Lifecycle Marketing Workbook

THE BUSINESS CATALYST

Collect Leads

Convert clients

Create fans

Identify your target market

Don't blow your budget promoting your business's services to the wrong audience. Use this worksheet to help you narrowly define your target client so you can meet them where they are.
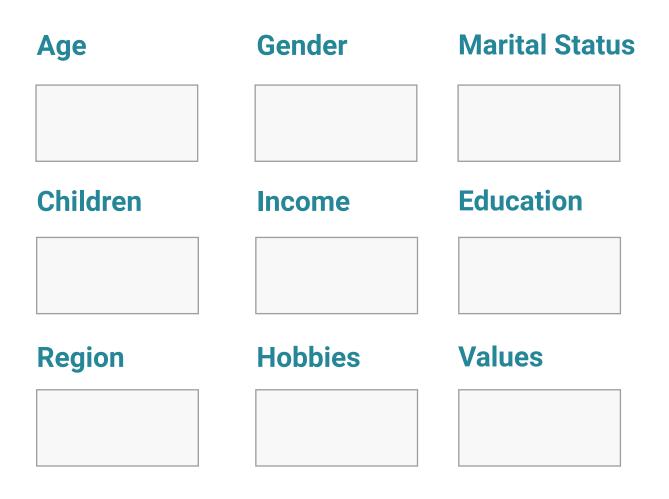
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First, consider your clients' traits by demographic and psychographics

Demographics: the average or typical characteristics of your target market.

Psychographics: what motivates them to take action.

Age

Gender

Marital Status

Children

Income

Education

Region

Hobbies

Values

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Collecting Leads

Attract new leads by indentifying your target audience

Who are my ideal clients? (Think age, annual income, educational level, behaviors, values, etc.)

What are their pain points? (Efficiency, time, ease of use, etc.)

Why should they buy from me instead of a competitor?

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What are their most common objections to doing business with me? (Cost, time, etc.)

Who is NOT my target client?

What do I need to accomplish in the next 30 days to identify my target client?

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What websites are they visiting

What keywords are they putting in Google?

What forums / message boards?

What Facebook groups are they members of?

Which Influencers are they following?

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What podcasts are they listening to?

What newsletter are they subscribed to?

What Blogs do they read?

Which YouTube Channels are they following?

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Converting Clients

Engage with leads, present a compelling offer, close the deal

Engage your leads

How can you tell prospects are ready to buy? Are they visiting pages on your website? Opening and reading emails? Scheduling an appointment or consultation?

How are you nurturing your leads? What valuable information are you providing to address their concerns?

What are you doing to build your company's credibility? What gives you a competitive edge?

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Present the offer

Which step in the sales funnel process are your prospects? What key milestone would make the most sense for them to pursue next?

In what way will your offer solve your lead's problem?

How are you building value around your offer? How are you presenting your product or service in an informed, professional way that establishes you as the expert in your niche?

What sets you apart from others in your industry?

Why should your business be the one your prospects trust going forward?

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Close the deal

**How can you reduce or eliminate friction in the closing process?
What detailed documentation are you using to communicate clearly?**

**How have you built trust and given your leads a reason to be excited
about doing business with you?**

**How are your business' strengths emphasized through your
product offering?**

Take some of the ideas you brainstormed above and choose 2-3
actionable items you can start implementing right away.

**How will you make the closing process as easy as it can be?
Via email with a payment link? A digital invoice?**

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Creating Fans

Provide an exceptional experience for your customers and create strong relationships through your delivery and impressive service

What will be your systemized method to deliver services so that clients consistently get everything they were promised?

How do you plan on being an advocate for your customers?

Choose your top 2 ideas for each category and start to put a plan in place.

How do you plan to improve the customer experience and really impress your clientele? Birthday emails? Care packages for a new home? Loyalty programs? Etc.

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When a client isn't happy, what will you do to reach out and make the situation better?

Finally, what are your plans to guarantee repeat business, positive reviews and customer referrals? How will your business create incentives for customers and partners in an effort to grow your client base?

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Impress your clients worksheet

Select the items you'll want to use that will leave a lasting impression
on your customer base. Add additional items that you want to incorporate
in the space provided.

Cost-effective ways to impress your clients

- ☐ Follow up with a quick call or text to see how things are going after they buy your product or service
- ☐ Follow up with personalized emails
- ☐ Answer questions in a timely manner
- ☐ Send a $5 gift card with every purchase
- ☐ Start a rewards or loyalty program
- ☐ Provide a surprise discount
- ☐ Send a book with a personal note
- ☐ Send them their favorite food or snack
- ☐ Provide special private shopping hours or prizes during certain hours
- ☐ Throw a party for all of your customers at your next major event
- ☐ Provide a gift card for an item in your store or on your website
- ☐ Provide offers to customers who contribute ideas or engage with your company online
- ☐ Celebrate an event, such as a birthday or anniversary
- ☐ Celebrate a milestone, such as number of years as a customer
- ☐ Send a gift card for a free car wash
- ☐ Offer free wrapping on gift purchases
- ☐ Respond to complaints right away
- ☐ Send a box of office supplies
- ☐ Send them a travel mug with a coffee shop gift card
- ☐ Provide group/bulk order discounts
- ☐ Follow them on social media and give them a shout out
- ☐ Give them bonus items with their purchase
- ☐ Call them and say thank you

- ☐ Send a handwritten thank you note
- ☐ Send a magnetic reference guide, chart, or calendar with your logo on it
- ☐ Feature a customer on your website
- ☐ Send cookies, fruit, or flowers
- ☐ Make a donation on their behalf to their favorite charity
- ☐ Plant a tree on behalf of your customer
- ☐ Meet up with customers in the cities that you are visiting
- ☐ Randomly select a few customers to receive one of your products or services for free
- ☐ Provide a free upgrade
- ☐ Send swag with your company logo on it (coffee mug, water bottle, shirt, etc.)
- ☐ Schedule lunch at your office and invite customers to attend and share feedback
- ☐ Tell your customers how their feedback was implemented
- ☐ Create a video message and send it via email
- ☐ Give them a dinner-and-a-movie gift card
- ☐ Send samples of new products
- ☐ Upgrade their shipping to priority mail
- ☐ Provide free shipping when they spend a certain amount
- ☐ If they call and you know the wait time will be long, offer to call them back

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