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DISCIPLINED MARKETING

FOR BUILDING A PROFESSIONAL SERVICES PRACTICE

BY: ROBBIE KELLMAN BAXTER & LINDA POPKY



IS THIS E-BOOK RIGHT FOR ME?

This e-book is right for you if you are a consultant, professional services provider, or small business owner who would like to expand your business by more effectively using marketing initiatives.

You don't need to be a marketing expert. In fact, we've designed this material for those of you for whom marketing is not your main area of expertise. You probably have a lot of great ideas about how you might market your business, but you may lack the money, time, or expertise to do everything you want to do. The purpose of this e-book is to help you focus on the right activities that will get you the results you need.

We are assuming that you have tremendous value to add, and a unique area of functional or process expertise that will dramatically improve the condition of your clients. And we want to help you to get the word out and have ample opportunity to make a positive impact.

When you read this e-book, you will see a lot of examples of the different approaches successful consultants have taken to use marketing to achieve their goals. We hope that the combination of abundant examples and a lean, easy-to-use framework will inspire you to take a more focused approach to marketing and that you will be able to measure the impact of your investment.

If you'd like to build your business, expand into new markets, or more effectively reach existing customers, this e-book is for you.

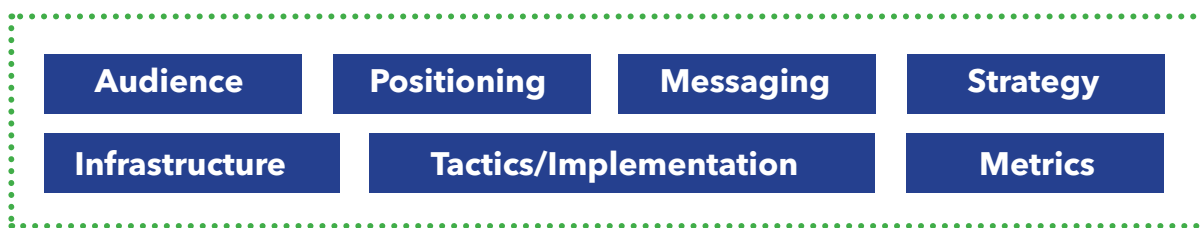


MARKETING IS MORE THAN SOCIAL MEDIA ...A LOT MORE

With all the hype around social media tools, it's easy to be misled into thinking that a marketing campaign in today's world should start and end with social media.

While many businesses do profit from effective use of social media tactics, like Twitter, Facebook, or e-books, it's important to remember that without a good strategy these tactics may be wasted. The basics of good marketing still apply: You need to start with a quality product or service that meets the needs and wants of a particular target audience. It should be packaged attractively, available at a good value, and promoted effectively so that your prospective audience is aware of what you have and incented to take the next steps to find out more.

We believe that marketing requires discipline, and have developed a model we call Disciplined Marketing. There are seven key marketing elements in the Disciplined Marketing Framework™ :



Without these elements, the value of any investment you make in marketing will be less than optimal. We will elaborate on the nature of each of these elements later in this e-book, and show you how you can apply these principles to maximize the return on your investment in terms of time, effort, and money.

Consider the construction of a new house. While a new homeowner might be most excited with choosing the interior design and finishes that are most visible when the house is completed, it's the architect and general contractor's preparation work that determines the success of the overall project—a properly poured foundation, well-placed plumbing and electrical, walls and floors that are level and plumb, etc.

You choose these professionals on the basis of their expertise, and the attention they'll provide to the fundamentals beyond just the cosmetic details. Why then would you create your logo, website, or Twitter account without first understanding your own fundamentals—such as target audience, how you're positioning your offering to meet their needs, and the best strategy for getting your message across?

Jumping into a marketing campaign without considering the Disciplined Marketing Framework™ is like jumping into a car and starting to drive, without knowing where you want to go or the purpose for your outing.



HOW MARKETING HELPS YOUR BUSINESS

We joke that there are only 3 types of businesses who need Marketing: those that are growing and want to grow more, those that need to maintain their existing presence, and those that are not growing and need to get back on track.

Marketing enables and drives the process of buying and selling a product or service. Prospective customers or clients have a need to fill (even if they're not consciously aware of it); the marketer helps them find the product or service that best meets that need.

While having quality products and services is certainly at the core of any successful business, we know dozens of very talented, competent professionals who have not been able to build demand for their services. By and large, the people who have been successful in consulting ARE talented, but the sobering fact is for every successful consultant, there are a handful of equally skilled experts who have failed due to ineffective marketing (or no marketing at all).

