

# Lifecycle Marketing Master Plan



Target + Attract   Collect Leads   Educate + Help   Offer + Close   Wow + More!   Get Referrals

Discover what step to take next in your business  
and see if marketing automation is a fit for you!

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## Great choice!

When you use the Lifecycle Marketing Master Plan to evaluate your business, it reveals where the opportunities (or holes) are so you know what to do next and how to prioritize. Where to get the most impact and ROI — and fast. It's my map, my guide, the ultimate business framework. We use this with companies in broadcast media and high tech everyday. And now it can be yours, too!

## A look at the plan

The Lifecycle Marketing Master Plan is built on three main pillars, or phases: attract, educate + sell, and wow. When you have solid marketing strategies and tactics deployed in each phase of the Lifecycle Marketing Master Plan, then your company will excel! Following this plan allows you to establish a unified and continuous process for guiding prospects toward a purchase and driving ongoing engagement.

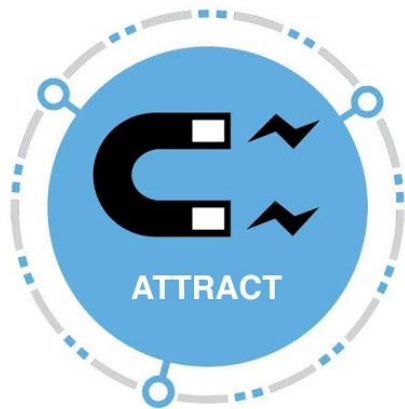
## Holes = Opportunities

As you look at the Lifecycle Marketing Master Plan, take note of where you have holes, or opportunities, in your company. I suggest that you literally take notes as you dig into this plan and mini challenge. When something resonates with you, write in the margins of this resource! Or make a note on your phone.

You'll be using these thoughts and insights as you level-up your marketing, and your future success! And, in case you're wondering, you're not alone here. We all have holes and opportunities in our businesses.

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# Lifecycle Marketing Master Plan



## Target + Attract

Identify your ideal customer + give them what they want.



## Collect Leads

Set up a Sign up / Opt In system to capture all of their info.



## Educate + Help

Provide the helpful info your prospects crave. Build know, like, trust.

## Offer + Close

Make it easy for your customers to buy. Don't leave money on the table.

## Wow + More!

Welcome + follow-up system. Offer more and increase LTV

## Get Referrals

Get testimonials and referrals on demand.

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## Target + Attract

Before you can target your prospects with your marketing, you need to know them. That's why identifying your ideal customer persona is the first phase of the Lifecycle Marketing Master Plan. Maybe your perfect customer is the director of engineering at a broadcast station or an IT person at a playout facility.

When you think about the last 10 or 20 people who bought from you (or the first 10 people you'd like to buy from you). How old are they, where do they live, what problems do they have, what are their values, and what do they want?

Capture whatever information you can and then categorize prospects by their interests, behavior, demographics, location, and any other detail that differentiates them as potential customers. By putting these categories together for a particular type of prospect or customer, you are creating a persona or ideal customer avatar. If you have two or three perfect customers, come up with a distinct name for each one. When you really know your prospect, you can keep your marketing and messaging personal, which makes all the difference when building "know, like, and trust."

Next, identify how they find you. What information would be incredibly helpful to them, and what would draw them in? Using your ideal customer personas as a guide, you can move forward in providing prospects with the right messaging and information on the right communications platform.

You can use your own experience with current customers to define your ideal customers. At the same time, tools such as your website and marketing automation can help you identify prospects who, in doing their research, have shown interest in your business, products, or services.

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## **Collect Leads**

When someone is interested in working with you, how do you capture their data? It's crucial to have a simple and good way to collect your leads. When you're at NAB or IBC can you snap a photo of their business card on your phone and automatically bring them right into your database? Can you have someone fill out a form on your website or Facebook and send them directly into your database? If you meet someone at a virtual event do you have a link you can pass to your prospects that let someone automatically book a meeting with you and get an SMS reminder? We all need to have a really good system in place that lets people join our group, our tribe, our email list... Make it easy for people to indicate interest, sign up, or join!

## **Educate + Help**

Once someone raises their hand and indicates interest, how do you educate and help them? You want to create an experience where your perfect customer can learn something from you. You could provide emails, videos, other great info that addresses typical objections. When people talk with you or message you with questions, what are the things people always ask? They will get the info they need from someone – why not from you? Can you create a technical white paper or guide that your prospects can sign up for? And what about automatically sending more useful info to them on that topic they are craving info on? If you can help them, be of service to them, and give them the info they are personally interested in, then they will be more likely to buy from you. Be the expert!

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### **Offer + Close**

How are you set up for offering and selling? If you're all set here, that's great. But there are so many people who need to work on this piece.

If it makes sense for your company, do you have a good way for someone to try out what you offer, maybe download something that you offer, or some way for them to check out what you are selling? Can you offer a software trial and have automated follow-ups that help them get up and running and move them toward a purchase?

Is it easy for them to buy, is pricing clear? Can they easily send you a payment or is it difficult? Further, it's good to have a system in place for the times that your prospect doesn't follow through to make that first payment.

### **Wow + More**

I like to call this Wow + More because first, we need to deliver the purchased product or service as promised, and second, we can look at ways to over-deliver. You can add that special touch they will appreciate and remember, plus distinguish yourself from other companies and competitors.

Can you give them a quick call and find out if they liked their appointment? Can you send them something really wonderful that they wouldn't expect — chocolates, a book, something custom they'd love? What can you do to help them to like you even more? How can you show your customer they are special to you and matter? And for the next step, can you automate that process so that it happens every time?

