

Program Runway

Designed to ensure
the odds are stacked in your favor.

Workbook



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Welcome!

to **Program
Runway**

We are so excited to work with you! We know there are many people you could have chosen to work with, and we appreciate that you decided to place your trust in us and the program we have developed for you.

We are committed to your success and will be here every step of the way to ensure you have the best foundation possible to grow your business.

Let's get ready for takeoff!

Nadine & Linda

What to expect

Over the course of the next eight weeks we will be working together to ensure you have a strong foundation for long-term, sustainable success. In small groups, we will share best practices for each of the five "ignitors" listed below. Between sessions, you will use this workbook to apply the concepts to your business. We will also support you through one-on-one sessions as needed.



THE FIVE IGNITORS FOR RUNWAY SUCCESS.

01

You'll **NAIL** **YOUR NICHE**, an absolute requirement for sustainable success.

02

You'll develop **MAGNETIC MESSAGING** to attract your perfect clients.

03

You'll create and implement a **LEAD GENERATION STRATEGY** that is perfectly aligned with who **YOU** are.

04

You'll **PACKAGE** your offerings and **PRICE** them in accordance with your value.

05

You'll assess your **MINDSET**, identify vulnerabilities, and develop a custom plan to ensure you are, and remain, "success ready".

...and we'll be with you every step of the way.



Your work will culminate in a **"blueprint"** that you will reference for on-going implementation.

Program Runway

Bird's-Eye View



Program Runway is focused on the first pillar, Sales Strategy.

We will welcome clients of **Program Runway** to the **Takeoff** and **Soar** pillars when they feel they are ready.

A stack of three smooth, dark brown stones is balanced on a sand mandala. The mandala is a circular pattern of concentric rings of sand, resting on a wooden chair with a slatted back. The background is a blurred wooden chair. The text "YOUR MINDSET" is overlaid in white, bold, sans-serif font on the middle stone.

**YOUR
MINDSET**

Mindset - why it is important

Our beliefs and attitudes toward life and business can have a tremendous impact on our success and happiness. How we think about the world, our work, our clients, our impact, and our finances greatly affect our overall business success and the level of satisfaction and joy we experience when achieving it.

Our mindset can change as context changes. For example, we might feel very confident in one situation and like an "imposter" in another. We can have a healthy outlook on our financial situation one day and worry about money the next day. For this reason, it makes sense to periodically raise our level of awareness around how we are viewing the world. To this end, we have created this assessment.

Without any judgment and with a lot of curiosity and loving kindness, answer the questions on a scale of 1-10.

1= not at all and 10 = YES, fully and completely

Be prepared to share your reflections in a one-on-one coaching session so that together, we can customize a strategy to ensure your mindset is perfectly aligned with your success.

Assessment

Purpose & Calling

1. How connected to your unique gifts and talent do you feel?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

2. How confident are you in your ability to deliver on what you promise?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Assessment

Intuition & Action

3. How much do you trust your judgment and act on your intuitive knowing?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

4. How easy is it to get things done (even things you don't like to do)?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

5. How easy is it for you to make and act on decisions?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Confidence & Presence

6. How clearly and confidently do you express your value and the transformation you can deliver to others?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

7. How confident are you that you have the solution to your clients' problems?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

8. Do you believe you are one of the best in your field?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Assessment

9. How enthusiastically do you share what you do with others?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Money & Prosperity

10. How confident are you that you will meet your revenue goals and that your business will thrive in the long term?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

11. How positive, aligned, and energized do you feel about how you make a living?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

12. How deserving of wealth and abundance are you?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

13. How harmonious is your relationship with money? Does it flow to and through you guilt-free and with ease?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

14. Do you set financial goals fearlessly and with optimism?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Assessment

Selling

15. How comfortable, genuine, and authentic do you feel in a sales conversation?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

16. Do you believe that selling is an act of generosity?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

17. Do you believe your clients are lucky to work with you?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

18. Do you believe selling is an opportunity for two people to decide to work together?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Health & Self-care

19. Does your business keep you motivated, energized, and fired up?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

20. How well are you caring for your physical well-being at the moment?

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>									

Assessment

Impact

21. How much of a difference do you make in the lives of others? Do you feel you are uplifting and empowering the people around you?

1 2 3 4 5 6 7 8 9 10



Reflective Questions:

Based on your scores, what insights can you draw about your current mindset?

Which 1-3 areas do you feel intuitively drawn to focus on?

What would it look like and feel like to step into more of your potential in these 1-3 areas in your life?



YOUR MISSION & VALUES

Values - what they are

Your values are the beliefs that you, as a company, stand for. They serve as the compass that guides your brand story, actions, behaviors, and decision-making process.

Why they are important

Research shows that 77% of consumers buy from brands that share their core values. Being conscious of your values allows you to connect with your clients and prospective clients on a deeper level. They help you to solidify your brand, ensure your messaging is consistent and, in a crowded marketplace, help you stand out from your competition.

Examples:

Precision Sales Coaching

- Be authentic, genuine, and transparent
- Focus on the client first and always
- Communicate with kindness, positivity, and integrity
- Build strong and lasting relationships
- Approach the work with determination, grit, and enthusiasm

Starbucks

- Creating a culture of warmth and belonging where everyone is welcome
- Delivering our very best in all we do, holding ourselves accountable for results
- Acting with courage, challenging the status quo, and finding new ways to grow our company and each other
- Being present, connecting with transparency, dignity, and respect

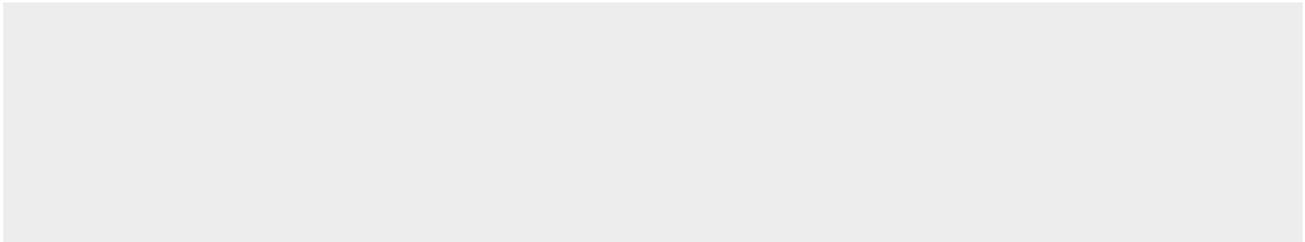
Patagonia

- Build the best product
- Cause no unnecessary harm
- Use business to protect nature
- Not bound by convention

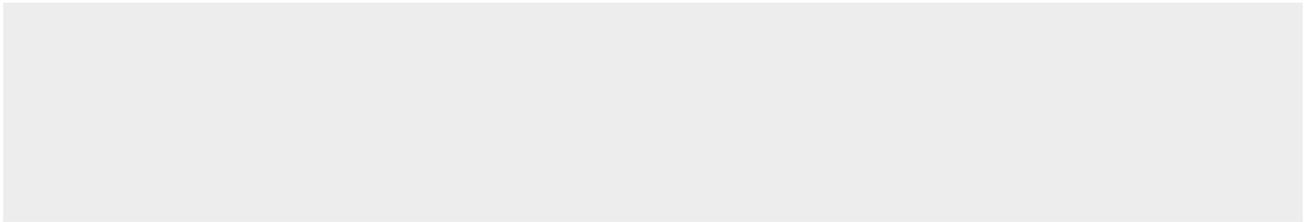
How to discover your values

Think of your values as your brand's DNA. They should deeply resonate with you and be unique to who you are and what you stand for. You may already know your values, or they may come to you very easily. Or, you may find that you need to do some deep thinking to arrive at them. If the latter, the following prompts are designed to help.

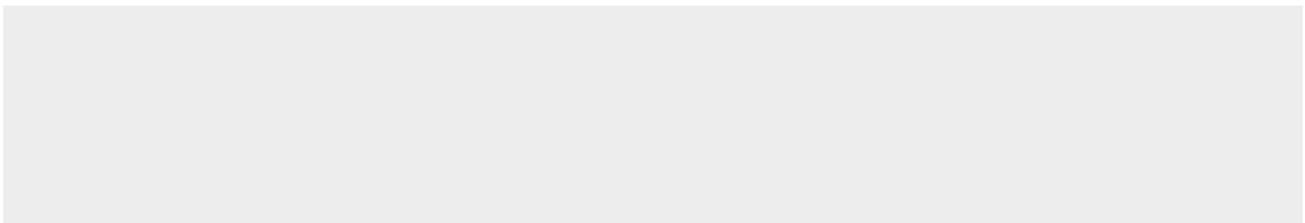
What values first come to mind for you (without giving much thought)?



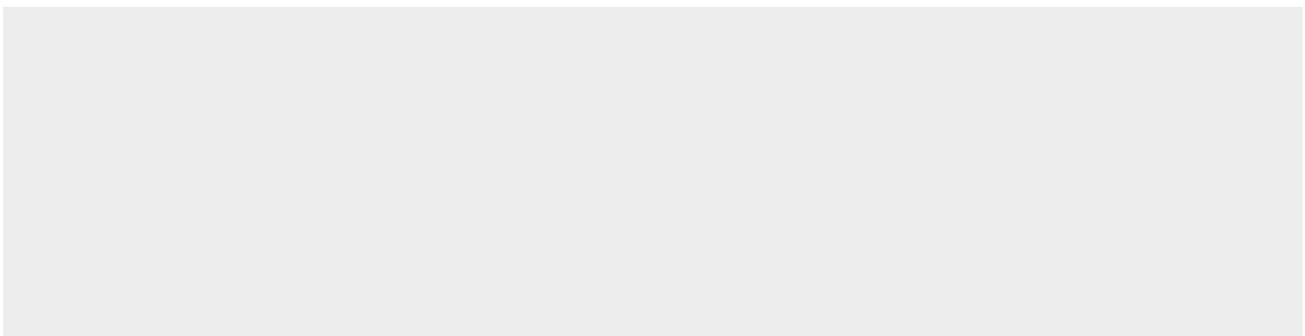
What companies do you most admire? What values of theirs resonate with you?



Think about negative experiences you may have had with certain brands - what values were *not* demonstrated?



What values do your best or ideal clients share?



Common Value words

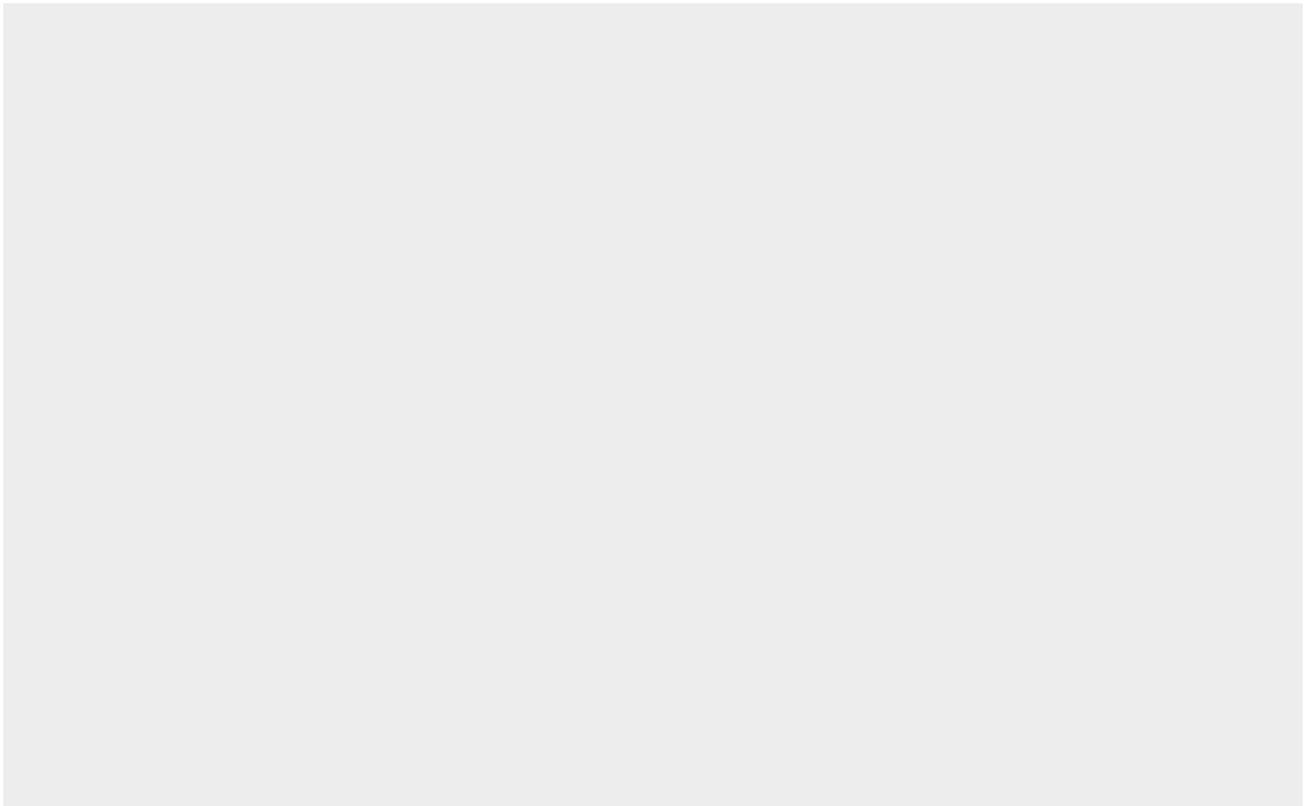
Take a look at these typical value-oriented words. These, along with your answers above, may help you pinpoint your values on the next page.

- Accountability
- Achievement
- Authenticity
- Authority
- Balance
- Collaboration
- Compassion
- Competence
- Connection
- Courage
- Creativity
- Curiosity
- Financial security
- Empathy
- Enthusiasm / Passion
- Excellence
- Fame
- Freedom
- Fun
- Gratitude
- Happiness / Joy
- Helping others
- Influence / Power
- Integrity
- Inspiring others
- Kindness
- Learning / Growth
- Making a difference
- Play
- Positivity
- Relationships
- Respect
- Sense of purpose / mission-driven
- Trust

Expressing your values

Ideally, your values are "actionable" in some way. For example, instead of stating "respect" as one of your values, it is more actionable to say "demonstrates respect for others" Be sure to write your values using your own voice and tone. Aim for writing 3-5 values that reflect what is most important to you.

Your values



Now what?

It is a good idea to keep your values in plain sight where you often work. Think about framing them or posting them near your computer.

You will be referring to your values throughout the rest of the program to ensure that they are reflected in your mission, your ideal client, and your messaging.

Mission - What it is

A mission statement is a brief description of your purpose. It is why your company exists.

Why it's important

Your mission statement acts as your guiding light and impacts your strategy, messaging, and client selection. When building out your team, it will help to attract and inspire the right team members.

Examples:

Precision Sales Coaching

"To help 500 ambitious women entrepreneurs achieve \$500,000 in revenue while being authentic so they can have a greater impact on the world while finding joy in the journey."

Starbucks

"To inspire and nurture the human spirit – one person, one cup, and one neighborhood at a time."

American Red Cross

"To prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors."

Forbes

"To convene, curate, and cover the most influential leaders and entrepreneurs who are driving change, transforming business, and making a significant impact on the world."

Structure

Your mission requires a headline sentence, but you may add 1-2 sentences to include your values, philosophies, or goals to capture your uniqueness. Example:

TED: To spread great ideas

TED is a global community welcoming people from every discipline and culture who seek a deeper understanding of the world. We believe passionately in the power of ideas to change attitudes, lives, and, ultimately, the world. We're building a clearinghouse of free knowledge from the world's most inspired thinkers — and a community of curious souls to engage with ideas and each other, both online and at TED events around the world, all year long. Our agenda is to make great ideas accessible and spark conversation.

