WORKSHEET

MARKETING CAMPAIGN STRATEGY

A STEP-BY-STEP GUIDE TO DETERMINING YOUR CUSTOMER LIFECYCLE, AUDIENCE AND GOALS TO GET ON TRACK FOR SUCCESSFUL CAMPAIGNS

ONTRAPORT

ABOUT THIS WORKSHEET

Marketing Campaign Strategy Worksheet

A Step-by-Step Guide to Determining Your Customer Lifecycle, Audience and Goals to Get on Track for Successful Campaigns

Without a clear, well-defined strategy that is narrowly focused around the right audience and the right message to promote your business, there's a lot that can go wrong with a campaign. Developing a strategy that works doesn't have to be complicated: It's as simple as understanding the way customers naturally want to develop their relationship with your brand and constructing your marketing efforts to support that development. In this worksheet, we'll guide you through determining each piece step-by-step.
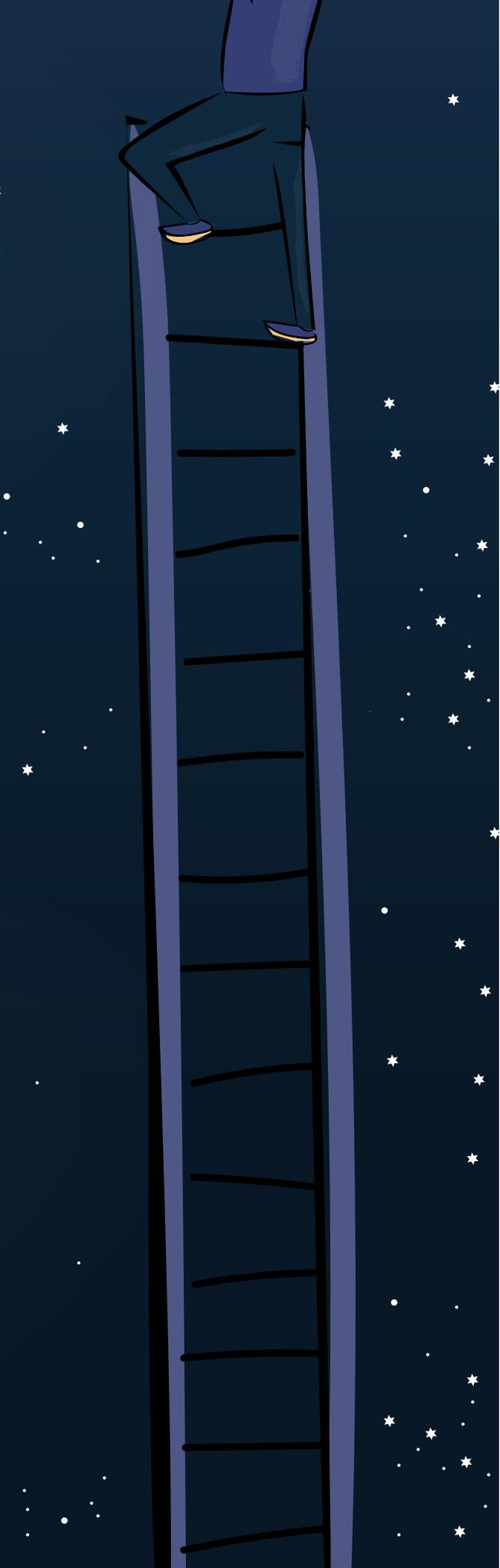
TABLE OF CONTENTS

CHAPTER 1

SETTING THE FOUNDATION

Finding Your Strategy

With so much riding on your marketing strategy, it's important to get it right. But where to begin?

Use the following questions to get you started on the right path:

1. List three core reasons customers purchase your product or service.

   _____

   _____

   _____

   _____

2. List the most common uses or applications for your product or service.

   _____

   _____

   _____

   _____

3. What are the problems your product or service solves?

   _____

   _____

   _____

   _____

It's important to keep these in mind as you develop your marketing strategy, which should serve to support the way your customers naturally want to develop their relationship with your brand.

