

Essential Marketing Vision Workouts

SelfScore

Section I: Introduction--Founders, Owners and the Marketing Leader

Small businesses usually are only strong in one or possibly two sides of our Transit Triangle. It is an extraordinarily rare business—small or large—that has depth in Brand, People and Package. Most small businesses tend to reflect the founder's personality and interests. This is unavoidable and not all bad. Without the sustaining and tenacious will of the founder, a small business gets boiled alive in the competitive cauldron of today's business environment.

But that same sustaining spirit that jumpstarts the business and enables it to grow can also make the company's marketing efforts one-sided. Many company founders are great salespeople but not as skilled in marketing. They fail to move their business beyond the finite influence of their own personality.

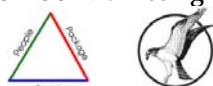
We initially mention the founder because it is the founder that first puts an imprint on any business. Subsequent owners may sometimes be unaware of even who the founder of a business was. After all, they are out to make a profit, not engage in business archaeology.

Whether the founder is a mother, a sister, or a complete stranger, you can be assured they have left a thousand invisible fingerprints all over the business. These have now grown to permeate the business culture in undiscovered ways.

But what if the current owner *is* the founder? What if you are both founder and owner? It doesn't matter a bit. "But if I founded the business, shouldn't I have the right to imprint my personality on it?" you ask. Absolutely, we want you to. Otherwise your business will have no soul of its own and the business culture that grows out of it will be unappealing and have a hard time growing.

Marketing can help your small business grow beyond your own web of personal relationships. Most small businesses don't move much beyond the owner's personal sphere. But maybe yours can.

But what if you aren't the owner? What if the owner has given you the task of taking care of marketing? You're the person we call the Chief Marketer. You have some special skills the owner has trusted you with that can be developed into helping the business succeed. Remember, you're already a consumer. You've made thousands of purchases, and are already trained in looking at other businesses from a customer's



point of view. Now you just have to use these Workouts to tune-up the company you work for.

If you are a Founder, an Owner, or a Chief Marketer you will need to find out which of the areas of marketing: Brand, Package and People your company is weakest in and then find ways to improve in those areas that matter most.

Marketing probably isn't even your full-time job at your company. It doesn't matter. Every one of our Workouts is designed to be done at your own pace. Each has a cumulative effect, and is built to interlock and support each other. You decide which Workouts you take on, and when. Your time is too valuable to waste on areas you're already strong in by grinding through some pre-arranged curriculum. Each business has its own uniquely urgent needs. This is why we aren't taking you sequentially through the Workouts.

We want you to be able to find out where the company is weakest and concentrate on that area first. Even incremental improvements in an area your company is weak in can have create some large profits

The Marketing Hawks SelfScore is a 15-30 minute exercise designed to help you better understand your relative strengths and weaknesses. Please answer the questions honestly and follow the format. We need you to write down your perceptions of your business. Please don't look at the scoring key (the last two pages) until after you've completed all the questions. You'll just be cheating yourself and wrecking any chance at objectivity. Remember, we won't be keeping score...

Section 2: Evaluate your Company.

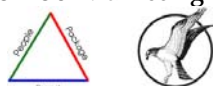
Brand

What does your business stand for? Not just what you *make*, or what you *do* or what you *sell*. What do you really stand for? What is your purpose?

Or we could ask of your business: "Who are you?" "What is your identity?" We're not talking about your latest advertising slogan or some catchy phrase on your business card or stenciled on the front door. We are talking about who your business really is.

Right now is a good time to introduce you to one of the core concepts of Marketing Hawks: The 80/20 rule. You've probably seen it in action at your business: 80% of your profits come from 20% of your customers. Throughout the Workouts we are looking for that 80% answer, in 20% of the time. Just remember to answer from your heart, and not worry about sounding like something from Advertising 101.

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Brand Question 1. In the space below, use 75 words or less to describe who your company is.

Brand Question 2. Now, again remember this isn't a test, so be honest in answering.