Marketing helps bring both parties together, so that the customer learns how the seller's offering may meet his need and the seller is able to provide a solution that meets the customer's expectation. Ideally, this results in a series of sales and a long-term ongoing relationship.

We define the Marketing Relationship Process with 5 steps:



- 1 Awareness:** Prospective customers must first become aware of you and what you offer. If they don't know of your services, nothing else matters.
- You build awareness by letting colleagues, friend and family know what you do, and making it easy for them to refer you.
 - You build awareness by attending events and talking to people in your industry and professional groups.
 - You build awareness by getting quoted in relevant news outlets.

- 2 Consideration:** Once prospects know about you, they have to feel comfortable enough with you and what you offer to **consider** using you. This means clients need to consider you a quality provider with a service that meets their needs, available at a good value in a timely manner.
- You build consideration by reaching out to your network and offering valuable content.
 - You build consideration by understanding your target audience, and by knowing as much as you can about what motivates them to make purchase decisions.
 - You build consideration by educating your audience on how you can help them and when they should call you.



3

Purchase: In most cases, an initial purchase is not your real goal—it's a first step along the way to building a long-term ongoing relationship with your client.

- You get people to purchase by having offerings at multiple price points and making it easy for them to buy from you.
- You get people to purchase by having thought provoking conversations that show you understand their issues and concerns.
- You get people to purchase by showing them that because of the tremendous value you offer, working with you is not only logical, but makes emotional sense, too.

4

Preference: Once the client has tried your offerings, your aim is to create Preference, the state where all else being equal, a client will go out of their way to choose you as their provider—the way some people will go out of their way to find a place that serves Coke vs. Pepsi.

- You build preference by putting your clients' interests first and by focusing on the shortest path to results.
- You build preference by delivering outstanding results in your initial engagement with a new client.
- You build preference by building a peer relationship with your clients, not by being a vendor. People want to buy from people they like and respect, whom they feel are self-confident and exude an aura of success.

5

Loyalty: The ultimate stage in the Marketing Relationship Process is Loyalty. This is where clients ask for you by name, as in, "Get me Robbie and Linda for marketing!" And, if you're not available, they'll wait until you are.

- You build loyalty by investing in ongoing relationships.
- You build loyalty by being a partner your clients know they can trust.
- You build loyalty by being proactive in proposing new strategies and solutions to your clients.

As loyalty increases, price sensitivity decreases. After a heart surgeon saves your life with a complicated surgery, it is unlikely you will switch to another physician to save a few dollars. The consultant who has helped you navigate major reorganizations without losing any key team members will probably be your choice for the next big project—regardless of price.

Stop and consider where you are in this process. If you're new to the business, you may need to focus on building brand awareness. If you want to fill your pipeline, consideration may be your area of focus. Once you're started to develop an ongoing business, you'll need to monitor your funnel to be sure you're efficiently moving your existing clients from purchase through preference to loyalty.



WHAT IS DISCIPLINED MARKETING?

Ask a dozen people and you'll probably find a dozen different definitions of marketing. The American Marketing Association says Marketing is "the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large."

We like to keep things simple, so we define Marketing as the virtuous cycle of increasing your understanding of your target market so you can most effectively create, communicate about, and deliver the right products and services. For most companies, Marketing is the key differentiator that can make or break you. But Marketing is **not** one size fits all, and, without a plan, misguided Marketing initiatives can waste a lot of money, time and effort.

Marketing for professional services firms has its own unique set of challenges. Usually, the consultant is also responsible for his own marketing activities, which needs to be done concurrently with service delivery. The consultant has limited time, resources and often limited skills in marketing, and yet she needs to quickly learn how to effectively understand market needs and communicate desirable offerings.

Disciplined Marketing
A focused approach to marketing that is built around only the highest priority business needs

Disciplined Marketing is a marketing approach designed for consultants and small business owners. As with any strong marketing program, its core is a sound strategy for attracting, winning, and retaining great clients in your target market. The difference is the level of focus on key objectives (which is higher than you might expect) and the number of concurrent programs (which is lower).

You might have some terrific ideas for marketing your business—events, presentations, white papers, blog topics, or networking groups. And you might have more than one market to which you can provide value. Usually the problem is not coming up with the ideas, though—it's giving up some of them.

To have a sound strategy, you need more than great ideas—you need the ability to prioritize those ideas so that you focus your time on those that are most likely to produce the results you need. While we have worked with many different marketing frameworks that can effectively guide marketing strategy, we felt a need to develop Disciplined Marketing to specifically guide the specific needs of solo practitioners and small professional service providers.



