

9 Strategy Flavors Cheat Sheet

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Paid Discovery / Project Roadmapping

I (Austin) first started experimenting with paid discovery in early 2016. A software engineer named Brennan Dunn talked about this thing he did called “roadmapping” on his podcast, Double Your Freelancing. I was short on time and fed up with free marathon discovery sessions, so my curiosity was piqued.

I pounced on the roadmapping idea. Instead of a more casual approach to that first get-to-know-you call, I started showing up with questions already written down. I used those questions to gauge the person’s level of clarity and figure out how they arrived at certain conclusions.

Paid Discovery / Project Roadmapping (cont.)

For example, if they got in touch about some web copywriting, I might ask, “What made you decide you needed a new website?” Within 15 or 20 minutes, I usually had good insight into whether I thought the client had a deep understanding of their problems and needs and a sensible strategy and plan. Maybe 3 out of 10 times, that was the case, and I’d gather up the requirements and send a proposal like I always had.

More often, this new approach to the initial free discovery call revealed that the client could use some help getting clarity around the full scope of their problems and needs. I would then propose that we do a paid, formal roadmapping session where we create an actionable plan together. Whether they also hired me to help them implement the plan was up to them. I started selling Roadmapping for \$500 for a 90-minute session, and over the years, I have played around with different lengths of time (60 minutes to 4 hours) and prices (\$500 to \$3,500).

Copy & Content Strategy

Copy and content strategy can take a thousand shapes and sizes. It’s by far the lowest hanging fruit for freelance writers. You’re probably already doing it, but you just haven’t been charging for it. In short, this type of strategy involves helping clients decide what to create and why.

You don’t have to be the genius-writer-magician pulling awe-inspiring ideas out of your mind like rabbits out of a hat. Instead, your job is to listen attentively, capture the good ideas as you and the client stumble across them, and later repeat back your findings.

What copy and content is working? What isn’t? What do the web or social analytics show? What insights can you glean from that? What should they keep doing and what should they change? Okay, and what will the new-and-improved approach to copy and content (aka, strategy) be?

Maybe you go do some competitive analysis on your own—e.g., what appears to be working for competitors and why? What content opportunities are within reach? You catch my drift. Whatever you turn up can enrich the overall plan.

Copy & Content Strategy (cont.)

And that plan can encompass just one channel, such as blogging, or a variety, including website, blog, socials, email sequences, marketing collateral and sales assets, and anything their writing and messaging will show up.

A surprising number of organizations take a shoot-from-the-hip approach to copy and content, so there's growing demand for a more *strategic* and *less wasteful* approach.

Branding

If you've gone through the How to Sell Strategy training already, then you may remember the [3-Hour Brand Sprint that Google Ventures helped to popularize](#).

You can think of this set of 6 exercises as "branding lite." I'd say the same of Donald Miller's [Building a StoryBrand](#), and in both cases, I don't mean that as an insult.

Branding is a continuum—rabbit hole is the more accurate metaphor—and the more robust the methodology, the more you can charge. I've charged as little as \$500 to guide a church through the 3-Hour Brand Sprint, and \$30,000+ for bigger engagements where we do much more comprehensive branding work: one-on-one interviews with key stakeholders ("primary, qualitative research" if you want to be fancy), insight mapping, work sessions for mission, vision, values, brand personality (archetype, voice, tone), brand and business goals, positioning, target audience(s), core messaging, brand identity, brand experience, and other more nuanced variations of those different elements.

In my experience, a well-defined brand (ideally, crystallized in a brand book people actually reference) makes creating solid copywriting and content *so much* easier. We have to know what the key plot points in the story are before we can tell it effectively, yes?

You could focus on comprehensive brand strategy or double-click on one key part of positioning, messaging, or customer experience. Choose your own adventure.

Branding (cont.)

Branding work is definitely high-value, “upstream” work for writers, and it’s still a blue ocean opportunity. When in doubt, grab someone else’s methodology, exercises, and worksheets, and guide a client using those.

Web / Conversion / Funnel

The way I define strategy is this: The collection of decisions we plan to make to get from where we are to where we want to be. Not all writers have the skill set for marketing strategy or want to acquire it and spend time thinking about funnels and optimizations, BUT if this bozo can figure it out, you can too.

