

# BDA-Inspired Marketing and Sales Workshops

Week 1

Identifying your ideal client and offer(s)

# BDA-Inspired Marketing and Sales Workshop 1

Welcome, introductions, and housekeeping

- Host introductions
  - Nick intro
  - Marc intro
- Why we wanted to do this workshop
  - Nick and Marc
- Housekeeping and best practices
  - Muting, raising hands, chat feature, cross talk, service positions
  - Notes, save questions, home work
- Attendee intro - Name, solvency, location, industry

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## Conference outline and overview

- Each week follows the same basic flow (besides this week)
  - 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
- Both have some flexibility
- Presenters - 2 or 3 people working on plans to present in final workshop
  - Who they are and why they are willing

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## What we will be covering

- Overview – Nick’s philosophy of acquisition, conversion, and tracking
- Due to time constraints, we can only go so deep in each topic
- **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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Clarifying some terms, as we use them and believe them to be

- **Marketing** is creating or capturing demand for your product or service
  - Brand awareness and direct response, feeds into the sales pipeline
- **Sales** is qualifying and converting prospects into clients
  - Typically interactive - discovery, qualifying, follow up, objection handling, closing
- **Fulfillment** is delivering the product or service
  - The actual customer experience once they are engaged
- **Measuring** is tracking to document and improve
  - Typically reporting based on industry/company standards and towards goals
  
- There can be some cross over or duplication
  - Depending on model, industry, etc
  - Drive to call or online sales page models

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Check in and

?’s

about the structure of the workshop, terms,  
and agendas

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## Identifying your ideal client

When it comes to identifying your ideal client you want to understand

- The attributes
- The motivations
- The specific problems or challenges they have
- The ideal outcomes they are seeking

Why?

- Helps you shape marketing methods
- Helps shape the sales process
- Helps with product or offer creation

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## Identifying your ideal client - 2 main types

### B2B - Business to Business -

- Who to contact (typical roles/responsibilities)
  - Correct company size (SMB or large enterprise)
  - CON - gatekeepers and run around
  - PRO - you can research them online in advance of outreach
  - Tip - use social media and the web
  - Research the company and person
- 
- Firmographics focused - size (revenue, # of employees, service areas, customer make up, roles and departments you work with or impact)



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## Identifying your ideal client - 2 main types

### B2C - Business to Consumer -

- Geographic region you want
- Demographics you want
- CON - harder to do specific research in advance
- PRO - can easily leverage Social Media for awareness and opportunity
- Tip - use social media and the web - groups are great
  - Join and participate or scrape/buy data - look alike audience
  
- Demographics focused - Age, Income, Education, Net Worth, Life stage or events, Hobbies/Interests

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## Identifying your ideal client - 5 key criteria

### 5 things to look for

- Right Industry or niche - you can help them
  - Right Motivation - they need your help
  - Right Geography - you can service them
  - Right Capacity - they are the decision maker(s)
  - Right Demo/Firmographics - company/client fit
- 
- Can add culture/value fit if you like

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## Identifying your ideal client – Nick's example

### Client type 1

11-50 employees, B2B focused, Founder led or owner operated,  
Regional to National size, up to \$1 Million in revenue

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## Identifying your ideal client – Marc's example

### Client type 1 - seller

- Owned home more than 15 years, no refi 10 years, over 1500 sq ft, 5k to 15k sq ft lot, Seattle proper zoning
  - Niche down to neighborhood or zip code(s)

### Client type 2 - buyer

- Renter, income over \$100k, 27- 40 years old, Zip code specific
  - Can niche down to rental amount

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## Identifying your ideal client - Meditation

### Tool

**BDA Tool 10 - We separate ourselves from difficult personalities and poor-paying clients and place principles before personalities**

### Meditation

**HP please show me what I can do to practice more principles and show me the way to the right clients for my business in alignment with your will for me and my business**

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## Identifying your ideal client - Homework Pt 1

### Assignment

- Say the prayer and do the meditation daily for 1 week
- Pay attention to your favorite and least favorite clients
- Make a red light and green light list from them
- Create your ideal Avatar(s) - limit 2
- Complete the homework sheet

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Meditation Check in, and Aha's

About right clients?

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Break Time!!!



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## Identifying your right offer - Intro and topic overview

How do you create or identify the right offer?

- It's the combination of services and price that makes the right offer
  - Creates a no brainer for the right client to move forward with
  - Is truly compelling and unique
  - Will be, or seem to be, tailored to their exact needs
- 
- While being in alignment with the program tools and principles

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## Identifying your right offer - Key elements of the offer

What does the right offer consist of?

- Clear on who it is for (and/or not for)
  - Has a clear problem identified
  - Has a clear outcome identified
  - Clear on what is included
- 
- The value to the client outweighs the investment

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## Identifying your right offer - Pain and Solutions

Understand pain points, speak to solution statements

- Identify their pain point or problem
- Reframe pain to solution statement
- EXAMPLE: Sell your home for top dollar with less stress
- EXAMPLE: Buy a home with no cash out of your pocket
- EXAMPLE: Get more profitable customers without cold calling

Can you identify the client pain from these?

- Make sure you can deliver on this!

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## Identifying your right offer - Evaluation factors

Factors to consider when creating an offer matrix

<b>Product/ Solution</b>	<b>Type (DIY, DWY, DFY)</b>	<b>Effort Level for you (H/M/L)</b>	<b>Client Perceived Value</b>	<b>Client cost</b>	<b>Return for you</b>	<b>Grade 1-5</b>



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## Identifying your right offer - Problem/solution statement

What to think about when creating these

- What problems do you solve for your clients?
  - What do they want when the problem is solved?
  - Have you asked or could you ask your clients this?
  - Surveys can be great tools
  - These can be great questions for new/past clients
- 
- Asking these questions can be great reasons to follow up

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## Identifying your right offer - Fleshing out the offer

### Dialing in the offer details

- What are the core components?
  - Are there bonuses or give aways?
  - Special event or sale promo?
  - Do you have a guarantee or promise?
  - Upsell or downsell process?
- 
- Does your competition do any of this?

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## Identifying your ideal client - Meditation

### Tool

**BDA Tool 9 - We notice the competition but don't worry about it. We learn from our competitors and trust that it is an abundant universe with more than enough for everyone**

### Meditation

**HP Please remove my fear of there not being enough and/or of my competition and show me the way to clarity for the right product to offer so I can best do your will for my clients and myself in my business**



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## Identifying your ideal client - Homework Pt 2

### Assignment

- Say the prayer and do the meditation daily for 1 week (week 2)
- Identify 5 client problems
- Create 5 solution statements
- Identify 3-5 unique service attributes you offer
- Dig deeper if you like (Offer matrix, SDV, etc)

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Meditation Check in, and Aha's

About right clients?

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## Wrap up and Recap

- We covered the right clients and right offer
- We covered BDA Tools 9 and 10
- We meditated
- We covered the homework assignments
- Thanks to Bob for timekeeping
- Wrap up and pray out

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Time  
For  
After Party!!