

Momentum

Playbook 18

Simplify Your Marketing Plan

By Maria Rass

Here's What's Inside!

The Winchester Mystery House	3
Less is More	3
The Rule of Three, Revisited	4
What Makes a Good Marketing Plan?	5
Different Strokes for Different Folks	6
Your Plan "Buckets"	8
Your Assignment: Your Rule of Three Marketing Plan.	9
One Last Thing...	10
Goodies and Inspirations	10

Playbook 18:

Simplify Your Marketing Plan

The Winchester Mystery House

In San Jose, California, right across the street from a trendy, high-end shopping complex, nestled between gas stations and fast food places, lies the Winchester Mystery House. This ornate, rambling architectural curiosity used to be the home of Sarah Winchester, widow of gun magnate William Winchester (of the Winchester Rifle fame). Visitors can tour this labyrinth of rooms, false doors, indoor windows, blind staircases leading nowhere, and other oddities.

After the death of her husband and infant daughter, Sarah became distraught and some say she went insane. *“Winchester came to believe her family and fortune were haunted by ghosts, and that only by moving West and continuously building them a house could she appease these spirits.”* (Wikipedia)

She purchased a Queen Anne-style mansion in Santa Clara Valley and oversaw round-the-clock construction and renovation, often swapping out construction crews so one group could never fully know all the false rooms, blind staircases, trap doors and access points sprinkled throughout the house.

Sarah Winchester just kept adding on and building...and building...and building with no final architectural plan or objective in sight. Until what was left at the time of her death was a bizarre, jumbled maze of a house full of features that lacked purpose, connection and, in some cases, aesthetics.

Many business owners tend to build their own version of the Winchester Mystery House: They call it a Marketing Plan.

They keep adding to it with every new tactic they can find in hopes of appeasing the revenue spirits. And it can get just as chaotic and rambling as Winchester’s mansion, with a similar effect of leading people nowhere, fast.

Less is More

As you’ve hopefully gleaned by now during MOMENTUM, putting a proper brand strategy foundation in place helps you be more efficient. You can do less promotion, marketing and heck, exert less effort, but each individual activity will give you more return.

Your marketing plan should be tight and focus you on a few essential activities that impact just the right people with just the right message. And you want to do each thing really, really well so you nail it!

A marketing plan filled with every possible new shiny marketing object under the sun might seem smart – after all, there’s no way you could miss anybody by taking that approach, right? They won’t be able to escape your clutches, there will be nowhere to hide....MWAH HA HA HA HA! (*evil laugh*).

When you are a bajillion dollar corporation with a 400-person global marketing team to do all this fantastic work you’re dreaming up in your plan, you are welcome to go all out. But while you are the only person on your marketing team...and you still have to run your company and do the work...let’s scale back our expectations, shall we?

The Rule of Three, Revisited

Remember back in Playbook 8, when we talked about the intersection between the marketing activities you enjoy doing and where you are most likely to reach your ideal target audience? Let’s expand on what you discovered in that work.

We talked about the concept of **The Rule of Three**. Instead of trying to include every option out there in your marketing plan, pick three to start. This is doable and will propel you into action. Once you master those, then you can decide if you need to add more or if you’re good with the pipeline you’re building.

Let me repeat this: **Yes, there is always another tactic you can try.** Always another social media channel you can use, always another campaign you can run. It doesn’t mean you should do more but do it all really, really badly.

When you find yourself overwhelmed by, *“I need to build my website AND build my email list AND network in seven different groups AND update social media AND make videos AND run a lead generation program AND book speaking gigs.....(gasp...gasp...hyperventilating!)...”*

Stop. Take a breath. And remember the Rule of Three. Which three initiatives need your time and attention to make the most progress right now?

And what do you do when one activity has multiple options underneath it? Follow the **Rule of Three** again. For example, if one of your marketing objectives is to “Create a New Facebook Ad Campaign,” just pick three promotional activities within it, rather than kill yourself trying to do twenty-five!

Make the steps you take count. Take a few, long, solid strides forward...not a bunch of rapid baby steps in a circle.

What Makes a Good Marketing Plan?

Your Marketing Plan should be based on your brand strategy. That means before you even create your tactical plan, you should already know the answer to:

- Who you serve?
- What value do you offer them?
- What is your brand personality (vibe, style, voice?)

Armed with that, you can build the right, focused tactical marketing plan.

