daily if needed.

Use the forms that suit you best for creating your marketing plans. See the Appendix on page 24.

Example:

Example Overall Marketing Plan

What am I going to sell?

- eBooks
- Teleclasses
- Downloadable Programs
- Paid Membership Site
- Graphics Work?
- Printing and or Printed Products?
- Wordpress/Website Services?

How much money do I want to make this year? \$ _____

To meet my financial goal, I must earn \$ _____ each month

To meet my financial goal, I must earn \$ _____ each week

Marketing Actions I will undertake this year:

- Publish an eZine each week
- Take advantage of Social Media
 - Learn about different ones: Facebook, Twitter, LinkedIn, Others?
 - Take a Social Media course from Nancy Marmolejo
- Produce a printed newsletter each quarter
 - Postcard style?
 - 2 page 8.5x11? 4 page 8.5x11?
- Blog
 - Make blog posts at least 3X per week
 - Create schedule; put in calendar
 - Create capture file for blog post ideas
- Add audio and video to my website
 - Learn about options
 - Search YouTube once a week for usable videos; schedule on calendar when to do
- Expand Membership component of my website to include a PAID membership
- Publish the Articles that I write
 - Article distribution services
 - Ask list to reprint articles

Partial List of Marketing Activities/Actions You Can Take

Write a description of your services
Define your marketing niche
Define exactly who my Perfect Client is
Write my 10–30 second introduction (elevator speech)
Business Cards
New Client Kit
Media or Publicity Kit (Press Release)
Website (or multiple websites)
Add sign up form to my site
Sign up for an autoresponder service (like Aweber or Constant Contact)
Start a blog
Develop blog concepts and topic ideas
Write out a list of prospects to contact
Follow up with prospects
Seek out leads sources such as a leads group
Find Networking venues
Seek out Referral Partners
Hone my networking skills
Create a web promotion strategy (both online and offline)
Find speaking venues
Develop speaking topics
Write my bio
Find writing venues (newspapers, magazines, article distribution services, my ezine and others' ezines)
Find publicity venues
Promotion concepts
Advertising venues
Write ad copy, layout
Flyer venues
Create a brochure
Create a marketing kit
Write a marketing letter
Contact Management System

Create an in-house postal mailing list
Buy a mailing list
Send out a postcard or other mailer
Publish a newsletter
Publish an ezine
Create an autoresponder-driven ecourse
Make personal connections
Write a telemarketing script
Write qualifying questions
Do some competitive research
Narrow focus of services (maybe)
Create a portfolio
Create items to leave behind
Get some promotional product items (pens, notepads, key chains and such)
Get testimonials
Write thank you notes
Write glad-to-meet-you notes
Social Media (Facebook, Twitter, LinkedIn, Others)
Teach a teleclass
Participate in a trade show
Co-sponsor a promotion

More Marketing Actions You Can Take

Cold Calling. This is where you call a complete stranger on the phone. This might work if you have reason to believe the person needs your service and you can tell her why with no additional information from them, but this is generally the least effective way you can make direct contact with a prospect. There are, however, some great teachers out there — Wendy Weiss comes to mind — who believe in cold calling and can teach you how to make it work for you. Be forewarned, however, that unless you have a strong tolerance for rejection, cold calling will likely create a lot of stress for you.

Warm Calling. This is better than cold calling because now you're calling someone you have some connection with — someone you have met before perhaps, at a networking or other social event, someone who has been referred to you, or someone who belongs to the same association as you do. A warm call is great just after you've met someone at a networking event. You can call them to re-introduce yourself and that you are calling to learn more about them and their needs as a fellow business person. Even if they are not a good match to be a client for yourself, you may learn enough so that you can give them referrals for their business. They are more likely then to remember you as being helpful and will be willing to give you referrals as well.

Canvassing. Not too many people do this more except for hucksters. This is where you would walk into an office (or several) without an appointment, or even without a contact. You might try this for information gathering but you aren't likely to win any friends doing this — nor get any clients.

