

DEVELOPING AN  
**EFFECTIVE**  
MARKETING STRATEGY

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**Ryan Anys**

Copywriter +  
Marketing  
Consultant

310.466.7893

[ryan@ryanany.com](mailto:ryan@ryanany.com)

[ryanany.com](http://ryanany.com)

## STEP 1:

# SETTING GOALS

For a variety of reasons, [which you can explore here](#), developing a marketing strategy is integral to the success of not only your marketing and promotional efforts but, ultimately, the growth of your business.

But while many small business owners understand these facts, they're still left wondering: "Where do I start?"

A marketing strategy is invaluable to the growth and development of your business because it provides a roadmap that guides you to your destination – A thriving enterprise!

And determining your destination is the first step in developing an effective marketing strategy.

Why?

That's the million-dollar question, right?

### **A Marketing Strategy is Your Map -- And Goals Are Your Destination**

I like the road trip analogy best... Imagine jumping in your car and heading off on a road trip. And whilst backing out of your driveway, you toss your road Atlas (or GPS if we're keeping up with the times) out the window.

Sounds crazy, huh? Of course, you'd never do something so absurd.

Yet, that's exactly how countless business owners (perhaps you included?) approach marketing. You launch a website, dive into email marketing, or start promoting your business on social media, all without really considering what exactly you're trying to accomplish.

Now, I can hear your objection... New business and increased revenue are the ultimate goals. And these intentions sound perfectly reasonable.

But there are two problems with this broad, non-descript approach:

**First off, how do you measure success without defined goals?**

Of course, new business and more money are your endgames. But how much new business? How much additional revenue?

Marketing goals set benchmarks that help you measure whether your marketing efforts are a success or failure.

If you aim to generate more leads, would you be satisfied with 20 new prospects in a month, or is anything less than a hundred disappointing?

If you're looking to increase revenue, is a couple hundred more dollars a month adequate, or is anything short of a 20% increase over the prior month a letdown?

**And secondly, how do you evaluate and revise your tactics and strategy without goals?**

If you don't generate 100 new leads or increase revenue by 20% within the monthly horizon you set, what are you doing wrong? Are your tactics falling short? Is your marketing strategy off-target?

Working from this perspective, you can examine your approach, identify the flaws, and make adjustments. Rather than just tossing up your hands and grouching, "marketing doesn't work!" which is where many frustrated, overwhelmed, and overworked small business owners wind up.

**The Takeaway?**

In short, your marketing strategy needs goals, and those goals need to be specific in order for your strategy to be effective.

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**STEP 2:**

# **IDENTIFYING YOUR IDEAL CLIENT**

After setting [goals](#), the second step in [crafting an effective marketing strategy](#) is identifying your ideal client.

Sounds good you say, but I can hear your question coming...  
"What does that really mean?"

In short, not everyone needs or is a perfect match for your services. In fact, at any given time, only a select group of prospects really need what you're selling.

And this select group are your ***ideal clients***.

Who are these folks, and how do you connect with them?

You need to answer these questions to create an effective marketing strategy.

# So, where do you start?

## Demographics + Psychographics

Step one is nailing down your perspective clients' demographics.

### This includes:

- Age
- Location
- Marital and family status
- Income level

### These factors are relevant because:

- Prospects have different goals depending on their age bracket.
- You're likely targeting a specific location in your marketing efforts.
- Single people have different goals in mind than married people and people with families.
- And people at higher income levels expect different messaging than those at lower levels, and vice versa.

Up next, and probably more importantly, are your perspective clients' psychographics.

### These factors include:

- Needs
- Wants
- Concerns, some minor and others major, that keep them up at night, staring at their bedroom ceiling or pacing their kitchen floor.

Gathering this data enables you to create a composite profile, which is the next step in the process.

