



Session 3

Strategy Flavors 5-9

Austin L. Church



Session 2 Recap

Juicy offers are easier to sell than generic services.

The main thing you do is ask questions.

You enrich their ideas with your perspective.

The agenda and your notes become the report.

You can start small.

Your confidence will grow through doing.

Session 3 Preview

1. Discovery / Project Roadmapping
2. Content & Copy (incl. web, email, social, blogging, thought leadership)
3. Brand / Positioning / Messaging
4. Web / Conversion / Funnel
- 5. Launch / Go-to-Market**
- 6. Marketing / Growth**
- 7. Product Strategy**
- 8. Ideation / Brainstorming**
- 9. Business (incl. diagnosis, problem solving, prioritization, goal setting, planning)**

Steps for You

1. Share the offer and get the yes.
 2. Send the invoice and questionnaire.
 3. Once the client pays the invoice, you schedule the session.
 4. Use client's answers to create agenda.
 5. Ask open-ended questions and take notes.
 6. Define the problems and available solutions.
 7. Repeat back what you have heard—often.
 8. Turn your notes into an actionable plan, and deliver it within 2-3 days.
- Optional** – If you like the client, include 2-3 options for ongoing collaboration in your report—i.e., the next step up on your value ladder.

Strategy

Flavors 5-9

Flavor 5

Launch / Go-to-Market

Problems Solved for Clients

Define goals for launch: What does success look like?
How are we going to get customers?

Think through all the pieces, projects, creative, assets,
set-up, and effort required.

Cherry-pick specific strategies and tactics from
successful launches from other companies / brands.

Avoid wasted money, time, and effort.

Figure out the limiting constraints (e.g., budget), tools,
team, and schedule.

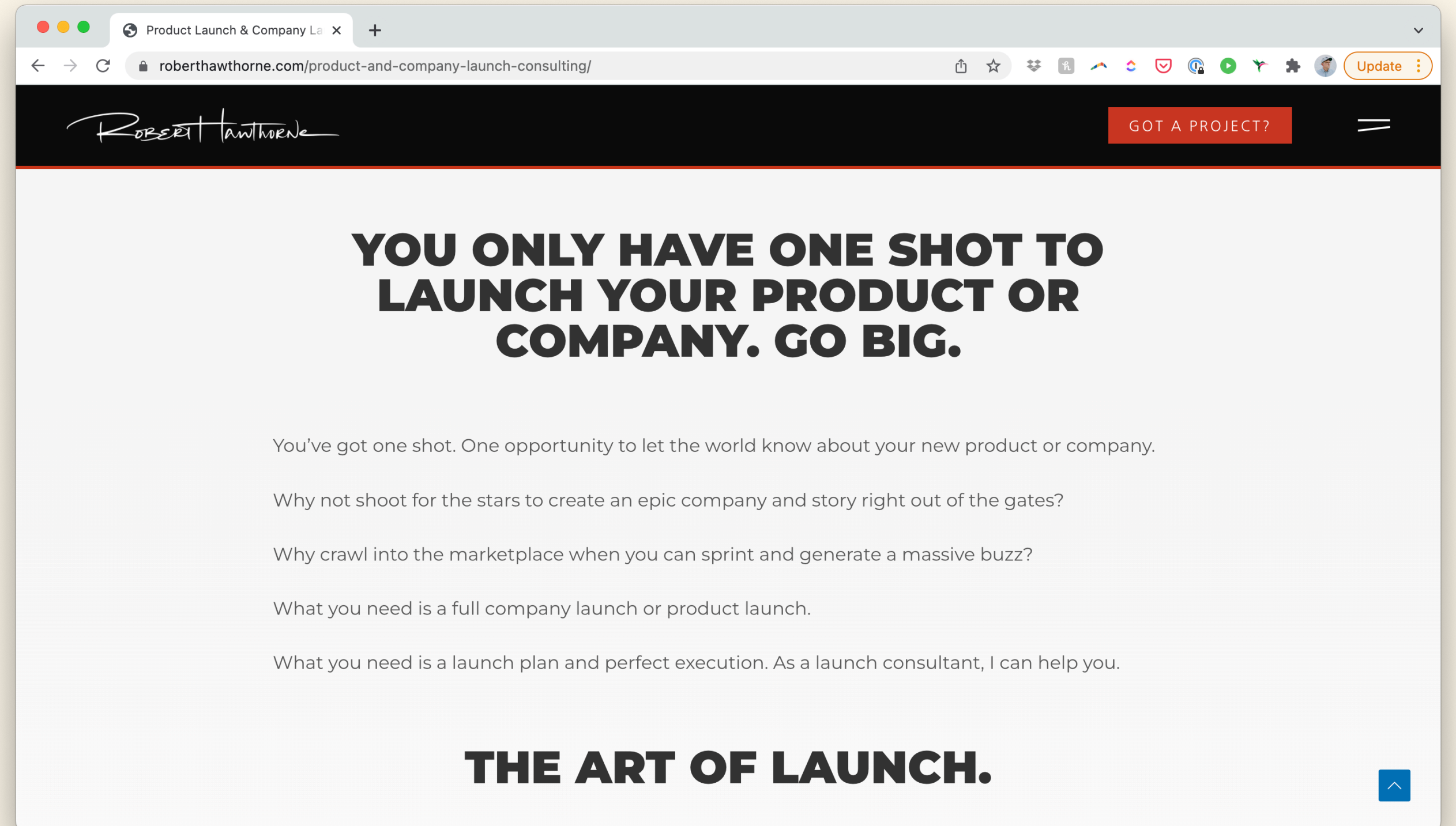
Bring in outside perspective.

Determine next steps and build an actionable plan
around those steps.

Pieces You Need

- Offer
- Consulting Questions
- Agenda / Framework
- Your Notes + Report Template
(with optional proposal section)

Offer



<https://www.roberthawthorne.com/product-and-company-launch-consulting/>

Consulting Questions

What are your goals?

What does success look like at this stage?

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?

And so on...

Report Template

Overview

Goals

Metrics

Timeline

Plan

Strategies

Priorities

—Q1

—Q2

Questions to Be Answered

Specific Tests

Unknowns

Needs

Deliverables & Assets

Ideas

Report Template

Launch Plan (Fall 2019)

Goal: Create an awareness about Balernum, educate the world on why we exist; reposition our personal brands/projects/expertise in Lancaster and Knoxville.

Week 1 (Aug. 5 - Aug. 9) / Soft Launch

- Finish website & soft launch to friends & family
- Update LinkedIn Profiles
- Post Graphics to Social Account

Week 2 (Aug. 12 - Aug. 16) / Public Launch

- Email newsletter with short blurb/update about website
- Social Posts (3 throughout the week), announcing website overhaul
- Finalize direction for blog post illustrations
- Finalize details for Launch Party
- Finish design mockup for Launch Party invitation

Week 3 (Aug. 19 - Aug. 23) / Blog Post

- Publish the Introduction to Balernum blog post
- Email newsletter promoting the "Introduction to Balernum" blog post
- Social Posts (3 throughout the week), promoting blog post
- Brainstorm invite list for Launch Party
- Finalize BT Design Lab case study content and design materials

Week 4 (Aug. 26 - Aug. 30) /

- Publish BT Design Lab case study on the website
- Social Posts (3 throughout the week), promoting case study
- Finalize new blog post
- Finalize new blog post illustration

Week 5 (Sept. 2 - Sept. 6) /

- Publish new blog post
- Social Posts (3 throughout the week), promoting blog post
- Finalize BT Design Lab case study content and design materials

Report Template

Contents

- [Overview](#)
- [Possible Strategies](#)
- [Contract Manufacturers](#)
- [Packaging Process](#)
- [Photography](#)
- [Fulfillment](#)
- [Deliverables](#)
- [Assets](#)

Overview

Our primary goal with the Breedwise go-to-market strategy is validating product-market fit. There are already a number of other calming treats on the market, so the many available products confirm that there's a market.

