



In business, you miss 100% of the sales you don't ask for. Use this worksheet to understand your ideal customer and create a strategy that drives them closer and closer to purchase.

TARGET SEGMENT:

List your target customer here. Be very specific and include things like demographics, psychographics and why they are included in this campaign. The buyer mindset explains what the buyer is thinking of or doing in this stage. It's important to know the buyer's mindset so that you can craft content that drives them to the next stage.

STAGES

There are three stages in the Sell phase of Lifecycle Marketing. Each of these stages drives buyers closer to completing the action that you want them to take, like buy your product or service.



GOALS

List the goals that you want to achieve in each stage to progress the buyer along the journey.



EDUCATE GOALS:



OFFER GOALS:



CLOSE GOALS:

Now that you know your goals for each of the stages in the Sell phase of Lifecycle Marketing, it's time to build out your strategy.



Email Marketing Strategy

What targeted content are you going to email this segment?

Email: List the content that you're providing in this email.

Call-to-Action: List the call-to-action that you're inserting into the email. The call-to-action is what you want the buyer to do next.

	 EDUCATE	 OFFER	 CLOSE
Email 1			
Call-to-action 1			
Email 2			
Call-to-action 2			
Email 3			
Call-to-action 3			



Social Media Strategy

What reinforcement messages are you providing on social media?

Social Post: List the content that you're providing in the post.

Social Network: List the network that you're posting the content in.

	 EDUCATE	 OFFER	 CLOSE
Email 1			
Call-to-action 1			
Email 2			
Call-to-action 2			
Email 3			
Call-to-action 3			



Website

What actions on your website help buyers complete the goal?

Website Action:

List the properties or copy that you need to include on your website in order to assist buyers with the steps you want them to take.

	 EDUCATE	 OFFER	 CLOSE
Website Action 1			
Website Action 2			
Website Action 3			

Example Campaign Strategy Worksheet

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Small businesses in Durango, Colorado who have \$50-100K in revenue, have been in business less than 2 years and who are struggling to complete their business tax forms.

STAGES

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GOALS

List the goals that you want to achieve in each stage to progress the buyer along the journey.

 **EDUCATE GOALS:**

Accountant Example: To complete the Educate stage, the buyer needs to read three articles related to tax audits and believe that we're experts in accounting.

 **OFFER GOALS:**

Example: To complete the Offer stage, the buyer needs to select one of two offers related to our service.

 **CLOSE GOALS:**

Example: To complete the Close stage, the buyer needs to access the contract and submit payment.

Example Campaign Strategy Worksheet

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	EDUCATE	OFFER	CLOSE
Email 1	Three tips to help you avoid an audit on your taxes this year.	See how this bike shop owner turned a \$500 tax bill into a \$1,000 refund.	We're excited to welcome you to the family. Here's the information that you need to get started.
Call-to-action 1	Click here to read the article.	Click here to learn how we can help you too.	Click here to access your client contract.
Email 2	Avoiding an audit is important, but saving money has a direct impact on the bottom line. Here are five ways to reduce your tax burden this year.	Strategic financial planning is key to turning tax burdens into refunds. Stop working in your business and start working on it. We can get you started with a solid financial plan.	Katie is a small business florist who signed up for this program last year. See how she's changed the future of her business.
Call-to-action 2	Click here to read the article.	Call us today.	Click here to read about Katie.
Email 3	Ten steps to keep your financial books up to date.	We're opening up three slots to our small business accounting mastermind tonight. If you're ready to take your business to the next level you have until tonight to secure your spot.	I see that you haven't sent in your financial planning overview document. We need this to get started with building your strategy. What questions do you have about the contract?
Call-to-action 3	Share on your thoughts on Facebook.	Click here by midnight.	Click reply to let me know how I can help you.



Social Media Strategy

What reinforcement messages are you providing on social media?

Social Post: List the content that you're providing in the post.

Social Network: List the network that you're posting the content in.

	EDUCATE	OFFER	CLOSE
Email 1	Link to blog post about avoiding an audit.	See how this bike shop owner turned a \$500 tax bill into a \$1,000 refund.	Share a featured success story.
Call-to-action 1	Facebook, LinkedIn and Twitter	Facebook	Facebook
Email 2	Poll the audience, "What's the worst experience you've had with the IRS?"	Meme Graphic: "Stop working in your business and start working on it."	Introduce the newest program.
Call-to-action 2	Facebook	Facebook, Instagram, Pinterest	Facebook & Twitter
Email 3	Share an article from Entrepreneur on how to find the right accountant.	We've opened up three slots in our next mastermind. Sign up today.	Infographic sharing tips on how to find the right accountant.
Call-to-action 3	Facebook, LinkedIn and Twitter	Facebook, LinkedIn and Twitter	Facebook and Twitter



Website

What actions on your website help buyers complete the goal?

Website Action:

List the properties or copy that you need to include on your website in order to assist buyers with the steps you want them to take.

	EDUCATE	OFFER	CLOSE
Website Action 1	Article is listed on the website.	Testimonial page includes bike owner story and testimonial.	Instructions on how to complete the contracts are loaded to the membership portal.
Website Action 2	About us page is current.	Mastermind sales page is complete.	Success story from Katie the florist is loaded to the website.
Website Action 3	Social sharing buttons are prevalent on the articles.	Testimonials from previous mastermind participants are loaded to the website.	Infographic is posted to the website or blog with social sharing buttons and embed code.