## Ideal Client Profile

Purely for discussion purposes, here's an example of an ideal client profile for a potential home buyer:

- 35 - 45 years of age.
- Living in an up-and-coming neighborhood but looking to move to a more settled affluent neighborhood -- The neighborhood status is important to them.
- Married with preteen children -- They want good schools and a neighborhood with plenty of school-age kids.
- Upper middle class or holding a professional degree with rising income potential -- They can afford to buy more than a starter home.

- Looking to buy in the next 3 to 6 months -- They're looking to act soon but not desperate.
- May have enough in the bank for a down payment, but their profession and income potential make them a reasonable risk for lenders, so a second mortgage isn't a burden – Meaning securing financing isn't an issue.

You can take your profile a step further and gather a set of photos for your fictitious family and even give them names.

These folks are your ideal client. They represent the target you're aiming to hit when crafting your marketing messaging and selecting your marketing tactics.

Understanding your ideal client's demographics and psychographics helps you craft messaging that not only speaks to their needs but also speaks their "language" and reaches them where they're most likely to be.

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## STEP 3:

# NARROWING YOUR NICHE

After [goals](#) and [identifying your ideal client](#), narrowing your niche is the third step in [crafting an effective marketing strategy](#).

So, what does narrowing your niche really mean, and why is it so important? Here's a great analogy that helps explain my perspective:

### **If you're a football fan, you probably recall the 2011-2012 NFL season:**

The Tom Brady-lead New England Patriots won all their regular season games and plowed through the playoffs en route to the Superbowl XLVI (or 46 if you had to look up the Roman Numeral translation like me) showdown against the New York Giants.

The event was notable partly because a Patriot's win would match the 1972 Miami Dolphins' "perfect season." That team never lost a single game their entire '72 season. And this feat has never been repeated since.

Sadly, for Brady and his Patriots, Eli Manner (younger brother of future Hall of Fame Quarterback Paton Manning) and the Giants prevailed. Ultimately winning 21-17 in a close, tightly played game.

Brady performed well overall. But his passing completion stats for the game ranked below his average.

When questioned (or some might say heckled) by paparazzi after the game, Brady's supermodel then wife, Gisele Bundchen, responded: "You need to catch the ball when you're supposed to catch the ball! My husband can't throw the f\*cking ball and catch it at the same time!?"

Fair point you'll no doubt agree (even if you're upset with Giselle over divorcing Tom).

## **So, what does this have to do with marketing and, more specifically, narrowing your niche?**

The effort to be "all things to all people" is fruitless. And in the context of your business, being the guy (or gal) who "does everything" makes you look like the guy (or gal) who does nothing.

Of course, you don't "do nothing." You actually "do everything," right? But to position and market yourself as capable of "doing everything," your messaging necessarily becomes broader, less descript, and ultimately diluted.

### **Narrowing Your Niche: A Case Study**

So, let's say you're a lawyer, and the majority of your business is Wills + Trusts, which is also where your legal expertise happens to be the strongest.

Meanwhile, I'm looking for an attorney that specializes in Wills + Trusts. But when I land on your website, I find that in addition to Wills + Trusts, you're hyping Real Estate Contracts, Business Development, and Personal Injury legal services.

Faced with such a presentation, I'm likely to wonder if you're REALLY the attorney for me, given that you seem to be busy with half a dozen other legal specialties.

And this reaction is all the more likely if your competitors position themselves as the "Wills + Trusts specialist," with no mention of ancillary legal services.

### **A Quarterback is Only As Good As His Receivers**

It's like Tom Brady in his Superbowl 46 loss. He's a great quarterback. And his record 7 Superbowl wins proves it. But if he's not throwing to the right receivers (in his case, those capable of catching his passes), he's not going to succeed.

And in your case, if you're pitching a slate of services to prospects with one particular need, you're not going to succeed, either.

Hence the value of narrowing your niche.

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## STEP 4:

# DEFINING YOUR CORE VALUE

Following [setting goals](#), [identifying your ideal client](#), and [narrowing your niche](#), defining your core value is the next step in [crafting an effective marketing strategy](#).

