

# MARKETING CAMPAIGN STRATEGY WORKBOOK

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2020

# How To Use This Workbook

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According to Benjamin Franklin, "Without a plan, you are planning to fail." He's right, even if he wasn't referring to a marketing plan.

When it comes to marketing your business, you need a plan with a clear, focus centered on your target audience and the message that will be relevant to them and communicate your values as a company.

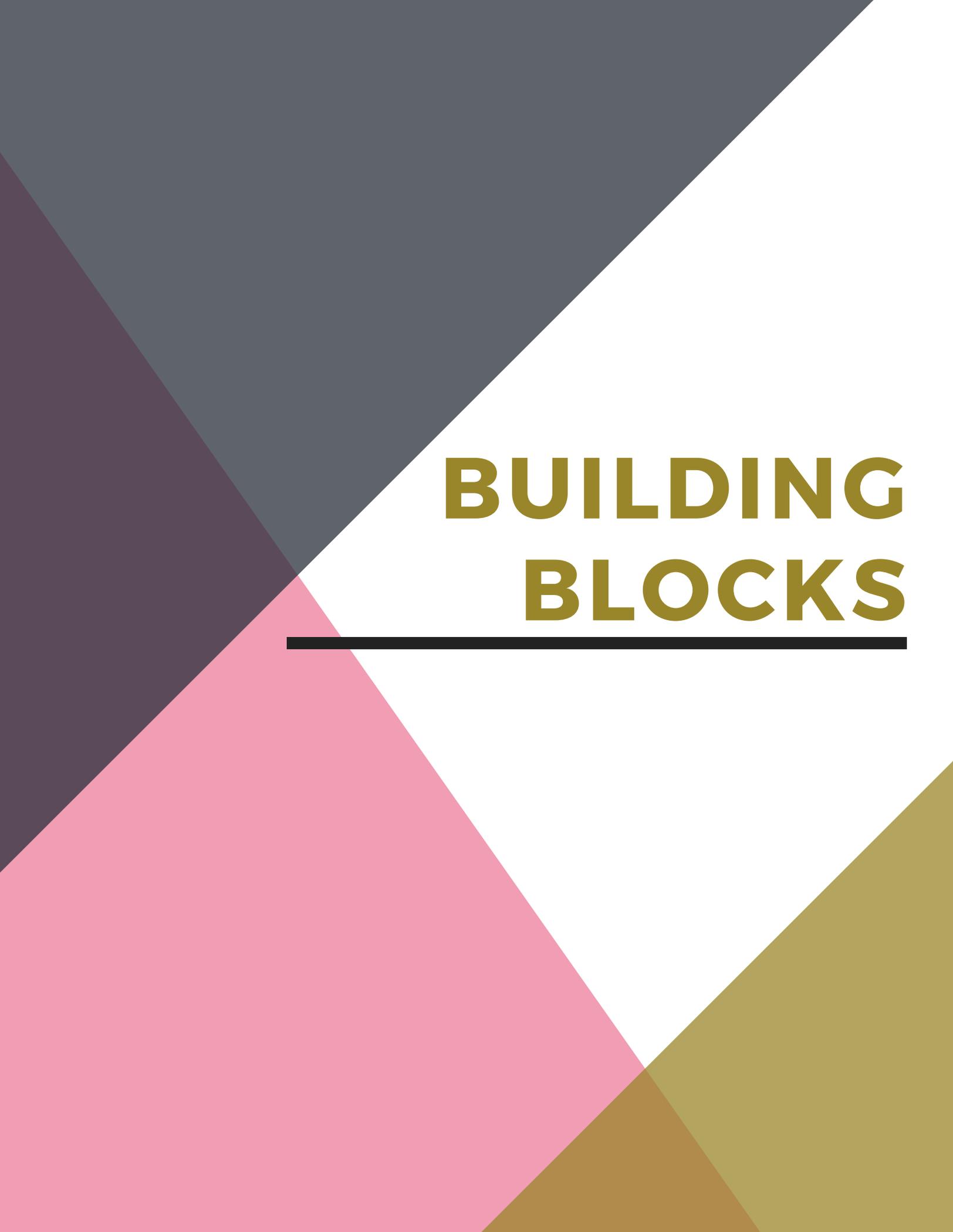
A plan doesn't have to be complicated either, but it does take some devoted thought and attention to developing the right plan for you.

Use this workbook you'll use a step-by-step approach to identify your target audience and construct a plan with S.M.A.R.T. goals to build relationships, polish your messaging and attract the customers you wish to reach.

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# **BUILDING BLOCKS**

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# Customer Lifecycle

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It's important to understand these answers and refer to them as you develop your marketing strategy, which should serve to support the way your clients naturally want to develop their relationship with you and your business.

To plan the purpose of each marketing campaign you develop and execute, and how it connects with the rest of your marketing plan, it's helpful to understand with the "Customer Lifecycle."

