

# BDA-Inspired Marketing and Sales Workshops

Week 3

Creating and implementing your ideal path,  
message, and method

# BDA-Inspired Marketing and Sales Workshop 3

Welcome, introductions, and housekeeping

- Serenity Prayer
- Host introductions
- Housekeeping and best practices
  - Muting, raising hands, chat feature, cross talk, service positions
  - Notes, save questions, homework
- SESSION 3 - Creating and implementing your ideal path, message, method
- Tools - 7 and 10 - Doing what we say we will, Holding clients accountable by invoicing

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## Conference outline and overview

- Each week follows the same basic flow
  - Opening and check in, cover the topics with meditation,
- After Party - moderated, support and Q and A, round robin style
- Drop in sessions - more support and Q and A, working session, moderated
  - These are intended to be times for you to come seek help and ask questions
  - Not heavily guided - focused on the people needing help and digging in
  - If no one is there at the start we may leave - may not use all the time
- Both have some flexibility in how they are run
- Final presentation

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## What we will be covering

- **SESSION 1 - Identifying your ideal client and offer**
  - BDA Tools 9 and 10 – There is enough, being aware of the competition, principles before personalities
- **SESSION 2 - Identifying goals, strategies, and channels**
  - BDA Tools 5 and 6 - Dollars spent generate revenue, clarity about profit margins
- **SESSION 3 - Creating and implementing your path, message, method**
  - BDA Tools 7 and 10 - Doing what we say, holding clients accountable by invoicing
- **SESSION 4 - Wrap up and presentations**
  - BDA Tool 12 – Delegation, responsibility, and leadership in our businesses

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Attendee Introductions - 2 minutes each on any of the following

- Name, location, solvency, industry,
  - Key takeaways from last session
  - Aha's or realizations from doing the homework
  - Things that came from the 2 weeks of meditation
- 
- SESSION 2 - Identifying goals, strategies, and channels
    - Tools - Dollars spent generate revenue, clarity about profit margins

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## Creating your ideal Path

What does the ideal path mean?

The journey that you guide your customer through, both through implicit and explicit processes. The way that your customer finds you through the various paths they can reach towards your solution. This includes, but is not limited to: Marketing Funnels, Websites, Sales Processes, Lead Capture Forms, etc.

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## Creating your ideal Path

What paths are you currently using?

- Website traffic?
- Links in Paid ads online (PPC)?
- Print Ads?
- Newsletter sign ups?
- Social ads with link?
- Social Posts with links?
- Front End offer?
- Other?

Are there paths you would like to use, but are not?

What are your competitors doing?

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## Creating your ideal Path

What can you do to help incentivize their journey on the path?

- Free giveaways (PDF, Cheat sheet, E Book)
- Free Consult or Strategy Session
- Scarcity (limited time or space)
- Discounted price
- Free Bonus or upgrade



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## Creating your ideal journey

What is their Journey on the journey?

What steps do they take on the way?

- How do they get initial awareness?
- What is their first interaction with your company?
- What is their purchase process with you?
- How do you fulfill or deliver the product or service?

Are there different journeys for different entrances?

Are there places they fall out in the process?

Are there differences in your competitors journey?

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## Creating your ideal Journey



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## Creating your ideal Journey

Each step on the path represents a micro-decision

Your task is to guide your prospective customer towards making the next micro-decision towards a better solution

You act as a guide or a sherpa on the journey, helping them along the way (because you've been there before)

You create a map as a guide, and refine the map along the way

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## Creating your ideal Journey

Mapping out the customer journey  
(Best to do this on a whiteboard or pen & paper)

1. Get in the mindset of your customer
2. Outline all the particular steps that a prospect takes from:
  - a. Initial awareness of your product/service
  - b. Researching alternative solutions
  - c. First interaction with your company
  - d. Purchase
  - e. Onboarding
  - f. Fulfillment
  - g. Repeat Purchase / Engagement
3. Determine if there are any gaps where your customers may fall off in the process
  - a. Need to measure this
4. Figure out what can help resolve the current step

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## Creating your ideal Journey

### Mapping out the customer journey

If there are pieces of the journey you do not understand - you need to go down the path to identify what specifically happens at that part of the journey

And provide a solution that gets them unstuck

Guide's role is to help them succeed at their desired outcome and help them along the journey - this may not mean that they go with you all the way to the top, and that is OK

Because some WILL go with you to the top...

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## Creating your ideal Journey

Volunteer Exercise – any volunteers?

We'll discuss potential areas your customers might be getting stuck in the path towards a solution (which may or may not be your product/service)

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## Creating your ideal Journey

### Marc's example

#### PATH 1 – Website - Link Clicks

- Click link for free automated home value
- Click here for to search for homes

#### JOURNEY 1

- Automated text and emails go out
- Followed by personal call and text
- Qualify and try to set appointment
- Automated drip follow up if no contact

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## Ideal Journey - homework





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## Tool time!!

### **BDA Tool 7 - We pay our bills and invoice our clients promptly**

- If I don't have a bill paying process why not?
- If I don't have an invoicing process why not?
- If I do have these processes, are they serving my clients and my business?
- Do I pay my bills promptly?
- Am I holding my clients accountable to their invoices, payments, and agreements?

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## Tool time!!

Meditation – HP please show me how to best serve my business and clients by invoicing and paying promptly, and upholding my agreements. Please remove my fear and resistance, while helping me do your will for my clients and my business.

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Check in time!!



**Aha!**

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## Break time!!