However, providing yet another option at a comparable price point isn't going to be enough to help Breedwise gain critical mass. Calming treats are already commoditized—a fact made quite evident by their white-label availability from contract manufacturers—so to position the Breedwise option as the premium one will take very thoughtful execution.

We must rely on the Breedwise brand strategy to make decisions that will help us stand out and deliver more value than other companies with competing products. Here are some of the Breedwise differentiators:

- Proprietary formulas
- Credibility (“developed and tested by Board Certified pharmacists”)
- Breedwise brand
- Breedwise community(?)
- “Thoughtful complete solutions to common pet problems” (instead of just another product)

Tests

Here are some early tests that Paul and Austin discussed:

- What do we hope to learn?
- What do we expect to happen?
- Delegation

Sell one 3-Hour Launch Strategy session.

Best Way to Start

Flavor 6

Marketing / Growth

Problems Solved for Clients

Reflect on what has worked in the past.

Pinpoint most promising growth opportunities.

Set goals.

Pick strategies, tactics, and activities.

Talk through budget, tools, and team.

Define timeframes, hypotheses, and metrics.

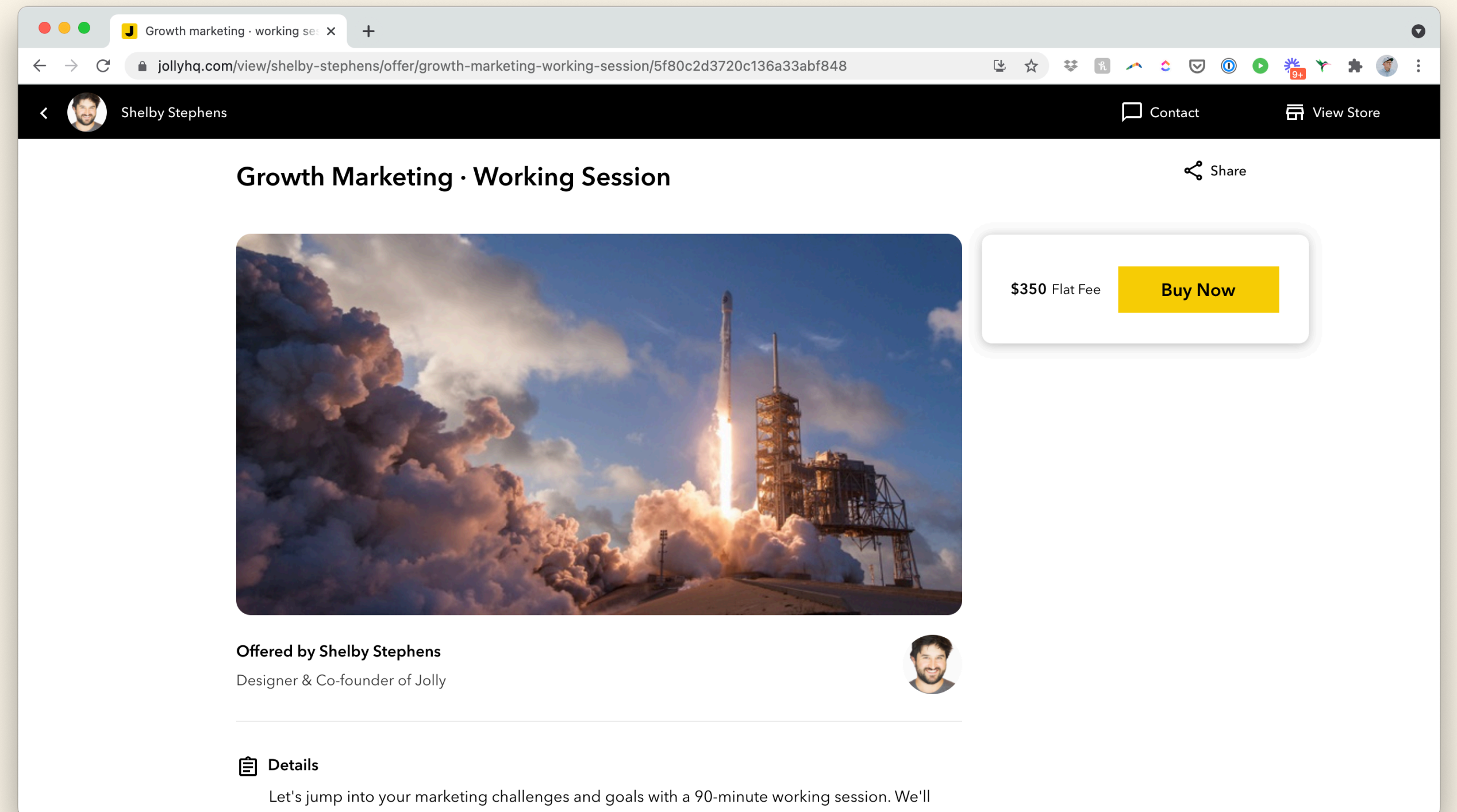
Bring in outside perspective.

Gather all that up into an actionable plan.

Pieces You Need

- Offer
- Consulting Questions
- Process and / or Framework
- Your Notes + Report Template
(with optional proposal section)

Offer



The screenshot shows a web browser window displaying a JollyHQ offer page. The browser's address bar shows the URL: jollyhq.com/view/shelby-stephens/offer/growth-marketing-working-session/5f80c2d3720c136a33abf848. The page header includes the offer title "Growth Marketing · Working Session" and a "Share" button. A large image of a rocket launch is featured, with a price tag of "\$350 Flat Fee" and a yellow "Buy Now" button. Below the image, it states "Offered by Shelby Stephens" and "Designer & Co-founder of Jolly". A "Details" section is partially visible at the bottom, starting with "Let's jump into your marketing challenges and goals with a 90-minute working session. We'll".

<https://www.shelbystephens.com/offer/growth-marketing-working-session>

Consulting Questions

What are your best-selling products, services, and experiences?

Which ones make you the most money—i.e., highest profit margin?

Which cost you the least amount of time to deliver—i.e., highest return on time?

What is your first growth goal?