There are five stages of the audience lifecycle you will use to guide both your leads and loyal customers to take action. Each stage corresponds with a different phase of their relationship with your business. As leads and customers build rapport and trust with you, they'll progress through these five phases over time. Pushing customers to take an action that doesn't match the level of their relationship with you is risky — it's best to develop the relationship over time and let the customer level up in their time.

**1. ATTRACT.** During this stage, the goal is to make prospects aware of your brand and begin a relationship by having them opt in for something — a piece of valuable content, a coupon code, your weekly newsletter — and share their email address.

What can you offer of value, for free, to gain interest from new leads?  
List some ideas below.

# Customer Lifecycle

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## 2. CONVERT

At this point, you want to take those leads and turn them into paying customers. Do you have lower-priced products that you can use as initial entries to your business? List them below:

If not, in the space below, brainstorm lower-priced products that you can create. Consider anything related to your core business or product that shows your expertise and value.

## 3. FULFILL

Once you have converted leads into customers, your goal is to serve these customers to the best of your ability to build trust, encourage retention, and create brand loyalty. This includes everything you can do to improve the client experience, add more value for customers, and keep them coming back. What can you do to improve the experience your customers have with your company and your product or service after they purchase? For example, could you implement follow-up messaging?

# Customer Lifecycle

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## 4. DELIGHT

Here, the objective is to expand the buying relationship by introducing the now loyal clients to additional products, events and services. Strategic expansion encourages customers to make your core product more a part of their lives. What are some add-on products that would complement your core products? List ideas below.

Can you host an event — live or online — to further engage with your clients? Plan out some topics here:

## 5. REFER

The ultimate value you can receive from your customers is not the money they pay, but rather word-of-mouth marketing. How can you incentivize your customers to refer new leads to you? For example, could you offer them a discount or something of value for referring their friends?



# **BUYER PERSONA**

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# Buyer Persona

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To effectively build your contacts' relationship with your business, you need to know who your contacts are and what matters most to them. The best way to keep your marketing campaigns and messaging audience-centric is to create buyer personas that describe your typical client/ customer. A buyer persona is an imaginative representation of an ideal buyer based on what that you know about your current client/customers.

1. Think about your business's most common customer types  
Why do customers purchase your product or service?

What's the most common use or application for your product or service?

What problems does your product or service solve?

Who needs your product or service? Who was your business created for?

# Buyer Persona

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2. Think about the behavioral information you know about your customers, such as their buying habits, engagement with your content, visits to your website and clicks on your ads:

How often do they buy your product?

How much of the product do they buy each time?

Which type of product do they buy the first time?

Second time?

Are they just getting free downloadable content? Are they buying? Both?

Are they opening your emails?

Are they clicking the links in your emails?

Did they join or like your social media group or business page?

# Buyer Persona

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How often do they visit your website before purchasing?

What does their journey look like as they click through your website?

Who are clicking on your current ads and what do they have in common?

3. Think about some demographical data such as:

What is the age range of those you want to target as customers or leads?

Is there one gender that will identify more strongly with your product or service than the other?

Are there certain job titles that may find more use of your product or service?

Perhaps there's an income bracket who is more willing or able to purchase from you?

# Buyer Persona

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Are you trying to reach a local, regional, state, country or national audience?  
Maybe a specific zip code, city, state, country?

Does your product or service cater to a certain education level?

Does the marital status or number of children play a role in whether or not someone will buy from you?

Do you cater to all business types, or is there one in particular you focus on?

## **Audience Challenges**

With the data above, you should have a clear picture of who your audience is, but to create a campaign strategy that resonates with them, you have to also consider their challenges.