The difference between mission and vision

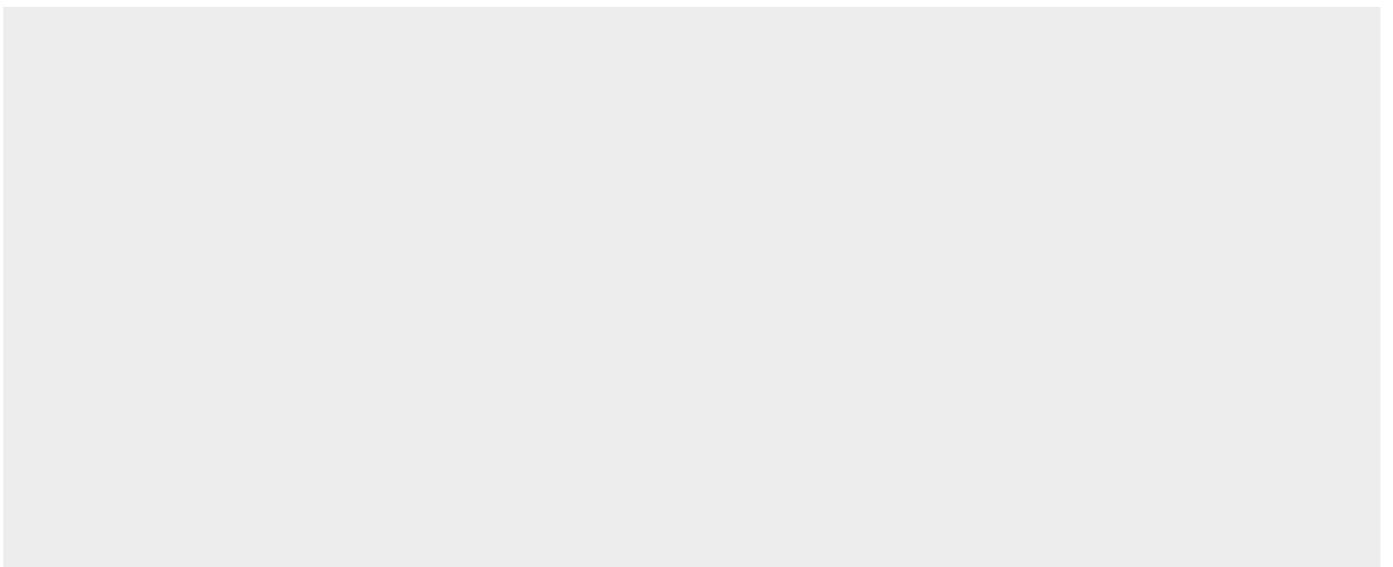
Mission is your purpose. Vision is what your company wants to be in the future.

LinkedIn Example

Mission: “Connect the world’s professionals to make them more productive and successful.”

Vision: “Create economic opportunity for every member of the global workforce.”

What's your mission?





”

When you discover your mission, you will feel its demand. It will fill you with enthusiasm and a burning desire to get to work on it.

W. Clement Stone

YOUR NICHE



Why it's important

Focusing on a niche or a small market segment is critically important to your business. While it can seem counterintuitive to limit your market, it actually positions you for faster, sustainable growth by enabling you to:

- Focus your marketing efforts
- Limit your competition
- Create "authority" in the space, becoming the "go-to resource"
- Charge premium pricing

Typically, you don't choose your niche, but rather it chooses you through a process of discovery. It is important that you don't short-change this exercise, as your niche is a critical component of your long-term success. **You want to nail it.**

It begins with you

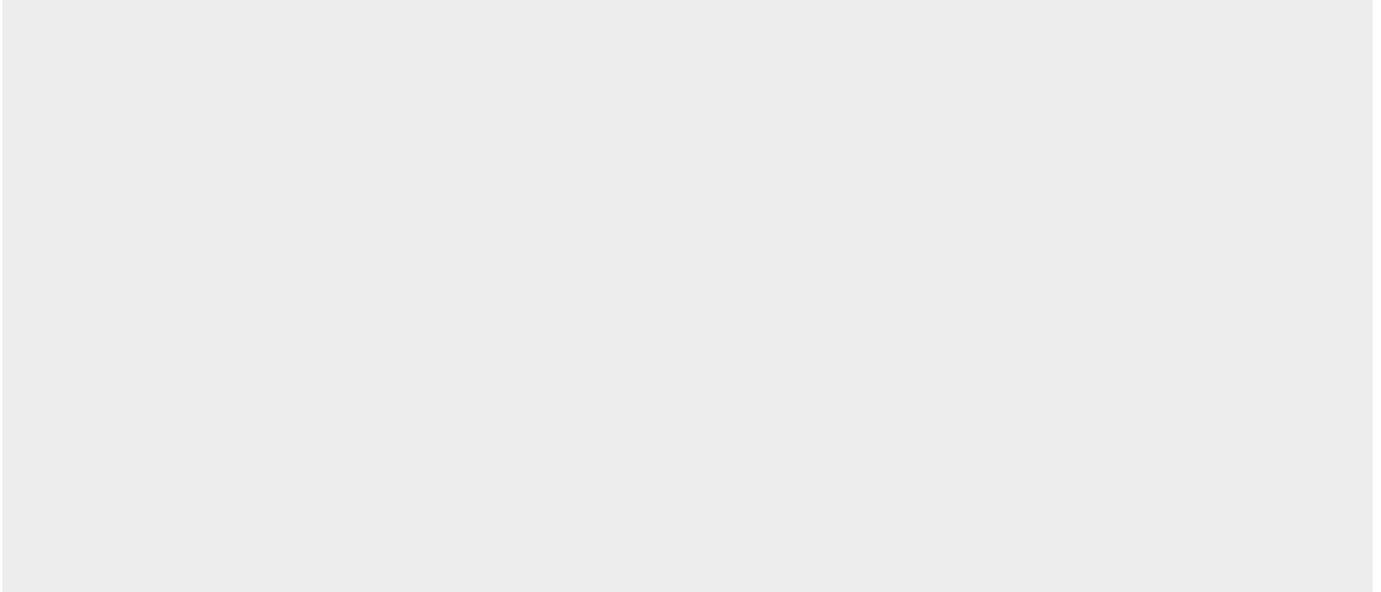
Before focusing on the client, we want to focus on you – who you are, what you love to do, who you like to hang out with, and your own personal journey. This focus on you is important for two reasons:

- Your ultimate business success and personal well-being depend on you LOVING what you do, LOVING who you are working with, and feeling GREAT about the impact you are having.
- If you can personally relate to your client's story in some way, it will position you to easily attract your ideal clients – they will know you "get them."

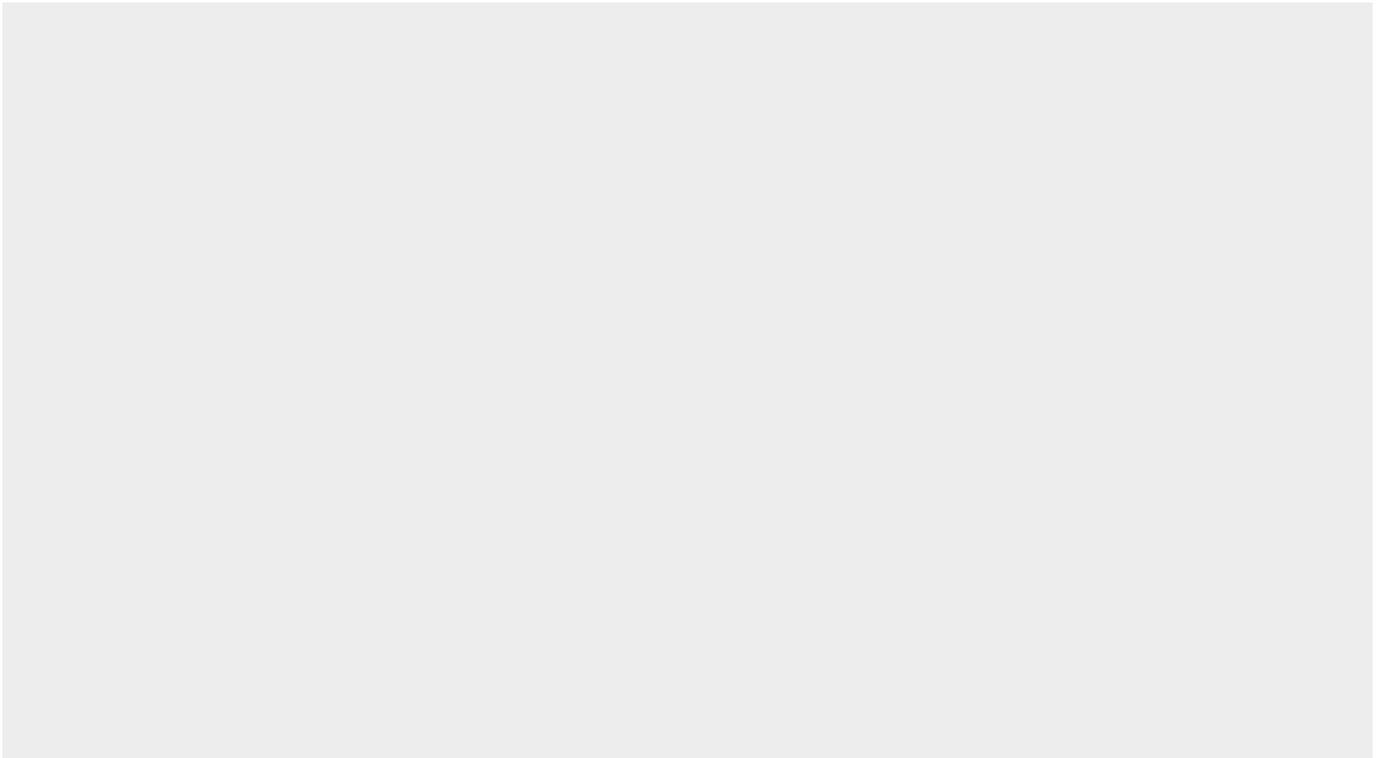
Answer the following questions thoughtfully and thoroughly. The deeper and more detailed you are, the more likely you will discover the perfect niche for your business.

Part One: About you

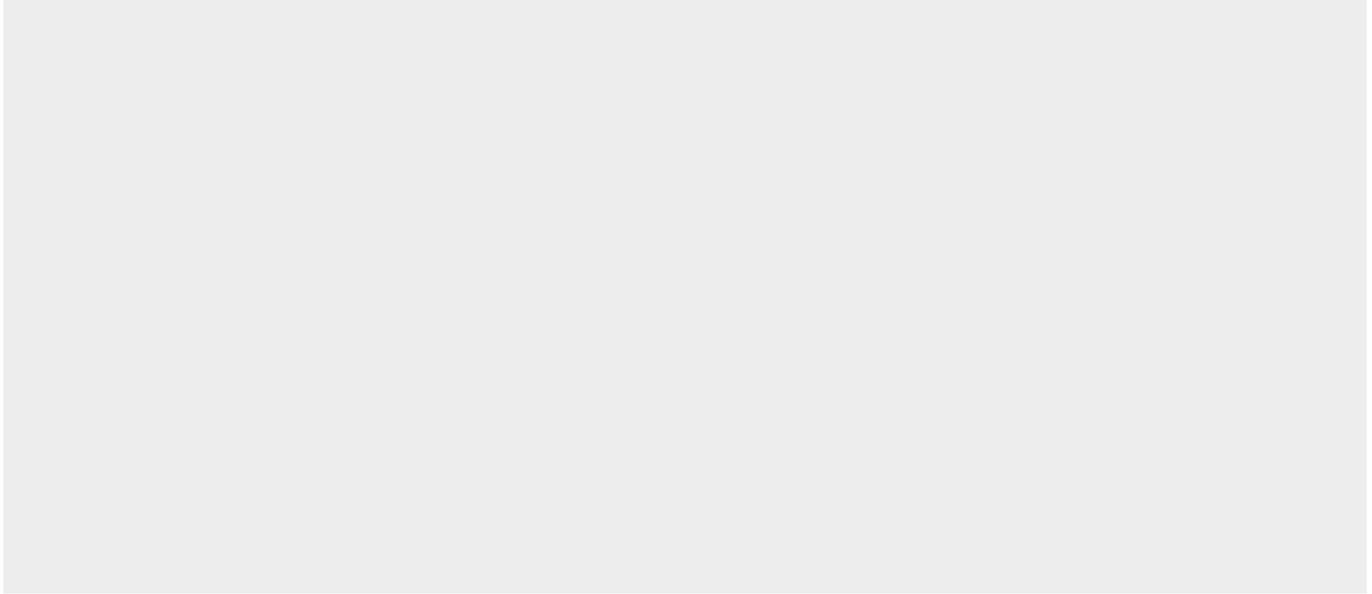
List your passions, talents, interests and hobbies (even those that are not necessarily related to your business.)



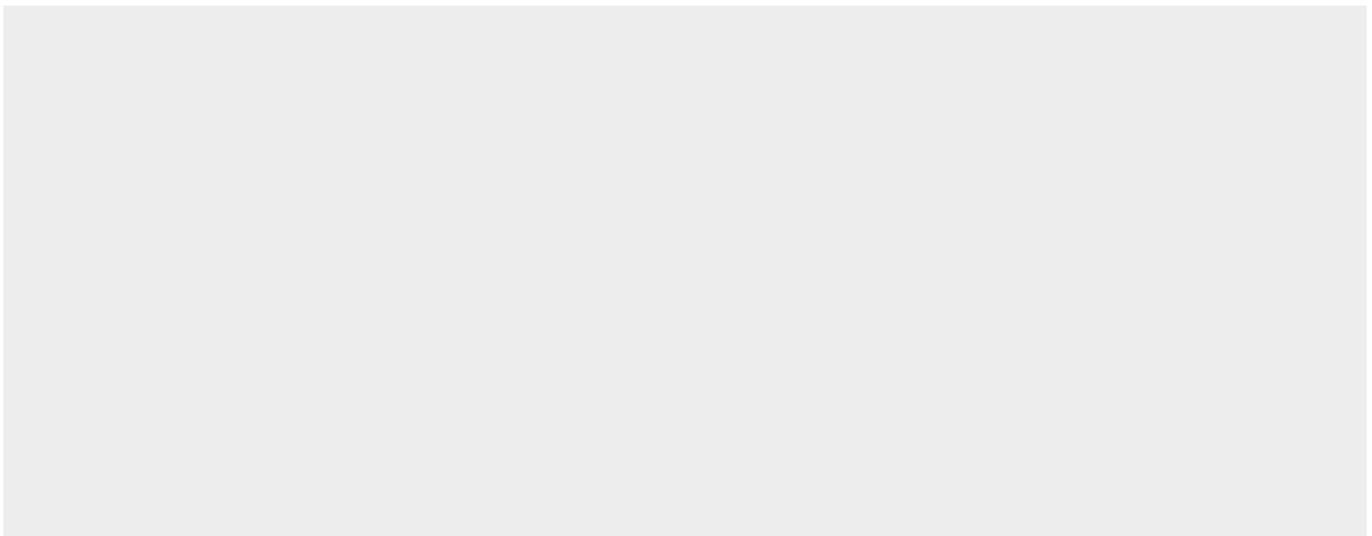
What problems are you particularly good at solving? What do colleagues and friends often come to you for help with?



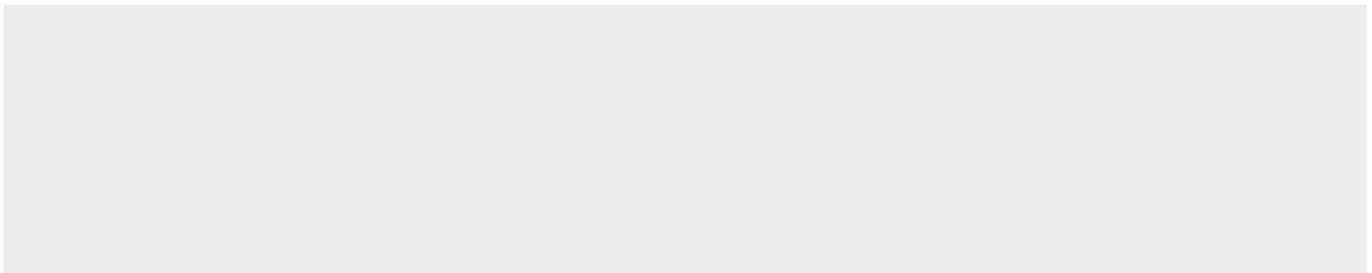
What problems have you overcome on YOUR own journey (personal & professional)?