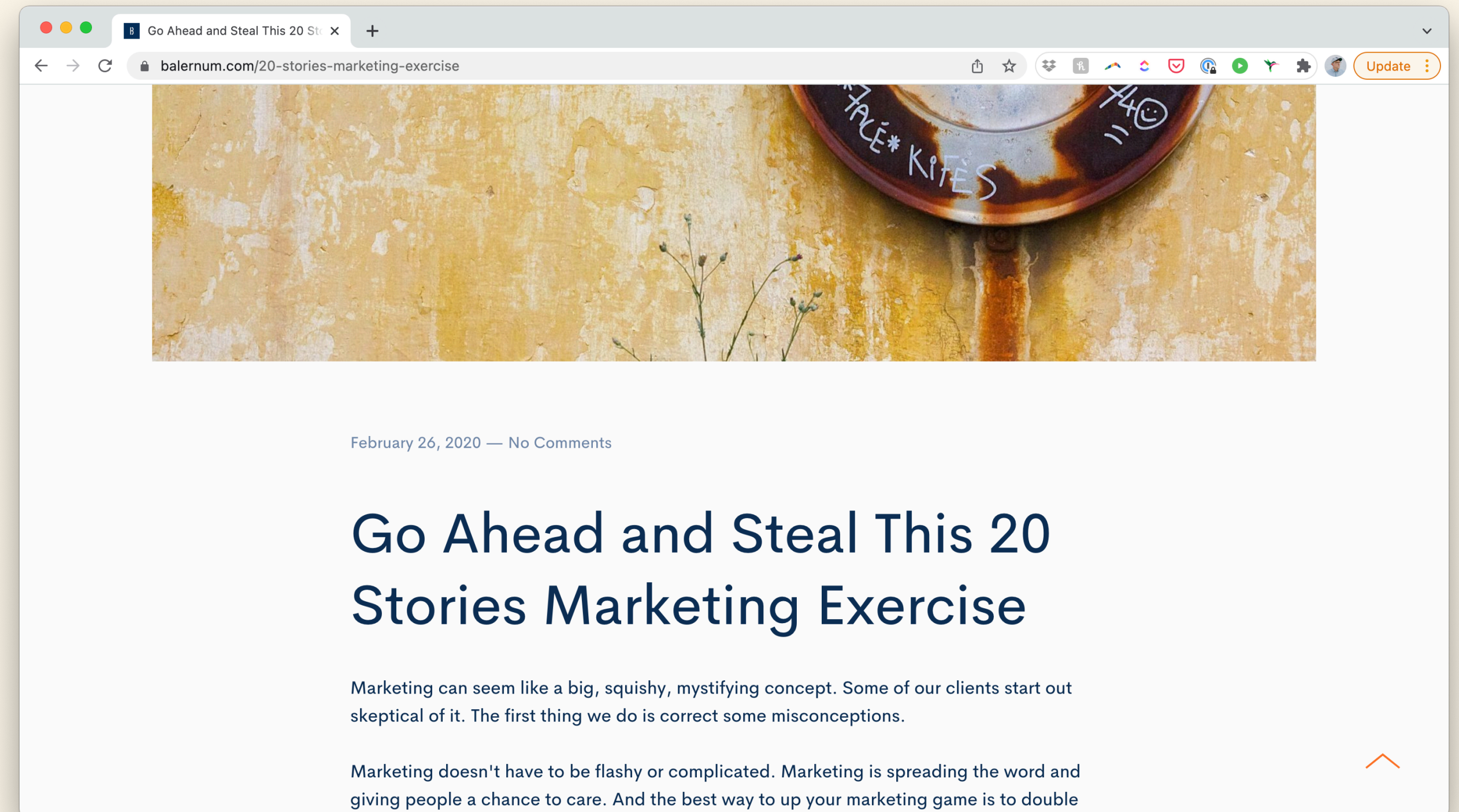
What strategies have worked best for you in the past?

Where do your strengths with marketing lie—e.g., writing, email, video, speaking, podcasting, events?

And so on...

Steal My 20 Stories Marketing Exercise*

*<https://balernum.com/20-stories-marketing-exercise>



Steal My Process*

*<https://bit.ly/howtocreateamarketingplan>



Steal My Worksheet*

MARKETING STRATEGY WORKSHEET *Balernum*

| | | |
|---|-------------|-------|
| STRATEGY (___ OF ___) | | GOAL |
| FALSIFIABLE HYPOTHESIS - WHAT DO I EXPECT TO HAPPEN? - WHAT DO I EXPECT TO LEARN? | MEASUREMENT | TOOLS |
| | TIMELINE | |
| TACTICS | ACTIVITIES | |
| SCHEDULE | | |



Plans doesn't have to be pretty.

Foxsoft Marketing Plan v2

File Edit View Insert Format Tools Add-ons Help

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Foxsoft Marketing Plan (2020)

Foxsoft wants to level up our business by working with more small- to medium-sized businesses who lack a dedicated IT team and CTO. Our marketing goal is to pick strategies, measure results, and marketing Foxsoft consistently.

By 31st July 2021, we'll know if these strategies are working if the average order value (AOV) for software development and maintenance, for current and new clients, increases by 18-20% for Maintenance to around £750. We may lose 1 to 2 older, lower-paying clients, but achieving these specific goals will offset the loss:

- Increase support clients from 14 to 20
- Increase maintenance clients from 7 to 10.

AOV of current categories for July 2019 to July 2020

| Category | AOV (GBP) |
|----------------------|-----------|
| General | £42.08 |
| Hosting | £196.85 |
| Maintenance | £628.61 |
| Other | £102.05 |
| Rails LTS | £411.43 |
| Software Development | £5,014.28 |
| Support | £388.19 |

Strategy #1. Stay in touch with clients, past and current, and remarket services to them and share new offers.

Goals – 1) Increase the lifetime value of each client, and 2) Move low-paying retainer clients to higher packages, or replace them with higher-paying clients and projects.

Falsifiable Hypothesis – We expect to sell more work and increase LTV because we stay in touch, and we expect to learn whether or not our clients will pay more for packages that have more conspicuous value.

Measurement – clients emailed, dates of emails sent, # of new appointments, # of sales from appointments

Timeline & Schedule – By September 30, 2020, we will have contacted all desirable clients, past and current, from the last 3 years; send follow-up emails weekly.

Tactics

- Send monthly newsletters.
- Send personal emails from your own address.
- Book quarterly check-in calls and ask: 1) What's going well? 2) How can we improve? 3) What's on the horizon for you? and 4) How can we best support you?
- Institute a minimum engagement for both projects and retainers.

Activities

1. Calculate the lifetime value of your clients.
2. Customize personal email templates.
3. Pick email newsletter topics.
4. Write and schedule email newsletters.

Best Way to Start

Sell one engagement.

(I'm starting to sound like
a broken record, huh? 🤔)

Flavor 7

Product Strategy

**“Product” can mean
many things.**

New Website

Blog

App

Tradeshow

Physical Product (e.g., Book)

Digital Product (e.g., Podcast, Book, Whitepaper)

Experience (e.g., Conference, Retreat)

Kickstarter Campaign

Problems Solved for Clients

Brainstorm ideas for features, functionality, parts, pieces, content, layout, target audience, etc.

Think through how people will use and interact with the product—i.e., user experience.

Organize thoughts around the work to be done.

Decide on the most logical sequence of mini projects, milestones, and investments.

Develop a rough timeline and assign the work to be done to specific days, weeks, months, sprints, or phases.

Figure out any blockers and solve for them.