For-profit businesses want to grow, and they need help thinking through how they’ll turn a web visitor into an email subscriber, follower, customer, or [insert label here]. What is a meaningful “conversion” for them? What are the steps in that process? What needs to happen at each step to turn someone from a stranger to a fan to a paying customer? What are the potential obstacles or points of friction? How can they remove them?

The same as with copy and content strategy, you don’t have to be the wizard conjuring solutions out of thin air. You just have to have a toolkit of questions to unlock the right insights. People are much more likely to do what you want if you tell them *what* to do, give them some incentive, *and* make it easy for them. Most people, like water, follow the path of least resistance.

The good news is that if you can help your clients create a map of website “userflows” or customer journey or steps in the funnel, then there’s usually a crap-ton of writing work required to actually bring the website or funnel to life. If you guide them through the strategy, you’ll have first dibs on the writing.

Launch / Go-to-Market

This is a similar flavor to the one above. People start businesses all the time, but that doesn't mean they have a solid plan for the launch. Depending on the type of business (e.g., a tech startup), the way they go to market (or effectively get *into* business) may be very different than how they grow or scale the business later.

For example, ConvertKit, my email service provider of choice, went after professional bloggers early on. The CEO, Nathan Barry, who was a fairly well-known blogger himself, would reach out and say, "Hey, are you frustrated with MailChimp? If so, will you give me 15 minutes to show you what I'm building?" That go-to-market strategy worked, and Nathan was able to stabilize the monthly recurring revenue from subscriptions and start building the team. ConvertKit has obviously branched out to other types of creators, and at the end of 2022, they had [44,939 paying users](#)—Gretchen Rubin to Tim Ferris to Tim McGraw to Arnold Schwarzenegger. Wowsers!

I helped launch a brand called Breedwise in 2019, and our primary goal was not scale! scale! scale! but validating product-market fit for the first product. The steps looked something like this:

- Define goals for launch: What does success look like at this stage? How are we going to get customers? What's most important right now? How are you validating product-market fit? Who are our closest competitors? What can we learn from them? What are they doing well?
- Let's think through all the pieces, projects, creative, assets, set-up, and effort required.
- Let's cherry-pick specific strategies and tactics from successful launches from other companies / brands.
- How can we avoid wasted money, time, and effort?
- Let's figure out the limiting constraints (e.g., budget), tools, team, and schedule.
- What are the next steps? Let's build an actionable plan around those steps.

Different goals require different strategies, and smart writers can help devise them and help clients put them into an actionable plan.

Marketing / Growth

Growth strategy answers the question, “How are we going to systematically grow the business?” Marketing strategy answers the question, “How are we going to drive awareness, put offers in front of the right people, and ultimately win new customers?”

To some degree marketing is also the art of making products and services more desirable, spreading the word about them, and giving people a chance to care.

Regardless of how you define the terms, clients need help picking specific marketing strategies and channels: SEO vs. paid ads vs. social vs. email vs. direct mail vs. traditional media vs. the list goes on. Certain tactics will support their chosen strategies, and certain activities drive the tactics.

The steps in the engagement might look like this:

1. Reflect on what has worked in the past.
 - a. What are your best-selling products, services, and experiences?
 - b. Which ones make you the most money—i.e., highest profit margin?
 - c. Which cost you the least amount of time to deliver—i.e., highest return on time?
 - d. What is your first growth goal?
 - e. What strategies have worked best for you in the past?
 - f. Where do your strengths with marketing lie—e.g., writing, email, video, speaking, podcasting, events?
2. Pinpoint most promising growth opportunities.
3. Set goals.
4. Pick strategies, tactics, and activities.
5. Talk through budget, tools, and team.
6. Define timeframes, hypotheses, and metrics.
7. Gather all that up into an actionable plan.

Gathering up all those pieces and putting them into a cohesive plan is something I’ve done for tons of clients. Some of them know how but simply won’t slow down long enough unless they’re paying someone and that investment becomes the forcing function. Some of them lack the expertise to do it on their own.

Marketing / Growth (cont.)