Who are some of your favorite current and past clients? What do they have in common (demographics, values, problems, personality traits, industry, etc.)?



Who are some of your LEAST favorite current and past clients? What do they have in common (demographics, values, problems, personality traits, industry, etc.)

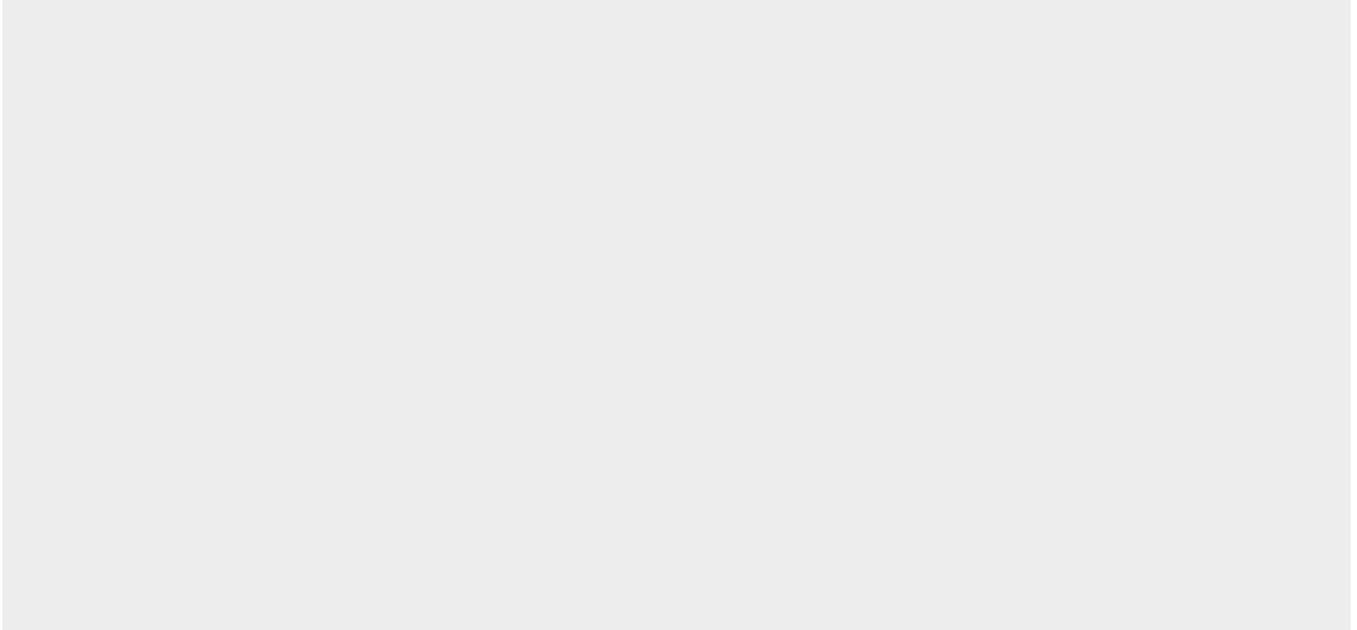


What types of people are you drawn to?

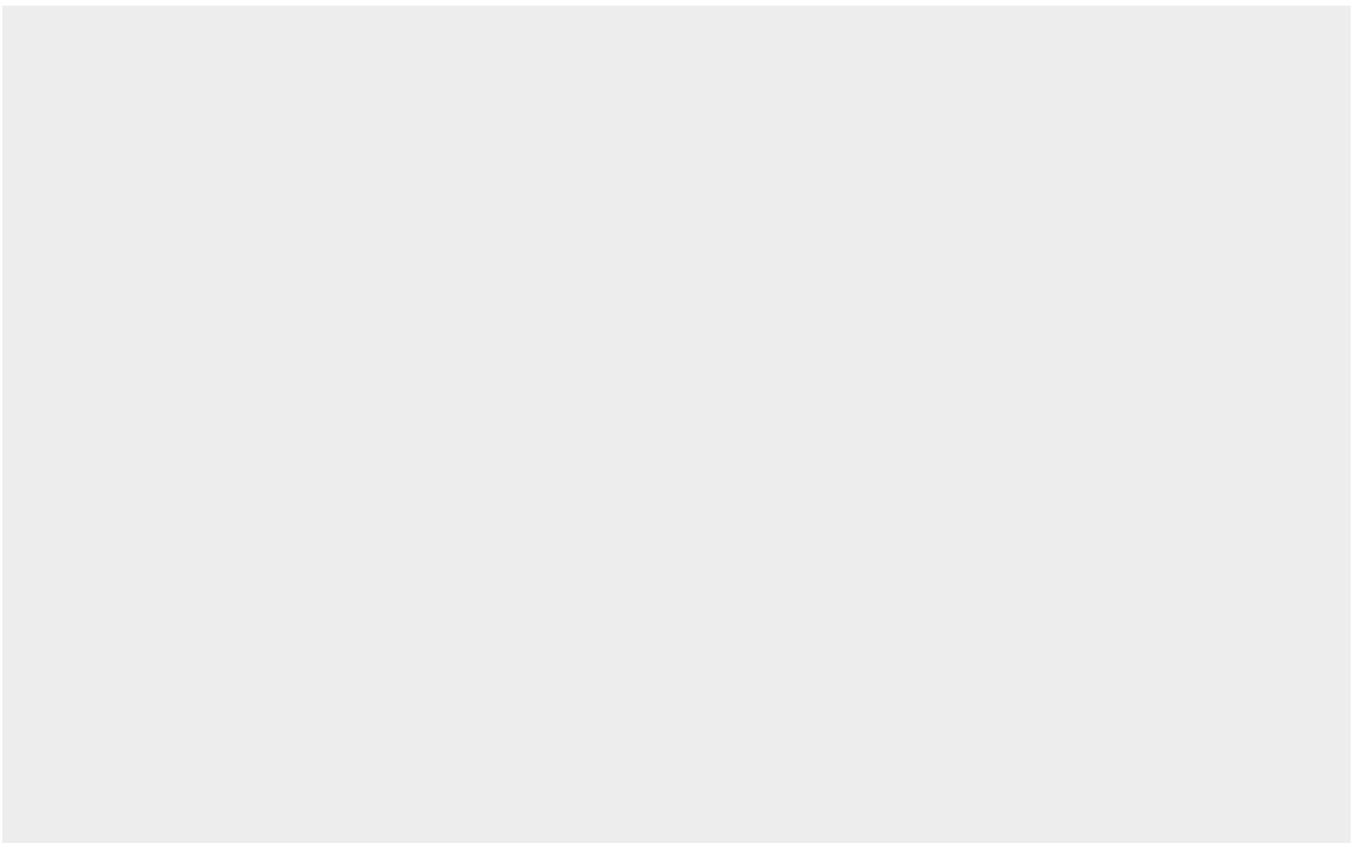
What types of people drive you nuts?

Part Two: The what and the who

Review your work in Part One. What insights can you draw on WHAT you most like to do, and the problems you most like to solve?



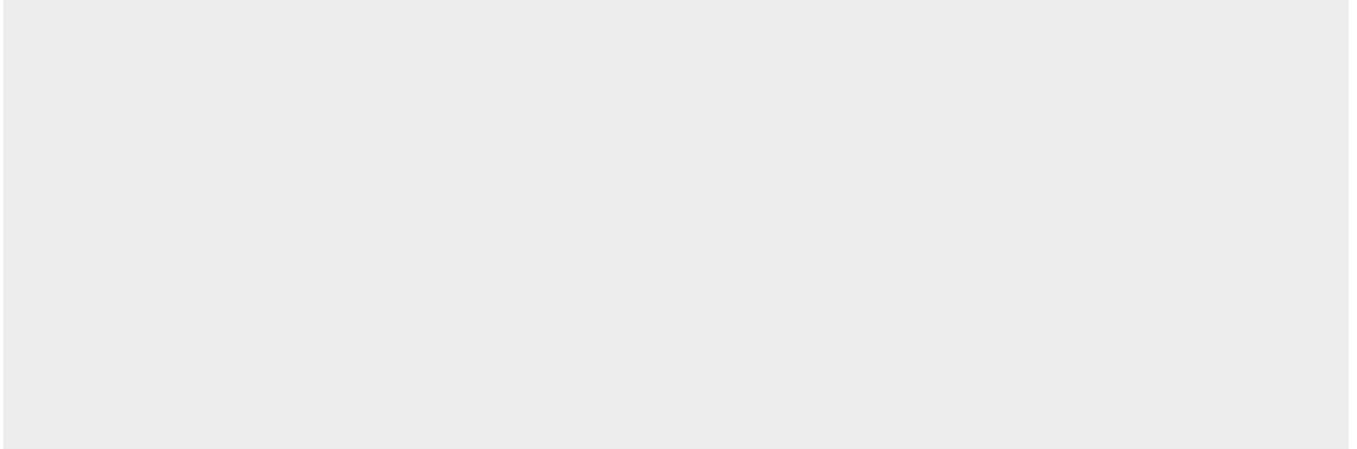
Review your work in Part One. What insights can you draw on WHO you most like to work with?



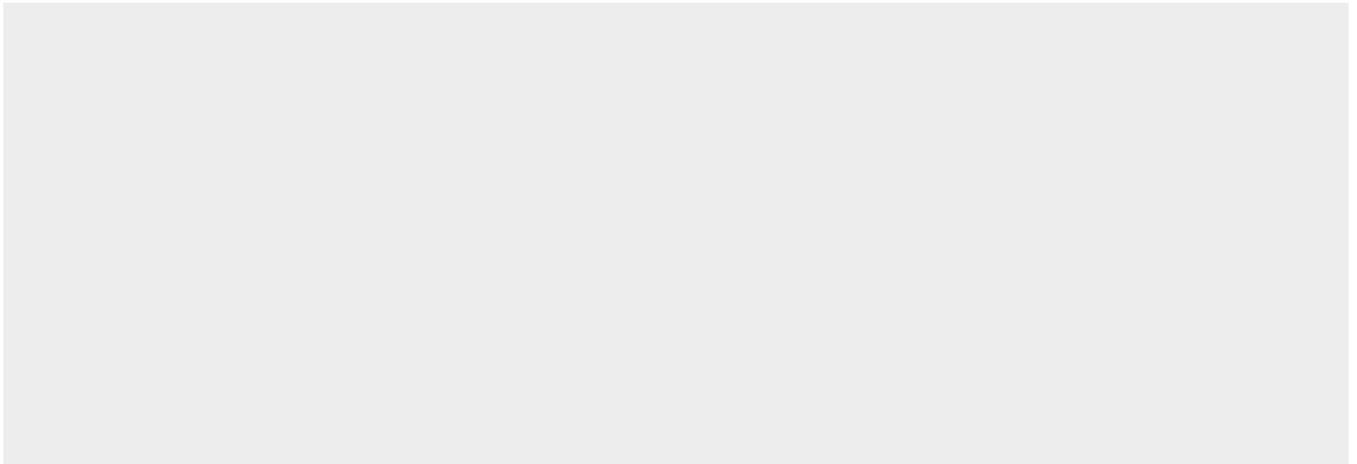
Part three: Potential niches

Identify three potential niches for your business.

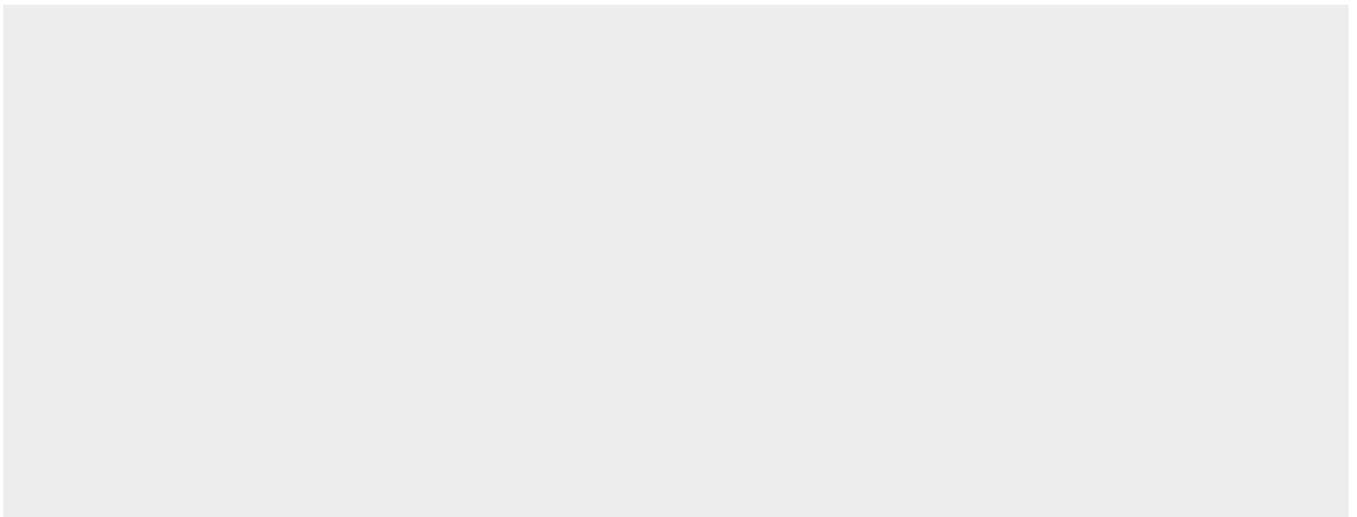
Niche # 1



Niche # 2



Niche # 3



Part four: Niche research

Research the demand and competition for these niches. Explore Google search, Google Trends, social media hashtags, and pay-per-click ads to get a general feel for the need and the opportunity.

Niche #1

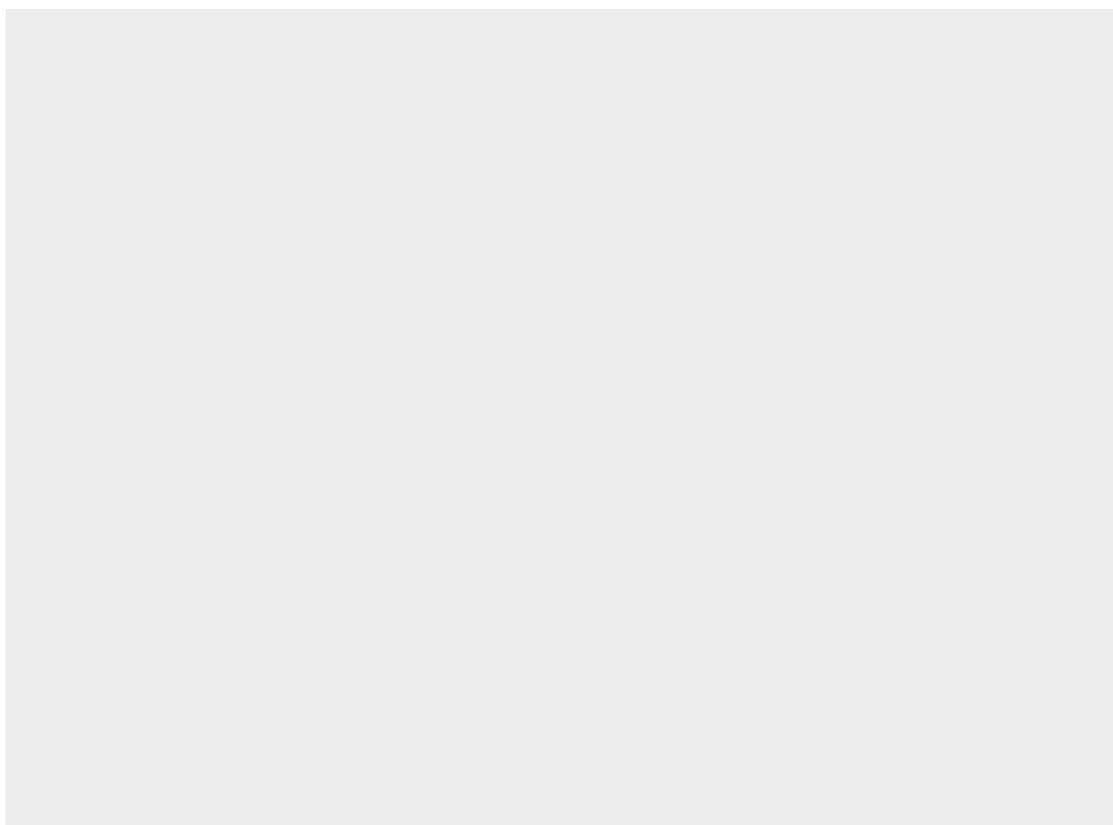
Demand

High Medium Low

Competition

High Medium Low

Competitors:



Niche #2

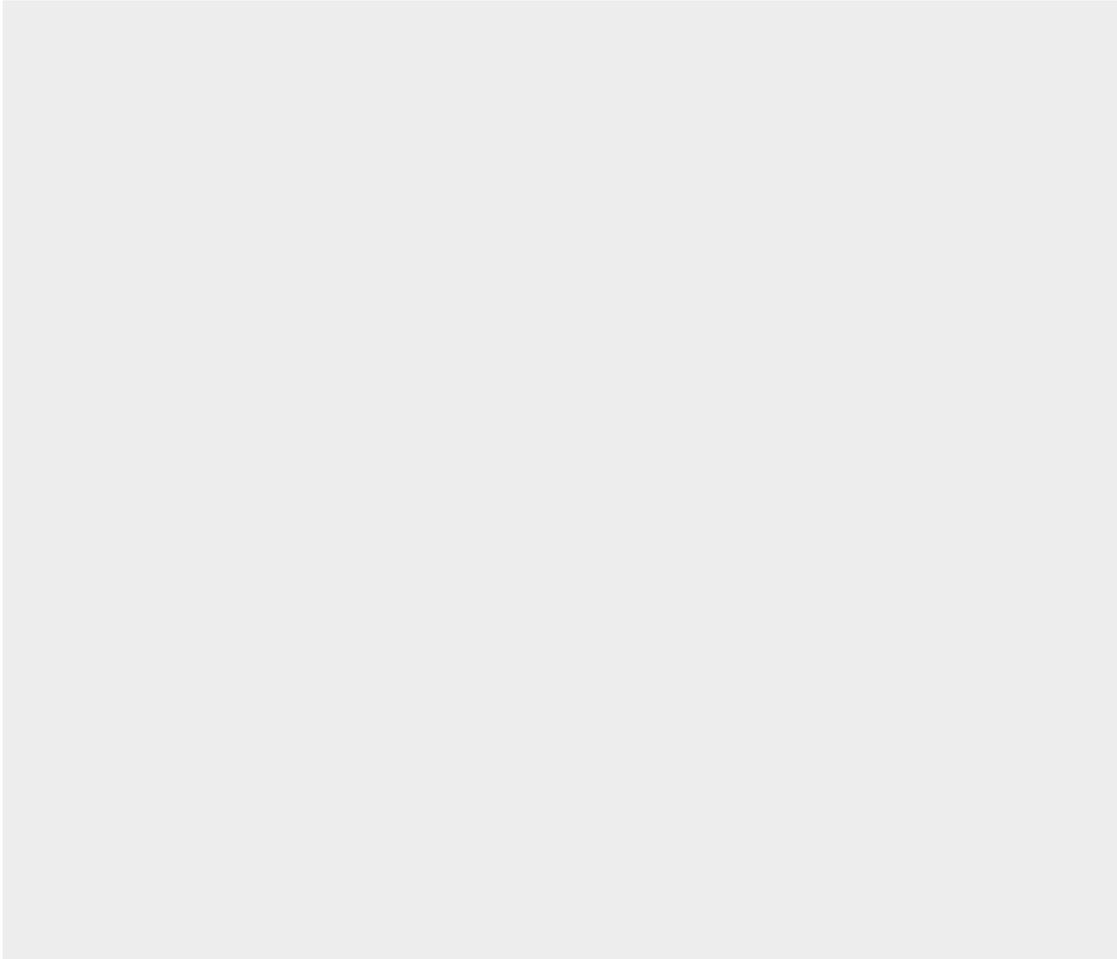
Demand

High Medium Low

Competition

High Medium Low

Competitors:



Niche #3

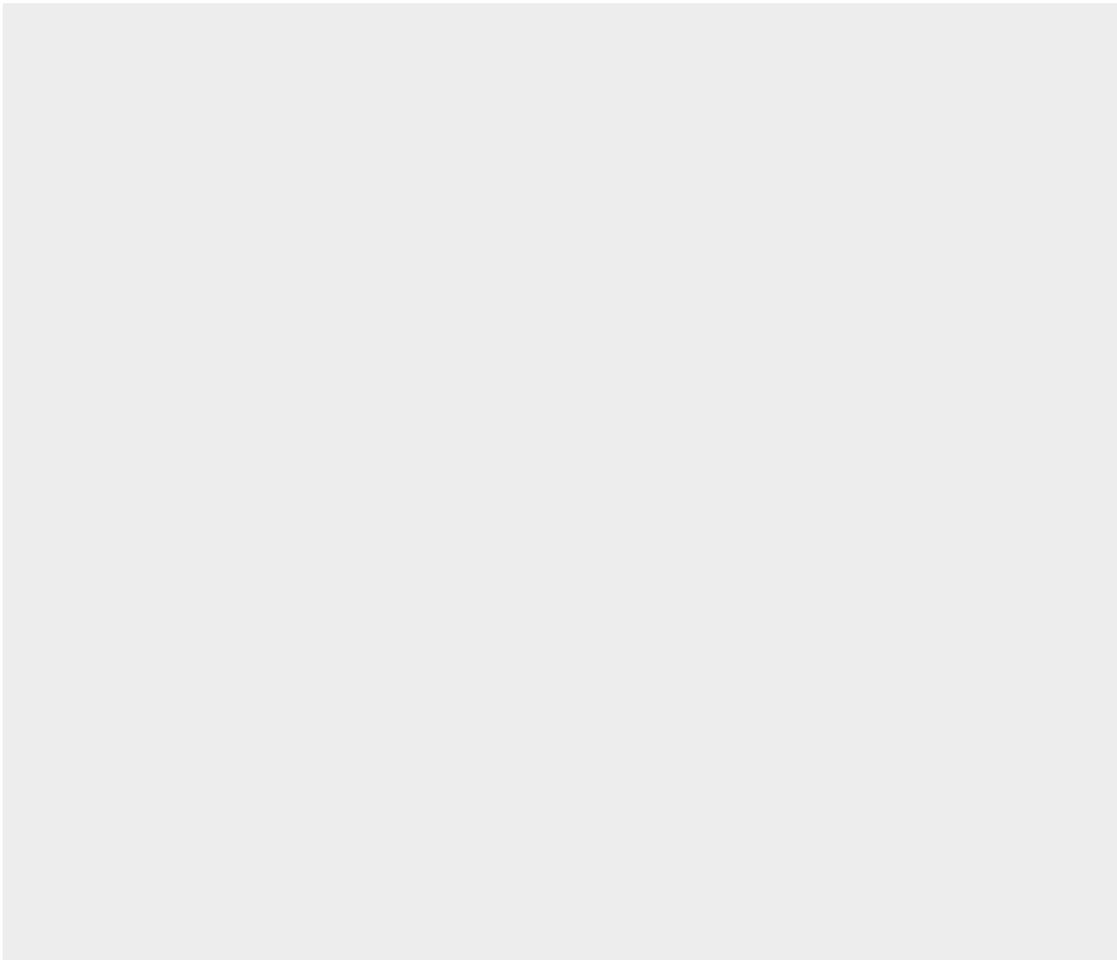
Demand

High Medium Low

Competition

High Medium Low

Competitors:

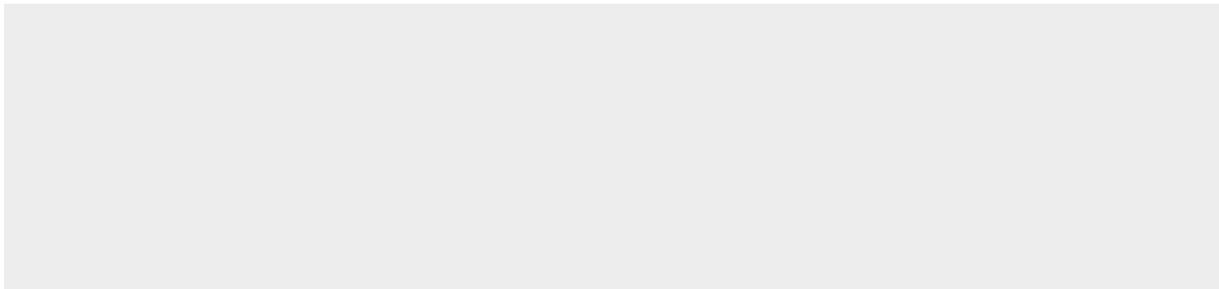


Part five: Analysis & selection

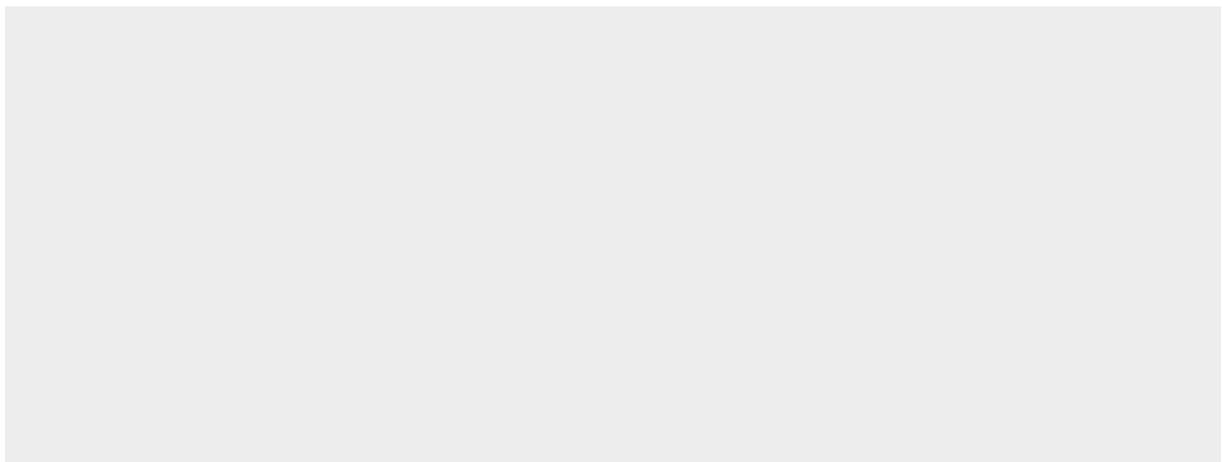
What did you learn from your market analysis? Questions to consider:

- Is there sufficient market demand in each niche?
- Is there a lot of competition in the space? Note: Competition is not necessarily a bad thing, as it demonstrates there is demand. You just need to get clear on how to stand out.
- In what niche can you most easily differentiate yourself?
- Will clients in this niche be able to afford your services?
- Do you know where to find clients in this niche?
- What is your gut telling you about the niche you should pursue?

Which Niche have you selected?



What are your thoughts on how you can stand out?



Three factors

Congratulations!

Now that you have selected your niche, we want to zero in on the transformation you will provide your clients and create a "transformation statement." We begin with three critical factors.

Who is your ONE SPECIFIC ideal client?

What is the ONE SPECIFIC place in their journey where they MUST make a change?

What is the ONE SPECIFIC desired outcome they are looking for?

Your Transformation Statement

Now, with those factors as background, create a transformation statement. This will be a statement you use internally, so don't worry if it's wordy. The purpose of it is to ensure that you are **crystal clear** and **very specific** on whom you are serving, the problem they have, when they are likely to seek help, and their desired solution.

Here's Precision's transformation statement:

We help ambitious women entrepreneurs who are professional service providers go **from** being worried about the future of their business and “stuck” at a revenue plateau **to** having confidence in the future of their business through a steady stream of clients, and increased revenues **so that** they can continue to grow, have a greater impact on the world, find joy in the journey – and most importantly – feel financially free.

I help

go from

to

so that

A young woman with long, wavy brown hair is smiling warmly at the camera. She is wearing a light pink blazer over a white top. She is holding a silver laptop in her left hand, which is partially visible on the left side of the frame. The background is a bright, out-of-focus indoor setting, possibly a window with blinds.

”

**Defining your niche
is the single most
important business
decision you can
make as an
entrepreneur.**

Saskia Gregory



YOUR IDEAL CLIENT

INSTRUCTIONS

PART 1

CONDUCT BRIEF INTERVIEWS

interview 3-5 favorite clients so that you can uncover ways to attract more just like them. Focus on their commonalities. Conduct 3-5 "cold" interviews. Download this spreadsheet to track what you learn.



PART 2

CLARIFY YOUR TRANSFORMATION STATEMENT

With the interviews as background, RE-write, if necessary, your transformation statement and why you are uniquely qualified to help your clients achieve their transformation.

PART 3

COMPLETE YOUR IDEAL CLIENT PERSONA

Conduct a "deep dive analysis" of your ideal client so you can develop "magnetic messaging" that will resonate with them.

PART 4

WRITE YOUR MESSAGING

With steps 1-3 as background, write messages that will resonate with your ideal client.

PART 5

ASSESS YOUR MARKETING

Review your website and other marketing materials and identify opportunities to improve your messaging.

PART 6

IMPLEMENT CHANGES

Identify implications and implement changes.

Favorite client interview guide

You know who your favorite clients are. The ones you love to work with, who have received the most value from your offering, and who appreciate the impact you have had on their success. Tell them that you want to attract more clients just like them, and request a brief interview for your marketing purposes. Customize these questions accordingly.

What was the primary reason you decided to seek help with _____?

What research did you conduct to find a solution to_____?

If you were looking for a solution today, where would you go? What would you google?

Did you consider other alternatives to me? What was the most important decision making criteria?

How would you describe your experience working with me?

What is different for you after having worked with me?

What wishes would you have for us going forward?

Do you know others who might benefit from working with me? *(If yes, ask if they will provide an introduction.)*

Would you be willing to do a video testimonial? *(If yes, offer to write a draft script based on their answers. The video can be short and taped using their device.). While video is preferred, a written testimonial is appreciated if they are uncomfortable with video.*

Cold lead interview guide

As you promised when you asked for the meeting, the objective of the call is research. It is NOT a sales call.

The high-level flow is to get them talking about their challenges and pain points, what solutions they've looked for, their desired transformation, and to ask them for interview referrals.

If they seem like an ideal client, ask if they would be interested in hearing about your offer on another call.

Immediately after the interview, capture what you heard on your SPREADSHEET. Download [HERE](#).

Opening

Provide context for the meeting in your own words. Example:
I am conducting research as part of a new offer I am building. My goal is to learn more about the challenges of _____ as it relates to _____. I have a set of questions I'd like to ask. How does that sound?

Tip:

Ask "WHY" questions as a follow-up to their responses as needed.

Sample Questions:

1. What are your biggest challenges as it relates to _____?
2. What do you feel is the main issue you're struggling with right now when it comes to _____?
3. How long have you been thinking about _____, or has this been an issue or frustration?
4. Have you looked for a solution? Where/what did you search for?
5. Have you engaged an expert to help you?
6. How much did you invest?
7. What was your return on the investment?

Cold lead interview guide

8. How active are you on social media? Which platforms/groups?
9. What networks do you belong to, or events do you try never to miss (in-person or virtual)?
10. Mad Lib: fill in these blanks for me, "I want to go from _____ to _____ so that_____."
11. How confident are you that you will achieve this transformation?
12. Do you see a scenario where you would invest to accomplish this transformation?
13. What would an ideal solution look like for you?
14. What would you be willing to pay for your ideal solution?
15. **Ask for referrals:** Do you know other (insert your ideal client) who may be open to an interview? If so, I can send you a blurb* you can copy and paste into an email to make it easy for you to make an introduction
16. **If the person is a good fit for your service:** You sound like a fit for the offering I am building. Once it is developed, would you be interested in hearing about it?

Cold lead follow-up

Sample follow-up email, request for referrals

Kate,

I so enjoyed our time together today! Thank you for sharing so much of your story with me. I am truly grateful.