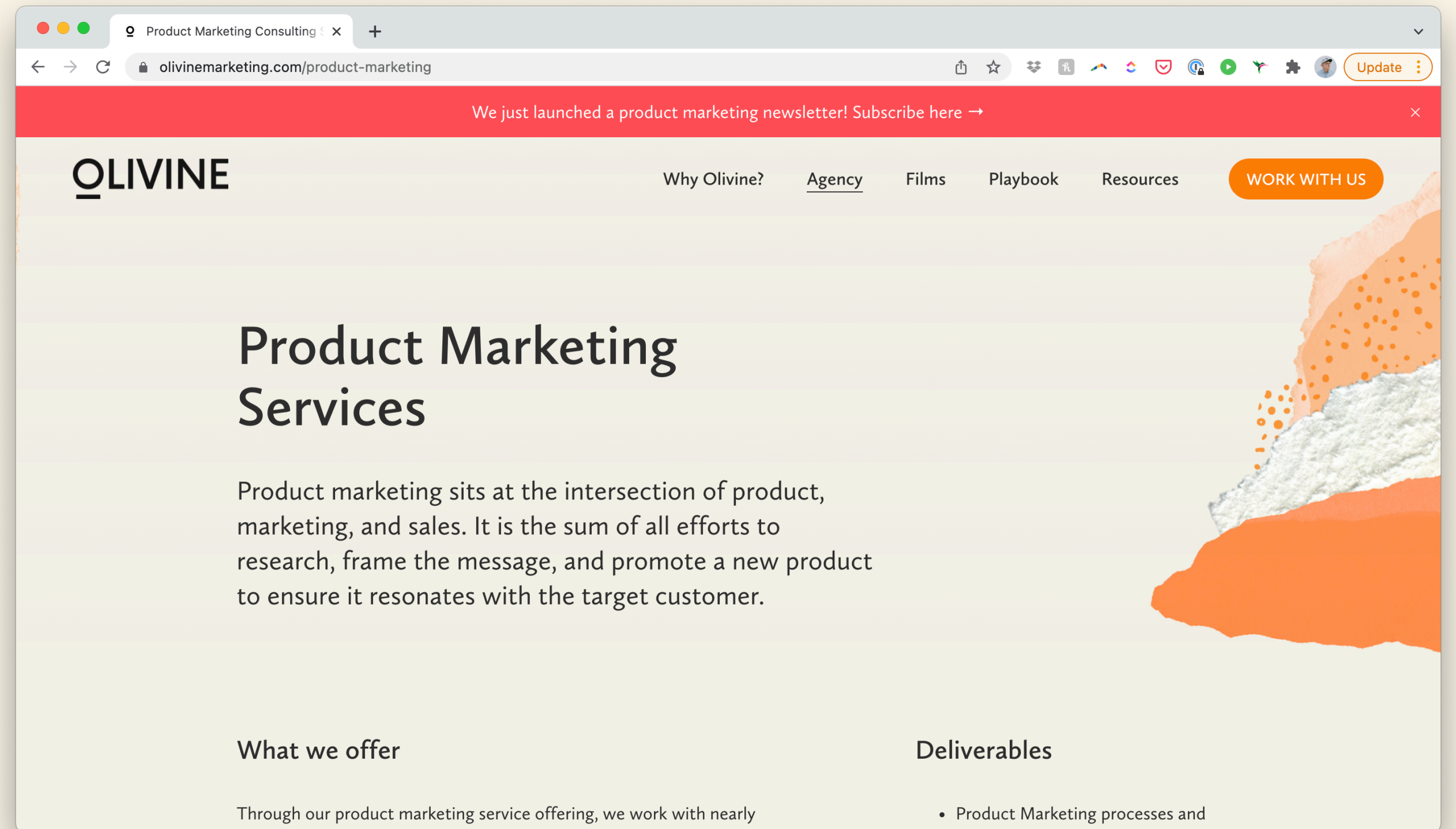
Bring in outside perspective.

Create an actionable plan.

Pieces You Need

- Offer
- Consulting Questions
- Agenda / Framework
- Your Notes + Report Template
(with optional proposal section)

Offer



<https://www.olivinemarketing.com/product-marketing>

Consulting Questions

What is the product / project?

What questions are you trying to answer?

Who is it for?

What's your main goal with it?

What are "must have" parts of the product?

What about "nice to have" parts?

How will you know if the product is a success?

What could keep you from crossing the finish line?

Alright, let's start planning for Phase I.

By when are you looking to have it finished?

What's most important right now?

What can wait until Phase 2?



Report (Book & Course)

accessible. On top of that, many of the candidates for the accelerator have come from Stephen's personal network or new connections made at conferences and events. Those people naturally want to connect with Stephen afterward, and though some vetting is necessary for the accelerator, time spent on these appointments and conversations cannot be spent on finishing the book manuscript.

Priority → Figure out how to take Stephen out of the equation. Perhaps you need to codify the interview questions or create an application that Tara can later review with the candidate. Perhaps Stephen needs to think through how he ordinarily qualifies someone, and then you figure out how to mimic that process without his direct involvement. Regardless, you need to make him less accessible *without bruising the brand*. You can find other, more creative ways to make candidates/applicants feel special and cared for.

Priority → Put a plan in place for growing the email list. You want most of your accelerator leads to come from the email list. The *Only Work Left* can and should be a part of growing your list. The book helps you cast a wider net, create a funnel with a bigger mouth. Your goal is to fill out future accelerators without the burden falling on Stephen's shoulders.

- While Tara is acclimating business processes and systems, she is acting somewhat like an executive assistant.
 - Priority → Put a plan in place to transition her into her true role as Head of Operations. This could include hiring a part-time virtual assistant on a specified date to pressure-test the processes and systems and ensure that both Stephen and Tara have documented everything and can delegate properly. Tara could also plan a vacation for around the same time so you both could get a true read on the viability and scalability of your business "operating system."

- Stephen needs to recalibrate his travel schedule. He hasn't had enough time to write.
 - Priority → Take a look at your calendar and map out where you're going to be. Decide in advance how long you will stay there. You might even look up some local coffeeshops where you can work. Show up at each new destination knowing how long you're going to be there, where you're going to work, and which parts of the book you plan to work on while there.

- Stephen needs to lock down a cadre of editors to help him strengthen his manuscript.
 - Priority → Make a list of people whose opinion matters to you, preferably people with writing or editing experience, and send out a "feeler" email to each of them. Are they willing? Do they have the time?

Opportunities

- Create an assessment that will help you better segment your audience. You're not just talking to people at one stage in their careers. A twenty-eight year old software developer making \$125,000 a year and a single mom making \$40,000 as a bank teller will have very different motivations for becoming solopreneurs. You can serve all of these segments with customized content and opportunities once you have everyone categorized. Your call to action can be: "I can help you wherever you are in your journey. Share a bit more information about yourself so that I can point you in the right direction."
- Create a content "track" for each segment. You can start by recycling content you already have. Five of your LSTM podcast episodes may be perfect for the software developer, and eight different ones would inspire the bank teller.
- Dive into your analytics, both plays/downloads for different episodes and unique visits and organic traffic on various web pages and blog posts. Which topics have been most popular to date? How can you double down on what's already working? With minimal effort you can create a lead magnets and content upgrades. Read this blog post I wrote: "[How I Doubled My Email Subscribers in 30 Days](#)."
- Improve your content strategy on the website. The "Get Started" call to action could send people into an email course. (The important thing is, those people are now on your list and receiving value!) You could also route people toward an assessment. "Feeling stuck and frustrated in your career? Answer these questions, and I'll help you figure out your next move."
- Set a timer for 20 minutes. Brainstorm 30 ideas for getting more qualified accelerator leads. Both of you should do this, and then compare notes. (Note: Brainstorming usually goes better if it is a solo activity.) The simple act of brainstorming may take you into new terrain.
- Read 20 blog posts you find with "how to sell group coaching" and similar queries. Though your accelerator is different than coaching, many of the same strategies and tactics will apply. You may get some cool new ideas this way. For example, have you ever thought about running a contest and incentivizing your accelerator graduates to recruit friends and family?
- Define what you mean by "qualified leads." What are the tell-tale signs of someone who is ready to invest *and* take decisive action? What kind of language do they use? What are their objections (even if you notice their readiness)? What books have they been reading or what podcasts have they been *bingeing* on? I recommend developing a specific Ideal Customer Profile to better define what

you mean by qualified and how you mark someone's readiness. Here's an example of what I mean...