Ultimately, by wowing your current customers, keeping them happy and coming back for more, you not only build loyalty but also set yourself up for testimonials and referrals, which is a fantastic way of getting new business.

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## **Get Referrals**

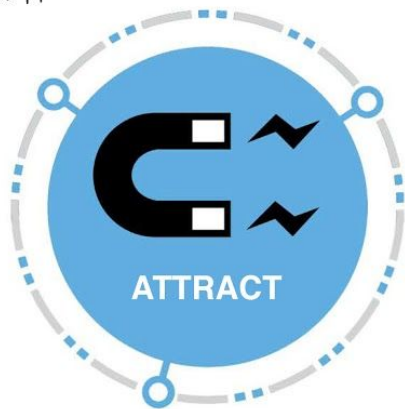
We all talk with friends and colleagues before we buy. So, doesn't it make sense to have a plan in place to automatically get reviews, Google stars, and referrals? Yes!

Everyone can benefit from having a system in place to ask for reviews on Google, Facebook, Yelp, or wherever your customers hang out. NPS, or net promoter score, requests can go out to customers asking for ratings and input. And if we need to improve, it's good to know that, too. It's wonderful to have a system in place that ensures everyone is happy and we're spreading even more happiness.

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# Lifecycle Marketing Master Plan

Fill in your details  
below! Look for the  
holes (opportunities)...



Target + Attract



Collect Leads

Educate + Help

Offer + Close



Wow + More!

Get Referrals



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## Your Mini Challenge!

### Step One:

Take 10 minutes or so and write down what you've got in place now in your business for each part of the Lifecycle Marketing Master Plan. If you don't have anything in place for one of the sections, then make a big "O" for opportunity in that spot.

For example, you might have tactics in place that target + attract, and you might have a system in place for collecting leads, but not have a way to educate your prospects. Write it down!

Fill it in the above page for your business. And if you need inspiration, you can check out the following pages for a couple of real-life examples.

### Step Two:

You will have one or more O's in your Lifecycle Marketing Master Plan. Choose one, any one. If you feel one is easier and will get you a quick win, choose that one first. Don't worry, you can keep it simple to start with. Just pick one and start.

For example, if you need a way to educate + help, you could choose a webinar or white paper/checklist/guide campaign.

Set a date on which you will offer your webinar or white paper/checklist/guide. This date should be two to three weeks out at the most!

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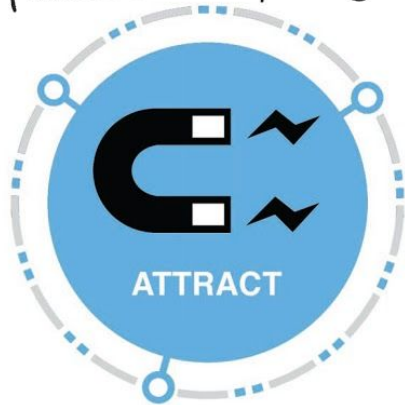
### **Step Three:**

Make a quick plan and start on this one tactic. Feel free to keep it simple and pare it down. Get a quick win, and get it out there! You got this! If you want more info on how to implement your chosen tactic, check out the [7 Marketing Basics book](#).

Feel like you need some inspiration? See the real-life examples on the next two pages.

# Lifecycle Marketing Master Plan

software company



## Target + Attract

Sometimes call spreadsheet or rolodex contacts??  
White paper campaign

## Collect Leads

website form  
Smartphone app to capture leads into CRM

## Educate + Help

Not doing much here, but I should!  
Webinar campaign

## Offer + Close

offer a free trial, auto follow-up with setup info and pricing

## Wow + More!

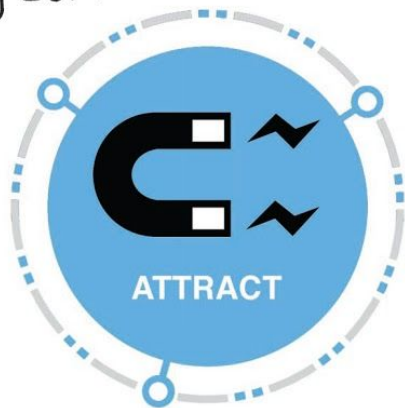
Monthly online event  
Helpful email series - evergreen nurture

## Get Referrals

Helpful email series - our evergreen nurture includes requests for referrals, testimonials

# Lifecycle Marketing Master Plan

My service business



## Target + Attract

Weekly open house /  
virtual coffee hour  
Facebook ads and posts

## Collect Leads

Sticky notes  
sometimes

Checklist campaign  
with sign up on web  
and social

## Educate + Help

best lead  
follow-up  
campaign

## Offer + Close

wait till people  
call or stop in??

Book a meeting  
(or demo)  
campaign

## Wow + More!

Mail gift to each  
new client

## Get Referrals

Automatic task to  
call each new client  
after 1 week and  
6 weeks

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## ✨ Bonus for you

[Join the \(free\) 7 Marketing Basics Facebook Group here.](#) Most marketing people feel overworked, overwhelmed, and are spinning their wheels trying to figure out what's actually working in digital marketing. And most CEOs and business owners hate doing marketing. They feel like they need to do it but it takes time away from what they really want to spend time on. Join the free group and get up-to-speed on what marketing works and learn how to do it. Get the sales and results you want and have peace of mind again! And then you can spend all of your extra time on what you love most – working on your business, talking to customers, beach time, or family time. You can text “7basics” to 1-530-203-5703 for more info. Talk soon!

*Cindy Z*