"Defining your core value" sounds like a very \*buzzy\* business phrase, the kind of marketing jargon that can sometimes be off-putting.

But rather than more fluffy, meaningless language, your Core Value is central to why your business, and the services you provide, matter to your ideal clients.

### **How Do You Define Your Core Value?**

Start by answering a couple of crucial questions:

## **What benefits do your services provide?**

If you're a real estate agent, your specialized knowledge helps clients find their ideal homes.

## **What needs do your services fulfill?**

If you're a Wills + Trusts attorney, you draft a will or set up a trust that protects the future of your client's family.

## **What problems do you solve for your ideal clients?**

If you're a CPA, you help clients reduce their taxable income and save BIG \$\$\$ on their annual tax returns.

## **Why is Defining Your Core Value Important?**

This clarification is CRITICAL to your marketing efforts for a couple of reasons.

First, business owners often can't clearly define why what they do has value or how that value serves their clients.

Secondly, even if business owners are clear on the value they provide, they haven't thought through and articulated this value in a clear and concise fashion. And that leaves you fumbling when prospects ask how your services can help them.

And finally, the lack of a clear value proposition can result in marketing messaging that fails to persuade prospects because while your messaging might say WHAT you do, it doesn't define how it BENEFITS your prospects.

## **A Quick Case Study**

Let's say you're a CPA. At the most basic level, you prepare people's income taxes. And while that's something everyone needs, not everyone turns to a CPA to get their taxes done.

So, why, then, turn to a CPA? And more specifically, why turn to you?

This is where you highlight the tax savings and audits-avoidance working with a CPA can provide. And where you underscore your specific experience in helping clients save big on their income taxes while avoiding IRS inquiries.

In short, illustrating your Core Value is about thinking beyond the nuts and bolts of what you actually do and focusing on the benefits your services provide.

## **What Do You Do With The Answers to Your Core Value Questions?**

Once you formulate answers to these questions, write them out as a [USP \(Unique Selling Proposition\)](#).

If you're not familiar, a USP is a brief statement that defines:

**Who you are** -- A realtor, accountant, attorney, etc...

**What you do** -- Find or sell homes, prepare taxes, draft wills + trusts, etc...

**And why it matters to your ideal clients** -- Wins your dream home, saves you money, protects your family's future.

Usually in three sentences or less.

And once drafted, make your USP the central piece of your marketing messaging:

- Put it on the Home page of your website.
- Use it for every short bio of your business – On your social media profiles, at the bottom of your eNewsletter, on the About Us page your website and social media pages, and as your accompanying bio with every press release.
- Share it in every meeting with prospects, whether in answer to a casual "so, what do you do for work?" question or in a formal client pitch meeting.

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## STEP 5:

# SELECTING YOUR MARKETING TACTICS

The next step in [developing an effective marketing strategy](#) -- after [setting your goals](#), [identifying your ideal clients](#), [narrowing your niche](#), and [defining your core value](#) – is **selecting your marketing tactics**.

Marketing tactics are your actual avenues of communication. These are the tools, mediums, and methods by which you connect with your prospects.

This is the part of the process that's often the most exciting. This is when you get to do and make stuff, stuff like:

- Launching or redesigning your website
- Creating and publishing ads in print, online, and on social media
- Launching email marketing campaigns

- Sending direct mail packages to thousands of would-be clients
- Sponsoring promotional campaigns
- Participating in tradeshow and other promotional events
- Courting media exposure using PR (public relations)
- Running radio & TV ads
- Posting display advertising (billboards, bus bench ads, building signage)
- And so on...

But with so many options available (in truth, many more than listed above), what are the "right" tactics for your business?

The answer here is, of course, it depends.

How so? Several factors come into play:

## **Active Channels**

First and foremost, your messaging needs to be where your would-be clients are active. Thus, this is where you turn to your [ideal client profile](#), which tells you WHOM you're trying to reach and where you're most likely to find them.