Mike the Mid-Market CEO

| Goals: | End-users: |
|---|--|
| <ul style="list-style-type: none">• Growth/Revenue• Brand | <ul style="list-style-type: none">• Businessowners, Architects, Builders, GCs, Contractors |
| Pain: | Content They May Like: |
| <ul style="list-style-type: none">• Making sense of digital for growth• How to drive awareness online• Marketing to mid-level• How design can help grow your B2B sales | <ul style="list-style-type: none">• B2B Customer report• How to drive awareness online• How design can help grow your B2B sales• How B2B manufacturers can grow sales using online presence• Case Study: How to Build a Successful B2B & B2C |
| Consequences: | Technology: |
| <ul style="list-style-type: none">• Disruption & Competition• Falling behind on marketing trends• Shortage of marketing effectiveness | <ul style="list-style-type: none">• GA, Wordpress |
| Company Examples: | Role in the purchase process: |
| <ul style="list-style-type: none">• Steve worked with an agency before• CTO Marketing• Steve got sales people | <ul style="list-style-type: none">• Ego Review, One Core Systems, Feedback Building Materials |

- Collect and/or write 50 Facebook posts.

- Start posting on Wednesday or Thursday to begin warming up your Facebook group.
- Monday: Write and send Email #1 ("Sorry you haven't heard from me in awhile. I 100% understand if you'd like to unsubscribe. All you have to do is click the Unsubscribe link below. I hope you'll stay tuned though because next week I'm going to share my most popular video of all time! It's about [topic], and you'll learn how to [benefit].")
- Friday: Write and send Email #2 ("On Monday I promised to send you my most popular video of all time. Click the link below to learn how to [benefit]. This is really important for [target audience] because *blahblahblah*."

Week 4 (6/24 - 6/28) // Objectives

- Record Video Groups 6 and 7
- Edit Video Groups 4 and 5
- Upload final video files.
- **MILESTONE** – The ~20 videos for the Basic course package should now be finished.
 - Revisit any assumptions about the time required for course prep on the Kajabi platform. Is it taking more time than you thought?
 - Do you need to adjust your expectations or timeline?
- Post daily in your Facebook group. You should be able to automate this posting because you already collected and/or wrote the post content in Week 3.
- Write and send Email #3.

Week 5 (7/1 - 7/2) // Objectives

- Note: This is a short, two-day week due to the Fourth of July holiday.
- Edit Video Groups 6 and 7.
- Write and send Email #4.
- Continue posting on Facebook daily.

Week 6 (7/8 - 7/12) // Objectives

- Record Video Groups 8 and 9.
- Note: Video Group 9 includes all of the supporting videos needed for course lessons but not the lessons themselves
- Edit Groups 7, 8, and 9.
- **MILESTONE** – The ~40 videos for the Intermediate course package should now be finished.
- Write and send Email #5.
- Continue posting on Facebook daily.

Week 7 (7/15 - 7/19) // Objectives

- Finish editing and post-production for all Intermediate package videos if that hasn't already happened.
- Write and send Email #6.
- Continue posting on Facebook daily.
- Finalize sales page.

- Finish writing content for Southern Accent course.
- Once you have wrapped your head around the full scope of the Southern Accent course, make a judgment call about whether you can squeeze in recording those videos before the kids leave.

Week 8 (7/22 - 7/26) // Objectives

- Finish editing and post-production for all Intermediate package videos if that hasn't already happened.
- Finish uploading all final video files to Kajabi if that hasn't already happened.
- Finish all course prep in Kajabi so that both the Basic and Intermediate course packages are Done Done.
- Write and send Email #7.
- Continue posting on Facebook daily.

Week 9 (7/29 - 8/2) // Objectives

- Monday: Write and send Email #8 with a teaser in the P.S. section about a big announcement you'll be making on Friday.
- Continue posting on Facebook daily.
- Research your sequence of launch emails. Pro Tip: Limit yourself to one hour of research.
- Finish outlining your sequence of launch emails.
- Write Launch Emails 1 through 3.
- Friday: Send Launch Email #1.

Week 10 (8/5 - 8/11) // LAUNCH WEEK Objectives

- Post manually on Facebook each day about the launch. Keep the buzz going!
- Monday: Write Launch Emails 4 through 8.
- Monday: Send Launch Email #2.
- Tuesday: Send Launch Email #3.
- Wednesday: Send Launch Email #4.
- Thursday: Send Launch Email #5.
- Friday: Send Launch Email #6.
- Saturday: Send Launch Email #7.
- Sunday: Send Launch Email #8. "Cart is closing at 11:59pm ET!"

Week 11 (8/12 - 8/16) // Objectives

- Continue with "regular" Facebook posts.
- Wednesday: Once you've given your list a couple of days to rest, send a "Big Thank You!" email to let your list know how successful the course launch was. It sold out!

Week 12 (8/19 - 8/23) // Objectives

- Finalize details for Prague coaching sessions and workshops.

Prague Plan

Your goal is to break even on what you have invested—approximately \$4,500. You typically sell an hour of coaching for \$150 to \$200. A three-hour workshop would cost \$450 per person. You could require a five-person (or \$2500) minimum for companies.



Report (App Idea)

Clipfox Overview

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Working Title – Clipfox

Overview
We hope to revolutionize video editing at a foundational level.

Our idea is a software product that would save every wedding videographer anywhere from 6-10 hours in post-production editing time and make the rest of their editing time more efficient and enjoyable. Use of the product would extend far beyond wedding videography, but that market is the easiest to enter.

We have a pretty good idea of where we could find investment dollars, and the product has clear enough value to the market that we think a proof-of-concept, showing that we can pull this off, would be enough to lock in investment. We also know several people who would fund development of the proof-of-concept.

We need to connect with a smart programmer. The biggest unknown for us is finding good programmers and working effectively with them.

Okay, so here's what I've got so far:

- Product – App
- Audience – Budding wedding videographers trying to turn passion into business
- Why – 1) save them anywhere from 6-10 hours in post-production editing time, 2) make editing more efficient, 3) make editing and post-production more fun, and 4) make each shoot more profitable due to #1 and #2
- Needs
 - Proof of concept for wedding videographers
 - Developer to create proof of concept
 - Requirements document to get quote from developer
 - Quote from developer to get enough cash from your personal connection

// Requirements v1.0 //

- Compatible with [Adobe Premiere Pro](#)
 - [Download free trial of Premiere here.](#)
- Needs to plug into the UI
 - Example of another plug-in that docks straight in to the Premiere UI (<http://filmconvert.com/plugin/adobe>)
- Features
 - Select files to process
 - Import files into Premiere
 - Use algorithm to process files

- Batch save "selects" (which are references to original raw files, not new files) into new bin
- Algorithm
 - Each raw video file (or "clip") is a long series of images that the camera takes quickly—i.e., a succession of still images shot at certain aperture and so on.
 - We'd use samples from past representative projects and clips to define standards/norms/recipes for different types of clips (e.g., ceremony, reception, dancing; or even just two: daylight and everything else).
 - Software scans clips, notices characteristics or patterns, and auto-selects most appropriate algorithm/recipe for that particular batch of clips.
 - Algorithm would enable software to grab one frame at regular intervals (e.g., every second)
 - Analyze frames based on norms.
 - Use that analysis to score clips based on norms.
 - Display best clips based on scores (perhaps top 10% or top 50 clips).
 - Default to organization based on time signatures. earlier to later.