Have lunch or coffee with prospects. This would be something you would invite a prospect to do only after you've had several previous contacts. Asking for lunch and coffee dates too early in the relationship can appear desperate on your part. But if your services are expensive or difficult to explain, or your sales cycle is typically long, this is an excellent way to have more time with the prospect so that both of you feel more comfortable in moving forward.

In-person office appointments. An office appointment may be more appropriate than going out for coffee or lunch and it is definitely more for-

Three steps for turning customers into raving fans

Here's the process Ken Blanchard and Sheldon Bowles teach in their book, *Raving Fans*:

1. Create a corporate vision of perfection.
2. Ask customers what they want and build those needs into your vision.
3. Deliver, and continuously improve the vision.

mal. Here you have an opportunity to make an impressive presentation using audio-visual equipment or showing off your portfolio.

Send a personal letter. Sending a personal letter these days will almost always get you noticed — and remembered — these days because so few people do it. This can be extremely effective when it is truly personal, not just boilerplate, and is coupled with a follow-up phone call.

Send an announcement card or letter. If you're just starting out in your business or practice, this is a great way to let everyone know that you've opened up "shop." Print a nice announcement card if you can afford it and then you can follow up with personal phone calls after you've sent the announcements.

SPECIAL NOTE ABOUT PHONE CALLS: When making phone calls to prospective clients who are also in business, be sure to find out as much as you can about their business, too, and let them know you're asking because you may be able to give them a referral. This will also put them in a more receptive frame of mind to hear what you have to say about yourself and they will keep you in mind for referrals, as well.

Send a "nice-to-meet-you" note. Whenever you meet someone and collect their business card, send them a note letting them know you enjoyed meeting the (remind them who you are and where you met). This is a case where it would be good to have your picture on a business card so they can put the face with the note. You can also include literature if it seems appropriate and, of course, follow up with a phone call if you like.

Send articles or cartoons. If you see an article in a newspaper or a magazine that you think might interest your prospect, send it along to them with a personal note indicating that you had seen it and thought they would benefit from it. You can have custom post-it notes printed with your name and company name and other contact information to use in situations like this. You might also send cartoons or jokes, but remember, humor can be such a personal thing and if you don't know someone well enough to know their tastes, avoid cartoons or humor and never, under any circumstances, send jokes to prospects via email.

Give them a present

How about sending gifts to your customers on *your* birthday?

To celebrate its 10th anniversary, Montana-based pager and radio equipment company Cosner Comtech Inc. sent its top customers a birthday card and a coupon they could redeem for their choice of four free accessories with a value up to \$40.

— *From 1,001 Ways to Keep Customers Coming Back*, by Donna Greiner and Theodore Kinni

Extend an invitation. Invite prospects to a meeting, or seminar you are planning to go to anyway. It's an excuse to contact them without trying to sell them something and an excellent opportunity to spend time with them so that you can get to know them better and they can get to know you.

Send a newsy newsletter. An effective way to stay in touch without being obtrusive or pushy is to mail a printed newsletter to prospects. Be sure to include lots of valuable information but be sure to include a call to action of some kind. This is a great way to keep your name in front of your prospects as well as call attention to your website or blog. Show off your expertise and remind people you're available.

Write a special report. A special report written about your area of expertise will have many uses. Send this to prospects with a note that it might be something of interest. Offer it in exchange for email and regular mailing addresses. Offer it as a premium to entice people to sign up for your email list.

Attend meetings and seminars. One of the best ways to meet people is at a meeting or a seminar, because others have come there to meet people, too. If you keep returning to the same group meeting you'll naturally begin to meet more and more people.

Get referral partners. Seek out business people who serve the same clients that you want to serve, no matter what they sell. Find complementary businesses where you can actively exchange referrals. If you bake wedding cakes you might partner with a florist. If you're a chiropractor you might partner with a local gym. A massage therapist could partner with a candle shop or a fragrance and oil shop. If you're a coach, partner with an acupuncturist. Hair stylists could partner with a tanning salon. Exchange materials with your referral partner or create coupons or brochures to use to promote each other's business and agree on how you will promote each other.

Serve on committees. This can be an excellent relationship building strategy, and a great way to find referral partners. (Think Chamber of Commerce Visitor's Council or Event's Committee.) You also gain visibility as others in the organization see you working and helping out.