I'd love any referrals to other ____ (your ideal client) ____ who may be open to an interview. As promised, here's a blurb you can copy and paste into an email to make it super easy to make introductions

Dear ____

I'd like to introduce you to Linda Knox. She and her partner, Nadine Keller, are doing some exciting work around sales effectiveness. They are researching the sales challenges of ambitious women entrepreneurs who sell services. Their goal is to interview 50+ women, and I thought of you right away.

I have copied Linda on this email, hoping you might agree to a 30-minute chat with her. I know you'll have great perspective to share, and you will likely find the conversation informative as well. If you are game, you can book a call with Linda here.

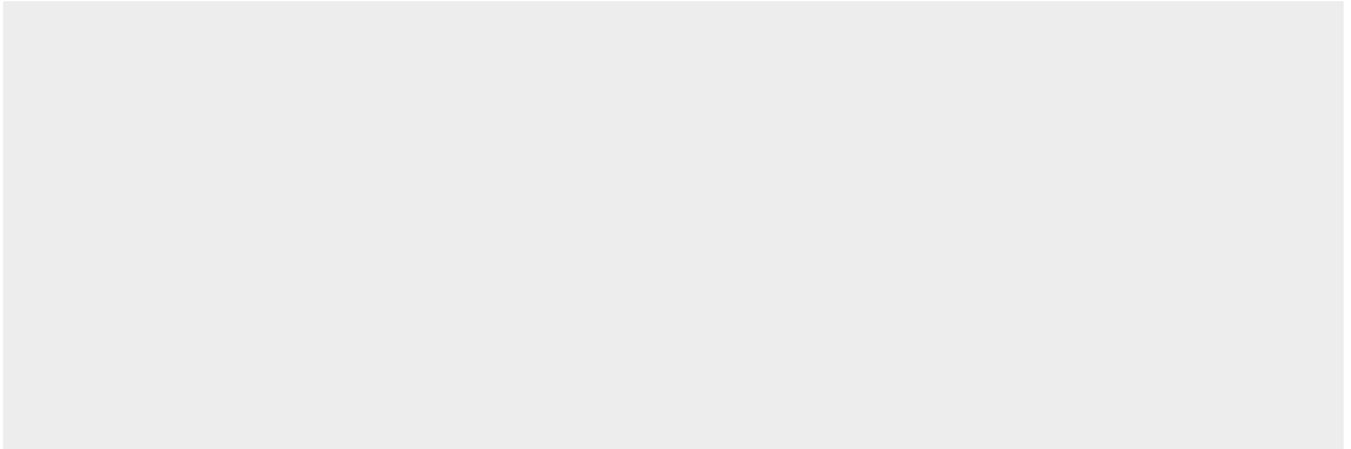
If you do not want to participate, no worries, just let me know either way.

Thanks so much...

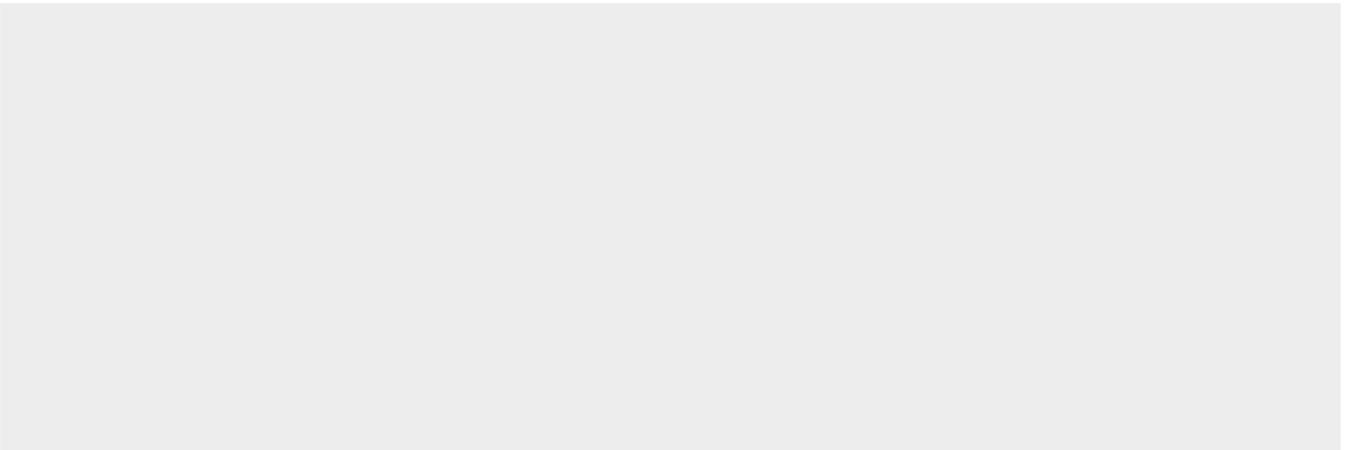
Analysis of interviews

Review your SPREADSHEET capturing what you learned in the individual interviews you conducted. Look for commonalities and document them here.

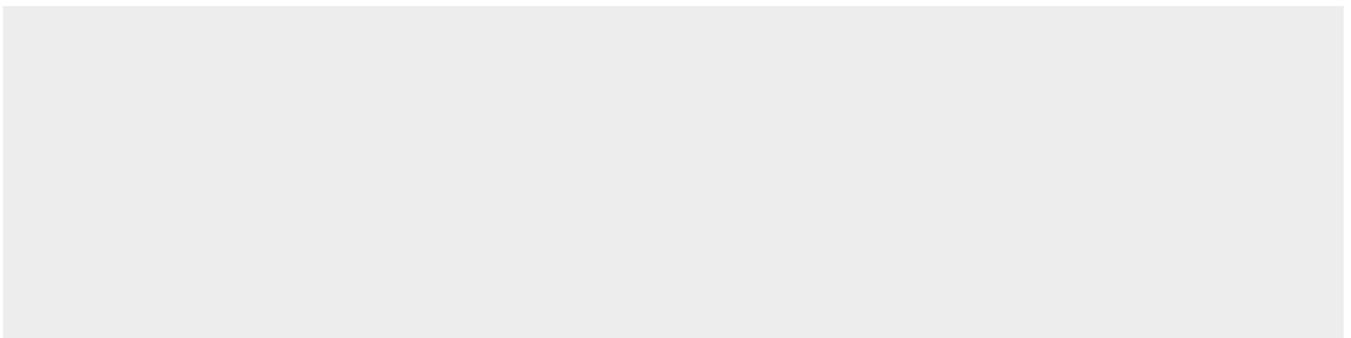
Common challenges



Common words to describe their challenges

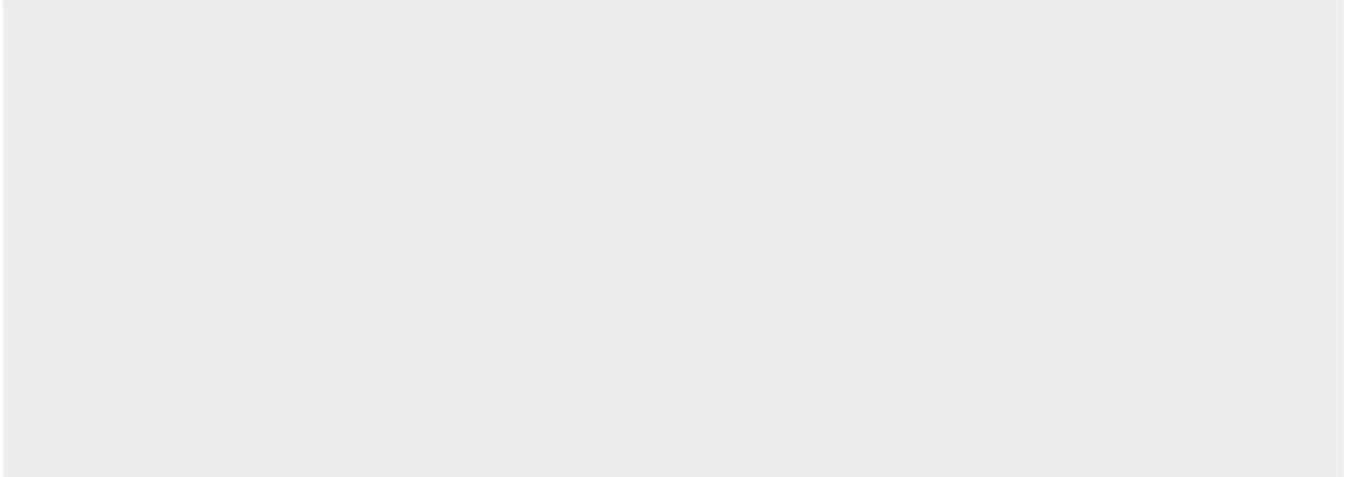


Common words to describe what is most painful

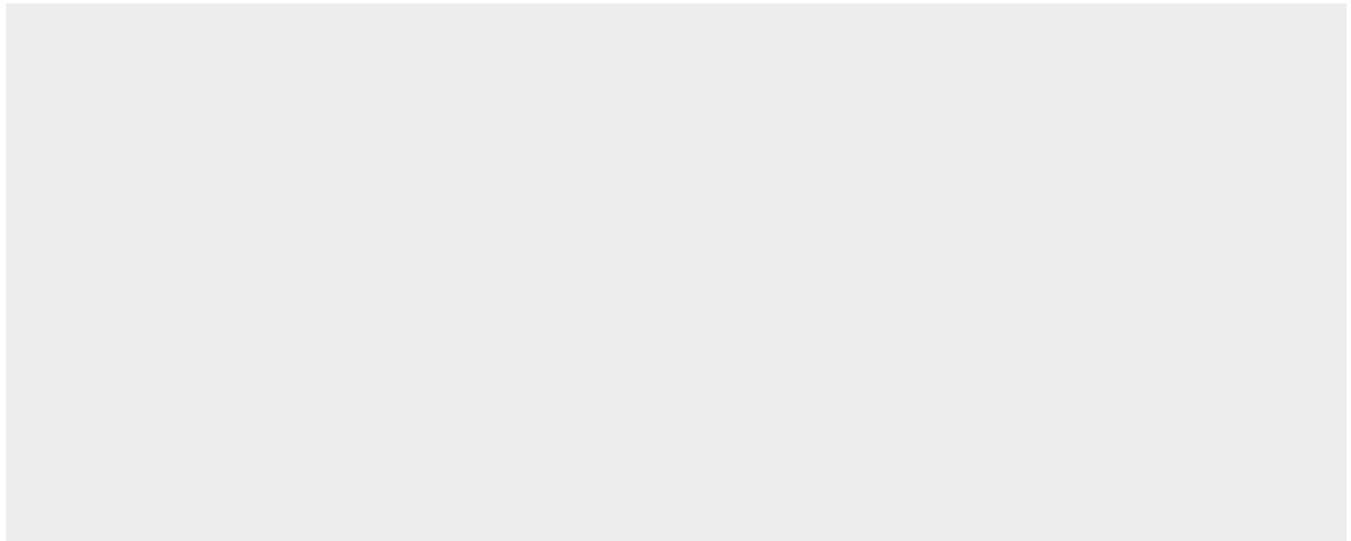


Analysis of interviews (cont.)

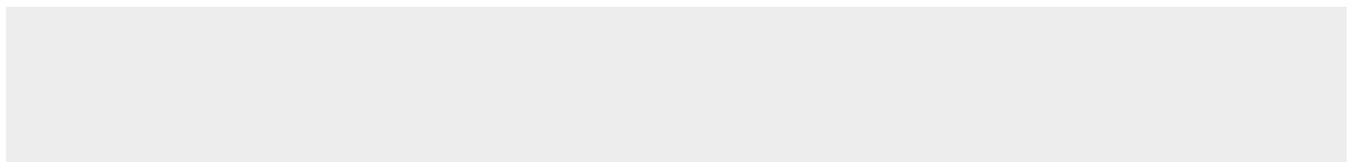
Common words they use to describe their desires/ feelings



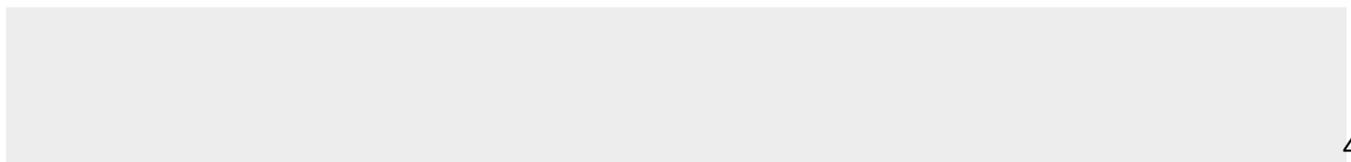
Common ways they describe their ideal state



Common places they look for a solution



What they would expect to pay for their ideal solution (range)



Revisit your three factors

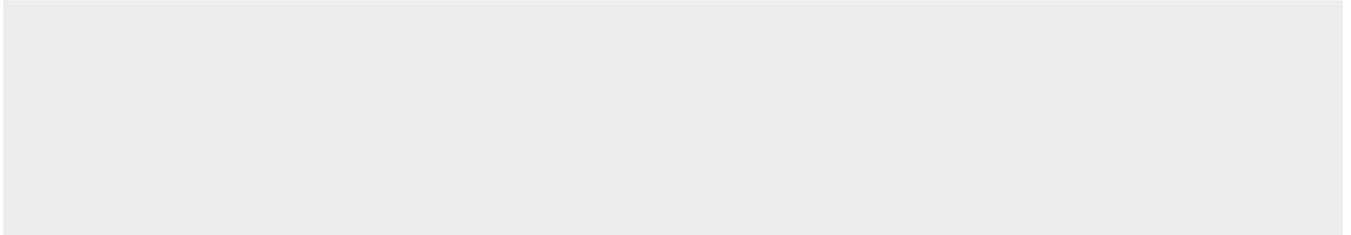
Who is your ONE SPECIFIC ideal client?

What is the ONE SPECIFIC place in their journey where they MUST make a change?

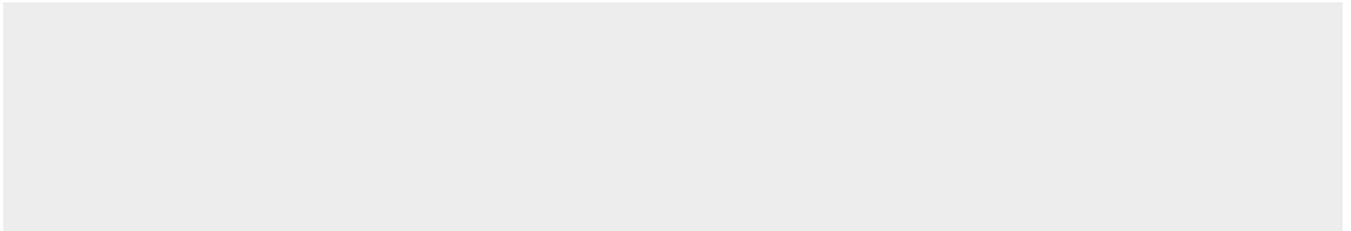
What is the ONE SPECIFIC desired outcome they are looking for?