1. What is your audience struggling with? What problems are they experiencing on a daily basis?

# Buyer Persona

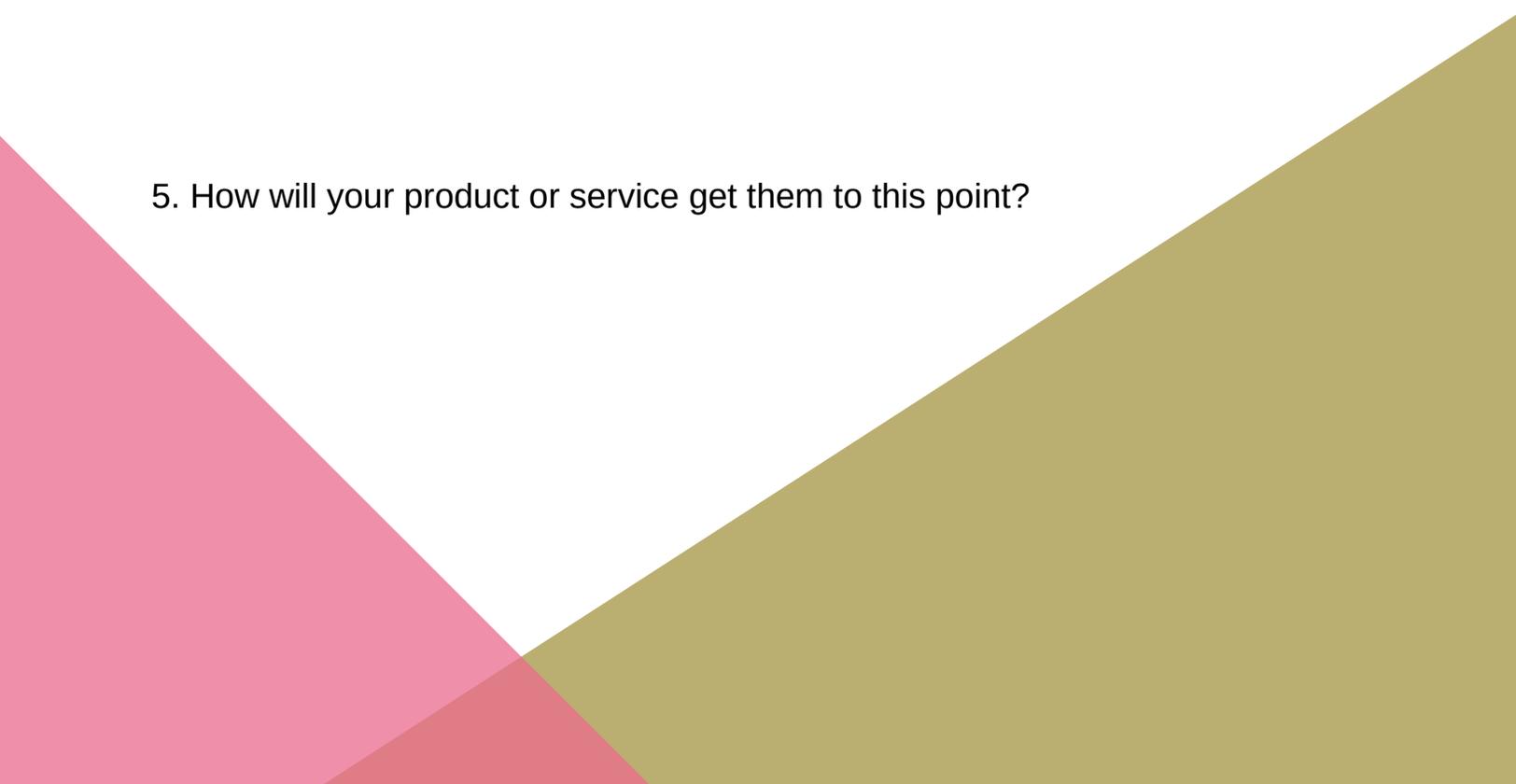
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2. What are they doing now to help alleviate these problems?

3. Put yourself into their shoes and imagine what it would feel like to struggle with their issues. How would you feel?

4. What would it look like to them to have this problem solved for good?

5. How will your product or service get them to this point?





**SETTING  
S.M.A.R.T.  
GOALS**

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# S.M.A.R.T. GOALS

Once you have your buyer persona, understand their challenges and a strategy, it's time to start thinking of the end result and goals. We want to make these goals simple and targeted to start successfully. Before we can tackle the goals, you'll need to a few quick responses to the questions on the different stages of a buyer lifecycle below:

	What is their rapport with you like?	What action(s) do they need to take next?	What will you do to motivate them to take the next step?
ATTRACT			
CONVERT			
FULFILL			
DELIGHT			
REFER			

Once you have this grid completed, circle the specific actions that your marketing campaign will focus on encouraging clients to take. This table shows your entire marketing funnel, but a successful marketing campaign only needs to focus on one part of it. After you've circled your actions, use this information to help set your S.M.A.R.T. goals by answering the questions on the next page.

# S.M.A.R.T. GOALS

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1. What action do you want your contacts to take at each stage of the customer lifecycle? For example, if you chose a goal within Attract, and the action you want your audience to take is to download your free ebook, you would need to measure how many people downloaded that ebook.

2. Is this a goal that can be measured easily? Can you, or anybody looking at your performance numbers, know at-a-glance if the goal has been achieved?

3. Don't shoot for the stars. Is this a goal that you can reasonably attain? On that same note, is it realistic? Is it something just out of reach that isn't demoralizing but prompts you to be challenged?

4. Set a specific time frame in which you want to achieve this: One week? A month? A year?

# S.M.A.R.T. GOALS

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Setting S.M.A.R.T. Goals  
The "SMART" acronym stands for "specific," "measurable," "attainable," "relevant," and "time-bound." Each SMART goal you create should have these five characteristics to ensure the goal can be reached and benefits your business.

**My S.M.A.R.T. GOALS are**

**Specific:**

**Measurable:**

**Attainable:**

**Realistic:**

**Time-bound:**

**Excellent work!**

**Now let's put your plan into practice...**