What % of your *customers* would say the same thing about your business? (If you don't know, please just go ahead and tell us your best guess.)

_____ less than 5% _____ 5-25% _____ 26-50%
_____ 51-75% _____ 75% or more

Brand Question 3. Another tough one. Remember, nothing but gut-level honesty will do, here.

What % of your *employees* would say the same thing about your business?

_____ less than 5% _____ 5-25% _____ 26-50%
_____ 51-75% _____ 75% or more



Brand Question 4. We need to introduce a concept that is especially important:
Brand Drift.

Brand Drift happens in two ways:

1. Customer moves away from Company, due to shifts in technology or customer changes.
2. Company moves away from original intent, due to internal forces.

Believe it or not, #2 is tougher to deal with and to be on guard for.

HAS YOUR BRAND DRIFTED? Answer the following questions to find out.

Has your customer base moved away from your company, due to either:

Technology shifts yes no
Customer changes yes no

Has your company moved away from its original intent, due to changes in ownership, or a shift in focus or product mix?

yes no



People

Brand and Package are two traditional areas marketing can help companies in. Both are critical, but if you stop there, you just won't grow.

The third critical element in any business is people. You might think we are going to focus on your customers—and you're right. But The Essential Marketing Vision Workouts focus intently on your employees, because they are the keys to ongoing profitable relationships with your customers.

The Business Mix

Customers		Employees	
Number of (Quantity)	Impact	Number of (Quantity)	Impact
Crucial Few	Crucial Few	Achievers	Achievers
Majority		Majority	

First, let's look at two key points:

- The Crucial Few Customers drive most of your *current* profits.
- The "Achievers" among your employees are not all in management. They exist at all levels of your company.

The People section is green for a reason. Green is the color of growth. Things that don't grow typically die. Only customers are going to fuel that growth, and only employees are going to nurture those customers. Simple, really.



People Question 1. How do you keep your Achievers excited? You know the employees we're talking about—the ones that you can count on to get the job done, the ones with the ideas, the ones that put in that extra effort when nobody's looking. Every organization has them...typically they are pulling 3X their weight and not whining about it. Just take 75 words or so and write down how you incent these people.

People Question 2. Earlier we introduced the 80/20 concept. Many businesses find that only 20% of their customers generate 80% of the profits. Not the gross sales, but the profits—a key difference. We are making an assumption, here, and guessing that your business follows such a pattern. . These customers make up what we call the "Crucial Few". Please take a few moments and think about these most profitable customers. Next, just take 50 words or less and describe them. A quick sketch is all that's needed.

Next, check which attributes your most profitable customers *share*.

- | | |
|----------------------------------|---|
| _____ They buy often | _____ They buy a large dollar volume |
| _____ They are a similar age | _____ They have similar occupations |
| _____ They are mostly women | _____ They are mostly men |
| _____ They live in the same area | _____ They go out of their way to buy from us |



People Question 3. How do you treat your most profitable customers?

- Same as every other customer
- Price discounts
- Value-added extras like special delivery or some other “extra something”
- Call them by name
- Remember their purchase preferences
- Send them special “preferred customer” invites or discounts or gift certificates
- Send them special newsletters or catalogs
- Rewards or points system based on purchases
- Assign special sales staff to them

People Question 4. How do you attract your future best customers? In other words, how do you *prospect* for people who look just like your current best customers?

- Same as any other prospects
- Unique program, targeted to this type of prospect

Package

If Brand is who you are to the customer, then Package is where and how you present yourself to the customer.

Brand is the present, and Package is the wrapping paper. And whether they’ll admit it or not, every one of your customers was once a kid who enjoyed the anticipation of opening a birthday present almost as much as the gift itself. Wordsworth wrote “the child is father to the man”, and that’s as true today as it was two centuries ago when he wrote it.

But most small businesses don’t realize the vital importance of this simple concept. Most small businesses—including many of your competitors—don’t understand that getting the superior product delivered to the customer is just the first step in truly satisfying the customer. But you can be different. You can learn to look at your business through your customer’s eyes.