Regardless, a growth plan or a marketing plan or both have significant value, and once you have some exercises (such as my [20 Stories Exercise](#)), worksheets [like this one](#), and some working knowledge of the strategies you recommend, you can make a lot more money selling the strategy than you ever did selling writing exclusively.

Product Strategy

“Product” can mean a bunch of different things: new website, blog, app, tradeshow, physical product (e.g., book), digital product or platform (e.g., podcast, book, whitepaper), experience (e.g., conference, retreat), or even a specific marketing campaign (e.g., Kickstarter campaign).

Good news: Getting any of these out into the world will involve strategy and writing.

You can meet a real, felt need for clients by helping them get clarity, bring more definition to key parts of the product, and create an actionable plan:

1. Answer important questions:
 - a. What is the product / project?
 - b. What questions are you trying to answer?
 - c. Who is it for?
 - d. What’s your main goal with it?
 - e. What are the features, functionality, parts, pieces, content, layout, target audience, etc. you’ve been thinking about?
 - f. What are “must have” parts of the product?
 - g. What about “nice to have” parts?
 - h. How will you know if the product is a success?
 - i. What could keep you from crossing the finish line?
 - j. Alright, let’s start planning for Phase I.
 - k. By when are you looking to have it finished?
 - l. What’s most important right now?
 - m. What can wait until Phase 2?

Product Strategy (cont.)

2. Think through how people will use and interact with the product—i.e., user experience.
3. Organize thoughts around the work to be done.
4. Decide on the most logical sequence of mini projects, milestones, and investments.
5. Develop a rough timeline and assign the work to be done to specific days, weeks, months, sprints, or phases.
6. Figure out any blockers and solve for them.
7. Create an actionable plan.

I've helped clients think through product strategy for mobile apps, books, online courses, physical products, in-person events, you name it.

If the idea of doing this excites you, go for it! And charge a premium too.

Ideation / Brainstorming

I don't have to tell you what brainstorming is, but you may need a little convincing that clients will value your head just as much as your hands, your ideas just as much as your words. Some clients really want and need a thought partner who can create and hold space where the creativity can flow.

Yes, you can get paid handsomely to help the client generate ideas. Together, you can evaluate ideas based on their relative merit. You can narrow down the list to the best ideas. And if time allows, you can even create an actionable plan.

Here are some questions that I've used in the past to prime the pump:

- Why are we here? What would be a good use of our time today?
- Let's talk through your needs, problems, and opportunities.
- Which one would you like to focus on first?
- If we generate a bunch of ideas around X, would you leave satisfied?

Ideation / Brainstorming (cont.)

- What ideas do you already have?
- If you threw the rules out the window, what would you do?
- Let's think of the worst ideas we can.
- Let's go lateral. What would Kim Kardashian do? Elon Musk?

You can use a brainstorming session to come up with ideas for social or blog posts, lead magnet ideas, headline options, tagline options, product names, ways to reward loyal customers, any situation where the client needs outside perspective and fresh ideas.

Business Strategy

I've worked as a business consultant with many digital agency owners, consultants, creators, startup founders, and solopreneurs. Many of them don't have enough mentors or advisors, and they're happy to pay for a sounding board—that is, someone who can be compassionate and dispassionate at the same time.

I've sold multiple business strategy "subscriptions" where I got paid to hold a meeting (aka, strategy session) twice a month and problem-solve with my clients.

Here's what do we do in those strategy sessions:

- Talk through needs and opportunities.
- Diagnose problems.
- Beat up the problems and explore solutions.
- Begin prioritizing and solving problems.
- Get outside perspective from a domain expert.
- Set goals and define next steps.
- Create a strategic plan.

Business Strategy (cont.)

I *love* creative problem solving, and I've found that a liberal arts education and what some might call a meandering career path (freelance writer, app developer, startup founder, consultant, online creator, embarrassing dancer) helps me make connections that a strictly business track MBA couldn't.

No joke, my main role is repeating back what I just heard: "It sounds like you're tired." And, "It sounds like you're dissatisfied with that freelancer and need to have a heart-to-heart."

I'm kind of like a business therapist. One client even called me that. By being an active listener, I help clients verbally process, sort through the mess, reconnect with their goals, prioritize, make decisions, plan, and gain confidence in the next step and step after that.

You can too.