As members of the professional community led by Million Dollar Consultant® Alan Weiss, we often saw our peers struggle to sort through their long lists of great ideas and focus on the few activities that would have the biggest impact. We felt a need to create a way to help—leveraging Linda’s expertise as a “marketer’s marketer”, and Robbie’s work at the intersection of business strategy and marketing. Robbie and Linda were both thinking about this need, and started collaborating. And with that, Disciplined Marketing was born.



Let’s explain in more detail the seven-part Disciplined Marketing Framework™ we introduced earlier.

Audience

The first place to start is by identifying your Audience. Be as specific as possible about who you are trying to reach. All women or businesses over \$100 million are fairly vague parameters. The more specific you can be in defining your audience, the better you’ll be able to target your offerings and your marketing to meet their needs. Here are a few examples:

- John helps closely-held and family-owned businesses plan for succession in the Midwest.
- Sameer helps general managers improve revenue and profitability through big data that their large companies are already collecting.
- Bebee mentors founders of fast-growing, venture-backed companies so they develop the skills they need to keep control of their organizations as they grow.

Positioning

Next consider how you will position your offerings for your audience. Positioning is about establishing a unique place—or position—in the prospect’s mind, particularly in relation to the other alternatives available to them. If you don’t position yourself, others will do this for you, and you likely won’t like the results!

An important part of positioning is developing a unique value proposition—a clear concise statement that articulates how your offering is different (and better!) than the other alternatives available to your target audience. Remember that other alternatives include maintaining the status quo (perhaps doing nothing), or using internal resources for a project, rather than hiring an external professional services provider.

- Jung positions herself as a branding and positioning expert who is more focused on business results and bottom line than the more “creative” branding agencies who are all about sizzle.
- Guillaume advises US-based companies on global expansion, leveraging his background in big firm strategy consulting and his years of experience managing global operations—he’s more strategic than typical operations people, but has credible experience doing what his clients hope to achieve.
- Niti positions herself as a CFO on call, working with the CEO to ensure that less experienced controllers and accountants are keeping the big picture in mind.



Messaging

Once you have the value proposition, you'll be able to focus on Messaging, the wording—or messages—you'll use to communicate your positioning and unique value to your target audience.

- Angela's messaging is simple—it's "helping you manage difficult changes."
- Sven communicates that he designs products that people love to use.
- Jack helps clients get their arms around hairy problems that cross functional areas and have significant impact for an organization.

Strategy

Next you'll need to determine your marketing Strategy. Start with your most important objective. Are you just getting started and needing to define and establish your brand? Do you want to start building your pipeline for long-term success? Or, do you need cash flow right away?

- If you're just getting started and need to pay your mortgage, your strategy may be to fill the pipeline as quickly as possible, which usually happens through networking.
- If you're trying to build what Alan Weiss calls "Marketing Gravity" and have more people calling you, you need to create some thought leadership pieces that will educate, inspire or challenge your target audience.
- If you want to lessen your labor intensity, your strategy may include identifying subcontractors and changing the way you scope options for your clients—perhaps by operating more in an advisory capacity and doing less yourself.

Infrastructure

There's a minimum amount of foundation, or infrastructure you should have in place before you go out to meet with clients.

- Matt, who is just starting out, needs a good value proposition, a basic website and a business card.
- Gloria, who is trying to build awareness in her key market, is considering adding a blog, newsletter, or a podcast series.
- Eduardo has built a good reputation in his field and is now writing a book to be seen as a thought leader.

The One Page Disciplined Marketing Plan

The phrase "marketing plan" strikes terror in the heart of many who recall the big binders full of annual marketing plans many large organizations were famous for creating (and then filing on a shelf).

We don't believe in creating plans for their own sake. Instead, we recommend creating a simple one page marketing plan for your practice, based on the 7 Step Disciplined Marketing Framework™:

WHO: This covers the **Audience**. Who specifically are you trying to reach?

WHAT: This is your **Strategy**. What are you trying to accomplish? What's your goal?

WHY: Why should your audience care? Your **Positioning/Messaging** should differentiate you here.

HOW & WHERE: Here's where you'll address **Infrastructure and Tactics/Implementation**. How will you get there? What tactics will you implement? Where will you market to best reach your target audience?

WHEN: Add a timeline. When will you execute each aspect of your initiative? When will you check in to see how successful your efforts have been and what mid-course corrections you should be making?