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Three Areas of Customer Contact

We meet our customers in three places:

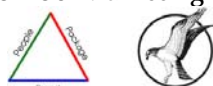
1. On our Turf.
2. On their Turf.
3. Remote.

“Our Turf” is usually in a retail store, although it could be at a trade show or craft fair booth, a rented hotel meeting hall, or even in a luxury suite at a sporting event. The main difference between “Our Turf” and the other areas we can contact customers is that we have a much greater control over the environment.

“Their Turf” usually involves a remote presentation and hopefully, a sale. Typically, companies that operate on their customer’s turf employ full-time, dedicated salespeople. From the high-powered six figure salesperson selling IBM mainframes to the Girl Scout trundling door-to-door selling those delicious cookies, there are a thousand variations of people out peddling on their customer’s turf and loving it.

“Remote” is selling without the face-to-face interaction that occurs on either our turf or their turf. Most businesses that sell “on our turf” have some customer interaction over the phone and with email or fax. “Remote” can be extremely cost-effective and entire business models are shifting toward it. Think of Dell’s enormous success in selling computers direct to the customer.

To find out which category your business is in just answer this simple question: Where are MOST of my sales made? Then, simply fill out either the On Your Turf or the On Their Turf questions. Currently we don’t have a separate Workout for Remote.



Package Questions: On Our Turf

Package Question 1. Who is the first employee a customer sees when that customer enters your shop?

What does that employee do?

- _____ Nod and continue with whatever task they are engaged in.
- _____ Simply continue with whatever task they are engaged in.
- _____ Stop or pause what they are doing, speak to the customer.
- _____ Stop or pause what they are doing, ask customer what they need or how they are doing.
- _____ Speak to customer, as employee continues along with their task.
- _____ Stop or pause what they are doing, ask customer what they need or how they are and make small talk or pay customer a compliment.

Package Question 2. Which of the following phrases describes what a **Repeat** customer does when they enter your business? Remember, this customer has been to your shop before.

- _____ Customer heads immediately to the service counter or check-out and goes about their business with a member of my staff.
- _____ Customer typically browses the merchandise, then finds a member of my staff or heads to the service counter.
- _____ Customer goes to coffee pot, pours a cup of coffee, then on to find a member of staff.
- _____ Sits and waits for a member of my staff to show up.
- _____ Other _____



Package Question 3. Now, tell us what a **Brand New** customer does when they enter your business. Remember; just be as honest as you can.

- Customer heads immediately to the service counter or check-out and goes about their business with a member of my staff.
- Customer typically browses the merchandise, then finds member of my staff or heads to service counter.
- Customer goes to coffee pot, pours a cup of coffee, then on to find a member of my staff.
- Sits and waits for a member of my staff to show up.
- Other _____

Package Question 4. What does your **Repeat** customer expect when they enter your store?

- Prompt service
- Goods on hand
- To wait at least 5 minutes
- To wait in line
- To be in and out in less than 10 minutes
- To spend some enjoyable time browsing
- To get great advice from my staff
- Have a member of my staff call them by name



Package Questions: On Their Turf

Package Question 1. What material does your sales force send out in advance of the call?

- Brochures and letters
- Survey
- Promotional Video
- Link to your company website
- PowerPoint presentation
- Nothing

Package Question 2. How do you determine who gets this advance material?

- Lead generated by advertising campaign and salesperson responds to
- Salesperson determines, after telephone contact
- Prospect contacts office for quote or information, then office assigns salesperson



Package Question 3. What does the salesperson leave behind with the future customer, once the initial presentation is completed?

- Business Card
- Quote
- Proposal
- Copy of presentation
- Product Sample
- Brochures

Package Question 4.

How does your salesforce dress?

- Business suit
- Business casual
- Company uniform
- Clean & casual

How do your customers dress?

