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Starter Kit Instructions

Please Read This Entire Chapter FIRST!

Congratulations! You have taken the first step in replacing the hit-or-miss marketing you have been doing with a proven marketing plan that delivers reliable results. If you are like most of the business owners I work with, marketing is about as fun as a root canal. Chances are you are far more comfortable fixing a computer network than you are creating a marketing campaign or making sales calls to customers.

For this reason, I'd be willing to bet that you are not enthusiastically picking up the phone to call on new prospects and implementing a multitude of marketing campaigns every month. As a matter of fact, you are probably not aggressively doing much of anything to generate new clients.

Instead you rely mostly on the word of mouth referral business you get. And while it's enough to keep you going, it's not enough to help you grow your business the way you'd like to. So how can you solve this? You are holding the answer in your hands.

This Tool Kit is designed to teach you a step-by-step process for marketing any type of product, service, or idea. Not theoretical marketing ideas, but grass roots, hard hitting, apply it to your business today type strategies.

Why A “Good” Marketing Plan Doesn’t Cut It Anymore

Getting the attention of a new prospect is quickly becoming the single biggest challenge facing technology companies today.

Budgets are getting slashed and companies are trying to make do with what they have instead of investing in new products and services. They do not feel any urgency to buy your services now and instead wait until it becomes an absolute necessity before doing anything. Then you have to deal with a number of competitors who readily cut their prices to the bare bones forcing you into a bidding war for every new project.

Then you have to battle through the ever growing attention crisis. The average American is **bombarded with over 3,000 marketing messages a day**. As staggering as this number seems, it doesn't take into account the number of e-mail messages, online ads, and telemarketing calls they receive every day.



Add to that a demanding job, a family, bills, and a home to take care of and you can see why getting someone to pay attention to your marketing message is so difficult. With such fierce competition for your customers' attention and dollars, it takes more than a good marketing plan to be successful. It takes a well thought out, full blown marketing attack.

Marketing: Your Ultimate Competitive Advantage

One of the biggest advantages you can have *is* your marketing. A better product or service is only important **AFTER** the sale is made. Computer Reseller News did an article titled "Rising Stars" where they profiled 25 companies that had a significant increase in revenue in a one year period. The company that led the pack was Network Plus with a 600% increase in revenue.

When they asked James Kernan, the CEO of Network Plus, what his secret was, he simply replied, "I wish I had one or two things that are trade secrets that make us special, but we just try harder than our competitors and are extremely aggressive...in reality, most of us are chasing the same business with the same bag of tricks...it's the ones that market themselves better that win."

A new prospective customer has no idea how good your services or your products are **UNTIL AFTER** they have decided to buy from you. **Prior to making the purchase, they only know how good your MARKETING is.** That's why you are losing business to cheaper competitors. You are not doing a good job of educating the customer on why it makes sense to pay you a bit more and get the job done right.

The Only Thing Standing Between You And The Results You Want To Achieve

Creating a powerful marketing system takes effort, and it won't happen instantly. You will need to invest some serious time and thought into learning how to market your business, researching your customers, and testing new ideas.

As with any worthwhile achievement, the results you attain will be in direct correlation to the effort you put into it. The only thing standing between you and the results you want to achieve is your commitment to learning this system and implementing it in your business.

What To Expect

In the following chapters, you will see a step-by-step process for building a marketing system for your company. At the end of every chapter is an exercise or action item for you to complete. I encourage you to complete at least one chapter and exercise every week to keep the momentum going.



Results will not happen overnight. While some businesses see a significant increase in sales with their first campaign, it is not likely.

It will take you awhile to develop and test your campaigns to find which ones bring you the best results. It will also take you some time to get into the habit of marketing, to develop your database, and to re-build the relationship with prospects or customers you've not contacted in awhile.

Once you have been applying the strategies taught in this program for 3-6 months, you should see a significant increase in revenue and profits.

Getting Started

Step 1:

Use this hardbound binder as a marketing “hub” to hold your marketing plan, completed campaigns, results, and your “swipe file” of ads and marketing pieces (a swipe file is a folder of ads, sales letters, and marketing campaign ideas that you want to “swipe” or copy).

Step 2:

Complete the Confidential “Opportunity Finder” Marketing Analysis enclosed on the “Marketing Templates” CD and send it to me. Completing this questionnaire serves two purposes:

1. It will help you identify marketing opportunities in your business that you may be overlooking.
2. It will help me prepare for our first coaching session so I can provide intelligent answers and real solutions to your marketing problems.

Note: Some of the questions will take thought and research, but make sure you don't skip those! If you need more information gathered, assign it to someone who can research the facts and get back to you. If you simply cannot answer a question, leave it blank.

Step 3:

Read and complete the exercises at the end of the first 3 Chapters. These chapters are fundamentals that are relatively easy to understand and execute on. Once completed, you can move on to future chapters.

I also would encourage you not to jump ahead as each chapter builds on the previous lessons. For example, if you jump to the part about marketing your business with e-mail but don't understand how to create an offer, your efforts will be in vain.

Important Information About Your Coaching Calls:

- Coaching calls, marketing piece makeovers, and quick start coaching calls are by appointment only. To schedule a call, send an e-mail to: ask@technologymarketingtoolkit.com.
- The Quick Start Call will not be scheduled until you have completed the Opportunity Finder Questionnaire located on the “Sales and Marketing Templates” CD located in Bonus Section 2 of this kit. This is a PDF form and you may type your answers directly into the document. This form is designed to give me an overview of your goals, current marketing situation, strengths, weaknesses, and opportunities so I can focus 100% of our call on providing you solutions.
- All appointments are scheduled on CST (Central Standard Time). Please be careful to account for any time differences.
- Once a call is scheduled, you **MUST BE ON TIME**. If you are more than 10 minutes late, your call is forfeited and will not be rescheduled. That means you will lose the right to reschedule that call.
- You may reschedule a call **provided you give more than 6 hours prior notice** by phone or e-mail that you cannot make your time slot.
- I highly recommend that your record all of our coaching calls for review purposes.

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Chapter 1:

Know Your Customer

When a business owner starts feeling the pressure to increase revenue and generate leads, the first question they usually ask is: “Where should we start advertising?” **That is, they jump right to the media or message delivery stage.** Should we rent a list and send out a postcard? Should we run a few ads in a local paper? Hold a seminar or send a flyer to the Chamber of Commerce list?

Then, with very little research or knowledge about a particular media or the target list they are reaching, they make choices based solely on what they see their competitors doing or on what they think they can afford.

This is the worst way to determine what type of advertising to invest in because it jumps two very critical steps:

1. Getting absolutely clear on the type of customer you want to attract.
2. Determining what type of offer or message will actually get the attention of that customer, also called message to market match.

These two elements are absolutely essential to the success of your marketing efforts, yet my research has shown that very few technology service companies think this through before starting a marketing campaign.

Getting absolute clarity on the type of customer you want to attract is the single most important step in ANY marketing campaign or plan.