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## Creating your ideal message

What is the ideal message?

Ensuring that the message you are communicating through your sales and marketing efforts correctly and accurately addresses the problems your customers experience, so that they know that your product or service is relevant to them, and gets them to start considering that your solution may be the right solution to help them.

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## Creating your ideal message

What is your message?

- Are you speaking to the problem or issue they have?
- Are you doing it clearly and correctly?
- Are you communicating the ideal outcome(s)?
- Are you communicating the relevance to them?
- Are you communicating your expertise and credibility?
- Are you using the language you like?
- Is your messaging authentic and believed by you?

Do you have or do you need different messaging for different offers or clients?

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## Creating your ideal message

Think back to our exercise in week 1 – when we identified the problems we are helping our customers to solve...

**The Message is simple, clearly stating that you understand the problems your customers are facing...**

**And (maybe) outlining to them that you have a potential solution**

**And backing it up with actual proof to substantiate the solution you offer**

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## Creating your ideal message

Some helpful tips:

- Don't overcomplicate things
- Write like you speak
- Your message should be so easy to understand...
  - That a caveman would get it...
- AIDA Framework
  - Attention
  - Interest
  - Desire
  - Action



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## Creating your ideal message

Stick to the most pressing problems that your customers are facing

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## Creating your ideal message

Examples: We understand, growing a business is hard work

- Losing sales because you aren't sure how to close them
- Losing business to competition, unclear reason(s)
- Managing all sales alone or bad sales person
- Too busy to accomplish tasks from consultants
- Not tracking properly to see what is and isn't working
- Losing business due to price
- Losing leads to lack of follow up
- Working on tasks that should be delegated
- Can't focus on hiring or what a new hire would do
- Not enough lead flow
- Marketing isn't getting traction
- Clients fall out somewhere in the marketing or sales process

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## Creating your ideal message

### Marc's messaging example

- Separate for Buyers and Sellers
- Niche'd further for Sellers by Seller type?
  - Turn Key or Fixer?
- Turn key is full service and professional = Do For You, white glove
- Fixer is control, convenience, creativity = Do It Yourself, bare bones
- Buyer is consultant and guide = Do With You, unique to their needs
- Our values are used in communications and expectations
- Our process is supported by our values for consistency

Much like the DA and BDA Traditions, our values are the guidelines we use for decisions

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## Creating your ideal message

### Marc's message framing example

- **Problem** - Buyer struggling to win a home
  - Lack of inventory, high rates, multiple offers
- **Solution** - Our proven values based process
  - Our entire process is built to help you win
- **Social Proof** - Recent client we got in contract on their 1st offer
  - Under the top price they were willing to pay
- **Call to Action** - Click the link below to put our process to work for you
  - Today! Stop stressing and start saving now!

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## Creating your ideal message - Homework



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## Creating your ideal method

What is the ideal method(s)?

This is basically the process of analyzing the results of your sales and marketing efforts, recalibrating, and then proceeding forward with the learnings you are able to take away. Hypothesize, test, analyze, repeat – much like the “Scientific Method,” but applied to your sales and marketing activities.

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## Creating your ideal method

### Identifying the ideal method(s)?

High level things to look at:

- Where are you getting leads?
- How many are you getting?
- How much does it cost to get them?
- How often are you closing them?
- How much are they worth?
- How long do they stay?

You can compare multiple lead generation methods with these questions  
Create a control variable or group with these questions, then add or tweak

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## Creating your ideal method

Identifying the ideal method(s)?

High level things to look at:

Source	Source 1	Source 2	Source 3	Test Source
Total ad costs	\$1,000	\$0		
# of leads	100	10		
# of closes	10	2		
Total Revenue	\$10,000	\$2,000		
Total profit	\$9,000	\$2,000		
Avg Client Value	\$900	\$1,000		



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## Creating your ideal method



- Observe
- Question
- Research
- Hypothesize
- Experiment
- Test
- Draw Conclusions
- Report
- Repeat

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## Creating your ideal method



- Hypothesize
  - What do you think is most likely going to contribute to gaining new customers?

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## Creating your ideal method



- Experiment
  - What is the smallest experiment you can do that will help determine whether you are actually getting results?
  - Important:
    - Tests should cost no more than a few hundred dollars
      - Don't spend \$1,000 or more to determine if Facebook ads are working or not!

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## Creating your ideal method



- Draw Conclusions
  - What did you learn from your test?
  - How can you apply those learnings to your next experiment?
  - What metrics did you use to indicate success?

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## Creating your ideal method

Right goals should inform the actual things you track!

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## Creating your ideal method

Volunteer Opportunity?

Anyone want to talk through how they might approach the ideal method in your business?

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## Identifying your ideal Method - Homework



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## Tool time!!

### **BDA Tool 10 - We detach from difficult personalities and poor paying clients and put principles before personalities**

- Who are my most difficult clients?
- Why am I working with them?
- Am I a difficult client for others or the kind of client I want to have?
- What principles do I or should I have when it comes to selecting clients?



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## Tool time!!

Meditation - HP Please help me to creating a business and message that will attract the right kind of clients for me to serve, show me what to do to replace my difficult personalities, and what to change if I am a difficult personality

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Check in time!!



**Aha!**

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## Wrap up and Recap

- We covered the Journey
- We covered the Message
- We covered Method
- We covered BDA Tools 7 and 10
- Thanks to Bob for timekeeping
- Wrap up and pray out

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Time  
For  
After Party!!