- Business suit
- Business casual
- Company uniform
- Clean & casual



STOP!!! Make sure you've completed all the questions for Brand, People and Package prior to looking at or filling out the **answer sheet** below. If you glance ahead and try to figure out the "best" answers to the questions, you are defeating **the purpose of this survey**. There are no right or wrong answers, just a right or wrong way to complete this evaluation.

Section 3: Rate your Answers.

OK, different answers are weighted differently. Just either circle or write down the appropriate number according to how you answered the questions above.

Brand

Brand Question 1 is an open-ended question to make you think about your brand. We don't rate this question.

For **Brand Questions 2 and 3**, circle your answer on the table below:

	Brand 2	Brand 3
Less than 5%	1	1
5-25%	2	2
26-50%	3	3
51-75%	4	4
76% or more	5	5

A. Now, total the numbers from what you circled in **Brand 2 and 3** = .

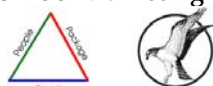
Now, look at your answers to **Brand Question 4**.

Has your customer base drifted from your company?

Yes = 0
No = 1

Has your company moved from its original intent?

Yes = 0
No = 1



B. Add up the total for Brand Question 4 and write it down, here.

Please add **A** and **B** two together. Circle the total for your OVERALL RATING, here.

1-4 = Low

5-8 = Medium

9-12 = High

People

People Question 1 - is an open-ended question for discovery purposes only that we won't rate.

People Question 2 - How many characteristics did you check that describe shared attributes of your most profitable customer?

If you checked 0, your total is 0

If you checked 1-3, your total is 1

If you checked 4-6, your total is 2

A. Write your total, here.

People Question 3 - How many questions did you check that describe how you treat your most profitable customers?

1-3, your total is 2

4-6, your total is 4

7-10, your total is 6

B. Write your total, here.

People Question 4 - How do you attract new best customers:

Same as any other prospects, your total is 0

unique program, targeted to this type of prospects, your total is 2

C. Write your total, here.

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Please add **A,B** and **C** together. Circle the total for your OVERALL RATING, here.

2-4 = Low

5-7 = Medium

8+ = High

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Package (Either Version)

The rating on this section is a bit different. You have to trust your gut, here. If you do it yourself, we are asking you to basically rate your reaction to the answering of the questions. Here, you are asking yourself to step back and see how you feel about your answers. Circle the answer.

	Not Satisfied	Satisfied	Very Satisfied
Package Question One	1	2	3
Package Question Two	1	2	3
Package Question Three	1	2	3
Package Question Four	1	2	3

Please add the circled items. Then, circle the total for your OVERALL RATING, here.

- 1-4 = Low
- 5-8 = Medium
- 9-12 = High

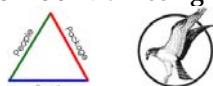
Section 4: Chart your Path.

OK, look at the three areas: Brand, People and Package. Circle the Overall Rating you had for each:

Brand:	Low	Medium	High
People:	Low	Medium	High
Package:	Low	Medium	High

Just as certain exercises strengthen specific parts of our body, an Essential Marketing Vision Workout helps your business tone up weak areas.

The average Essential Marketing Vision Workout takes a few hours to work through. We supply you some pencil-on-paper exercises and questions to fill out, plus several pages of text to read. But this isn't theory and it isn't a class you are taking. Each Workout has one ultimate purpose: to help your business make more money.



You'll want to *implement* and *integrate* the insights you gain via the Workout into your business. This process typically takes between 4 and 12 weeks depending on:

- Your company.
- The industry you are in.
- Your staff's willingness to embrace change.
- The scope of the workout itself.

Like most workouts, you'll see some immediate improvements but the real, sustainable gains come over time as your business embraces improved marketing.

At the end of each Workout, you'll find:

- Tips for staying on track.
- A timeline specific to that workout.
- A Marketing Helpers chart to see which people you can turn to.
- A list of relevant books.

We encourage you to take on the areas you are weakest in, first. Good luck, and Happy Marketing.

To order, go to: <http://store.yahoo.com/marketinghawks/>