Trying to uncover good, qualified buyers without a clear profile is a lot like throwing darts blindfolded. If I were to take a look at your current customers, chances are your serving a wide variety of companies, decision makers, and industries and have no real focus on any one type of market or customer.

This is because you have not thought about or decided to target a particular market or company type and have been taking whatever random business comes your way (mainly through referrals). When you serve that wide of an audience, it becomes very difficult to refine your marketing message, and you end up “watering it down” so it will appeal to everyone. But when you do this, it loses all its power.

You end up sounding and looking like every other computer service company in your area; **a generalist offering a commodity product that will end up getting shopped by price.**



As with any goal, you want to start with the end in mind. In marketing, that is getting absolute clarity on the type of customer you want to attract and who you are marketing to. The problems and wants of a small business owner are significantly different than the problems and wants of an IT Manager.

The needs of a doctor in a small practice are far different than the needs of a CPA. And the owner of a manufacturing firm is going to have different concerns than the owner of a bank. When you know who you want to reach, it becomes infinitely easier to find them, appeal to their specific concerns, and create offers they will respond to.

Take a look at the ad below and you can immediately see who it is written for:

An Urgent Message To IT Managers of Medical Companies In The Nashville Area Who Are Concerned About Complying With The New HIPAA Regulations:

If you are an IT Manager that is currently faced with the task of researching and recommending the best way for your company to become HIPAA Compliant, it is extremely important that you get and read this new special report:

“3 Critical Facts IT Managers of Medical Companies Must Know About The New HIPAA Regulations”

This report will feature important IT compliance issues, cost control strategies, and project management planning, as well as case histories and details on how to avoid the 3 most commonly made, costly mistakes IT managers of medical companies make when attempting to become HIPAA compliant.

For a limited time, copies of this exclusive guide will be made available for FREE at this web site: www.urlhere.com

So how do you know who to target? First, make sure you have a good database program. I know a lot of smaller IT consultants keep their database in Outlook or QuickBooks. I don't recommend this because it does not have advanced database marketing tools and will not allow you to automate and track your marketing system. I recommend ACT!, Goldmine, or any other CRM software designed for marketing.

Second, go through your current customer base and profile your A+ customer. An “A+” customer is one that represents the most revenue, profits, and on-going business. They also are the ones that appreciate your services, pay on time, and don't nickel and dime you over your invoices.



If you need help in picking a target marketing (niche), you can use the **“Target Market Worksheet For Technology Companies”** found on the Marketing Templates CD enclosed. Finally, segment your database so you can be more effective at targeting offers that hit the “hot buttons” of your prospects and customers.

The IT Manager of a company with 100 PCs is going to have different concerns and hot buttons than the owner of a business with 15 employees. Segmenting these fields in your database will enable you to look up only the people you want to target and improve your ability to get the right message in front of them.

At a minimum, here are the fields or information you should keep on your prospects and customers:

- FULL contact information (company, address, e-mail, phone, fax)
- Title (IT Manager, Owner, Office Manager)
- Industry or company type (manufacturing, medical, financial)
- Number of PCs
- Type of network or operating system
- What you’ve sold them to date
- Source of the lead (referral, rented list, yellow pages, etc.)

I also recommend you flag each person as a “customer”, “prospect”, or “prospect – pitched”. A prospect - pitched is a person you’ve talked to, maybe even submitted a proposal to, but hasn’t bought.

Tracking this information will not only allow you to target more effectively, but also to track what percentage of leads are converting to a sale.

Chapter 1 Exercise:

Before moving on to the next chapter:

1. Create your database. I recommend using database software designed to support sales and marketing activities such as ACT! or Goldmine.
2. Profile your A+ customers to uncover profitable niches. Use the Target Market Worksheet enclosed on the “Marketing Templates” CD as a guide.
3. Segment your database and create fields to track:
 - FULL contact information (company, address, e-mail, phone, fax)
 - Title (IT Manager, Owner, Office Manager)
 - Industry or company type (manufacturing, medical, financial)
 - Number of PCs
 - Type of network or operating system
 - What you’ve sold them to date
 - Source of the lead (referral, rented list, yellow pages, etc.)
 - Status (Prospect, Prospect Pitched, Customer, etc)

Below are two additional forms to help you profile your A+ customers.



Profile You're A+ Customer

Use this worksheet to note common characteristics shared by your high-profit customers.

Geographic Profile:

Zip Codes:	
States:	
Other:	

Consumer Target

Business Target

Home:	<input type="checkbox"/> Rent <input type="checkbox"/> Own	Type of Network:	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female	Number of Workstations:	
Type of PC:		Company Type:	<input type="checkbox"/> Non-profit <input type="checkbox"/> Government <input type="checkbox"/> Corporation <input type="checkbox"/> SOHO <input type="checkbox"/> Privately Owned <input type="checkbox"/> Union <input type="checkbox"/> Other: _____
Software:			
Uses Computer For:	<input type="checkbox"/> Home Office <input type="checkbox"/> Gaming <input type="checkbox"/> General PC usage (Internet, e-mail) <input type="checkbox"/> Creative work <input type="checkbox"/> Other: _____		
Income:	<input type="checkbox"/> Less than \$20,000 <input type="checkbox"/> \$20K - \$40K <input type="checkbox"/> \$41K - \$60K <input type="checkbox"/> \$61K - \$80K <input type="checkbox"/> \$81K - \$100K <input type="checkbox"/> \$101K - 150K <input type="checkbox"/> \$150K - \$200K <input type="checkbox"/> \$201 + <input type="checkbox"/> Other: _____	Years In Business:	
		Annual Revenue:	
		Key Decision Maker:	
		Influencers:	
		Number of Employees:	

Psychographic Profile

Clubs or Memberships:	
Magazines Read:	
Associations:	
Other Common Traits:	

Defining New Target Markets

Before settling on a target market, make sure they meet the following criteria. If your target audience does not meet all of the criteria below, you may want to consider choosing a different target audience, expanding your reach, or altering your products so they appeal to a larger group.

Identifiable	Does your target audience have a set of common characteristics that you can easily identify? Identifying all of the doctors' offices in a specific area is an easy audience to target. However, identifying people that are not happy with their computer is more difficult.
<input type="checkbox"/> Yes <input type="checkbox"/> No	
Size:	Is your target audience large enough to sustain your business? One way to determine market size is to look into the SRDS (www.srds.com) and find lists or databases of your target market. If you are targeting for a small, geographic area, call several list owners and ask for database counts in your area.
<input type="checkbox"/> Yes <input type="checkbox"/> No	
Profitable:	Do the majority of prospects you are targeting have adequate buying power to afford what you are offering? You may need to estimate this until further testing proves otherwise.
<input type="checkbox"/> Yes <input type="checkbox"/> No	
Accessible:	Can you easily reach your target audience? Going back to the SRDS, you can quickly find out how easy it is to find databases of your target audience.
<input type="checkbox"/> Yes <input type="checkbox"/> No	
Define New Potential Markets To Target:	
Target A	
Target B	
Target C	

Chapter 2:

Know Your Numbers

Before getting started on a marketing campaign, you need to establish sales goals and know your numbers for lead generation and conversion as they support those goals.