Revisit your Transformation Statement

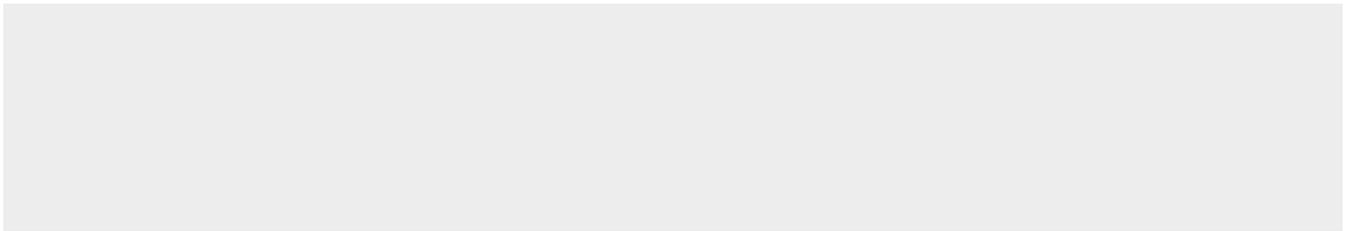
I help



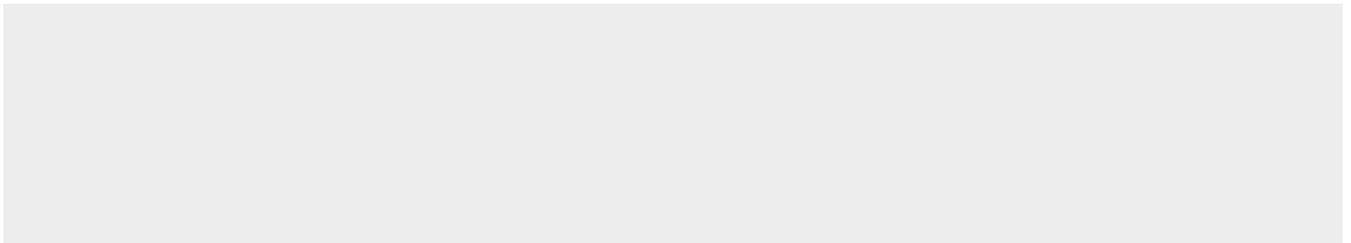
go from



to



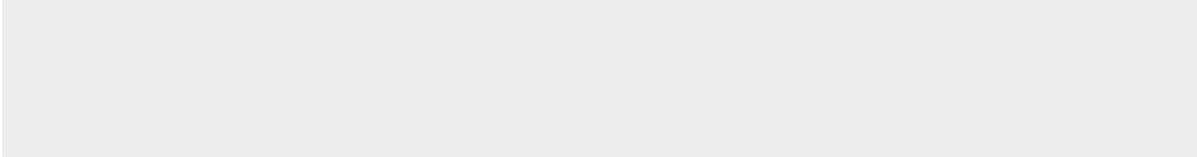
so that



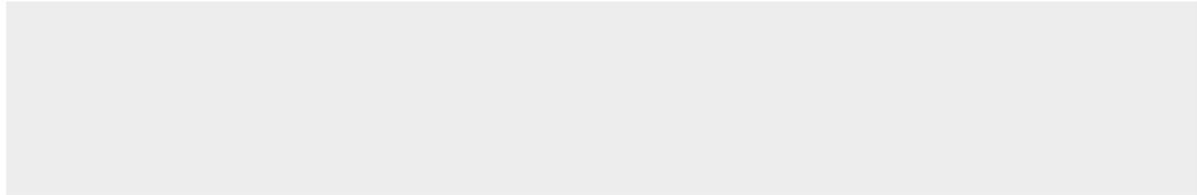
Your ideal client profile

With all the work that you have done thus far as background, let's do a deeper dive on your ideal client so that you know how to best attract them.

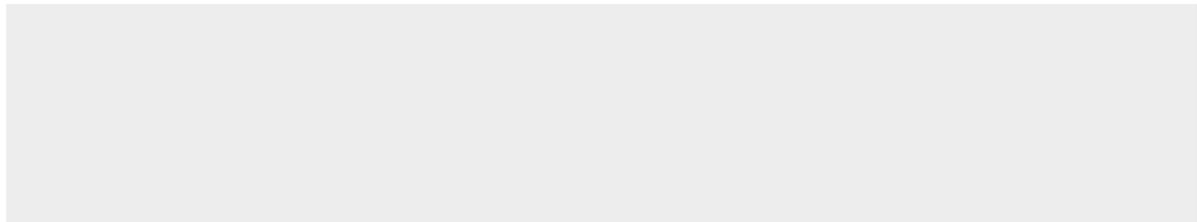
Demographics



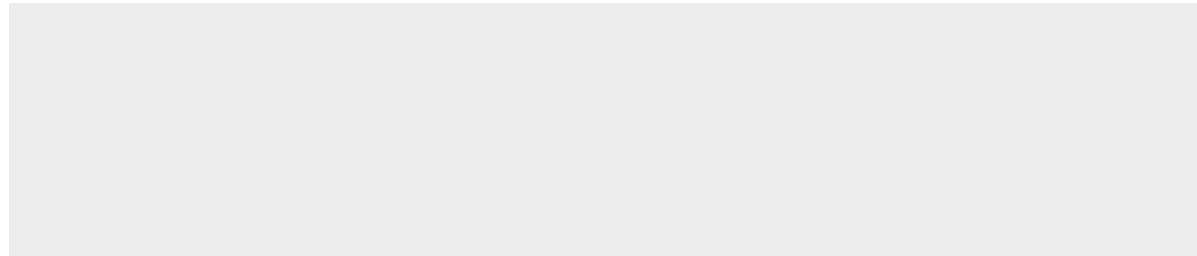
Challenges & pain points



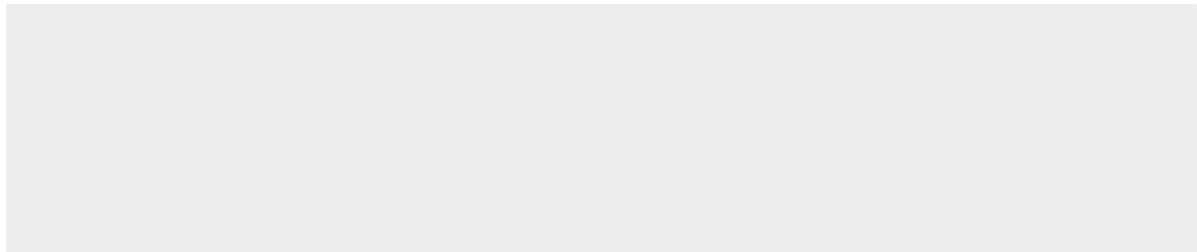
Where they get their info



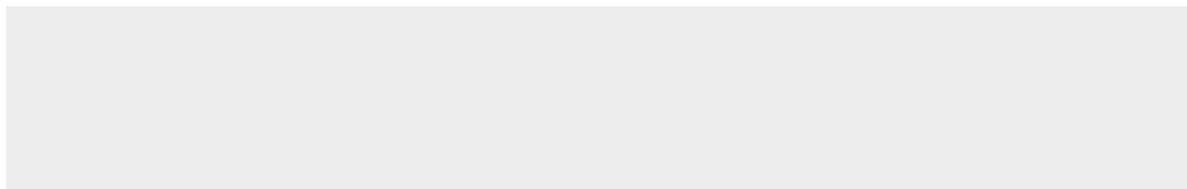
Alternatives to working with you, or someone like you



Potential objections to working with you



What is the cost of the client doing nothing to solve the problem?



Why you?

What makes you uniquely qualified to help your clients achieve their transformation?

How can you demonstrate your success? (Social proof, testimonials, stories)

Does your journey relate to your ideal client's transformation? If so, how?



**Focus on the
people you
want to attract
to your
business, and
they will come.**

Christine Joy



YOUR OFFER & PRICING

Current Offer / Pricing Analysis

What is your monthly/ annual revenue goal?

What is/are your current offerings and pricing?

Offer	Price
<input type="text"/>	<input type="text"/>

What is the potential **quantitative value** you provide with your current offerings?

What is the potential **qualitative value** you provide with your current offerings?

What is the potential **quantitative cost** to the client if they do nothing?

What is the potential **qualitative cost** to the client if they do nothing?

Current Offer/ Pricing Analysis (cont.)

What is your **hourly base price** (minimum you are willing to charge per hour?)
As you work your numbers, you can use the **Revenue Growth Calculator**

Hourly Base Price

For each program multiply the estimated **number of hours** to prepare for and deliver your offering.

Offer	Est. Hours x Hourly Base Price
<input type="text"/>	<input type="text"/>

What is the approximate **cost of alternatives** the client has to working with you or someone like you?

What do you expect your **competition charges** for similar solutions?

Future Offer/Pricing Analysis

With this as background, is there an opportunity to increase your pricing?

Offer	Current Price	New Price

Reflecting on your offer analysis, is there a need, opportunity or desire to change, enhance or add to your offering? What are your thoughts?

With the new pricing, how many clients do you need to achieve your revenue goal?

of clients



||

**No one will ever
pay you what
you're worth.
They'll only ever
pay you what they
think you are
worth, and you
control their
thinking.**

Casey Brown



YOUR BRAND



What is it?

Some people connect brands to logos and the look and feel of a company, but it is so much more.

Branding is a clear and consistent expression of who you are and what you stand for. It reflects your mission and values and is deliberately designed to resonate with your ideal customer. It has a unique and identifiable voice.

Why is it important?

When we think of brands, we often think of large companies like Nike, Coca-Cola, and Apple. It is just as important for small companies to deliberately define their brand because it is the driving force behind customer loyalty and recognition. It makes your offering relatable and desirable to your ideal clients and creates a sense of recognition in the marketplace

Your brand's personality

Defining your brand's personality is a way of personifying your brand. According to branding expert Jean-Noël Kapferer, *"brand personality fulfills a psychological function. It allows consumers to either identify with it or project themselves into it."*

We know from research that clients are more likely to buy from companies that have a personality similar to their own. Applying specific character traits to your business will make it feel more human to your clients and create a sense of attachment.

The following Brand Personality Framework was developed by Stanford Marketing and brand expert Jennifer L. Aaker. She suggests that your brand can fall into one or a combination of five categories.

Five brand personality types

- **Excitement:** Carefree, spirited, and youthful (Red Bull, Nike)
- **Sincerity:** Kindness, thoughtfulness, and an orientation toward family values (Patagonia, Dove)
- **Ruggedness:** Rough, tough, outdoorsy, and athletic (Harley Davidson, Ford)
- **Competence:** Successful, accomplished, and influential, which is highlighted by leadership (Volvo, Starbucks)
- **Sophistication:** Elegant, prestigious, and sometimes even pretentious (Chanel, Apple)

How it gets communicated

A brand's personality comes to life in three ways:

- **Visually:** Your logo, colors, typography, visuals
- **Communication style:** Voice, tone, tenor, and temperament through written and verbal communication
- **Behavior:** How your company acts relative to its customers

Brand worksheet

Which of the following personality types does your brand relate to most? You can choose one, or a combination of up to three.

- Excitement:** Carefree, spirited, and youthful (Red Bull, Nike)
- Sincerity:** Kindness, thoughtfulness, and an orientation toward family values (Patagonia, Geico)
- Ruggedness:** Rough, tough, outdoorsy, and athletic (Harley Davidson, Ford)
- Competence:** Successful, accomplished, and influential, which is highlighted by leadership (Volvo, Starbucks)
- Sophistication:** Elegant, prestigious, and sometimes even pretentious (Chanel, Apple)

If your brand was a person, what would it be like?

What well-known person or character would it be like?

How will your brand interact with your clients?

- | | |
|--|--|
| <input type="checkbox"/> Friend | <input type="checkbox"/> Expert Advisor |
| <input type="checkbox"/> Parent | <input type="checkbox"/> Sibling |
| <input type="checkbox"/> Role-model | <input type="checkbox"/> Other <input style="width: 150px;" type="text"/> |

Brand worksheet (cont.)

How does your brand look VISUALLY?

Colors

Images

Typography/ font

How does your brand communicate?

Voice, tone, tenor, temperament

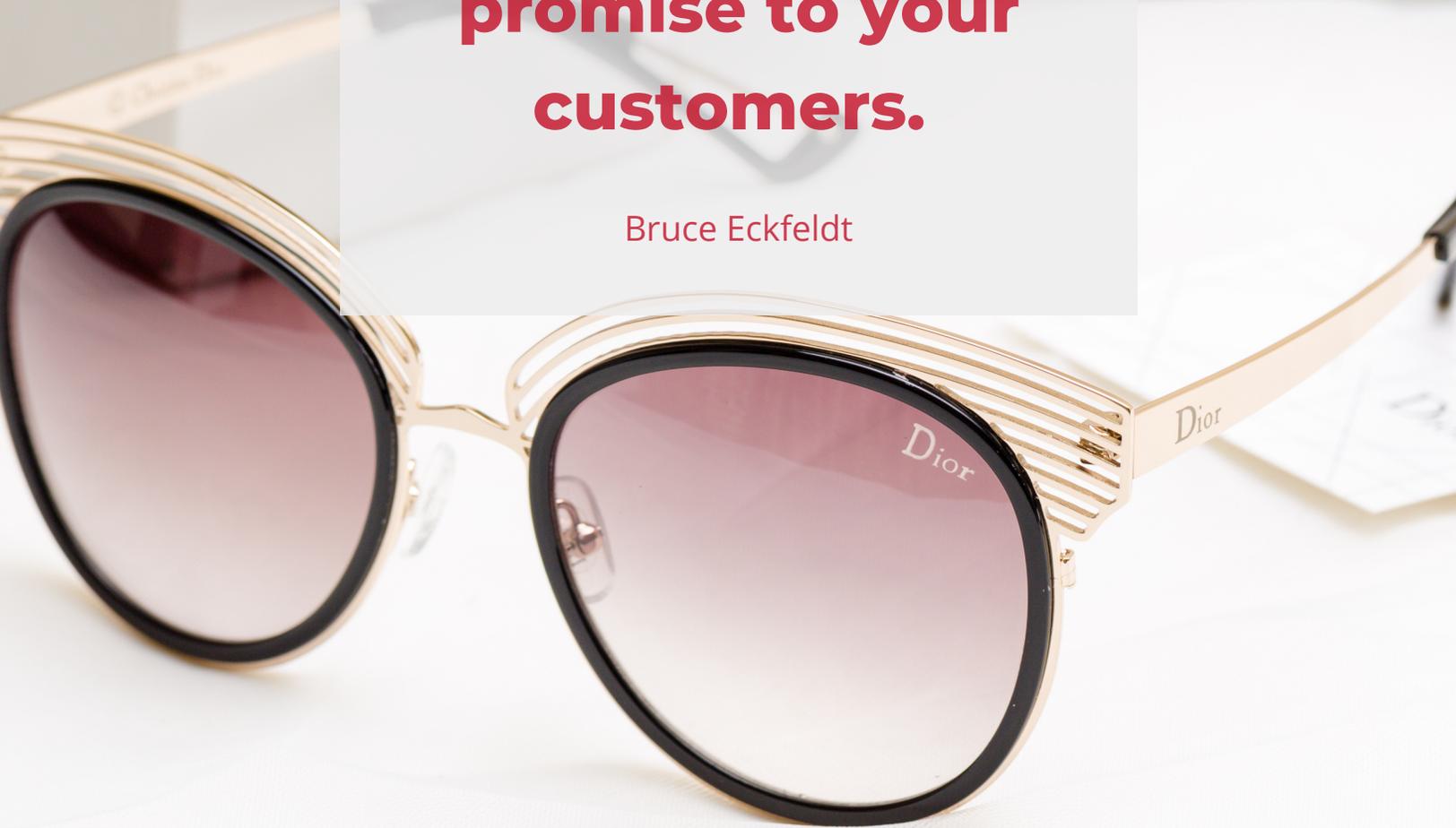
How does your brand behave?

Standards for communication, availability, approach to conversations, etc.



**Your brand
communicates
what you stand
for and
represents a
promise to your
customers.**

Bruce Eckfeldt

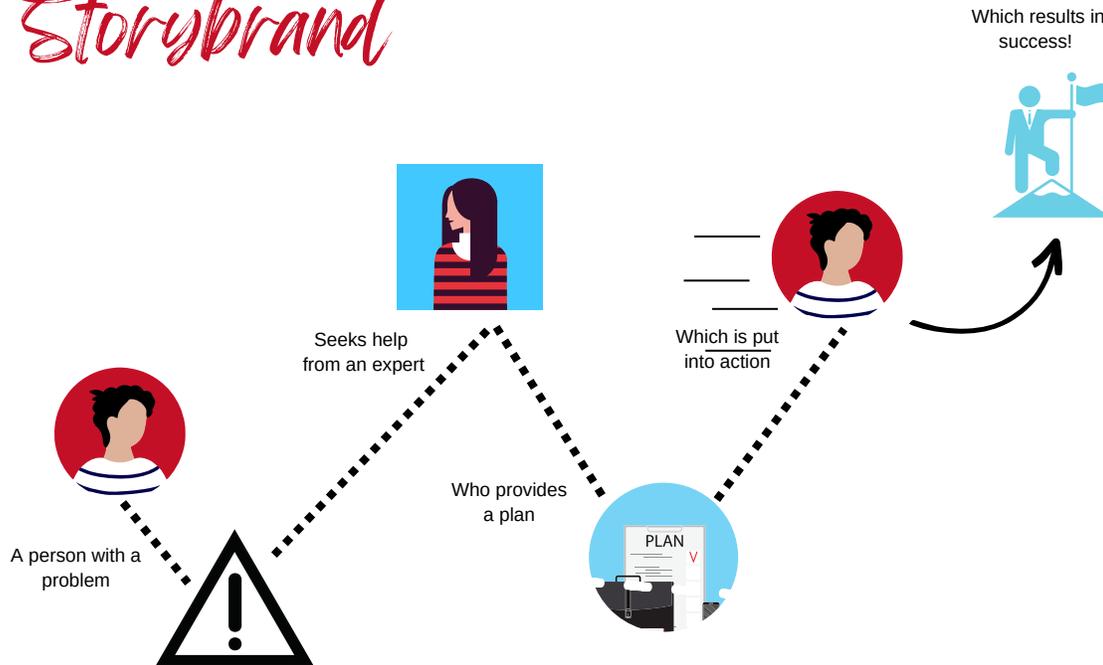




YOUR MESSAGING



The Storybrand



Storytelling is the most powerful methodology in marketing and sales. In marketing, where we are speaking to a broad group of our ideal clients, we want to be sure that your audience sees themselves and their problem in your story and your service as a means to a solution. The above model is adapted from Donald Miller's StoryBrand.