HOW WILL YOU KNOW: This relates to **Metrics**. What are the measurements you'll put in place to know you've been successful?

That's it. Start there and execute.



Tactics/Implementation

Only after you have your objectives and infrastructure in place should you start to think about specific Tactics, or start diving into implementation. Remember that it's better to do one thing well than a number of marketing activities half-heartedly. For any professional services provider, we recommend launching only one major initiative at a time. Get that established and you can then move on to the next item on your list.

- Diane wants to build gravity and attract others to her business. Her marketing strategy centers around her love of writing. She blogs for several prestigious organizations, and then leverages social media to build awareness of these pieces. She also combines these pieces into speeches which she presents to professional associations in her community.
- Jacques is trying to fill his pipeline as quickly as possible. He is a charismatic extrovert with a large network, so he's well-positioned for quick growth. He attends many events and sits on leadership boards of both professional and charitable associations, where he builds personal ties with potential buyers and connectors.
- Ani has been consulting for years and is focused on moving up in the organization. Her strategy is two pronged. She is aggressively asking her network for introductions to senior people at companies in her area. At the same time, she has updated her website and begun creating thought leadership pieces that focus on challenges facing C-suite executives.

Metrics

Finally, you'll want to establish Metrics, or measurements, to evaluate the effectiveness of your marketing efforts. Think about what you'll measure. How often will you do so? Be careful to choose metrics that are actionable—those that give you information you can use to make decisions. Avoid measuring things that are easy to measure but not relevant to your decision making process, such as how many articles you've written or how many books you've sold. We've found some of the key metrics to track include the following

- Relationship at top 10 target clients (number of quality contacts, meetings, thought leadership that refers to these targets).
- Sources of leads and clients (people, materials, events).
- Deal size and amount of work applied to each project (your goal is high impact, low labor intensity).
- Referrals and repeat business: Are existing clients calling you back and/or referring you to others they know?



CONSULTANTS WHO ARE DOING IT RIGHT

There is no one right way to market your independent consulting practice. Your marketing strategy will depend on your highest priority goals, your target buyer, and your unique style. After all, if you're professional services provider, most likely you are your own boss. Time to have a conversation with management about the way you need to market your practice!

Below are examples of consultants who have successfully leveraged Disciplined Marketing to grow their revenues and profitability. We hope to give you a sense of the range of approaches you might choose to take.

Case One: Steve dives in



While still employed in a middle management role at a large organization, Steve started thinking about establishing his own independent consulting practice. He prepared for his departure by making sure his contact database was current, and he took advantage of every conference and speaking opportunity available in his corporate role. He saved six months of salary before making the leap, so that when he did leave, he could invest heavily and fully in his new business.

Steve hired a professional design team to create his logo, website and brochure. He worked with a stylist at Nordstrom to buy a small but impressive wardrobe of business attire consistent with his new brand. By the time he officially launched his company, he had dozens of blog entries, some video testimonials from colleagues who knew his work, and a speaking engagement that he had secured prior to leaving his job.

Steve continued to set aside time and money every month for marketing, trying new things constantly, keeping what worked, and discarding what didn't. Steve is a great example of someone who launched his consulting practice with everything he had.

Case 2: Alyssa manages her resources wisely

Alyssa started consulting after following her husband to a new city, just months after the birth of their first child. Almost immediately she found 3 clients through her strong business school network, and chose only to invest minimally in her consulting practice—just a business card and a simple website. Consulting was a stopgap for her—a way to pay the mortgage without a rigid 9-5 job with a new employer. Over time, however, Alyssa began to see the long-term benefits of consulting and slowly, reluctantly, she began investing in building her practice.





She began to reach out to contractors so she could minimize her own time spent on projects, and started to position herself as an expert on new product launches. She slowly added white papers to her arsenal, and she leveraged the white papers to get speaking opportunities on the same topic. She also took a critical look at the pricing and packaging of her services, adding a “quick start strategy” offering at the low end, and a high-end retainer model for access to her smarts. Alyssa didn’t need to market to build awareness, or to get clients—her network was strong enough to drive business organically. Alyssa’s challenge was to figure out how to leverage her limited time and provide increased value with decreased effort. Her marketing in the early years focused on mining her relationships through active participation in professional and alumni associations, as well as building a first class web site. She leveraged marketing effectively—but spent only a small portion of her limited time on marketing activities.

Case 3: Mary evolves her consulting career

Mary had been a consultant for her entire career. She started working at one of the big strategy consulting firms after college, and returned after business school, only leaving after 10 years in the business when she realized that the travel and stress were not commensurate with the financial and psychic rewards she was expecting.