More specifically, you need to know:

- The number of potential customers for your business (market universe).
- The average number of leads you generate from any given marketing campaign. **Important:** The direct marketing industry considers a 1% to 2% a successful response rate. **HOWEVER**, do NOT make the mistake of judging the success of your marketing campaigns based on this alone. The only TRUE measurement of success is ROI or return on investment. The only reason I share the 1% to 2% response average with you is because my guess is that you have not been doing enough direct response marketing to know what your average response rate is to the various direct marketing strategies you've been using. If that is the case, then use a 1% response rate when considering the potential ROI for a direct marketing campaign.
- The average number of leads you convert to an appointment or proposal.
- The average number of proposals you convert to a sale.
- The average sale (revenue generated) per customer, per year, also known as life time value of a customer.
- Your sales targets.

Let me give you an example of how these numbers apply when planning a marketing campaign. Suppose you own a local business that supports computer networks for companies with 20 – 30 workstations. After a little research you discover your sales numbers are as follows:

- Your average direct mail campaign generates about a 1% response.
- You are able to set appointments with 1 out of every 4 sales leads you get.
- You close 1 out of every 4 proposals you write.
- The average sale per client is about \$40,000.
- Your current revenue per year is \$2 million and you have 50 clients.



- Your sales goal is to hit \$3 million next year.

Working with these numbers, you would need to secure 75 clients a year in order to hit your goal of \$3 million in revenue (\$3 million / \$40 thousand). That means you need to secure **25 more clients** to hit your goal. **Working backwards, here are your marketing numbers:**

- Number of new projects you need to quote on (proposals generated): 100
- Number of new sales leads you need per year: 400
- Number of new sales leads you need per month: 33
- Number of impressions per month required (1% / 33): 3,300

Note: An impression is when a target prospect reads or views your marketing message. If you send out 10,000 sales letters, you have made 10,000 impressions. If you make 100 cold calls, you've made 100 impressions.

Here's why knowing these numbers is important: Imagine you are the sales manager faced with the above challenge of hitting \$3 million in revenue. You have 2 sales people, and your primary marketing method is cold calling and networking at local events such as chamber of commerce meetings.

To make 3,300 impressions a month, you and your sales people need to make 55 cold calls a day (3,300 impressions / 20 working days a month / 3 sales people). Is that possible? Not likely. The average sales person makes less than 5 cold calls a day. This means you would have to implement some type of direct marketing campaign if you want to hit your sales goal of \$3 million in revenue.

Here's another important point: Do you even HAVE 3,300 prospects to reach? Suppose you live in a small town that only has 2,000 businesses that meet your criteria. Now what? To hit your sales target you will have to:

- Increase your closing percentage.
- Increase the average spend of every customer.
- Expand into new target markets.

As you can see from the above example, knowing your sales numbers enables you to plan strategically and put together a realistic marketing plan to reach your goals.

Where To Start

The first step is to identify your market universe or market opportunity. That is, the total number of potential customers for your business. If you did the exercises in Chapter 1, you have a profile of the type of customer you want to reach. Now you have to figure out how many there are in your target area.

The first place to look is in the SRDS directory. That is the Standard Rate and Data Services Directory (www.srds.com). This company publishes several directories that contain every major magazine's subscriber database, direct mail list, e-mail list, and telemarketing list available. A subscription may be a little bit steep, but you can usually access a copy of the SRDS at your local library for free.

Look up your industry in the index and start looking through the lists of your target market. For example, if you are trying to reach IT Managers, you can easily find lists of those individuals from various publications, associations, and directories.

Every list will have a data card that supplies information on its size, what you can select on (title, zip code, company size, number of PCs, number of employees, SIC code), who manages the list, where the list comes from, the cost, and a host of other information. Choose a few of the larger lists of your target audience and call the list manager to get a count in your target area. Most list brokers will be able to give you a count right over the phone. After calling a few brokers you will start to get an idea of the number of potential prospects in your area.

Here are some other list sources you should use in your research for universe counts:

- ZapData: www.zapdata.com This is a division of Dun & Bradstreet that enables you to get an instant database count online.
- List Technology Systems Group: www.ltsg.com They specialize in technology lists and can give you a count of IT decision makers and personnel within a 50 mile radius of your company.
- InfoUSA: www.infousa.com They offer a large selection of business to business and consumer databases.
- Harte-Hanks: www.harte-hanks.com This company holds one of the largest, most detailed technology-centric databases in the world. Their lists are expensive, but you can select on the type of network, technology installed, software installed, and so on.

Important: the reason you are doing this is to get an idea of your total market universe or the number of potential new customers in your market - not to choose a mailing list for a marketing campaign. Do not worry about the list cost or effectiveness at this point. In a later chapter I will discuss how to choose lists for direct mail, e-mail, and telemarketing. For now, you are simply doing research for market size.

Calculating Your Sales Numbers

The next set of calculations may require a bit of guesswork based on past campaigns if you have not been tracking your sales activities. There are 4 numbers you need to calculate:

1. The number of new leads you get every month. If you run a direct mail campaign or place an ad in the paper, how many calls does it bring in? If you attended a trade show, how many people gave you their business card and requested a follow up meeting? Word of mouth referrals should also be counted.

Regardless of where they come from, these prospects should be categorized as leads. They are individuals who have demonstrated some interest in your services. They are not a customer yet, but they are warmer than a “suspect” which is someone who does not know who you are. It is important to know the difference between leads and suspects.

A lot of list brokers call their databases “lead lists” or “leads”. I think this is incorrect. The people on that database are suspects because you don’t know anything about them and they don’t know anything about you. They may or may not need (or want) what you have to offer. I define a lead as someone with a need for your services that has requested more information. That is a lead. Anyone else is a suspect.

2. Lead To Proposal Conversion. The second calculation you need to make is the number of leads that turn into an actual presentation or proposal. Counting how many proposals you’ve written in a given month should be pretty easy to calculate. Simply look back at the proposals you have created over the last 3 to 4 months and count them up.

3. Proposal To Sale Closing Percentage. The third calculation is how many proposals turn into a sale. Again, this should be fairly easy to calculate. Look back over the last 3 to 4 months and see how many new customers bought. If you pitched 10 companies and 2 bought, your closing percentage is 20%.

Quick Note: If you can look back on the last 6 months to 1 year you will get a more accurate calculation on lead conversion and closing percentages because it will even out seasonal dips and surges that throw off your numbers. If you don’t track lead source in your database, you may not be able to look back 6 months to 1 year and calculate the number of leads generated from your various marketing activities. If this is the case, estimate the number of leads generated based on the most recent campaigns.