Sell a 3-hour brand sprint.

Best Way to Start

Flavor 8

Ideation / Brainstorming

Problems Solved for Clients

Help the client generate ideas.

Evaluate ideas based on their relative merit.

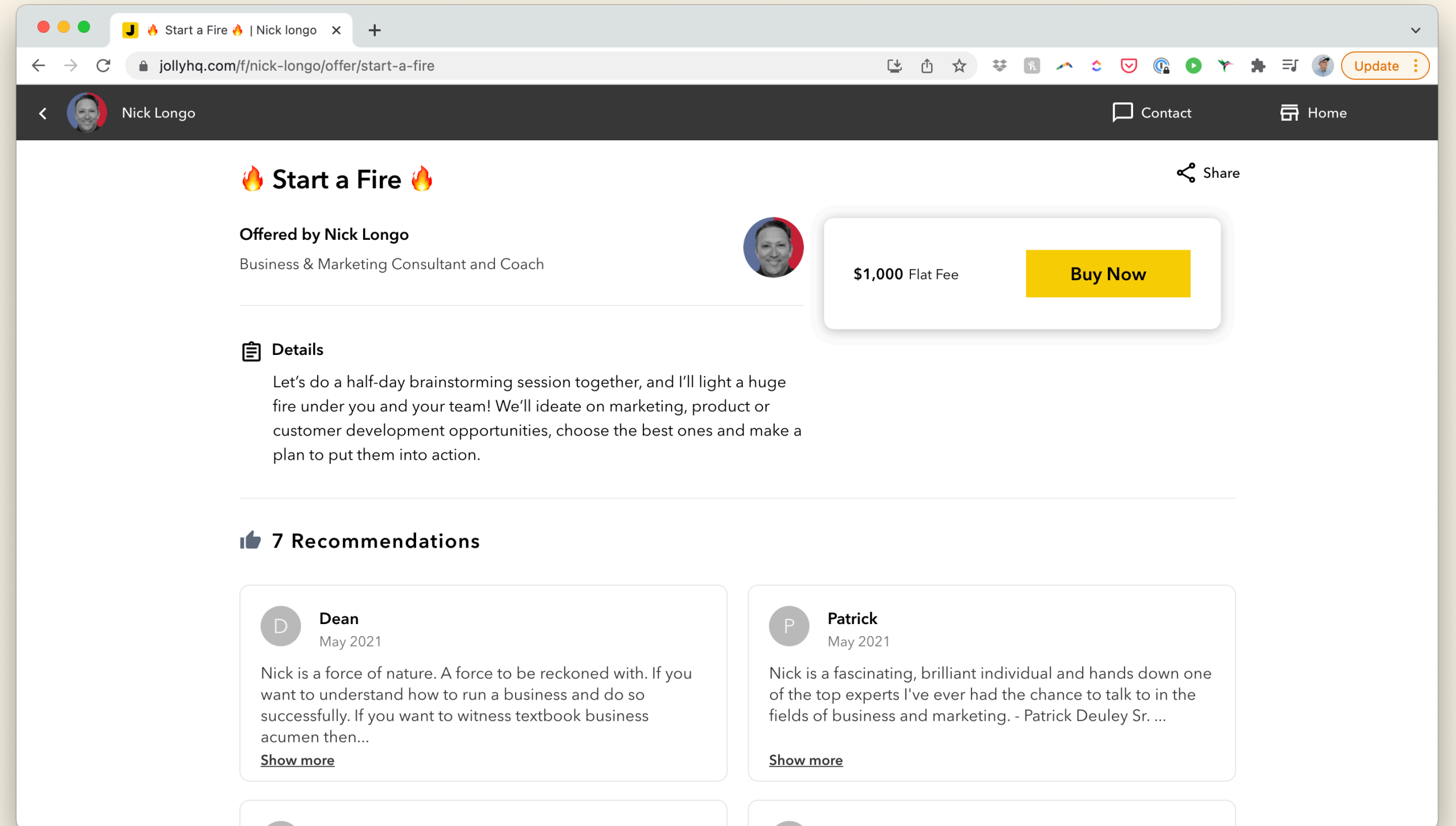
Optional: Narrow down the list to the best ideas.

Optional: Create an actionable plan.

Pieces You Need

- Offer
- Questions
- Notes + ~~Report Template~~ with optional proposal section

Offer

A screenshot of a web browser showing a JollyHQ offer page. The browser's address bar displays "jollyhq.com/f/nick-longo/offer/start-a-fire". The page header includes a navigation bar with "Nick Longo" on the left and "Contact" and "Home" on the right. The main content area features the offer title "Start a Fire" with a fire icon and a "Share" button. Below the title, it says "Offered by Nick Longo" and "Business & Marketing Consultant and Coach" next to a profile picture. A price box shows "\$1,000 Flat Fee" and a yellow "Buy Now" button. A "Details" section contains the text: "Let's do a half-day brainstorming session together, and I'll light a huge fire under you and your team! We'll ideate on marketing, product or customer development opportunities, choose the best ones and make a plan to put them into action." Below this is a "7 Recommendations" section with two visible reviews. The first review is from Dean, dated May 2021, stating: "Nick is a force of nature. A force to be reckoned with. If you want to understand how to run a business and do so successfully. If you want to witness textbook business acumen then...". The second review is from Patrick, also dated May 2021, stating: "Nick is a fascinating, brilliant individual and hands down one of the top experts I've ever had the chance to talk to in the fields of business and marketing. - Patrick Deuley Sr. ...". Both reviews have a "Show more" link.

<https://www.jollyhq.com/f/nick-longo/offer/start-a-fire>

Questions

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, you'd leave satisfied?

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?

And so on...

Report Template

Regardless, if you were to draw a circle around all five of these areas of your life, you could call that circle "Impact." Keeping these areas vital is how you will make an impact.

Find margin.

Once we identified these five areas, our focus shifted to what needs to go.

The first thing that popped up was extricating yourself from implementation work with Crown. You find joy and meaning in the parts of your work there that have clear impact—that is, they enable growth and help to spread the Gospel.

You're really good at the "purely strategic" responsibilities, but you need to delegate the personal project management.

To do that, you must empower your project manager Taylor and cease being the go-between, or intermediary. One year later, this type of work is draining for you, and to stop doing it is an opportunity to kill the hero.

Limiting Constraints

I told you a something that Closeup's first investor, Scott Beck, told me: A CEO's primary job is to remove limiting constraints.

Your limiting constraint is your lack of margin, and to remove it, you thought you needed \$16,000 in monthly recurring revenue. But that number included paying only your special forces team and not yourself plus operating expenses.

The real revenue target is \$27,000 per month in revenue. That is what you need in replacement income before you can stop selling your "product," which is billable hours.