Mary’s marketing focused on the 12 biggest, most well-regarded companies in her metropolitan area. She became an expert on the issues and opportunities of each of these companies, wrote articles about them, and used these companies as examples in her “offhand” comments. She also leveraged her network to seek out multiple contacts at each of these organizations.

Mary positions herself as a better, less expensive option to the big consulting firms, pegging her pricing to theirs. She also has leveraged a breakfast series with senior executives as one of her signature marketing programs, establishing herself as the center point of a high-powered community.

You may be similar to Steve, Alyssa, or Mary. Or, you may have a totally different situation. It can be tempting to compare your approach with that of your peers, and feel like you are coming up short. Don’t fall into that trap. There are as many different approaches to marketing as there are consultants—and the important thing is to do what’s right for you and for your own business.

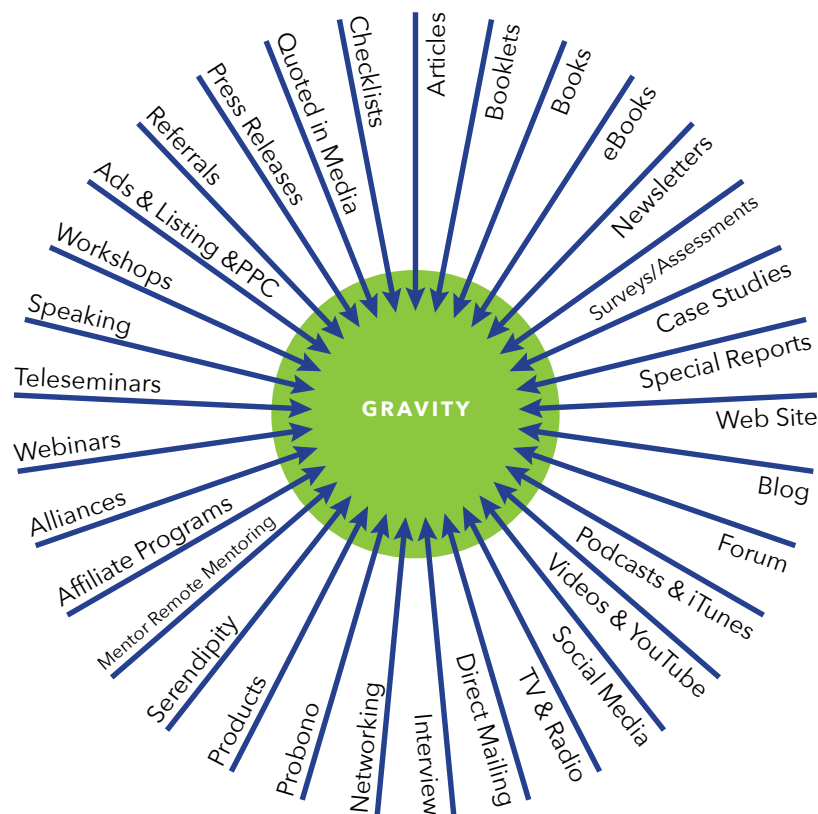


WHERE TO START? HOW ABOUT AT THE BEGINNING

If you're just starting out, you'll need to define your audience and your positioning. Then focus on building basic infrastructure. At a minimum, you'll need a list of contacts, a Website, and a business card with professional contact information. There's really no point in investing in other marketing activities if you don't have those basics in place.

Once you have your infrastructure, you have some discretion about where to invest further. Our mentor, Million Dollar Consultant® Alan Weiss, has a Marketing Gravity chart which shows the broad range of activities you might consider as a means of attracting client interest.

MILLION DOLLAR CONSULTING® MARKET GRAVITY



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Start with the spoke of the Gravity Wheel that most appeals to you. First, think about the audience you want to reach and the kind of results you want to achieve. Make sure that there's a correlation between your objective and your marketing tactics. For example, if you want to build awareness and aren't yet well-known in your target market, hosting a breakfast for senior buyers will likely be difficult. On the other hand, if your goal is to build relationships with a small, focused target group, then hosting an ongoing event series might be the perfect path.

We suggest that you initiate one marketing activity at a time, and evaluate the success of one before initiating another. Remember that Marketing is an ongoing process. You'll likely need to continue investing time and money to nurture your marketing program. It takes a lot more effort to establish a blog than to maintain it, for example, but you still need to create new posts every few days if you want your blog to be effective.



BEST PRACTICES

We like to compare cultivating a marketing program to the way one prepares a garden. No matter what time of year, serious gardeners are always working on their gardens in one shape or form...