4. Average Sale Per Customer. This is the average total revenue a client spends with your company over a period of 1 year or per project depending on the type of service you provide. This number may vary for the different services you provide or clients you serve.

For example, a small business customer with 5 PCs may only represent \$2,000 a year, while a larger corporate customer may represent \$20,000 a year or more. This exercise will enable you to determine which customers are most profitable and allow you to determine where to focus the majority of your marketing and sales efforts. After all, if one type of client provides you 10 times the revenue and profits, it stands to reason that you would focus more of your marketing dollars and time on acquiring those customers.

Tracking For Analysis

In my business, I track all prospects (people who opt-in on my web site), prospects pitched (proposals submitted), and sales (customers) using a simple field I set up in ACT!. Because every contact in my database is labeled with one of these 4 fields, I can easily determine my own conversion percentages. To start tracking your own sales numbers, all you have to do is set up a required field in your database with these 4 choices:

1. **Suspect.** This would be for new contacts (lists) that you purchased and added to your database or other potential prospects that you've gotten from local directories or the phone book. You may have left a message for them or sent them a sales letter, but you have not gotten a response yet.

In my business, I consider everyone who opts-in on my web site for a free report a suspect. I only move them to prospect status if they sign up for a free coaching session or request to meet with me regarding a marketing project.

2. **Prospect or Lead.** This is someone who has contacted you and requested more information, an appointment, or that has a project they would like you to bid on. These would also include a person who has responded to a newspaper ad you were running, a sales letter you sent out, or who has filled in a "contact us" form on your web site.

The key to moving them to prospect status is interest. If they do not initiate contact with you in some way, they are still a suspect.

3. **Prospect Pitched.** This is any prospect (lead) that you have pitched your services to. If you sell technical services, this means you have met with them, discussed their needs, and submitted a proposal for consideration.

If you sell technical training, this would be a prospect that you submitted a formal proposal to or that came in and met with you face to face. Leads that don't return your calls should not be considered "pitched" and should stay in the prospect phase.

4. Customer. Simply put, this is anyone who has written you a check.

I would also recommend setting up a required field that tracks the source of every lead. This will enable you to determine what marketing campaigns are providing you the highest return on investment. The exercise that follows will help you to estimate your current sales numbers so you can accurately plan the sales and marketing activities required to meet your goals.

Don't try to be perfect. Close estimates are better than flying blind with no estimates at all. If you have to guess, estimate as conservatively as possible and come back to this exercise a month or two later when you have more accurate numbers.

Finally, let me close this chapter with some very important advice. Your sales team should be tracking their sales activity and reporting it to you on a weekly basis. This should include how many NEW prospects they called, presentations delivered, proposals generated, and sales closed. You might also have them track how many times they solicited a customer for a testimonial or a referral.

Aside from helping you get a better handle on your sales numbers, it will force your sales team to focus on their selling activity. When I get my private coaching clients to enforce this reporting on their sales team, they are often shocked at how LITTLE time and effort is being put into prospecting for new business.

Enforcing this tracking will not be easy, and you should expect some push back (and lame excuses) from the sales team. **Do not bend on this point.** All you need are the numbers and percentages; not the stories as to why they did or didn't do something or lists of appointments they went on or people they talked to. Just the numbers.

At the end of this chapter you will find a sales activity tracking form that your sales team can use to track and report their selling activities on a WEEKLY basis.



Chapter 2 Exercise:

The form below has two purposes: to help you set actual sales goals based on real numbers instead of random estimates and to focus you on your revenue targets. If you want to take these numbers a step further, a similar but more comprehensive worksheet for calculating lead generation and sales numbers can be found in the “Fill In The Blank Marketing Plan” included with this Tool Kit.

Step 1: Determine Your Market Universe

Target Market A: _____ Est. Market Size: _____
Target Market B: _____ Est. Market Size: _____
Target Market C: _____ Est. Market Size: _____

Step 2: Determine the number of new clients you need to acquire to hit your sales goal:

- A. Fill in your revenue goal for the year: _____
- B. Fill in your current revenue projections for the year: _____
- C. Subtract B from A. This is the **gap**: _____
- D. Fill in the average revenue per sale or per customer: _____

Divide C. by D. to give you the number of new customers you need to acquire to hit your revenue goal for the year. For example, if your gap is \$200,000 and the average unit of sale is \$5,000, you need to acquire 40 new customers ($\$200,000 / \$5,000 = 40$ new customers).

- E. Number of new clients needed: _____

Step 3: Determine the number of new proposals you need to pitch to hit your sales goal:

- F. Fill in the number of proposals you generate per month: _____
- G. Fill in the number of new clients you acquire per month: _____
- H. Divide G. by F. to get your conversion from proposal to sale: _____
- I. Divide E. by H. to get the number of new proposals you need : _____



Step 4: Determine the number of new leads you need to generate in order to hit your sales goals:

- J. Fill in the number of leads you generate per month: _____
- K. Fill in the number of proposals you generate per month: _____
- L. Divide **K.** by **J.** to get your conversion from lead to proposal: _____
- M. M. Divide **I.** by **L.** to get the number of new leads you need: _____

Step 5: Break down your numbers into monthly goals:

- N. Divide **M.** by 12 to get your monthly lead generation goal: _____
- O. Divide **I.** by 12 to get your monthly proposal generation goal: _____
- P. Divide **E.** by 12 to get your monthly client acquisition goal: _____

Step 6: Track how many leads each of your marketing activities generate per month:

If you have not tracked leads before, come back to this exercise after tracking your marketing activities for 1 to 2 months. Tracking the source of leads and conversion is going to become increasingly more important as you build your marketing system. Knowing these numbers will help you determine ROI (return on investment) and the effectiveness of various changes in offers, media placement, and marketing messages.

Marketing Activity	Number of Leads Generated	Current Conversion To Sale
Newspaper (<i>example</i>)	100	10%



Daily Sales Activity Tracking Form

Name: _____ Date: _____

Pitch: _____ Total Selling Time: _____

Number of Prospecting Calls or Dials

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17
 18 19 **20** 21 22 23 24 **25** 27 28 29 **30** 31 32
 33 34 **35** 36 37 38 39 **40** 41 42 43 44 **45** 50

Number of Prospects Pitched

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17
 18 19 **20** 21 22 23 24 **25** 27 28 29 **30** 31 32
 33 34 **35** 36 37 38 39 **40** 41 42 43 44 **45** 50

Number of Appointments Set

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17
 18 19 **20** 21 22 23 24 **25** 27 28 29 **30** 31 32
 33 34 **35** 36 37 38 39 **40** 41 42 43 44 **45** 50
 51

Number of Appointments Completed

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17
 18 19 **20** 21 22 23 24 **25** 27 28 29 **30** 31 32
 33 34

Number of Proposals Submitted

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17
 18 19 **20** 21 22 23 24 **25** 27 28 29 **30** 31 32
 33 34

Number of Sales Made

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17
 18 19 **20** 21 22 23 24 **25** 27 28 29 **30** 31 32
 33 34

7:00 am	
8:00 am	
8:30 am	
9:00 am	
9:30 am	
10:00 am	
10:30 am	
11:00 am	
11:30 am	
Noon	
12:30 pm	
1:00 pm	
1:30 pm	
2:00 pm	
2:30 pm	
3:00 pm	
3:30 pm	
4:00 pm	
4:30 pm	
5:00 pm	
5:30 pm	
6:00pm	
7:00pm	

Conversion from call to appointment: _____

Conversion from appointment to proposal: _____

Conversion from proposal to sale: _____

Chapter 3:

Developing A Powerful Marketing Message

When someone asks you, “What do you do?” at a networking event, what is your reply? If you are like most technology sales people, you either waffle on about how you repair, install, or design computer networks or you completely confuse the person you’re speaking to with techno-babble.