You want to cut your team from 10 down to 3. You want to keep 3 key people who you believe are "elite" in the sense that they have the right personalities and skillsets to do the work and free you up to focus on what you do best. Here are your three key players:

- Taylor
- Riley
- Rebecca

As for Rod, you believe he is ready to move on to other ventures.

As for your brother Seth, you have acted as though you are responsible for him. You must shield the rest of the team from his quirks and idiosyncrasies. You worry about his being able to function on another dev team, without you as a buffer, yet you also, upon deeper reflection,

admitted that he may want to move in a totally different career direction. You have been enabling rather than empowering him.

At this point, we shifted from strategic to tactical and began developing a plan of attack for achieving \$27,000 in MRR. We identified the low-hanging fruit as these two products:

- 1) Assessments
- 2) Indicator Subscriptions

We then developed an outreach strategy for the assessments:

1. Identify influencers, thought leaders, bloggers, and other online "publishers" whose business models are a clear fit for assessments. (ConvertKit customers might represent a good audience for these assessments.)
2. Begin building relationships with these people using email, Twitter, LinkedIn, Facebook, and Instagram.
3. Set up calls with them to explain the assessments.
4. Pitch an assessment.
5. Close the deal.

You can sell one assessments for anywhere between \$18,000 to \$29,000. This pricing is value-based and is reasonable given the success stories you already have in the hopper.

In order to hit your \$27K revenue target, you would need to sell, on average, two assessments per month.

Summary:

Sell a 1-hour Brainstorming
"Idea Bounce" Session.

Best Way to Start

Flavor 9

Business Strategy

Problems Solved for Clients

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.

Pieces You Need

- Offer
- Onboarding Questionnaire
- Agenda + Followup Questions
- Notes + Report Template with optional proposal section



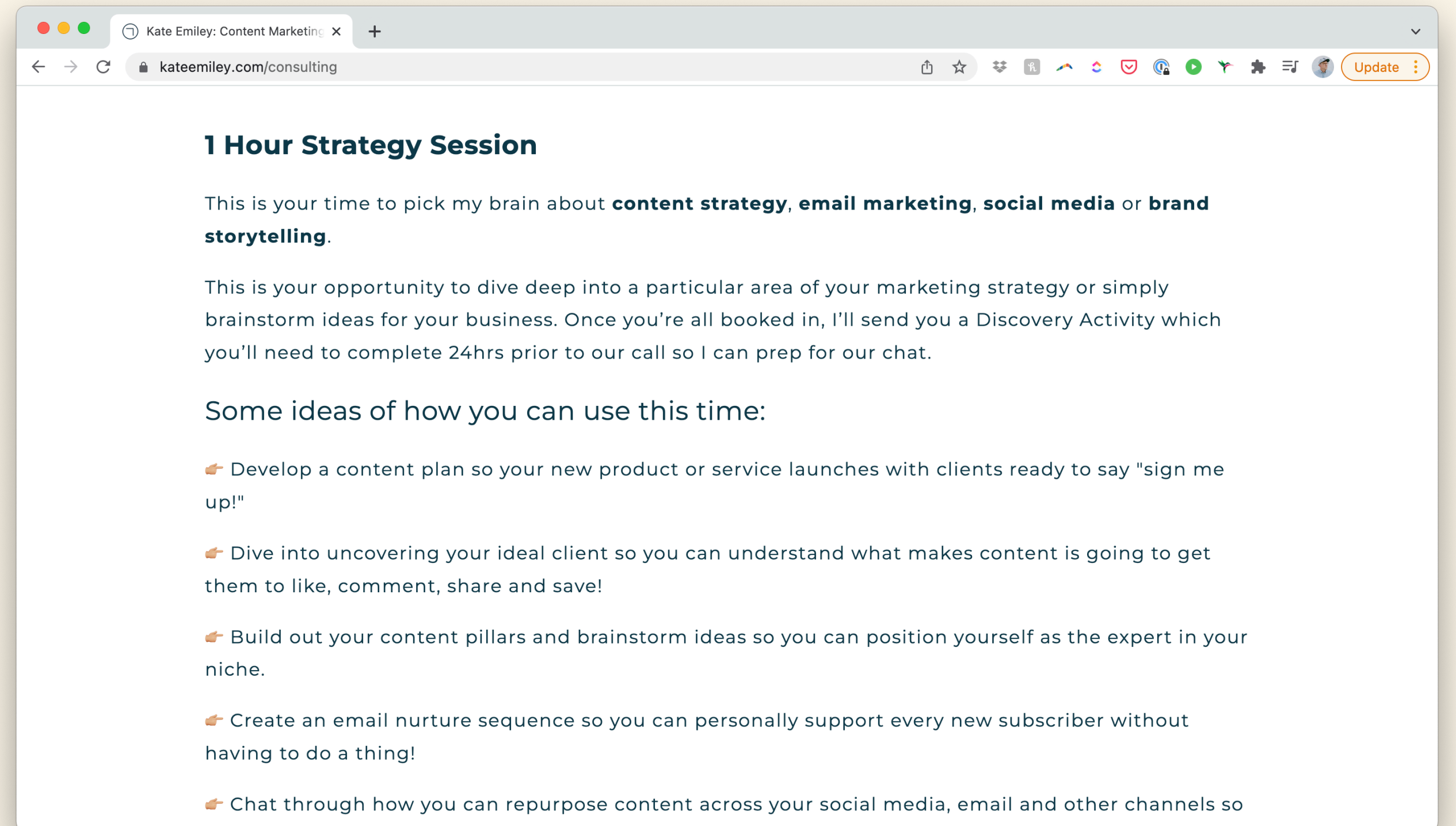
Offer

The screenshot shows a web browser window displaying a profile on the Clarity platform. The browser's address bar shows the URL clarity.fm/austinlchurch. The Clarity logo is in the top left, and navigation links for 'Categories', 'Dashboard', 'Browse', and 'Answers' are in the top right. The profile for Austin Church is the main focus. It includes a circular profile picture of a man wearing a baseball cap and glasses. To the right of the picture, the name 'Austin Church' is displayed, followed by the tagline 'Build a profitable business you love.' and the location 'Knoxville, Tennessee'. A detailed bio follows, mentioning his role as Co-Founder & COO of Closeup.fm, his MA in English Literature, and his passion for helping freelancers and creatives. Below the bio is a 'Play Video' button. To the right of the profile information is a pricing box showing '\$5/min', a 5-star rating from 29 reviews, and buttons for 'Request a Call', 'Send a Message', and 'Save to Favorites'. Below the pricing box, statistics show '45 Calls' and '29 Reviews'. A 'Verified' badge is present with social media icons for WhatsApp, LinkedIn, and Facebook. At the bottom, there is a section for 'Areas of Expertise' with a video player and a title 'Dear Creatives & Freelancers, Can I Help You Earn What You're Worth?'. The bio text in this section is partially obscured by a placeholder image.