Your tactical plan is the calendar of promotional activities you will engage in to achieve your goals. Don't overestimate your bandwidth here! You may want to launch seven new offerings and focus on networking, social media, list building, Facebook ads, etc. but you won't realistically get it all done at the same time. Use the **Rule of Three** as a sanity check.

I like to separate out my year into quarters and apply the **Rule of Three** to both my major buckets of activity and to my efforts within those buckets.

In a good tactical marketing plan, every activity you do should include:

- Objective: Why am I doing this? What business goal does it support?
- Audience: Who am I trying to reach?
- Timeframe: When will I do this?
- Budget: How much will I spend on it?
- Results: What do I want to get out of this and how will I measure it?

Every single marketing tactic you do must have an objective. If you don't have one, don't do it. Period.

Please. I beg you. Not every objective has to be a concrete number or even a sales goal (we'll get to that in the next section) but make sure everything you do leads back to a business goal. Don't do something simply because it's the new bright shiny object or "everyone is doing it!"

Your plan may look very different if you're just launching your business than if you're already up and running and looking to grow.

For example, let's say you're launching a wellness coaching business. Initially, you have to create the foundation so you can do all your other marketing. This is just the ante to get into the business game! Things like building and launching your website, creating and pricing your offerings, etc. Those foundational marketing pieces have to be in place before you can do anything, so initially that's where your focus will be.

Your initial quarterly plan may look like this:

- Launch the website: Hire a designer, Secure the URL, Write copy
- Create Facebook page and Twitter account: Secure handles, Write profile, Create header images
- Create an opt-in incentive guide for website to build my email list: Choose email marketing provider, Add sign-up box to Home Page, Research and write free guide.

Your ongoing plan will evolve. For example, if your business is already up and running, perhaps your quarterly plan looks like this:

- Continue growing my email list and community: Write weekly blog post, Send out monthly newsletter, Promote freebie weekly on social media
- Generate more local awareness and media: Research and target three local organizations for networking, Secure three speaking engagements (paid or free), Pitch local reporters with a juicy story idea.
- Launch a 6-week virtual fitness program to generate \$100,000: Create the program, Create and promote a free video series teaser, Advertise on Facebook, Twitter and Pinterest.

Hopefully, you now see why clarifying your brand strategy and knowing who you serve and what they need informs your tactical marketing plan. How will you know which activities to put in this plan if you don't have that information? In my example, **the only reason our wellness coach knows which organizations to target for speaking gigs or that Facebook and Twitter are good places for her to advertise her program is because she *already did all the thinking* you've done in this MOMENTUM course so far!** She knows that these tactics need to be part of her plan—and that others do not.

Different Strokes for Different Folks

Remember when we talked about taking prospects on a journey and courting them? Not everyone you are trying to reach is going to have the same relationship with you. Some folks may not even know you exist while others are very familiar with your work. So your marketing plan needs a mix of activities, depending on where people are in the buying cycle.

The steps to get to a sale are often called the *sales and marketing cycle*. Before customers buy from you, they need to pass through three other phases. For inexpensive, at-the-cash-register, impulse buys such as chewing gum, it may only take someone 30 seconds to go from the first to the last stage. But most other businesses need a bit longer lead time!

The **sales and marketing cycle** defines the stages a prospective client or customer goes through when considering you:

- *"I am aware that you exist."*
- *"I educate myself and seek out more information about you and your offerings."*
- *"I consider you for my short-list and evaluate you by imagining how I would personally benefit, maybe conducting a free trial or calling references."*
- *"I'm ready to buy from you!"*

Marketers often call these phases:

- Awareness
- Education
- Consideration or Evaluation
- Purchase



For each phase, put yourself in the prospective customer's shoes and visualize him or her at each phase. What are they thinking and feeling? For each phase of the cycle, the prospective client has different information needs, so you must plan your marketing activities accordingly.

We're going to talk more about creating specific "journeys" to convert prospects into loyal clients or customers in a future playbook. But for now, let's just think about how this impacts your simple marketing plan.

This does not mean your plan needs to have multiple activities under each phase at all times! That's not what I'm saying. Just be mindful that you'll need a mix of ongoing, "awareness-building" activities in your plan, along with concrete campaigns to convert them to buyers.

For example, in my own plan, blogging, emailing and social media are constants that I do for brand awareness and community building. However, I also have specific launches and new offerings sprinkled in at key points throughout the year that are designed to generate revenue—the "Purchase" phase of the cycle.