Unfortunately, this dry laundry list of “what we do” marketing is the way most IT service companies promote their business. If you ever hope to differentiate yourself from your competition and get the attention of new prospective buyers, this is one bad habit you’ll need to kick.

Below is a truism you should print out and hang by your desk as a reminder:

Your prospects don’t care about what you do, how long you’ve been in business, the technical features of your products, or the laundry list of services you provide.

They ONLY care about how you can save them money, make them money, eliminate their problems, make them look good, or make life easier for them; and the ONLY question on their mind is:
Can I Trust You?

That is why your marketing message cannot be focused on the technical aspects of your business. Instead, it needs to solely and entirely focus on conveying why your prospects should TRUST their business to you instead of your competition. Did you ever stop to wonder WHY so many prospective customers shop you on price?

It’s not because they don’t have the money or because they won’t spend more; it’s simply because your marketing is the same as everyone else’s and gives them the impression that your products and services are no better than your competitors.

No Differentiation = Shop On Price

To experience this for yourself, open your yellow page book to a service or product you have not bought before, or one that you only need occasionally such as carpet cleaning, window installation, or lawn care. Pretend that you were going to make a purchase. Based on the advertisement alone, who would you choose?



If you are like most people, you would pick the companies with the bigger ads, and call them with two questions:

1. Can you do the job?
2. What do you charge?

Why only those two questions?

That's because almost every company advertises the same services and features. You price shop because you have no other means of differentiating one company over another. After all, if they all appear to do the same thing price is the only differentiating factor. Here's another important truism in marketing:

Quality, service, and dependability are EXPECTED.

These terms are vague and unconvincing. We offer "quality" computer repair. We offer good customer "service". Would those words make you want to fire your current provider and rush to the phone to call for service?

Of course not. Everyone says they offer quality service; and you're expected to. If you hope to stand out and get the attention of your prospect, you must demonstrate or **PROVE** why it is more advantageous for the buyer to choose your products and services over your competitor.

Now consider this: when your customers read YOUR ad in the yellow pages (or your web site or any other marketing material you have), are they able to immediately see why they should pick you over the other 10 to 20 companies competing against you for their business? If your message is just an oversized business card with the same laundry list of services as everyone else, chances are you lose a number of deals on price alone and you are only getting a fraction of the business you could have.

The 5 Core Elements Of A Powerful Marketing Message

In order to be effective, your marketing message needs to include these **5 core elements**:

1. A clearly defined target market (your message should state who would benefit the most from your products and services).
2. The **SPECIFIC** problems and frustrations your products and services will solve.
3. The **BIG** juicy benefits of your products and services will provide.

4. How your products and services solve those problems and deliver those benefits better than any other company in your market known as your USP (Unique Selling Proposition).
5. Proof to back up your claims (remember, your prospects are disbelieving and don't know if they can trust you yet).

For example, let's look at the target market for a small, local computer reseller offering basic IT support. Their customer is usually a small business owner with 5 to 30 workstations. They are not technically savvy and have no in-house IT manager. They often view technology more of a necessary evil and nuisance rather than a competitive business tool. They hate spending money on technology and may hold off upgrading or repairing their network until it is absolutely necessary.

In most cases, their network is a mess and does not have sufficient virus protection or security. They have no policies and have not checked to see if their back ups are working properly – ever. **Yet these issues are the last thing on their mind.**

They constantly worry about generating more revenue and staying profitable. They stress over paying bills, making payroll, and getting their staff to do their job. Managing employees is a tiresome job and they feel as though they need to control and supervise everything, even if they shouldn't. In most cases, they run their business in reaction mode, running to put one fire out after another.

If they are going to take time and money to do something proactive, it's usually around growing or expanding the business, marketing it to generate more sales, or improving their products and services.

They hold to the belief of “if it ain't broke, don't fix it”. They have to because they are too busy putting out fires, servicing customers, or dealing with other urgent issues. They don't have TIME to think proactively.

This is one of the reasons why it is so difficult to sell a business owner *proactive* technology solutions or services that are not directly tied to revenue production or cost savings: if it ain't broke, they don't want to talk to you about fixing it.

Keep this in mind: EVERYONE has someone supporting their network. They have a power user on staff that does some of the day-to-day repairs and maintenance, they have a brother in law who helps them on the side, or they have one of your competitors doing it for them. **So what does all of this have to do with marketing computer support services to them?**

In a word, EVERYTHING.



To get your prospect's attention, you have to compete against all of the other day-to-day distractions.

Your prospect is not sitting at his desk anticipating your marketing message. He has a million other things on his mind that are far more urgent and important.

Can you see why your laundry list of technical services doesn't appeal to them? It never even gets into their consciousness.

To be effective, your marketing message must be able to divert your prospect's attention just long enough to demonstrate how your products and services will help them eliminate some of the day-to-day problems they struggle with. How it would help them lower IT costs, increase revenue, improve customer service, make them more competitive, and get their employees off their backs. In short, help them to improve their position in business and in life.

Now let's suppose your target market was the IT Manager of a corporation with 500 plus users. Would you market to them the same way? Of course not. They want solutions that are going to automate or simplify the maintenance of their network. They want to look good to the boss and stay in control. They also want solutions that will truly keep their network safe, running smooth, and eliminate end-user issues.

This is why knowing your target market is so critical. It allows you to understand what they think about most, what trends affect them, what they worry about, what an average day in their life is like, and ultimately, what you'll need to say or promise to get their attention.

Understanding And Communicating The Problems And Frustrations You Solve

Now that you know who your target market is, you have to understand how your products or services will solve their problems. Communicating (and even understanding) the key problems you solve for your target market is one of the most critical elements of the marketing message.

If you cannot convey this well, or if you talk about solving a problem your target market doesn't care about, your target market will not respond. It's that simple. Why does talking about the problems you solve work so well?

Human beings (especially business decision makers) are constantly immersed in problems, difficulties, and disappointments. Because of this, they are constantly looking for relief from the anxiety created by these problems. If you can clearly communicate how you can solve those problems, you've got their attention.



