



SMART SIMPLE MARKETING
GAIN CLARITY. TAKE ACTION. GET RESULTS.

Create Your Money Map™ 10 Simple Steps to a Profitable and Successful Year

Session #1

Hosted by
Sydni Craig-Hart
Your Smart Simple Marketing Mentor™



LEGAL DISCLAIMER

The author and publisher of this learning guide and the accompanying materials have used their best efforts in preparing this report. The author and publisher make no representation or warranties with respect to the accuracy, applicability, fitness, or completeness of the contents of this report. The information contained in this product is strictly for educational purposes. Therefore, if you wish to apply ideas contained in this report, you are taking full responsibility for your actions.

Every effort has been made to accurately represent this product and its potential. Even though this industry is one of the few where one can write their own check in terms of earnings, there is no guarantee that you will earn any money using the techniques and ideas in these materials. Examples in these materials are not to be interpreted as a promise or guarantee of earnings. Earning potential is entirely dependent on the person using our product, ideas and techniques. We do not purport this as a “get rich scheme.”

Any claims made of actual earnings or examples of actual results can be verified upon request. Your level of success in attaining the results claimed in our materials depends on the time you devote to the program, ideas and techniques mentioned, your finances, knowledge and various skills. Since these factors differ according to individuals, we cannot guarantee your success or income level. Nor are we responsible for any of your actions.

Materials in our product and our website may contain information that includes or is based upon forward-looking statements within the meaning of the securities litigation reform act of 1995. Forward-looking statements give our expectations or forecasts of future events. You can identify these statements by the fact that they do not relate strictly to historical or current facts. They use words such as “anticipate,” “estimate,” “expect,” “project,” “intend,” “plan,” “believe,” and other words and terms of similar meaning in connection with a description of potential earnings or financial performance.

Any and all forward looking statements here or on any of our sales material are intended to express our opinion of earnings potential. Many factors will be important in determining your actual results and no guarantees are made that you will achieve results similar to ours or anybody else’s, in fact, no guarantees are made that you will achieve any results from our ideas and techniques in our material.

The author and publisher disclaim any warranties (express or implied), merchantability, or fitness for any particular purpose. The author and publisher shall in no event be held liable to any party for any direct, indirect, punitive, special, incidental or other consequential damages arising directly or indirectly from any use of this material, which is provided “as is”, and without warranties.

As always, the advice of a competent legal, tax, accounting or other professional should be sought. The author and publisher do not warrant the performance, effectiveness or applicability of any sites listed or linked to in this report.



SMART SIMPLE MARKETING
GAIN CLARITY. TAKE ACTION. GET RESULTS.

All links are for information purpose only and are not warranted for content, accuracy or any other implied or explicit purpose.

This material is (copyrighted) by Craig Hart Consulting, LLC dba Smart Simple Marketing. No part of this may be copied, or changed in any format, sold, or used in any way other than what is outlined within these materials under any circumstances.



TABLE OF CONTENTS

Module #1 – 12 Month Year In Review	Page 5
Module #2 – Establish Your Target Market	Page 6
Module #3 – Update Your Brand	Page 9
Module #4 – Define Your Lifestyle Focused Business Model	Page 12
BONUS: “49 Different Information Products and Programs”	Page 15
Module #5 – Establish Your 12 Month Goals	Page 17
BONUS : “How to Set S.M.A.R.T. Goals”	Page 18
My Business and Marketing Goals for the Next 12 Months	Page 19
Additional Notes	Page 21
A Note From Sydney	Page 22



Create Your Money Map™ 10 Simple Steps to a Profitable and Successful Year

Module #1 – 12 Month Year In Review

The important takeaways from this course are:

1.
2.
3.
4.
5.

Click on the following link to download the Excel workbook I've created for you to complete the exercises for Session #1. Choose either the Fill-in PDF or the if your and Excel whiz the spreadsheet:

[**Fill-in PDF**](#)

[**Excel Spreadsheet**](#)

- Step 1: Complete the “Client Source Tracking Sheet” – Include EVERY client from the last 12 months
- Step 2: Complete the “Marketing Efforts Tracking Sheet” – Include ALL marketing efforts
- Step 3: Complete the “12 Month Marketing Results Report” – If you're a whiz with Excel, you can use the sort feature to help you with this step. If you're not an Excel whiz, that's ok, just print out the sheets and prioritize your responses with a good old-fashioned pencil.
- Step 4: Complete the “12 Month Marketing Results Analysis” – Write down your own thoughts and we'll discuss specific strategies to address these points during Session #2.

NOTES:



Module #2 – Establish Your Target Market

The three-step formula reconnecting with your target market is:

1.
2.
3.

Template for creating your Ideal Client Profile:

First, ask yourself:

What behaviors will you refuse to tolerate in your business?

What kinds of business owners do not deserve a place in your business?

What personality traits turn you off?

Once you have this list down, turn your attention to who IS a great fit for YOUR business! Ask yourself:

What types of people do I love to be around?

What qualities do they possess?

What do they like to do?

What do they talk about?

What type of business are they in?



Narrow your focus to one person and to create a profile of the EXACT client you want to work with:

Gender:

Age:

Marital Status:

Number of children:

Industry/Profession:

Number of years in profession and income level:

Where they live:

Educational background:

Hobbies:

Personality traits:

Where they like to vacation:

What their goals are:

Problems they want to move away from:

Solutions they want to enjoy:

Now, put all of these details together into one paragraph to create your ideal client profile.