Are your ideal clients active on social media? Or is email communication a better bet?

Are the folks you're trying to reach more old-school? If so, is direct mail a more effective option?

In short, wherever your clients are most likely to see your messaging and respond is where you need to be.

## **Time Available**

Next, you must consider how much time you can dedicate to your marketing efforts. Can you handle everything on your own, or will you need to outsource some (or all) of the work?

## **Budget**

And finally, what's your budget? How much can you spend, not only on the tactics themselves but also on bringing in additional support if necessary?

## **The Convergence Point**

Tactics, time available, and budget ultimately collide at a convergence point.

What does this mean?

Certain marketing tactics require more time. For example, building your brand organically on social media can demand a great deal of time and effort. Meanwhile, paid promotion can build a strong presence in short order. But paid promotion can be very pricey.

Thus, if you have neither the time to build your brand organically on social nor the budget to pay for promotion, social media may not be the most productive tactic for you -- Even if your ideal clients are active on social media.

Here's a more straightforward analogy: If you could run TV and radio spots, post billboards, and place banner ads on heavily trafficked websites, your business will likely gain significant traction due to mass market exposure. But you probably don't have the budget to pursue any of these campaigns, so you need an alternative approach.

Ultimately, the "right" tactics for your business are those that drive maximum results with the lowest possible investment.

That's not to say you shouldn't spend time or money or that spending a great deal of time and money isn't effective. If you have the time to post on social all day long or you can afford radio spots and TV ads and those tactics drive strong results, by means, post and spend away.

The point here is that finding the right tactics comes down to striking a balance between results, time invested, and cash spent.

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## STEP 6:

# MONITORING + MANAGING YOUR MARKETING CAMPAIGNS

In laying the groundwork for developing an [effective marketing strategy](#), we've covered: [setting goals](#), [identifying your ideal clients](#), [narrowing your niche](#), [defining your core value](#), and selecting the [right marketing tactics](#).

The next step -- monitoring and managing your campaigns and making necessary adjustments on an ongoing basis -- is often the most overlooked aspect of marketing strategy development.

### **Why Does Campaign Management Get Overlooked?**

In part, this happens because people are busy, and tasks are put off, forgotten, and end up slipping through the cracks.

This is also abetted by the "set it and forget it" mentality that dominates marketing these days. And the current emphasis on all things "marketing automation" reinforces this attitude.

But here's the problem with the "set it and forget it" approach. Let's say you're a business owner, and you (or their support staff) spend a great deal of time, expend a lot of effort, and invest a tidy sum of cash into building a marketing campaign.

But after launching the campaign, you forget about it -- moving on to all the other countless tasks on your ever-overflowing to-do list. And when you revisit the promotion six months later and see little to no results, you throw up your hands in disgust, proclaiming: "Marketing doesn't work!" (Perhaps this scenario sounds familiar?)

Meanwhile, though not every campaign is a winner right out of the gate, with proper attention and care, most campaigns can be successful. And every campaign is sure to be a valuable learning experience – *if you pay attention to the lessons.*

## **Here's a Quick Case Study Demonstrating How Failing to Monitor + Manage Your Marketing Campaigns Can Totally Tank Your Efforts:**

It's been three years since you last updated your website, so you decide it's time for a complete redesign.

You hire a designer, spend time plotting a detailed redesign, and set specific goals for the new site -- A 20% increase in weekly site visits.

And when everything is polished and pretty, the designer hits "Publish," and viola, your new site goes live!

That project ticked off your to-do list, you dive back into the work that's piled up while you're focused on the website redesign.

Six months pass, and it dawns on you that inquiries and leads through your website are down.

You hop into the backend of your website and realize... You never installed an analytics package. And once you get analytics installed and let it run long enough to gather a sufficient dataset (usually at least a month), you discover that not only have you fallen short of your 20% traffic increase goal, but site traffic has completely tanked.