Being able to succinctly define the problems you solve provides another key selling advantage: credibility. **The reader is far more likely to believe you can actually solve a problem if you can define it.**

Let me give you an example. The headline below is designed to not only flag the target audience (small business owners), but also outlines the key frustrations small business owners have with IT service firms:

**To All Small Business Owners:
Forget Dealing With Arrogant Techno-Weenies
Who Are Impossible To Reach When You Need Them,
Who Don't Return Your Phone Calls, And
Who Confuse You With "Geek Speak"...**

**We'll Make All Of Your Computer Problems Go Away AND Give You A Real,
Live, Plain-English Speaking Person To Talk To 24 Hours A Day, 7 Days A Week
When You Have A Computer Network Problem**

This headline causes you to believe that this company clearly understands the frustrations of dealing with most IT service firms. Because they clearly understand and identify this as a problem, the natural thinking is that they know how to solve it better than anyone else. If I was a small business owner dealing with this problem, they would be the natural choice.

Developing Benefit Statements

Benefits are simply the flip side of problems. Almost everyone understands this. The hard part is being able to describe the benefits of your products and services in terms of RESULTS rather than FEATURES.

For example, fast computer support is a feature. The fact that you'll never have to wait more than 20 minutes to get your network back up is a BENEFIT. Quite often, benefits are best preceded with the outline of a problem. Take the headline above. First, we defined the problem, then we talked about the benefits.

Here are some other headline examples that talk about the problem first then the benefits:

**Attention Small Business Owners Who Are Sick And Tired Of
Spam Invading Their Inbox; We'll Show You How To Stop Spammers
In Their Tracks Without Interfering With The E-mail Messages
You Want To Receive**

Wanted:

Small Business Owners Who Are Tired Of Dumping Money Into Their Computer Network Without Seeing It Pay Off!

We'll Show You How To Finally Get Your Network To Lower Costs, Increase Revenue, and Double or Triple Employee Productivity

To create your benefit statements, start by making a list of all the features of your services. This would include how your product is constructed, your store hours, location, authorizations, staff credentials, state of the art equipment, etc. Next to each of these features, write one or two BENEFITS or advantages they offer to your customers.

When writing benefits, be as specific as possible. “Prompt, reliable service” is vague. Turn that into “Technicians On Call 24 Hours a Day, 7 Days a Week Guaranteed To Arrive Within 1 Hour of Your Call Means You Never Have To Wait More Than A Few Hours To Get Your Network Back Up” and you’ve got a more specific benefit to the customer.

Here’s another example: “Largest parts distributor in the nation” does not tell me specifically how I will benefit. If I thought about it, I could draw some conclusions. But you don’t want to make your customers GUESS as to what you can do for them.

Instead try, “Largest Parts Distributor In The Nation Guarantees Your Parts Will Always Be In Stock And Delivered In 24 Hours Or Less”, or “Largest Parts Distributor In The Nation Guarantees Lowest Price To You Because We Buy In Volume”. Most business owners simply do not list all of the benefits of doing business with them in their marketing materials simply because they are under the erroneous assumption that everyone **already understands and appreciates** the benefits of their products’ features.

This is an expensive mistake that is costing you plenty. People do not buy things or products for what they are (features). They buy things for what they DO (benefits), and the burden falls on your shoulders to make it as easy as possible for your prospects to understand what they are. Once you have these benefits, they should be used as powerful bullet points somewhere in your letter, ad, or web site.

By listing all of the benefits of your products and services in bullet points, you are making it easy for your reader to scan your letter and understand them quickly. Benefits should also contain “emotional juice”. For example, if I were selling test prep software for MCSE Certification, I could say:

“Helps you to pass exams quickly”



The problem with that bullet is that it doesn't hit any emotional nerve, and it doesn't tell the reader what that means to them. It's very bland. Look what happens when we tie in a bit of emotion to the bullet:

“Virtually eliminates the frustration and embarrassment of failed exams and low test scores.”

Much more powerful and specific. It puts the reader into the pain emotions of failure and embarrassment making it more real to them. Whenever writing bullets, think in terms of what the good and bad IMPLICATIONS are and then use that as emotional juice to make the bullet more compelling.

Here's an example of how to use bullet point benefits:

- We guarantee a 60-minute or less response time to your computer emergencies, even after normal business hours and on weekends.
- We can detect and prevent computer problems before they arise saving you from costly and unexpected downtime.
- We will LOWER your overall IT support costs by maximizing the performance and life of your existing equipment.
- Our technicians will answer your questions in PLAIN ENGLISH and will not confuse or talk down to you with techno-babble.
- We offer fixed price quotes on all jobs to ensure projects are completed on budget and without “surprise” or hidden fees.
- All technicians are vendor certified and hold 7+ years experience which means we won't use your project as a learning experience.

Building A Powerful Unique Selling Proposition

Your unique selling proposition is simply the answer to the following question: Why should a customer favor you with their business over any and every other company, option, or solution available to them? This is a tough question, but you have a lot riding on the answer. Most business owners or sales people have never taken the time to refine the answer to this question, even though they understand its importance.

Chances are that you completely lack a USP, or your current one has not been refined into a clear, powerful, and compelling statement that acts as an irresistible enticement to potential customers.



See if you can fill in the blanks below for your company:

Our business/product is the only _____ that delivers _____ to _____.

You don't have to be unique in every space to have a USP, but you need to have at least one. And whatever your USP is, it is important that it is meaningful, significant, and compelling. Being different just for the sake of being different is not going to do you any good.

So how do you develop your USP?

Start by getting a clear picture of your target audience. What problems or frustrations do they have when dealing with other vendors or suppliers of your products and services? What needs are going unfilled? What do they REALLY want? A classic USP that most people recognize is: **“Fresh Hot Pizza Delivered in 30 Minutes or Less, Guaranteed”**. I don't even need to say the name of the company in order for you to know who I'm talking about. Here's another: **“When it absolutely, positively, needs to be there overnight”**.

Both of these companies found one major need their clients had that was going unfulfilled. There are a couple of things you should notice about their USP:

1. They deliver a powerful, meaningful, and specific benefit using only a few words. Their USPs are not even a complete sentence.
2. They do not require an explanation. Their message is not complicated, vague, or technical in any way.
3. They both make a single promise. They don't try to be all things to all people. There is no mention of a special “family recipe” or of “cheapest prices”.
4. They both set their companies apart from every other competitor.

When you look around at **the majority of businesses today, most do NOT own or advertise a USP**. This is a mistake that costs companies a considerable amount of revenue. If you would like to stop competing on price, then you need to give your customers a reason why they should pay more to do business with you over the other options available.

When you give your customers added value, easier purchase terms, a better warranty, faster service, or a guarantee, most will be willing to pay a bit more for that value.