This is useful to consider, because different marketing activities will serve different objectives along this journey. Some tactics are simply to "get your name out there." Others will be to get people to take the final purchase action.

Without understanding this sales and marketing cycle, you cannot define clear objectives for each of your marketing tactics.

Your Plan “Buckets”

All of this may seem frightfully academic when what you really want is to *sell stuff and make money*. I get it!

But, as I've shared before, you have to give people time to know, like and trust you. You have to have a mix of tools in your marketing toolbox to hit them at every stage of the buying cycle.

If you're wondering how to even start making sense of every possible tactic available and where it fits in, consider *bucketing*. This is one useful way to categorize all the tactics you could include in your own marketing plans. There are probably many, many more you could consider. Again, you don't have to do ALL of these: it depends on your goals and audience and what's right *for you*. Stay true to your **Rule of Three!**

Many of these activities cross phases. For example, you could do a speaking engagement as an awareness tactic but make a special discount offer for your services at the very end to push to purchase. Some can fall under multiple phases, depending on the content. This is just to help you frame things better.

Awareness Tactics:

Website/SEO

Social Media

Networking (Online and Offline)

PR

Contributed Articles/Online Publishing

Speaking Engagements

Cold Calling/Emailing

Education Tactics:

Email Marketing

Blogging

Free Webinars, eBooks, Videos (Lead Magnets, we'll discuss in next Playbook!)

Speaking Engagements

Digital ads: Google AdWords, Facebook, Twitter

Consideration Tactics:

Free Challenges

Demos

Customer Case Studies

Testimonials/Online Reviews/References

Referral Incentives

Purchase Tactics:

Special Discounts and Offers

High-Touch/High-End Events (Private party, VIP retreat, sporting event private suite, etc.)

Direct Marketing Campaigns with Specific Calls to Action, Purchase

Your Assignment: Your Rule of *Three* Marketing Plan

Determine the three main marketing initiatives you'd like to focus on this quarter:

- 1.
- 2.
- 3.

For each one, outline the following:

- Objective: Why am I doing this? What business goal does it support?
- Audience: Who am I trying to reach and where are they in the Sales and Marketing Cycle?
- Timeframe: When will I do this?
- Budget: How much will I spend on it?
- Results: What do I want to get out of this and how will I measure it?

But wait, you're not quite done....

Now: Please share your focused plans on the Facebook page by Friday. Would love to hear your thoughts and especially your questions as you work through your own individual plans.

Remember, we are here to encourage you and provide any feedback. If you're like me, often it's fellow collaborators that help me polish my ideas to a glossy sheen.

Again, I'm going to reward you all year long, so don't lose your MOMENTUM: Post it now and keep that train moving!

One Last Thing...

There are lots of ways to build your marketing plan. So why not keep things as simple as possible?

What is definitely not helpful is a laundry list of unrelated, random tactics that you call *a plan*. Remember, focus on your three main business objectives and plot out your tactics plan from there. And keep focused on three things at any given level.

Stop performing random acts of marketing. More is sometimes just *more*. Not better. And it can also mean more frustration, stress and wasted time and money.

If you can roll out only one amazing new offering this year, then focus on that and promote it brilliantly.

If you can only handle mastering one social media network, then focus on that and make it count.

My Crossfit coach always makes us take a step back from the overall workout to understand why we are doing the specific sequence of moves and how they all fit together. Her favorite saying is, **“Understand the intent.”** What she means is, don’t just do something just to do it. Do it right. Do it for a purpose. Or don’t do it at all.

Same is true for your marketing efforts. You should understand the intent and objective of every single activity you do. And they should all tie back to your major business goals.

As a solopreneur, you cannot possibly do everything. You’re not supposed to! If you pick a few of the right marketing tactics and do them really, really well, you won’t need to chase every new shiny object or fall prey to “get-rich-quick” schemes.

Simplify. Focus. Succeed.

Om.....

Maria

Goodies and Inspirations

Read this book now: [Essentialism: the Disciplined Pursuit of Less](#) by Greg McKeown. I just finished it. It's amazing. It will change your life, work and everything else!

Enjoy these [10 executive marketing lessons from Sun Tzu's *The Art of War*](#).

What can a master Sushi chef teach you about simplicity? [Plenty](#).