Volunteering or trading services. Volunteering your professional services for a high-profile non-profit organization gets you lots of recognition both within the organization itself and public recognition of your contribution.

Share resources. Become the person with the golden Rolodex™ by sharing the resources you have with others. They'll naturally want to share their resources with you to return the favor.

Join an introduction or leads group. Generally, a leads group will have only one representative from each business type, so you never have to worry about competition. These are groups of business people who meet regularly solely for the purpose of exchanging contacts, leads, and referrals. If you

can't find a group you like, or if you've been shut out because a competitor is already a member, consider starting your own group.

Reading trade journals and related periodicals in your field. Keeping informed about what's going on in your field, will enable you to take advantage of opportunities that others don't see. You can find referral partners and possibly leads, as well.

Host meetings. Any excuse for standing up in front of a group and speaking will make you more visible. What better way to be the center of attention than by hosting a meeting yourself. You can also serve on the program committee, arranging for guest speakers, then you get to make the announcements and introductions.

Serving on a panel. This is a great way to break into public speaking without having to prepare a whole talk or be the sole attraction. Let program committee chairs know that you're available to speak on your area of expertise as a panel member or to a group.

Make presentations. Every organization needs a speaker for their meetings. Most speakers are people like you, speaking for free to promote their business. It gets you visibility and creates credibility. In the eyes of the audience you *are* the expert.

Present (or host) a workshop. If you really like to speak or teach, this is an effective way to expose prospective clients to your expertise. If they like you, they will want more of you. You can do this live or over the phone by teaching a "teleclass."

Write articles about your specialty. When you write and publish an article, people immediately view you as an expert. With a carefully crafted biographical note at the end that includes all of your contact information, people will know you are available and will call you. An article can be used effectively as an excuse to follow up with a prospect. Just tell them you have an article that you think will interest them and ask if they'd like you to email it to them, or send it via the postal mail. You can use a single article in dozens of different ways.

Write an advice column. Advice columnists are always viewed as experts and if your column appears regularly in the same publication, people who read it will remember you and think of you when they need someone with your expertise to solve their problems or the problems of someone they know.

Get quoted by the media. But don't expect them to come calling you unless you prompt them to do so. You can make this happen by sending a letter to the editor detailing your expertise and offering to help them out whenever they need an expert to quote for an article they may be writing. Next time, they may call you, but only if they know you exist and are available.

Have stories published about you. Newspaper reporters and editors are usually too busy to come to you to write an article but they are always hungry for material to fill their pages. If you're not comfortable in writing about yourself and your business, then find a freelance writer in your field, and hire them to write an article about you. You can also easily do this yourself but it helps to have a polished story. Send the article along with photos to the editor for consideration for their publication. The same goes for the writers and editors at local TV and radio stations. They too are hungry for material and have lots of airtime to fill.

Participate in trade shows. a booth at a big show can be very expensive, but many associations also put on tabletop expositions if you don't want to spend the money. Trade shows are better for collecting leads than for closing sales and you'll want to be sure that not only will there be lots of traffic but that it is the kind of traffic that you want to reach. You must evaluate the cost versus the number of prospects you are likely to contact to decide if it is worth the time and money to participate.

Present a "Free" demonstration or workshop at a trade event. Just like meeting organizers, trade show presenters are eager for event speakers and doing a free demonstration or conducting a workshop in your area of expertise is a great way to show off to prospects. You can have a captive audience for an hour or more.

Hold an open house or reception. People love a party so find an excuse to throw one, and invite prospects and referral partners. If you work from home, rent a hotel meeting room for your event. Be sure to provide lots of take-home materials and goodies for the attendees. You can serve snacks and deserts, but refrain from serving alcohol. Besides the liability issue, you want those who attend to remember you!

Co-sponsor events. Co-sponsoring a workshop, symposium, or fund raiser with a nonprofit will attract clients who support the cause. (Think Chamber of Commerce events.)

Networking lunch, breakfast, or mixer. Invite clients, prospects, and referral partners to meet each other for their own benefit. Tell everyone to bring a guest.