A USP can take on many forms. Below are some USP starters:

- It can be your approach or methodology to solving a problem or implementing a solution.
- It can be the niche (target audience) or solution you specialize in.
- It can be the speed of your service.
- It can be a financing or payment option not offered by your competition.
- It can be convenience of location, hours of operations (evening and weekend hours), or additional customer service you provide.
- If you offer products, it can be quality, durability, selection, or prices.
- It can be unique merchandise or proprietary software you own.
- It can be a better or money-back guarantee.
- It can be your marketing!

A quick word about using “quality service” as your USP: if you are like most IT service firms, you feel that your USP is your quality service. While that might be true, just saying so is too vague and does not effectively relay the **specific** benefit it offers to the customer. Quality is a nebulous term because it can mean different things to different people. Quality and service done right is EXPECTED. After all, no company advertises substandard products or services.

If you truly believe that your USP is the quality of your products and services, you will need to find a way to demonstrate and communicate that to your customers in a way that is both meaningful and specific.

Remember Ginzu knives? Their infomercials demonstrated the quality of their knives like no other by using them to saw through a tin can and then slice a tomato.

Look at how Rolls Royce demonstrated the quality of their cars with the following headline: **“At 60 Miles Per Hour, The Loudest Noise In The Rolls Royce Is The Electric Clock”**. Ford Motor Cars demonstrate their quality in a different way by using the slogan “Built Ford Tough”. Instead of just saying, “Hey, we build quality trucks,” they show their vehicles hauling heavy loads and driving on rough roads.



Recently, the president of the company has been featured on ads saying, “The biggest complaint we get from customers is that they can’t find a good used Ford Truck...our customers keep them forever.” **If you are going to use quality as your USP, don’t just list every detail of the construction of your product or service. Glorify it and make it seem special.**

Case Study: Schlitz Beer

In 1920, Schlitz Beer was struggling to gain market share over its competitors and needed to find a way to differentiate in a highly competitive market. What they did was simple yet absolutely brilliant.

In their advertising, they explained that even though they were on Lake Michigan, they drilled down five thousand feet to get the right combination of water with the proper mineral content to produce an exceptional tasting beer. They spent over 5 years refining a mother yeast cell to produce a rich tasting flavor. They distilled the water 3 times to purify it, and steam cleaned the bottles at very high temperatures to ensure they were completely sterile.

Now, here’s the interesting part: Almost every other brewery was using the same process to process and bottle their beer, but Schlitz was the first company to advertise it. This is a perfect example of a company using creative thinking to turn an everyday process that wasn’t even unique to them into their own quality USP.

Here Are 5 Things Every Great USP Should Have:

1. **It must be a singular, stand-alone statement that requires no further explanation.** Don’t try to be cute or abstract because your message will be completely missed. You should be able to communicate it to your grandmother without having to explain it.
2. **You have to be the ONLY company that can make the claim.** Claiming that you are the “right” solution, or a “quality” company means nothing.
3. **It must promise to solve a problem or provide a benefit that your customers care about.** Being different for the sake of being different is of no value.
4. **It has to have teeth. A weak USP is about as valuable as no USP.** It must fill a need or make a promise that none of your competitors dare to make.
5. **You MUST be able to deliver on your USP.** There is nothing worse than making a claim, attracting clients, and falling flat on your face.

Some Example USPs:

- We are the only IT firm trusted by major banks, government agencies, and other financial organizations in <Chicago> to deliver fail-proof security systems. In the 15 years we've been doing this, none of our clients have ever experienced a security breach. Our services are for the company that simply cannot afford to be compromised.
- Other IT service companies simply look to put a band-aid fix on your computer network problems so they can appear cheaper and win your business. This allows them to charge you MORE MONEY in repeat service calls because they never fix the root of the problem. What we do is help you build a solid, reliable computer network that supports your strategic business goals long-term. By doing this we eliminate or significantly reduce the on-going network problems you experience and lower your overall IT costs.
- We guarantee our IT projects will be completed on time, on budget, and done right, or we'll pay YOU.
- Other IT Service firms treat small business clients as though they are a second rate citizen. They don't return calls quickly and send in their newbie junior technicians so they can reserve their senior technicians for bigger clients. We LOVE small business clients and treat them like a million dollar account.
- We guarantee our software will help you get 15% - 40% more productive work from your employees without adding to your overhead or their work load.

There are hundreds of other ways to state your USP. As you can see from the above examples, it will set you apart from your competition and give your prospects a reason to choose you EVEN IF your prices are higher.

Backing Up Your Claims With Proof

Once you know the specific problems you solve and the benefits you deliver to your customers, you've only got half the battle won. **Now you have to prove it.** People are cynical and skeptical of everything. That goes double for offers and claims tied to selling them something.

Your prospective client has been lied to, disappointed, and "taken" so many times that their natural reaction to anyone selling them something is caution and distrust. Quite often, it is safer for them to do nothing than to trust you and your offer and risk making a foolish decision. That is why proof is the final essential element in any marketing message. Without it, even the best offers will get tossed aside from disbelief.

A Multitude Of Ways To Provide Proof

Here is a short list of ways you can provide proof to back up your claims. The more you use in your marketing, the stronger your argument will be:

- Testimonials
- Newspaper articles/press stories
- Awards you have won
- Statements from well known experts
- Charts and graphs
- Lab tests/independent studies
- Survey reports
- Statistics/industry facts
- Client lists
- Before and after photos
- Live product demonstrations (think infomercial)
- Endorsements
- Years in business
- Certificates/memberships

Out of all the ways to provide proof, the most commonly used and easiest to obtain are client testimonials. After all, anything someone else says about you is always going to be more credible and believable than anything you can say about yourself. This is why referral and word of mouth marketing is so valuable.

Testimonials should be much more than, “Doing business with XYZ company is great!” This is very non-specific and meaningless to your cynical prospects.

A great testimonial should specifically outline what benefits your customer received as a result of doing business with you, and/or eliminate a common fear or objection that most prospects have before doing business with you.

Here’s an example of a weak testimonial:

“We love XYZ Company. They are just great.”

This testimonial is weak because it doesn’t give any specific benefits the client received as a result of doing business with you. All it says is that you did what was expected of you; no more and no less.



Here is an example of a meaningful and specific testimonial:

“Using XYZ to support our company’s computer network has turned out to be one of the smartest business decisions I have ever made. They have lowered my IT costs by 16%, eliminated the day-to-day computer problems that were interfering with my business, and still maintain the highest level of professionalism and responsiveness that I have ever seen in any IT service firm. You would have to be a fool to trust your computer network to anyone else.” - *John Doe, Anywhere USA*

On the Sales and Marketing Templates CD, there is a “Client Feedback Form for Testimonials” that is also a very effective tool for capturing testimonials. Here’s how it works:

1. Cut and past the form onto your company letterhead.
2. The next time you are visiting a client’s site, walk into their office and ask, “Would you do me a favor?”
3. When they say yes, hand them the Client Feedback Form and say, “Could you please take a minute to fill this out while I’m here working on your network? I’ll collect it when I’m done.”