There could be a variety of reasons for this traffic fall-off. It could be a technical issue. It could be the revised content isn't connecting with your ideal clients. It could be that your site is no longer linked to sources that referred traffic in the past.

Whatever factors are at fault, this unfortunate situation could have been avoided.

If you had only:

- a) Installed a complete analytics package when launching the site;
- b) Monitored site analytics, checking on traffic at least once a week;

And c) Began troubleshooting potential issues the moment you noticed a decline in traffic.

## **The Success or Failure of Your Marketing Campaign Often Comes Down to Consistent Monitoring + Management**

The website case study is, of course, just one example. But the overarching point here is that if a campaign is failing to drive results, one (or more) of its component parts needs adjustments.

Because ultimately, every marketing campaign's performance depends on how well you monitor, test, and adjust your strategy and tactics.

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## STEP 7:

# CONSISTENTLY APPLYING YOUR MARKETING STRATEGY

We've touched nearly all the bases on our path to [developing an effective marketing strategy](#). Coverage has included [setting goals](#), [identifying your ideal client](#), [narrowing your niche](#), [defining your core value](#), [selecting the right tactics](#), and [managing your campaigns](#).

Which brings us to the final stop on our journey...

Understanding and applying your marketing strategy -- in both macro and micro circumstances -- to every aspect of your marketing.

This step is also where maintaining an effective marketing strategy tends to careen WILDLY off the rails for many small businesses.

How so?

## **Applying Your Marketing Strategy in The Macro And The Micro**

All the steps we've outlined thus far in developing an effective marketing strategy apply not only to your overall strategy but are equally applicable to every campaign and tactic you employ.

When considering a new campaign or evaluating a new tactic, you should ask yourself...

- What's my goal here?
- Will this resonate with my ideal client, and if so, what's the messaging?
- Can I use this (campaign/tactic) to effectively promote the narrow niche I'm focusing on?
- Does it jive with the core value behind the services my business provides?
- And, of course, every campaign and tactic you employ must be carefully managed.

All of this is easy to grasp in the abstract. Yet countless business owners fail to adhere to these tenets and fall victim to...

## **The Shiny Object Syndrome**

The problem many business owners struggle with in sticking to a marketing strategy arises when a Shiny New Object -- a sexy new tool or captivating app is released (suddenly everyone's on TikTok, for example) or a particular type of campaign nabs big headlines (Red Bull's outrageous viral videos) -- appears. And in response, business owners jump into the fray without evaluating how these tools and strategies fit within their broader marketing strategy. Or even exercising this Shiny New Object strategically.

Instead, business owners dive in, hoping to replicate the results others have achieved, which are currently buzzing through the ether in the news, on social media, and in the blogosphere.

## **Don't Use a Shiny Object to Rescue a Failing Marketing Strategy**

If your marketing campaign isn't working, is underperforming, or isn't achieving the results you're aiming for, by all means, reevaluate your approach and either adjust or start over.

But don't toss in an exciting new campaign or employ a sexy new tool like you're "throwing a hail marry pass" in hopes of improving the results of a disappointing marketing strategy.

Maintaining a consistent marketing strategy requires time and effort. As does evaluating all of your marketing efforts relative to your broader strategy.

But succumbing to Shiny Object Syndrome is akin to falling back on the "throw (the shiny new object) at the wall and see what sticks" approach. Which is a proven loser, far more likely to derail your marketing efforts than improve your results.

# NEED HELP MARKETING YOUR BUSINESS?

If you need assistance with any of the aspects outlined in this strategy guide, I'm here to help!

Moreover, if you need help marketing your business, I can provide support in any (and all) of the following areas:

- Launching or updating your website
- Improving your website's SEO by starting a business blog
- Launching an email newsletter or other keep-in-touch campaigns
- Increasing your online presence with social media marketing campaigns
- Launching a PR campaign to gain media attention for your business

Sound like a plan?

Get in touch here: 310.466.7893 | [ryan@ryanany.com](mailto:ryan@ryanany.com)