The Customer Lifecycle

To understand the purpose of each marketing campaign you launch, and how it fits together with the rest of your marketing efforts, it helps to get familiar with the "Customer Lifecycle."

There are five stages of the customer lifecycle you will use to guide your leads and customers to take action. Each stage corresponds with a different phase of their relationship with you. As leads and customers grow to know and trust 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 your brand is a risky decision — like asking someone to marry you on the first date. In both cases, the better strategy is to develop the relationship over time before the big ask.

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.

   _____

   _____

   _____

   _____

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 you 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 improve the onboarding of your product, implement follow-up messaging?

_____

_____

_____

_____

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 customers? Consider some topics and ideas here.

_____

_____

_____

_____

5. **REFER**

The ultimate value you can receive from your customers is not the money they pay for your core product, 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 for referring their friends?

_____

_____

_____

_____

WHO TO TARGET

Creating Personas of Your Target Audience

To effectively grow your contacts' relationship with your brand, you need to know who they are and what they care about. The best way to keep your campaigns audience-focused is to create buyer personas that describe your typical customers from head to toe. A buyer persona is an imaginative representation of an ideal buyer based on everything that you know about existing 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?

   _____

   _____

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? Are they doing 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?

_____

_____

- 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?

   _____

   _____

- 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?

_____

_____

Finding and Relieving Their Pain Points

With the data above, you should be able to paint a clear picture of who your audience is, but to create a campaign strategy that truly resonates with them, you have to take things one step further and nail down their pain points.

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

_____

_____

_____

_____

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?

_____

_____

_____

_____
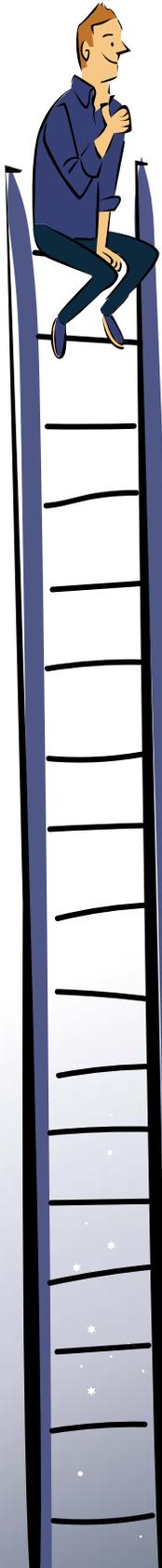
CREATING REASONABLE AND REALISTIC GOALS

Charting Your Path

Once you have your audience, pain points and strategy, it is wise to start thinking of the end result. Below, write in some quick responses to the questions on each step of the customer lifecycle:

	WHAT IS THEIR RELATIONSHIP 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			

Choosing Your Goals

Once you have this matrix completed, circle the specific actions that your campaign will focus on motivating contacts to take. Although this table shows your entire funnel, a successful campaign only needs to focus on one part of it. The information above is what you will use to set your goals and answer the more in-depth questions below:

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 goal. One week? One month? One year?

_____

_____

Use the above information to create a specific goal. For example: Increase one-time sales of online course Personal Organization for the Disorganized by 20% within Quarter one of 2017.

You should now have a better view of the marketing strategy you need for your specific business, along with a deeper understanding of who your target audience is. Using a marketing automation platform, you can dive even deeper into creating your customer lifecycle funnels to automate their journey through each phase. You can even incorporate your goals into a system such as ONTRAPORT and view their performance in real-time so you always know how your strategy is progressing. You've now got a strong, defined strategy that can serve as your guiding light to keep your campaigns moving in the right direction.

ONTRAPORT

ONTRAPORT's mission is to support entrepreneurs in delivering their value to the world by removing the burden of technology. We deliver on that mission by creating software, offering services, and educating the entrepreneurial community.

For over a decade, we have made a difference for thousands of businesses, their community, and our own staff, which is why we've received countless awards for innovation, revenue growth and company culture.

Our flagship marketing automation product is a subscription software that provides our customers with all the tools they need to start and grow their businesses through the advantage of an all-in-one platform. In addition, we also offer a large collection of free resources, courses and educational products that support entrepreneurs at any stage throughout their journey.

ONTRAPORT.COM