If you use this simple 3 step process, you will get a large number of great testimonials UNLESS there is a problem with your service. The key to making this system work is handing the form to the client. Do not mail or e-mail it to your clients or you won’t get anywhere near the same response back.

One of my clients got his technicians in the field to eagerly embrace this process by holding a contest. The technician that brought in the most completed forms over a one month period received a \$500 cash bonus. They collected over 33 testimonials in ONE MONTH!

Chapter 3 Exercise:

This week, go to work on developing each of these 5 core elements of your marketing message. If you feel unsure or a bit lost at first, don't be discouraged. This is not a simple task. As you progress in your ability to craft powerful marketing messages and in your understanding of the marketing process, you will most certainly come back and revise what you've written.

Remember: the ultimate test is not what you, your employees, or your spouse thinks. The ultimate test is whether or not your customers respond. Create your message, test it in a marketing campaign, and build on what you've learned.

Here are the 5 core elements you will need to develop:

1. A clearly defined target market (your message should state who would benefit the most from your products and services).
2. The SPECIFIC problems and frustrations your products and services will solve.
3. The BIG juicy benefits your products and services will provide.
4. How your products and services solve those problems and deliver those benefits better than any other company in your market (Unique Selling Proposition or USP).
5. Proof to back up your claims.
Note: work on getting at least 5 – 6 testimonials using the 4 step plan included in this chapter.

Use the following forms as a guide in helping you step through this process. If you have technicians or sales people on staff, have them complete these forms independently, then come together and share what you've developed (they may think of an approach you've overlooked). It will also be a great sales exercise for your team to complete.

Important: You may want to read Chapter 4 and complete your customer research calls before completing these documents and tackling your core marketing message.

Competitive Analysis

Identify your competition and the main benefit they emphasize so you can identify where your strengths stack up. A good place to research your competitors would be on the Internet, the yellow pages, or in the newspaper.

Direct Competition: Companies who are in the same business as you and go after the same customers.

Direct Competition:	Main Benefit Emphasized (or their USP):

Indirect Competition: This would include companies who target the same customers as you, but who only offer a portion of what you do or who offer an alternative to your service.

Indirect Competition:	Main Benefit Emphasized (or their USP):

Do-It-Yourself Competition: This would include raw material suppliers and do-it-yourself kits.

Do-It-Yourself Competition:	Main Benefit Emphasized (or their USP):



USP Development

In each of the categories below, list how you excel over your competition. If you cannot honestly demonstrate how you are better than you competition, ask yourself, what **COULD** I offer that would be more advantageous, attractive, or irresistible to new customers?

Quality:

Price:

Selection:

Guarantee:

**Customer
Service:**

**Payment
Options:**

**Product
Innovation:**

**Delivery &
Shipping:**

Other:



Feature - Benefit Development

List the features of your products, services, and your company that make you unique. Then list the specific benefit it provides to your customers:

Feature:

Benefit:

Feature:

Benefit:

Feature:

Benefit:

Feature:

Benefit:

Feature:

Benefit:

Feature:

Benefit:

Feature:

Benefit:



Overcoming Objections

Think of the top 3 or 4 reasons your customers do NOT buy from you, and then write out a way to mitigate this objection or eliminate it all together.

Objection:

Mitigate:

Objection:

Mitigate:

Objection:

Mitigate:

Objection:

Mitigate:

Using the information you outlined in the previous forms, use the sheet below to come up with as many reasons why a new customer should choose you over a competitor. Once you have this written out, put it on your web site and in every other marketing piece you send out. Use one of the following headline templates:

“X Reasons Why You Should Buy All Of Your Widgets Through XYZ Company”

“X Reasons Why You Should Trust XYZ Company To (Develop Your Next Application)

“X Reasons Why (IT Managers) Trust Us To Upgrade, Fix, And Support Their Computer Network”

Reason 1:

Reason 2:

Reason 3:

Reason 4:

Reason 5:

Reason 6:

Reason 7:



Your 4 Step Plan For Capturing Killer Customer Testimonials

Step 1: Develop The Specific Points You Want To Make With Your Testimonials

Determine what is most important to your customers AND what common fears and/or objections most prospects have before doing business with you. These are the points you are going to highlight in your testimonials. For example, if “your price is too high” is a common objection you hear, write that in the first space below. Next, you’re going to develop at least 2-3 testimonials from customers explaining why your price is fair and reasonable.

1.	
2.	
3.	
4.	
5.	
6.	
7.	

Step 2: Select and Call Your Customers

Make a list of your very best clients. Call these customers using the script below to extract your testimonials.

**Opening Statement:
Tell Them The
Purpose Of Your Call.**

“Hello Mr. Prospect, this is John from XYZ company. The reason I am calling today is because I need your help. (Pause).

We are working on a new marketing program here to get the word out about our products/services. Because you are such a great client, I was hoping you would be willing to provide us with a short testimonial about our products/services that we could use in our marketing materials.

Don’t worry, I won’t burden you with another to-do on your list. If you would be willing to take about 5 minutes with me right now on the phone to get your answers to 3 simple questions, I’ll write it for you and then e-mail it to you for your changes and/or approval. Do you have a few minutes now?”

Wait for answer. If they say no, then ask, “OK, when would be a better time to call you back?”

“Great!”

- 1. First of all, can you tell me why you decided to do business with us in the first place?*
- 2. What do you like most about our services/products? Why is that important to you?*
- 3. In your own words, why would you recommend someone do business with us?*

Step 3: Confirm And Offer A Gift

The reason you want to provide a gift is to induce reciprocity and ensure that they follow through. This gift should be something with value. Don’t be cheap! Think of how much money their testimonial will be worth to you in increased sales! I recommend gift certificates, free products, or gift baskets. You also want to send it immediately. Make sure they get their gift within the week for maximum impact.

Feed It Back And Offer Gift:

“So, if I understand you correctly, we were able to (feedback all answers to questions), is that right?”

Great. I really appreciate this favor because I know how busy you are. With your permission, I’d like to send you a small gift of (insert gift) just as a token of our appreciation.

I’ll write this up and e-mail it to you within the hour. Can I rely on you to send me back any changes and/or an approval?”

Wait for answer – get them to agree to a time when they will send this back to you. Do not let them get off the phone without making a commitment or chances are you won’t get your testimonial!



Step 4: Write The Testimonials

Write the testimonials using the information gathered on the call. Do NOT rely on customers to write their own testimonials because 1) they won't take the time and 2) they don't know how to write a testimonial to overcome your sales objections and highlight your benefits.

Here are some testimonial starters:

- We believed that XYZ products/services were all the same until they used yours and found out...
- They used a competitor's products/services in the past and now use you because...
- They are amazed at the (insert benefit) your products/services provide because...
- Have (insert common objection –thought price was too high) until they found out...
- Didn't think your product/service could actually (insert benefit) until they tried it and got this result...

1.	
2.	
3.	
4.	
5.	