- ...pruning back plants to allow them to blossom more fully.
- ...pulling out weeds and plants that haven't thrived, to make room for those that have.
- ...planting new specimens to see what will take.



They usually work from a calendar, thinking about the same issues at the same time each year. It gives them a framework to plan and measure progress through the year. They know that a seedling just put in the ground won't bear fruit until it matures, and that day will never come if it isn't fertilized, watered, and kept safe from harm.

As disciplined marketers, we need to do the same thing with our professional services practices.

Can you focus on marketing activities at any time of the year? Absolutely. But we find that it helps to have a plan so that you don't try to "harvest" right after you've "planted." Developing a rhythm and a tempo around the business of your practice can help you grow and thrive.

To see our recommendations for an annual marketing calendar, designed to grow your business and produce rich harvests in the future, [click here](#).



DISCIPLINED MARKETING DIAGNOSTIC

To begin thinking in a more disciplined way about your marketing strategy, start with these questions.

- 1. What are your primary business objectives?** You might be focused on making the rent, or building a big brand that can eventually support several people, or on building a pipeline in a key market. It's important to know what is most critical to the success of your business.
- 2. Who is your audience and target buyer?** The better you know your target buyer—company type, title, urgent need—the more effective your marketing will be.
- 3. What is your value proposition?** In addition to a provocative sentence that drives productive conversation, you also need to have a clear idea of who you provide the greatest value to, and what that value is. How will you improve the condition of your clients?
- 4. How do you usually package and present value?** Are you a keynote speaker? A coach? Or do you run projects to improve your client's condition?
- 5. What kind of marketing activities have you tried?** What needs more testing to make a definitive decision? What hasn't worked is just as important as what is working. Also, you might be surprised that you don't know the impact of some of the activities you've already invested in—something you need to fix right away!
- 6. What are your success metrics?** How will you know if your marketing programs are working?
- 7. What constraints do you have?** Budget? Time? Cashflow? Travel? Everyone has some constraints—if you need to make next month's rent, don't want to travel, or can't work past 4PM because of other commitments, you need to take those constraints into consideration.
- 8. What kinds of marketing activities are most comfortable for you?** Video? Writing? Speaking? Networking?
- 9. Who are your existing clients? What do they say about why they work with you?** Their endorsements will help your marketing efforts for sure, but it's also critical to be sure that you are communicating the value proposition that attracted others.
- 10. How and why have clients chosen you in the past?** If it's working, keep doing it and build upon your success.



QUICK CHECKLIST: WHAT TO DO RIGHT NOW

- ❑ **Complete the Disciplined Diagnostic Checklist** on page 15.
- ❑ **Take Stock of What you Have:** Gather background information, testimonials, articles you've already written, etc. Make a list of what you need to create.
- ❑ **Be Prepared to Move:** Put a stake in the ground and set a deadline. It's important to set a date to start—when you'll launch your marketing program, even if it's not 100% complete.
- ❑ **List Options:** Start to put together a list of the 3-4 initiatives you'd like to launch in the next 12 months.
- ❑ **Prioritize:** Based on the Disciplined Diagnostic checklist, determine the one initiative you'd like to focus on first.
- ❑ **Set Specific Goals and Objectives:** For the initiative you've chosen, set specific objectives for success. What do you expect to achieve with this program?
- ❑ **Go Do It.** As Alan Weiss says, it's about success not perfection. Go out and launch your program.
- ❑ **Consider Mid-Course Corrections:** Take time to evaluate how things are going and see what needs to change to get back on track.
- ❑ **Rinse and Repeat.** Marketing is about frequency and consistency. Maintain an active presence in your prospects' minds by continuing to market to them on an ongoing basis.



POTENTIAL PITFALLS: WHAT NOT TO DO

We're often asked by consultants what not to do when it comes to Marketing. Unfortunately, even the best professional service marketers often fall into bad behaviors. We've outlined a few here to help you avoid some of the potential land mines.

Taste Everything at the Buffet

There are so many different types of marketing activities, and it takes time and money to execute them well. Sometimes it can be tempting to try to do everything at once. Beware of going a mile wide and an inch deep. There'll be time to test everything, but not all at once.

PB & J...Every Day

Just like the seven year old, who wants nothing but a peanut butter & jelly sandwich every day for lunch, this person use only one type of marketing tactic: again, and again, and again. We encourage our clients to start with campaigns that are most comfortable for them—if they are writers, we let them write; if they love to network, we encourage them to host events and take leadership roles in associations—but we also warn them to never put all of their eggs in the proverbial single basket. Your prospects live in a world filled with marketing stimuli. Use a variety of tactics to reach them, not just the one that's most comfortable for you.