Newspaper or magazine classified advertising. Target your advertising to reach the people you really want to reach. The danger in general advertising is that your message scattered to too many people who may not be interested in what you are offering. Choose a call to action that will get the reader to make an immediate response. Track every response you get to see if the ad is working.

Display ads in newspapers, magazines, and trade journals. Ads like these will create visibility and name recognition for you but are not likely to yield a direct sale. You'll likely need a bigger budget, and repeat advertising, to make them work.

Yellow pages. Yellow Pages are on their way out. Don't waste your money. They can be very expensive in the long run and are the least effective of all advertising you can do.

Professional directories. Will get you noticed only if people actually use the directory. If a certain directory is the official source for your industry, then you probably want to be in it.

Event or conference programs. Will work for you best if you also have some visibility at the conference or event such as being a speaker or seminar leader.

Direct mail. Marketers are returning to direct mail because people now get too much email. But it has to be something really special to catch the eye of the client. Postcards work best for this because they don't have to be opened to read the message.

Appendix

Forms for Getting the Job Done

YEAR-END REVIEW

To set yourself up right for the new year, it's time to celebrate your successes, acknowledge your failures and shortcomings, and assess where you are right now. Follow the steps below to wrap up 2010 and move into 2011 with a clear vision.

1. Make a list celebrating all your successes, breakthroughs, and revelations in 2010.
2. Make another list acknowledging all your failures, disappointments, and breakdowns for the year.
3. Score your current level of satisfaction in each wedge of the Wheel of Life at http://www.mindtools.com/pages/article/newHTE_93.htm
4. With the above information in mind, choose three to five areas of your life, career, or business you would most like to make changes in over the next year. For each focus area, provide a simple heading, and a description of your desired result in that area. In describing your desired result, use the present tense. Example:

Be more organized

I have a system to follow up on calls and emails, I know where everything is, I plan ahead to meet deadlines, I eliminate a sense of overwhelm, I set realistic goals for myself.

5. For each of your three to five focus areas, design one goal, project, or commitment that will anchor your desired changes to a specific course of action.

Goals are exciting and motivating all by themselves. They are targets that draw you and inspire you. State what you want, and by when, in specific terms. Examples:

I will have 10 new clients by March 31.

I will book a vacation in Hawaii by May 1.

Projects are a means to an end. They may not be exciting, but need to be done to accomplish an end result that is important to you. Examples:

I will file and pay my taxes on time, by April 15.

I will clear the top of my desk by Feb 1.

Commitments are activities to perform on a regular basis, in order to make significant changes. Rather than an end date, they have a frequency. Examples:

I will go to the gym three times per week.

I will make my marketing calls first thing every day.

6. Throughout 2009, review your goals, projects, and commitments each week to align them with what appears on your calendar. Plan to repeat steps 3-5 at the end of each quarter to reassess where you are and what needs to happen next.

Used with permission of C.J. Hayden, Get Clients Now! Answer Center
Marty Marsh is a licensed Get Clients Now! Facilitator.

THIS WEEK TO DO

For week of _____

My overall intention/goal for this week is: _____

Project Name	Day to Do
--------------	-----------

- | | |
|--------------------------|-------|
| <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | _____ |
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| <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | _____ |

Soul Proprietor Daily Plan

TODAY'S DATE

THIS IS THE MOST IMPORTANT THING I WILL DO TODAY:

OTHER THINGS TO DO TODAY:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____

PERSONAL TO DO'S/ERRANDS:

- _____
- _____
- _____

PERFORMANCE & IMPROVEMENT

What I will do today to improve my overall performance:

- _____
- _____

READING FOR TODAY:

- WORK _____
- WORK _____
- FUN _____

DIET & EXERCISE PLAN:

- _____
- _____

JOURNAL

WHAT I WANT TO REMEMBER ABOUT TODAY

- _____
- _____
- _____

MARKETING TO DO TODAY:

- _____
- _____
- _____
- _____

TODAY'S STUDY PLAN:

- _____
- _____
- _____
- _____

MANAGING EMAIL

- 8:30 AM – 9:30 AM**
- Important emails flagged/moved?
- Flagged emails handled first?
- 1:30 PM – 2:00 PM**
- Important emails flagged/moved?
- Flagged emails handled first?
- 4:00 PM – 4:30 PM**
- Important emails flagged/moved?
- Flagged emails handled first?