<https://clarity.fm/austinlchurch>



Offer



<https://www.kateemiley.com/consulting>

Strategy Subscription Offer



JANUARY 20, 2021

Option #1, cont'd

- **6 Months of Ongoing Brand, Marketing & Growth Strategy** / One of the things Balernum's clients love most about working with us is gaining access to our big, bad creative brains. What that looks like is high-level strategy work where we help you help you get clarity around which projects to prioritize next and why. We then help you develop an actionable plan. We help you evaluate partnerships and growth opportunities using a brand-first philosophy: "Will this help us fulfill our brand purpose?" You also get access to our resource library and network of creatives and consultants. For example, when you're ready to ramp up email marketing, you can use our playbooks and templates. Or, when you're ready to accelerate growth with paid advertising, we'll help you evaluate your options and choose the right partner. We may even say, "Just hire So-and-So. They're world-class, and they're worth every penny." We're the partners with outside perspective who help you put all the pieces together and stay on track.
- You can count on us for both empathy and radical honesty, and here are some initial priorities:
 - Identify your various growth opportunities and pick the ones you will go after next and the rationale for doing so.
 - Create a product roadmap, score your various ideas, and pick the one that represents the right mix of factors like speed to market, cost, and potential.
 - Clarify your content strategy and affiliate strategy for Instagram.
 - Talk through your operating budget.
- This proposal includes 2 1-hour strategy sessions each month, as well as support, feedback/critiques, and discussion through email and video message.

Balernum

Wayfinding Workshop Offer

Wayfinding Workshop with Balernum

Founders and digital agency owners don't need to be told to take risks, make difficult decisions, or work smart, not hard. That just comes with the territory. Entrepreneurs start a business because we're more motivated by upside and impact than comfort and safety.

However, even go-getters need outside perspective from time to time.

Ambiguity, overanalysis, procrastination, and perfectionism—these are our enemies. They waste precious time. They get in the way of the growth that wants to happen.

Clarity leads to confidence, and my Wayfinding Workshop gives you the chance to get clarity, identify the various paths forward, pick the best one, and define next steps.

We won't attempt to iron out every wrinkle. Instead, we'll focus on the one problem, opportunity, or outcome that will make the workshop worth \$50,000 or \$100,000 to you. We'll ask the right questions then do deep problem-solving:

- What is most important right now?
- What does your business need from you?
- What decisions have you been putting off?

Here is the process:

1. I send you the short discovery questionnaire in advance to help uncover your current needs, bottlenecks, and obvious wins.
2. I customize the workshop's structure based on your questionnaire and how you fill in the blanks in this statement: "It would be awesome if I could [blank] so that I could [blank] without worrying about [blank].**"

**For example, one client wrote this: "It would be awesome if we could empower and enable our operations manager to manage day-to-day ops and our in-progress projects so that I could help build out our sales processes while getting more free time to also work on other projects and spend time with my wife."

Onboarding Questionnaire

- Did anything specific happen that made you want to reach out to **Austin** for consulting? Was there a triggering event?
- What in your business gives you the most heartburn right now? What keeps you up at night?
- **You recently hired an Ops Manager, which is the most impactful/ consequential role you've hired for yet. What specifically does your operations manager need right now?**
- **What questions do you have about the operational aspects of Balernum and how I personally have removed myself?**
- What tasks and activities consume your time right now? Let's figure out how to get you an extra hour or two each week.
- **What parts of your sales processes still need to be built out?**
- What is your #1 goal for this Wayfinding Workshop? What do we need to figure out to make the plan worth 10x your investment in 2021?

Questions

What's on your mind? Why are we here?

What's the real challenge here for you?

Does anything make you nervous?

What do you want?

If you're saying yes to this, what are you saying no to?

What was most useful for you?

Is there anything we're forgetting?

Play Red Team for a second and poke holes in this plan.

Report Template

Big Picture

Goals

Priorities

Plan

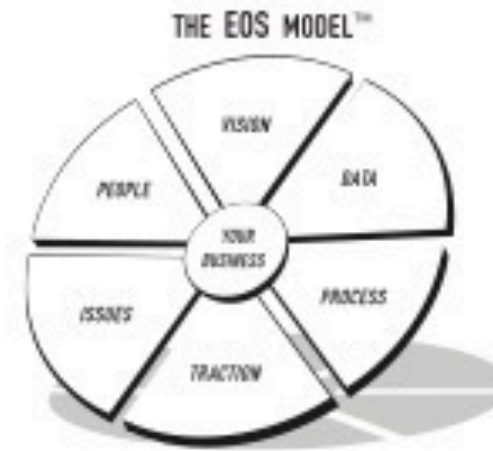
Other Opportunities

Resources

- Big Picture
 - Clarity
 - Operations
 - Sales
 - Next Steps
 - Other Opportunities
 - Resources
 - Total Pages: 8
-



Wayfinding Workshop
Balernum HQ | 12.17.2020



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION

| | | |
|---------------------------|---|---|
| CORE VALUES | 1. 2. 3. 4. 5. | 3-YEAR PICTURE™ |
| CORE FOCUS™ | Purpose/Cause/Passion: Our Niche: | Future Date: Revenue: Profit: Measurables: <u>What Does It Look Like?</u> • • • • • • • • |
| 10-YEAR TARGET™ | _____ _____ | |
| MARKETING STRATEGY | Target Market "The List": Three Uniques: 1. 2. 3. Proven Process: Guarantee: | |

90-Day Action Plan

Quarterly Action Plan {TEMPLATE}

| Focus Area One Business Area (e.g., Lead Generation) Specific Need (e.g., Getting more people in the door!) | Action Steps/Milestones | Who | By When |
|---|---|------|---------|
| Criteria of Success <ul style="list-style-type: none"> • Have a baseline scorecard in place that tracks daily traffic through store • Decided on the top 2 marketing ideas to implement for Q1 and implement them (with simple metrics to track results). Rough system laid out for each. KPI: # of Qualified Visitors to Store Per Day | <ul style="list-style-type: none"> • Lay out current system and tracking to see what historic performance reveals. Use insights in next action step to pick tactics to increase store visitors. • Conduct "Sweet Spot" Analysis and choose the top 2 marketing ideas to implement in Q1. Rough out plan to implement and systematize each. • Create a draft "Marketing Scorecard" to use to track daily key marketing numbers (and store sales by one breakdown) • Checkpoint 1: How is KPI going? Review how implementation of 2 new tactics is going. What is working well What simple tweaks should we make? | John | 1/15/XX |
| | | John | 1/31/XX |
| | | John | 1/15/XX |
| | | John | 2/28/XX |
| | | John | 3/21/XX |



Sell a 90-minute Strategy Session
or 3-hour workshop.

Best Way to Start

Let's take it one step at a time.

- You obviously don't have to sell all 9 of the strategy flavors we covered. Pick the low-hanging fruit: Which flavor would be easiest for you to pursue right away?
- You don't have to invent your own methodology. Collect existing frameworks, templates, and tools to get structure you lack. Clients won't feel cheated that you used someone else's tools.
- The trifecta of 1) creating space for the client's self-discovery, 2) asking good questions tied to an agenda and specific outcome, and 3) turning the mess of notes into a clear, actionable plan is how you create value for clients—not your singular genius with strategy or knack for capturing lightning in a bottle.
- It's okay for the lines between different strategy flavors to get blurry. You may start with project roadmapping and end with brainstorming and business problem-solving.
- You don't have to become a consultant overnight.

What Upcoming Sessions Cover

Session 4 – Marketing & Selling Strategy

Session 5 – Leading Effective Strategy Sessions

Session 6 – Avoiding Pitfalls + Getting Started

Session 3

Assignment

Write your crappy first draft.

Make a 30-minute appointment with yourself in your calendar. Knowing that the quality will come later in the edit, jot down initial ideas for your strategy offer, including a bold promise, process, key outcomes, value to the client (in terms of potential ROI, functional and emotional benefits, transformation), risks, price, and any proof you may have (even if it's proof from other non-strategy projects).