Ready, Fire, Aim!

Some people are so eager to get going with Marketing, that they just start without a clear plan—tweeting whatever comes to mind, quickly putting together a Facebook page, or investing a lot of money in a Website without clear positioning or a well thought-out value proposition.

Worse Yet: Ready, Aim, Aim, Aim Again!

Then there are the folks who do just the opposite. They need to wait until everything is absolutely perfect before actually getting out of their own head and into the market. Neither end of this spectrum leads to good results. But consider that it's highly unlikely all the stars will be in alignment and everything will be perfect. Good enough is good enough.



Stuck in a Rut

The combination of marketing tactics that's worked before may not be the best to continue for the future. Like the beehive hairdo and the horse & wagon, even the most wonderful creations can eventually be replaced by more current, effective options. Whether you are running your own marketing programs or working with a professional, make sure that you are periodically checking in with the outside world to see what is current.



DON'T GO IT ALONE: WHEN TO BRING IN THE PROFESSIONALS

As a professional services provider, you probably are used to doing many of the tasks related to the business yourself. But just because you **can** do something, doesn't mean that you necessarily **should**.

Think of Marketing like baking a cake. There are times when you are willing to buy all the ingredients, mix them together, and serve your concoction straight out of the oven. There are other times, however, when you want a cake that not only tastes great but looks fantastic, too. Or you want something that's done quickly, without investing the time to bake it yourself. That's when a luscious dessert from a high quality bakery may be what you're looking for.

We find that there are four times when our best clients call us for help with Marketing:

- 1. When they don't know how** – Perhaps a new or unusual skill is needed, one that the client does not want to take the time to develop internally.
- 2. When they don't like doing it** – Let's face it. Being able to do something doesn't mean you LIKE doing it or want to do it yourself.
- 3. When they aren't good at doing it** – Some professional service providers love to write; others avoid it like the plague. Some are very visual; others just can't create a good graphic.
- 2. When it's just not getting done** – We call this Polish & Finish. Much of the heavy lifting may be done, but a project still needs to be packaged appropriately or taken to the next level for public release.



INVEST IN MARKETING SUCCESS

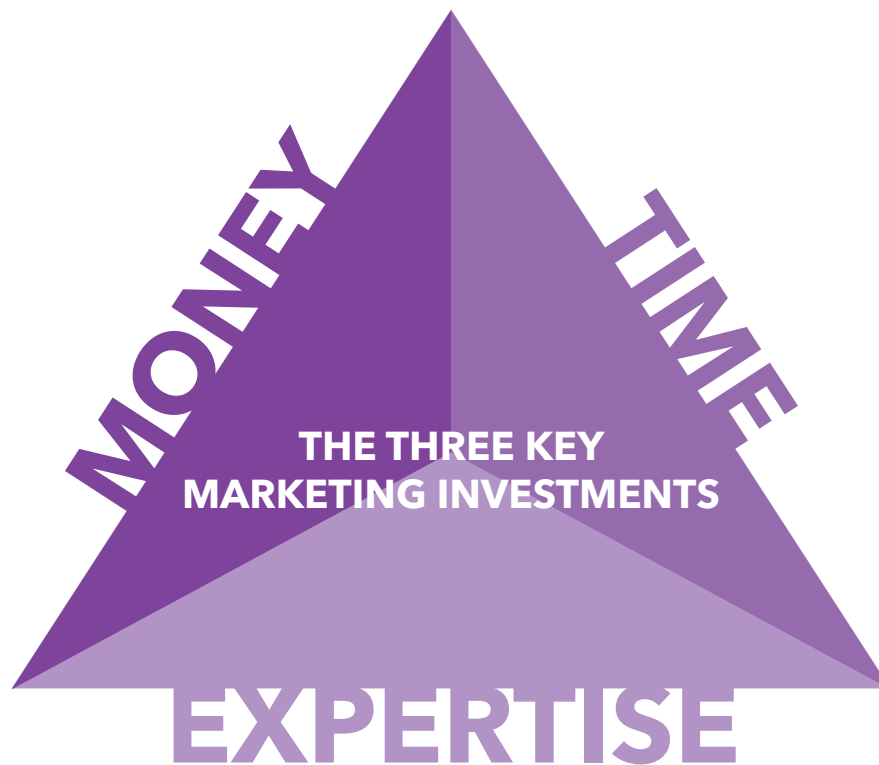
Most people think of Marketing costs as those tactical out-of-pocket charges we're all familiar with—the cost of ad space, printing, video production, etc.