APPOINTMENTS FOR TODAY:

- 7:00 AM _____
- 7:30 AM _____
- 8:00 AM _____
- 8:30 AM _____
- 9:00 AM _____
- 9:30 AM _____
- 10:00 AM _____
- 10:30 AM _____
- 11:00 AM _____
- 11:30 AM _____
- 12:00 NOON _____
- 12:30 PM _____
- 1:00 PM _____
- 1:30 PM _____
- 2:00 PM _____
- 2:30 PM _____
- 3:00 PM _____
- 3:30 PM _____
- 4:00 PM _____
- 4:30 PM _____
- 5:00 PM _____
- 5:30 PM _____

CALLS TO MAKE:

- _____
- _____

DELEGATE TO VA/OTHERS:

- _____
- _____

TODAY, I'M GRATEFUL FOR:

- _____
- _____

MAP: Marketing Action Plan

COMPLETION
DATE

Marketing Action Item: _____

Marketing Goal: _____

Today's Date: _____

Estimated time needed to complete: _____

Estimated cost: _____

Location of information needed:

Others involved: _____

What obstacles might get in the way of me completing this goal?

Additional Notes: _____

MARKETING ACTION STEPS

Step 1 - Complete by: _____

Step 2 - Complete by: _____

Step 3 - Complete by: _____

Step 4 - Complete by: _____

Step 5 - Complete by: _____

Marketing Goals for the Month of _____

	PROJECTED	ACTUAL
How much Money would I like to earn this month?		
How many Sales/Clients will I need to serve to make this much?		
How many Prospects will I need to see to get this many clients?		
This is the Amount of Time I will I need to devote to marketing to accomplish this goal:		
This is the Amount of Money I will I need to spend on marketing to accomplish this goal:		

What might stand in my way of achieving these goals this month? _____

What will it get me if I do complete these goals this month? _____

Action & Tools	By When?	Time it Will Take	Money Needed	Results I Got
Actual Totals				

Marketing GOALS Worksheet

Goal Description: _____

I'll complete this goal by (date): _____

What will it get me when I complete this goal? _____

These obstacles/challenges could get in my way of completing this goal: _____

Who will help me complete this goal? _____

What are the steps I'll need to take to complete this goal?

Step 1: _____ Completion Date: _____

Step 2: _____ Completion Date: _____

Step 3: _____ Completion Date: _____

Step 4: _____ Completion Date: _____

How will I celebrate the completion of this goal? _____

Annual Marketing Planner ■ 1st Quarter

Marketing Activities, Steps, Actions & Tools		Due Date	Done
JANUARY	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
FEBRUARY	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
MARCH	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		

Annual Marketing Planner ■ 2nd Quarter

Marketing Activities, Steps, Actions & Tools		Due Date	Done
APRIL	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
MAY	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
JUNE	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		

Annual Marketing Planner ■ 3rd Quarter

Marketing Activities, Steps, Actions & Tools		Due Date	Done
JULY	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
AUGUST	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
SEPTEMBER	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		

Annual Marketing Planner ■ 4th Quarter

Marketing Activities, Steps, Actions & Tools		Due Date	Done
OCTOBER	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
NOVEMBER	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		
DECEMBER	WEEK 1		
	WEEK 2		
	WEEK 3		
	WEEK 4		

MONTHLY MARKETING CALENDAR FOR MONTH OF _____

Tool / Strategy / Tactic	Cost	Action / Comments / Goal	Date	Results

If you find planning and strategizing an overwhelming, daunting and time consuming process, contact Marty Marsh at marty@martymarsh.com to set up a 75-minute strategy session and get this done so you can start making more money in your business!



If you want to get into marketing your business in a big way, Marty offers the Get Clients Now! 28-Day Client Attraction Program with optional coaching once each quarter.

Visit www.martymarsh.com/get-clients-now for the 2011 schedule.