It begins with your ideal client and your ability to describe their problem in a way that truly resonates with them. There are three components when you describe the problem:

- what they say,
- how they feel,
- and your philosophy/ approach on how it should be solved.

You then gently introduce yourself as an expert and friend who has empathy for their problem and can help them solve it.

Your ideal client will want to know how you plan to solve their problem, and this is where you provide the details of your offer.

Then comes the **call to action**, where you tell them exactly what to do (e.g., book a call, sign-up for a workshop, buy now).

Finally, you show them what success looks and feels like for them so you leave them smiling. 😊

Messaging Guide

Now it is time to reflect on all of your work to date and write the guiding messages you will use in your conversations, LinkedIn profile, website and other marketing and communications. Your work up to this point has mainly been internal. Now you want to focus on messaging that will resonate with your ideal client.

It is important to:

- Use language they would use to describe their situation
- Use words and phrases that are likely to resonate
- Make sure they see themselves as the hero in the story, with you as their guide

How you will talk about your mission & values

How your ideal client would describe themselves

How they would describe the problems or situations they are facing

Example: Not enough revenue; lacks confidence; uncomfortable selling; undercharging; feeling the need to take work they don't want

How they would describe their greatest painpoint

Example: Not realizing their potential

Messaging Guide (cont.)

How they would say this problem/pain makes them feel

Example: Uncertain, fearful

Your philosophy/approach for how you will address their problem/pain

Example: Accountability to apply proven methodologies

How they would describe the resolution they are seeking (without knowing what your offer is)

Example: A clear path forward, financial freedom, greater impact, working with clients that they love.

How the resolution will make them feel

Example: confident, focused, relaxed

How you will solve the problem (your offer)

Example: An eight week program that combines training, one-on-one and group coaching and a blueprint to guide you to applying best practices to your business

Messaging Guide (cont.)

What is included in your offer

Example: Full curriculum, group coaching, one-on-one office hours, lifetime membership

How you will talk about what makes you different

Example: Authenticity, commitment, high-touch, experience

How you demonstrate credibility. The proof you have that demonstrates your ability to deliver on your promise.

Example: Return on client investment of 200%, testimonials, case study

Your call(s) to action

Example: Book a call, apply for the program

Messaging Guide (cont.)

What are their likely objections/ questions and how can you get out in front of them in your marketing messages?

Potential Objection/Question

Message to pre-empt

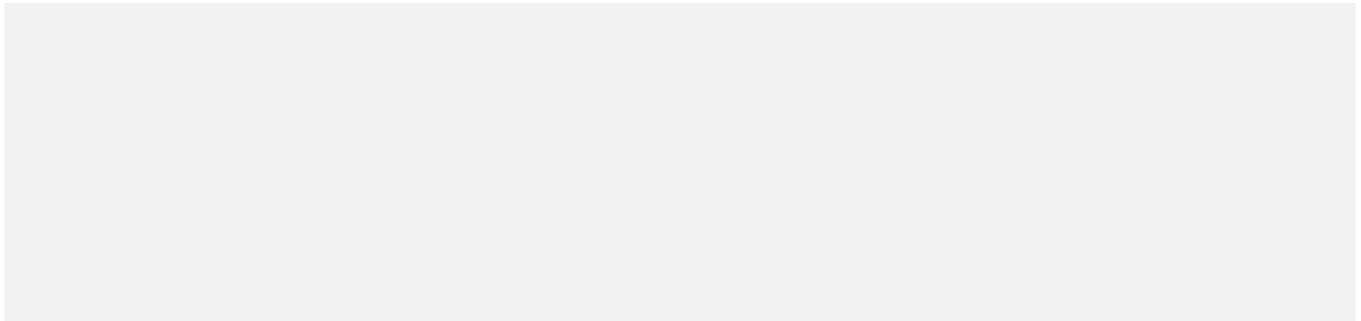
Implementing your brand & messaging

With all of your work to date, review your marketing materials and make note of what needs to be changed to ensure that:

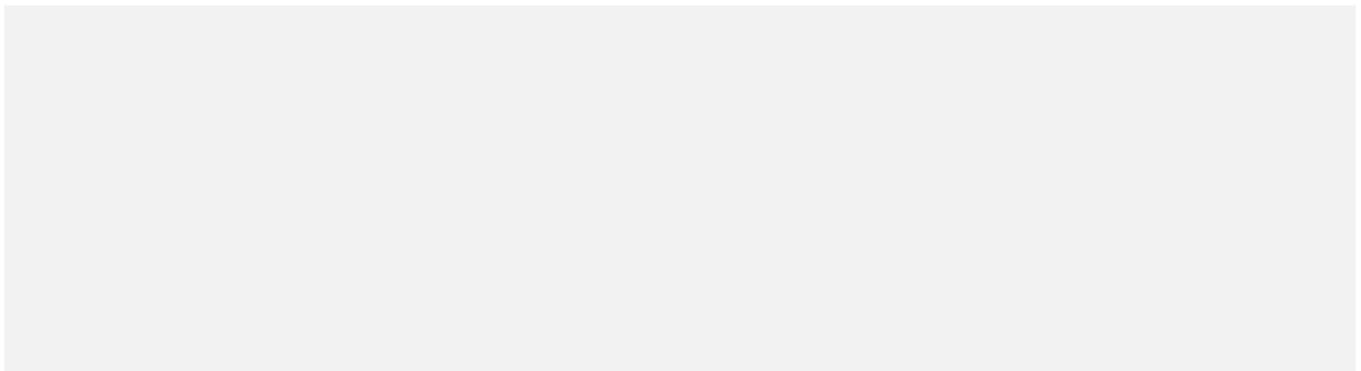
- Your messaging is aligned with your mission, values, brand personality
- You are speaking directly to your ideal client
- The transformation you provide is clear
- Your message is consistent across all channels
-

Note below changes you need to make.

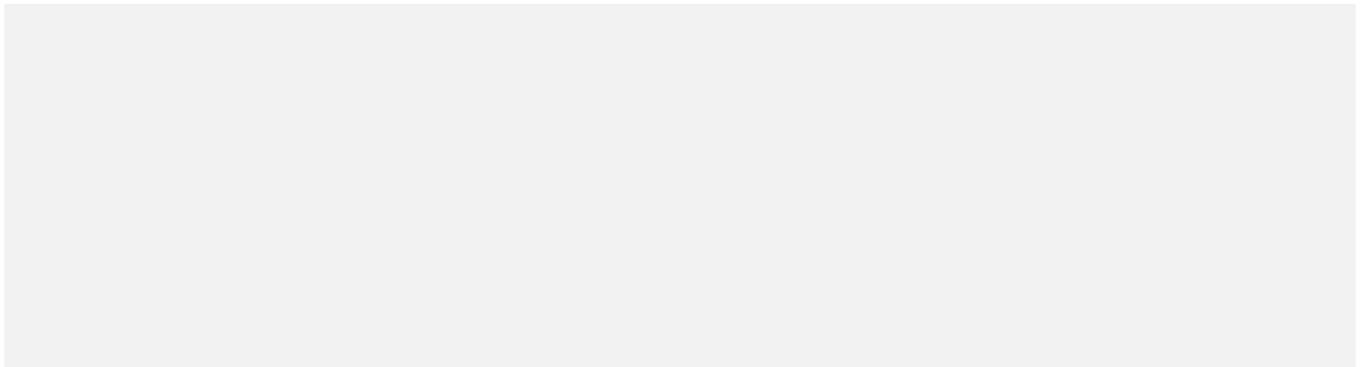
Website



LinkedIn Profile

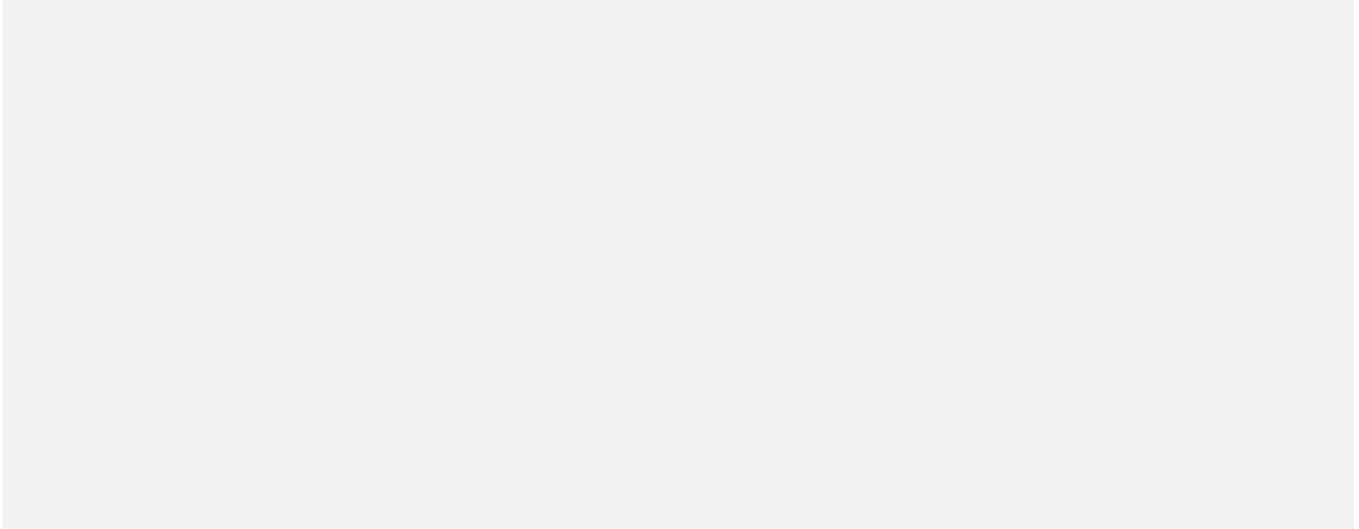


Social Media

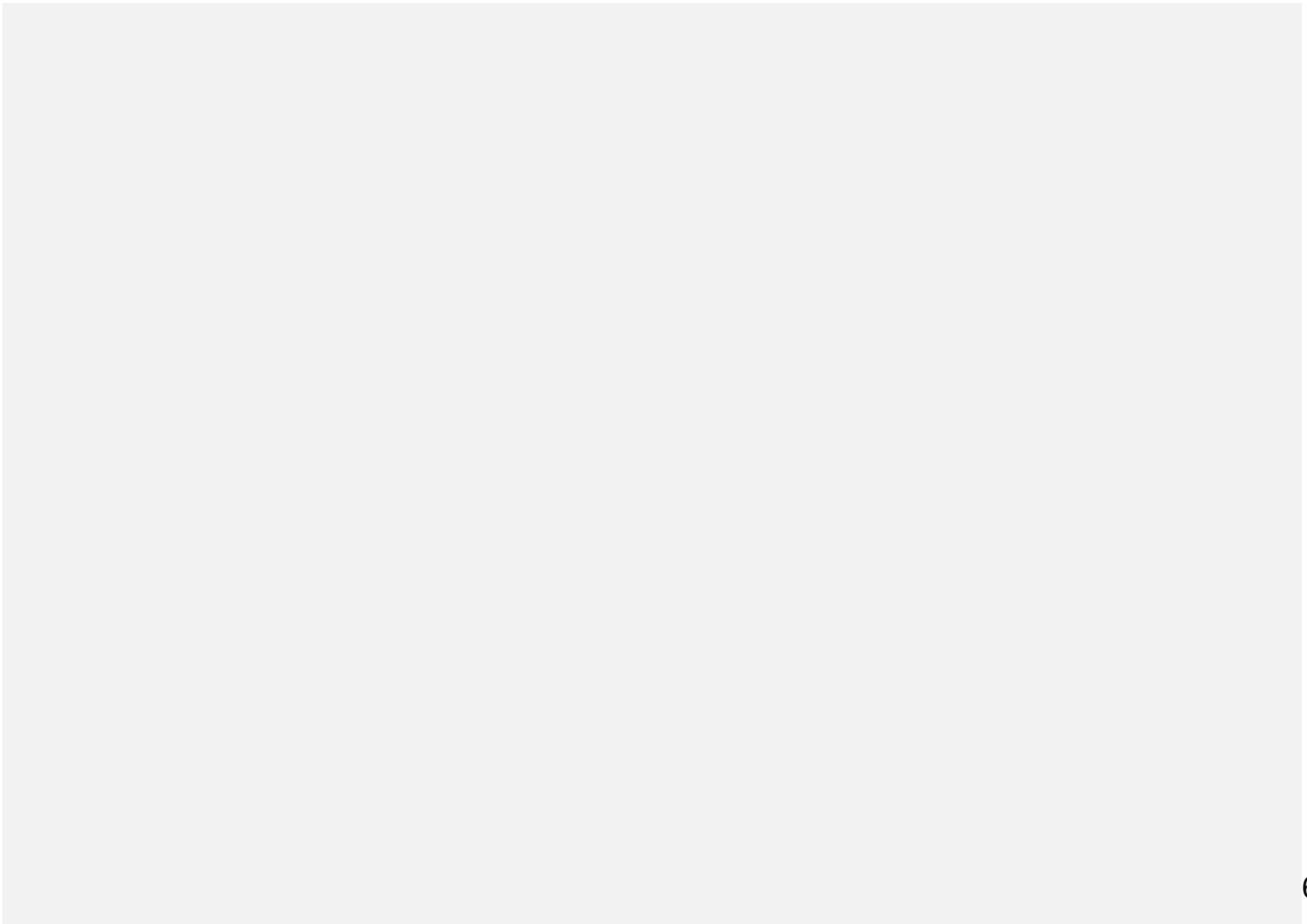


Implementing your brand & messaging

Sales Conversations



Other



A woman with blonde hair and black-rimmed glasses is looking down at a smartphone in her right hand. She is also holding a white mug with a handle in her left hand. The background shows a window with a view of a residential area with houses and trees. The scene is lit with warm, natural light.

||

**A great
message is not
when your
dream client
understands
you, it's when
your dream
client feels
understood by
you.**

Elizabeth McCravy



YOUR LEAD GENERATION STRATEGY



Why a lead generation strategy?

Most early-stage businesses rely on their network and referrals – which is great as a short-term strategy but does not position them for long-term, sustainable growth.

In reality, you don't have a business if you don't have a steady flow of leads that convert to clients.

For a small service-based business, lead generation can feel overwhelming. There are so many strategies and tactics to choose from that it can be challenging to figure out where to focus your efforts – particularly with social media, which tends to be a long game. It can feel like you are putting in a lot of effort with very little return.

Best practices

1. Do what is aligned with you, and who you are

Focus on what you actually like to do and what is aligned with your strengths and personality. Lead generation is a long-term commitment. If your business is early stage, you are likely doing the majority of the lead generation yourself. If you dislike writing, a blog is probably not your best choice. You will be miserable and exhausted, and the blog will likely be ineffective.

On the other hand, you may love speaking and want to host or be a guest on podcasts or conduct webinars. These engagements are likely to energize you.