But **Money** is only one of the three big investments that result in effective marketing.

The second is **Time**. Social media, like Facebook, blogging and Twitter, don't have big out-of-pocket costs, but they do require a large time investment on an ongoing basis. If you're busy Tweeting or updating a Facebook page, what important parts of your business are you not paying enough attention to?

The third investment required is **Expertise**. Whether it's you or someone else, if the person responsible for driving and implementing your marketing strategy doesn't have the right expertise, not only will you incur costs in terms of both time and money, your brand and reputation may be at risk, and that may be the biggest cost of all.

You don't necessarily need to invest in all three areas at once, but be aware that there's often a tradeoff. For example, saving out-of-pocket costs will often result in bigger time investment for you.



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WHAT KINDS OF RESOURCES ARE AVAILABLE?

The marketing resources available are as varied as the types of initiatives you might want to implement: from project managers to web and design specialists, copywriters to video producers, strategists to implementation teams.

As a professional services provider, you should be able to hire just the capabilities you need, rather than make long term commitments to large agencies. When talking to marketing providers, consider their expertise, their background, and the types of clients for whom they've worked, but most importantly, also make sure the chemistry is right.

Find the people who will meet you where you are and work with you in a disciplined manner to achieve the goals and objectives you've set for your practice. And, if you should find yourself working with someone who isn't meeting your needs, fire them and look for someone else. Your business deserves nothing less.

project manager
social media specialist photographers
services **Strategist**
video producers
specialist illustrators direct mail specialist
copy writers webmasters writer
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ABOUT THE AUTHORS



Robbie Kellman Baxter brings over 15 years of management consulting and market-strategy expertise to her clients. She has worked with start-ups and mid-sized venture-backed companies, as well as industry leaders such as Netflix, Yahoo!, Oracle, and Sun Microsystems.

The founder of Peninsula Strategies, Robbie is an expert on business models and has worked extensively with SaaS, freemium subscription-based, in-app purchased, and mobile apps on creative ways to build trial and generate recurring revenue.



Marketing expert **Linda Popky** has nearly three decades years' experience in marketing—in industry, agencies, and consulting. She's been involved with many of the Silicon Valley companies who developed and deployed the technologies that have changed the world over the last 20 years, including Sun Microsystems, Cisco Systems, NetApp, Pay Pal, Autodesk, Applied Materials, and others. In 2009, she was named one of the top 100 Women of Influence in Silicon Valley.

Linda is the founder and president of Leverage2Market Associates, Inc., a strategic marketing company that helps organizations transform their business through powerful marketing programs. Her achievements have been recognized by induction into the Million Dollar Consultant® Hall of Fame.

Robbie and **Linda** are both members of Alan Weiss Million Dollar Consultant global community of top consultants. They are each certified to deliver the Private Roster™ Mentoring Program for consultants and entrepreneurs.



WANT TO LEARN MORE?

If you are ready to apply Marketing Discipline to your practice, contact Robbie and Linda now! We have three programs which will help you get the most out of your marketing investment.

1. Private Roster Mentor Program:

Get six months of unlimited access to Robbie or Linda. You set the agenda--we are here to work with you on the issues of your choosing.

While working with us personally, this program also provides entry into the Alan Weiss global mentor community, where you can access online discussions 24/7; download text, audio, and video resources; receive newsletters; join mastermind groups; participate in international mentor "summits"; obtain discounts on development experiences; and much more.

2. Retained Advisory: We offer advisory services in 6 month increments, with unlimited access to either Linda or Robbie. These advisory services can be customized to include goal-setting and coaching as well as intensive planning sessions as needed.

3. Winnowing Workout

If you're overwhelmed with half-finished marketing campaigns, white paper ideas, lists of potential speaking opportunities or are in the process of creating more content than you know how to package and promote, this program is for you.

Bring us everything that's on your plate or in your mind—including all of your work-in-process—and we will help you separate the wheat from the chaff, bring together your best ideas, and put together an actionable, manageable plan. With this option, you'll have dedicated time with both Linda and Robbie individually, and finish the day with a combined session with both of us.

You'll leave with a very specific action plan that lays out exactly what your focus should be for the next 6-9 months, and provides you with a roadmap as to what marketing tactics to focus on when. You'll also have the choice of phone/email access to either Robbie or Linda for 3 months after your intensive session.



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