Begin with what you love, and as your business grows, you can explore other strategies by outsourcing or delegating to others on the team.

2. Consciously develop a lead generation strategy and be realistic

It is easy to spread yourself too thin if you are not careful. Create an overall strategy and focus on efforts that will have the greatest short-term impact. For example, you can accelerate the development of relationships by meeting people instead of DMing in a variety of Facebook groups. Your time is likely better spent networking at online (good) or in-person (even better) events.

Best practices (cont.)

3. Include in your strategy a plan for lead nurturing

Many of your leads will not buy your offer now but will in the future. While every product and service can be quite different, research suggests that, on average, prospects receive ten marketing touches from the time they become aware of a company until the time they convert into customers. For this reason, it is important to keep in front of your leads through email marketing, personal reach-outs, and posting valuable content where they hang out.

4. Focus on one or two strategies and channels

Contrary to what many say, you do not have to be everywhere and try everything to get leads. In fact, this is where early-stage businesses can get in trouble. Mature businesses have the resources to be everywhere – we do not. Therefore choose one or two channels where your ideal client hangs out and begin to create a presence there by posting valuable content and engaging with your audience frequently.

5. Repeat what is working for you.

Analyze where your best clients came from and repeat that strategy. This seems obvious, but we can sometimes overlook what is under our noses in the whirl of potential lead generation activities.

6. Always, always ask for referrals.

Referrals are the low-hanging fruit of your lead generation strategy. They typically have a higher conversion ratio and shorter sales cycles. Don't assume your clients, colleagues, and friends will think of this themselves. Simply get in the habit of asking, *"Do you know of other people/ organizations similar to you who might benefit from my work?"*

7. Experiment and track.

In addition to repeating what is working for you, be open to trying different tactics every once in a while and see how they work.

Lead Generation Activities

Some lead-generation activities have a more immediate impact on attracting your ideal clients. In contrast, others tend to be a more "long-game" play, slowly building your authority and presence in your niche. Of course, there are exceptions. A lead generation strategy should incorporate both. Early-stage businesses should focus on short-term tactics that quickly lead to sales while the long game catches up.

Short-term

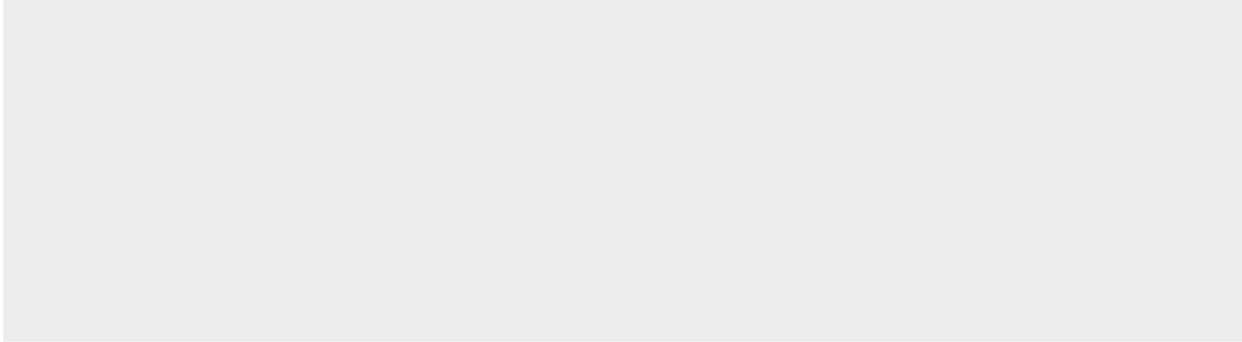
- Asking for referrals
- Referral program (offering something to clients in exchange for referrals)
- Networking — in-person events and online events
- Email marketing (with a lead magnet if you have a decent size list of ideal clients)
- Lead magnets (value in exchange for email)
- Webinars/masterminds events
- Speaking engagements
- Guest podcast with an offer (if large audience)
- Affiliate program/ Referral partnerships
- Advertising

Long-game

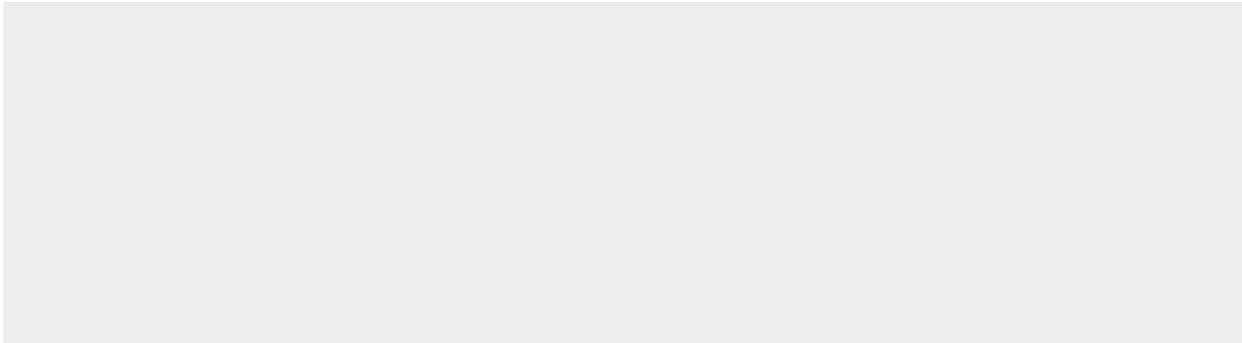
- Podcast hosting
- Social Media activity (liking, sharing, commenting)
- Social Media posts (valuable content)
- Website optimization
- YouTube channel
- Authoring articles In established media channels
- Writing a book
- PR

Lead Generation - Worksheet

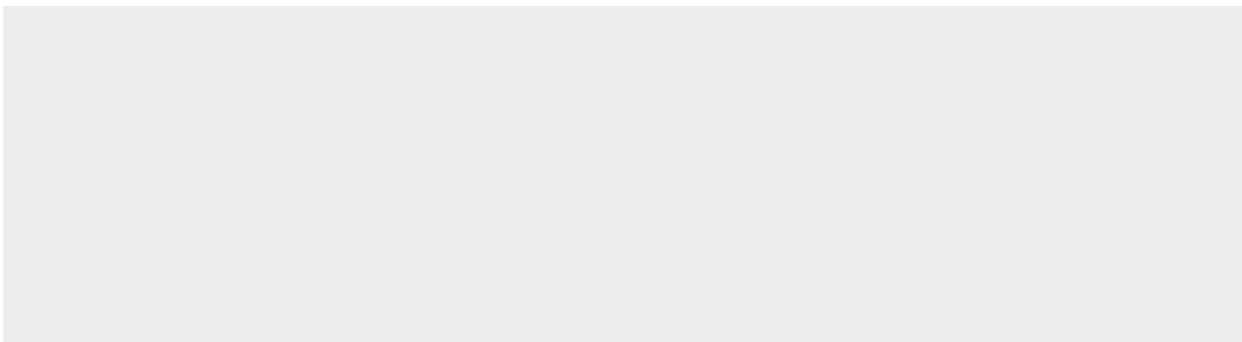
Review your past and current clients. Where did they come from? What patterns do you see?



Review the list of short-term lead generation activities on the previous page . Which 3-5 most appeal to you?



Review the list of long-game lead generation activities on the previous page. What 1-2 most appeal to you?



How many hours per week are you willing to devote to lead generation activities?

Lead Generation Activities - Worksheet

Do you have an email list? If so, how large is it? Is it aligned with your ideal client profile?

Do you have a system for tracking leads (CRM or other)? Is it working for you?

Yes No I have one, but not sure it is adequate

Where do you currently have the largest following?

LinkedIn Instagram TikTok YouTube
 Facebook Twitter Alignable Other

Where does your ideal client hang- out?

List content that you believe would provide value to your ideal clients and identify what currently exists that can be repackaged, or what needs to be developed.

Valuable content	Needs to be developed	Exists
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lead Generation Activities - Worksheet

Valuable content

Needs to be developed

Exists

Partnering with others who have a similar audience can often be a great way to attract new leads. Whom do you know who might be willing to partner with you? In what ways could you do this?

Lead Generation - 3 month strategy

You will now implement a very focused lead generation strategy for the next ninety days. At the end of the ninety days, set aside time to evaluate the effectiveness of your strategy and make adjustments for the next three months. Recognize that it may be too early to assess your long-game strategies.

Short term activities

I. Your current leads

If you have current leads, this is the best place to start. You want to be sure to keep in touch and remain visible. Review the leads you currently have and categorize them as HOT, WARM, or COLD. Identify three approaches you will take to personally reach out to all HOT and WARM leads 1-2 times per month.

Approaches

Examples: Quarterly personalized notes or DMs on LinkedIn, email valuable content, send an article that might interest them, make a conscious effort to comment on and share their posts

Lead Generation - 3 month strategy (cont.)

II. Referrals

Take a look at your past and current client list and colleagues and friends with whom you have worked in the past. Identify 5 people from whom you can ask for referrals. See the sample email example.

1.

2.

3.

4.

5.

Sample email to ask for referrals

Hi Susan;

I absolutely love following you on LinkedIn! Your last post on "Common Fears about Selling" was particularly insightful – and funny!

I hope business is booming for you. Maybe we can do a Zoom coffee and catch up?

Over the last six months, I have been able to work with incredible clients, and I am so proud of the progress they have made. Like you, I always want to ensure I have a full pipeline of potential clients I can help. If you come across any women you think would benefit from our services, I would greatly appreciate an introduction.

Perfect fit clients for us are ambitious women entrepreneurs who may have hit a revenue plateau and are looking to grow their businesses and have a greater impact.

I'd also love to explore ways I might support you, so please let me know when a good time is for us to connect.

Lead Generation - 3 month strategy (cont.)

III. Activities Plan

Create an implementation plan for three of the **short-term** lead generation activities you identified in your worksheet.

Activity #1

Example: Speaking Engagements

90 Day goal

Example: Secure three speaking engagements

Action Steps	By when?
<div style="background-color: #e0e0e0; height: 45px;"></div> <p><i>Example: Identify speaking topics</i></p>	<div style="background-color: #e0e0e0; height: 45px;"></div>
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Lead Generation - 3 month strategy (cont.)

Activity #2

Example: Network

90 Day goal

Example: Attend one networking event a week

Action Steps	By when?
<div style="background-color: #cccccc; height: 45px;"></div>	<div style="background-color: #cccccc; height: 45px;"></div>
<div style="background-color: #cccccc; height: 45px;"></div>	<div style="background-color: #cccccc; height: 45px;"></div>
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Example: Join networking group

Lead Generation - 3 month strategy (cont.)

Activity #3

Example: Partner with someone with a similar audience to host webinar

90 Day goal

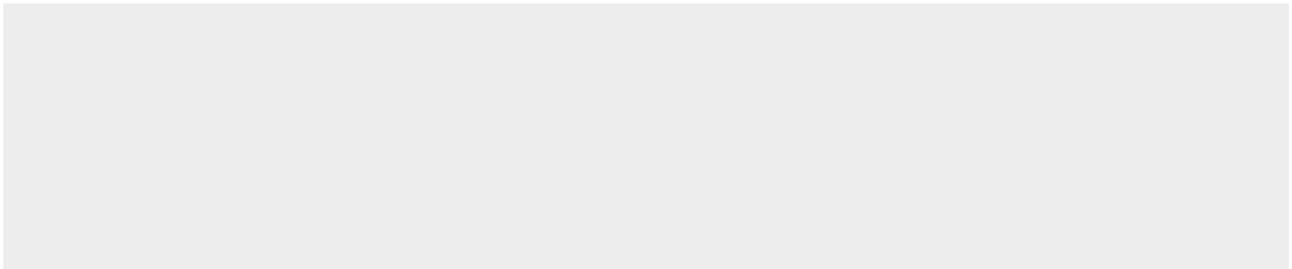
Example: Conduct one webinar

Action Steps	By when?
<div style="background-color: #e0e0e0; height: 47px;"></div>	<div style="background-color: #e0e0e0; height: 47px;"></div>
<i>Example: Identify partner</i>	
<div style="background-color: #e0e0e0; height: 47px;"></div>	<div style="background-color: #e0e0e0; height: 47px;"></div>
<div style="background-color: #e0e0e0; height: 47px;"></div>	<div style="background-color: #e0e0e0; height: 47px;"></div>
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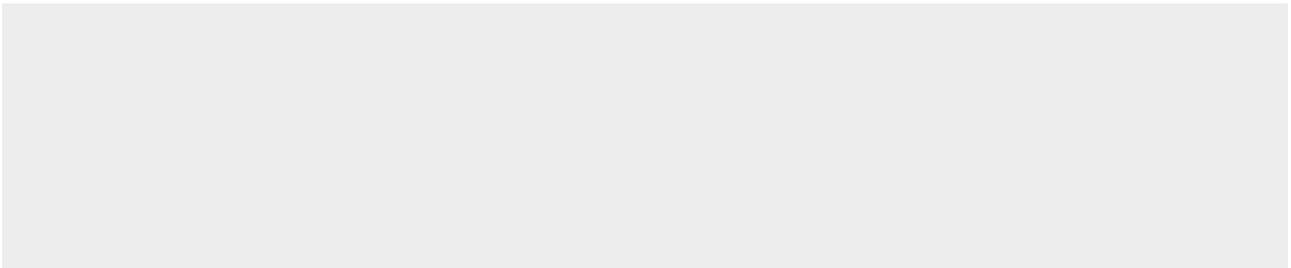
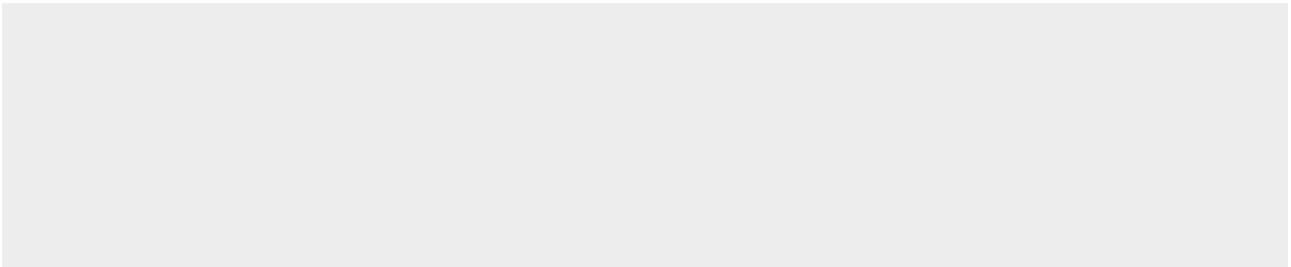
Lead Generation - 3 month strategy (cont.)

IV. Lead Magnets

What 2-3 "lead magnets" do you have or could you develop to collect email addresses? Examples of these could be toolkits, videos, quizzes, checklists, and ebooks.



Example: Foolproof framework for selecting your Niche



Lead Generation (cont.)

Long game activities

V. Social Media

What 1-2 social media platforms will you focus on long-term?

How often do you plan to post content?

How often do you plan to engage (comment, like, share, etc.?)

List content you will share to one or both platforms over the next 90 days (refer to your worksheet)

Content

Post date

Content	Post date

Example: 5 mistakes when determining your Niche

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Lead Generation (cont.)

Content

Post date

Lead Generation (cont.)

VI. Your Choice

What ONE other long-game lead activity would you like to pursue?

Activity

Example: Start a podcast

What are the first 5 steps you will take?

1.

2.

3.

4.

5.

A close-up photograph of a person's hands writing in a spiral notebook. The person is wearing a light-colored, textured sweater. The background is softly blurred, showing a green plant in a white pot. A semi-transparent white rectangular box is overlaid on the center of the image, containing a quote in red text.

||

**Content and
connection
build
relationships.
Relationships
are built on
trust.
Trust drives
revenue.**

Andrew Davis

Congratulations!

- ✓ You've aligned with your mission.
- ✓ You've clearly defined your niche.
- ✓ You know who your ideal client is and the transformation they seek.
- ✓ Your offer and your price are the perfect fit for your ideal client.
- ✓ Your brand speaks to who you are and resonates deeply with your ideal client.
- ✓ Your messaging is magnetic.
- ✓ You have a strong lead generation strategy.

*You are
ready for
takeoff!*