For example, my ideal client profile is as follows:

My ideal client's name is Alexis Taylor. She is 45 years old, runs a highly successful consulting, and lives in San Francisco. She has a Masters degree in Psychology and loves to read. She lives in a cool loft, is married to her best friend, doesn't have (or want) any children, loves wine, visits to the spa and vacations on the beach. She is easy going, fun loving, extremely business savvy, and loves technology. She's ready to create multiple streams of revenue in her business, automate her marketing systems and significantly boost her income, but isn't sure how to do so on her own, so she TRULY appreciates my expert advice, is ready and willing to do the necessary work and has no problem paying my fees.



Write your ideal client profile here:

Ways to find out where your target market hangs out (offline and online):

- Ask them!
- Discussion Boards/Forums
 - o <https://www.meetup.com/>
 - o <http://groups.yahoo.com>
 - o <http://groups.google.com>
 - o <http://groups.msn.com>
 - o <https://www.linkedin.com/directory/groups/>
 - o <https://www.facebook.com/groups/>
- Google "name of your target market" + "blog"
- Local/regional networking groups
- Magazines
- Professional Organizations
- Industry events, conferences and seminars
- Chambers of Commerce
- Trade Publications
- Trade Associations
- Via Social Media ([Facebook](#), [LinkedIn](#), [Twitter](#), [Instagram](#), [Google+](#) and [Pinterest](#))

NOTES:



Module #3 - Update Your Brand

To identify your unique selling proposition, answer the following five questions:

How did I come to be a and why? (HINT: Your unique combination of skills, experience and education will make you highly attractive to YOUR ideal clients.)

Out of all of the service providers in my industry, what do I do that others do not?

What benefits and results have I consistently created for my clients?

What features of my business set me apart from my colleagues?

What will a prospective client gain from working with ME as opposed to one of my colleagues?

If you're not sure how to answer these questions, ASK your top clients (if you have a large database - if you have a small database send the survey to ALL of your clients.) They'll be happy to help you.

I have found that these "surveys" get a much better response when done via postal mail. First you'll want to call the folks you will be sending this letter and questionnaire too and explain what you're doing. Ask for their commitment and their reply by a certain date. (A week to ten day is sufficient). Once you've gotten them on board, do the following:

1. Create a letter that models this template:

DATE

NAME
COMPANY
ADDRESS
CITY, STATE ZIP

Dear FIRSTNAME

As a highly valued past client, your feedback means a lot to me and I would like to solicit your help with a brief task.



I have hired a professional business and marketing coach to help me _____; and she has requested that I select five clients to give her some feedback about your experience in working with me. _____.

I was wondering if you would be so kind as to take a few minutes and complete the attached Client Questionnaire. Please know that your thoughts will be kept confidential.

Please mail your responses by 5 BUSINESS DAYS FROM DATE OF LETTER in the self addressed stamped envelope provided.

Thanks in advance for your much appreciated candid feedback.

And stay tuned for details on our new offerings! It's going to be amazing.

Warmest regards,

YOUR NAME

~~~~~

2. Mail merge the letter template with your database.
3. Create a questionnaire using the following questions page (be sure to include a line for them to write their name and space to reply between each question):
  - A. Why did you choose to work with [YOUR NAME] to [THE PROBLEM YOU SOLVE?]
  - B. What is your overall impression of [YOUR NAME] and the services she or he provided?
  - C. What major results have you achieved from working with [YOUR NAME] on [THE PROBLEM YOUR SERVICES SOLVE?]
  - D. How can [YOUR NAME] improve his/her services?
  - E. How would you describe your experience with [YOUR NAME] to someone interested in SOLVING A PRESSING NEED THAT YOUR SERVICES ADDRESS?
  - F. What is the biggest problem/challenge you are facing in your life/business RIGHT now?
4. Create a self-address stamped envelope for the recipient to return the questionnaire to you.
5. Include in the mailing the letter, the questionnaire and the envelope.

You can then follow-up by email and/or phone with the folks who don't reply via postal mail.

Once you have completed the aforementioned exercises, compile all of your responses into one document. Notice the specific language the clients use and how they describe their experience in working with you. **Use these EXACT same phrases (resist the urge to change them!!) in your marketing materials and when talking about your business.** You'll use this information in the following:



- ❖ On your business card
- ❖ On your website
- ❖ In your email newsletter
- ❖ In all of your print marketing materials (brochure, flyer, etc.)
- ❖ In your media kit
- ❖ In your speaking kit
- ❖ On your social media profiles
- ❖ When you're networking at live events
- ❖ In articles you write
- ❖ To explain to your referral partners the value you provide

You'll want to spend some time really thinking about the unique qualities that draw clients to you so that you can embrace them and make them a part of how you market your business.

Doing so will make you even more client attractive and allow you to market yourself in an authentic way.

NOTES:



## **Module #4 – Define Your Lifestyle Focused Business Model**

To create your lifestyle focused business model, first, answer these questions:

- 1) Who is already looking for the solutions you offer?

- 2) What *specifically* do they want and need?

- 3) What *specific* problems do you solve?

- 4) What are your greatest strengths?

- 5) How do you want to work with your clients?

- 6) How will your clients get the best results in working with you?



7) How much time do you have to devote each week/month to working with clients?

Based on your market research and answers to these questions, you can create different types of packages to offer to your ideal clients.

A package, product or program is easier to understand and easier to buy. It provides a win-win for you and the client. You both know exactly what deliverables are involved for a particular price. It's easy for you and easy for them!

Keep in mind, the easier you make it for someone to buy what you offer, the more they will.

On the following pages you'll find a bonus resource "49 Ways to Package and Sell Your Expertise" to inspire you. To select the options that are right for you, your business and your ideal clients, consider:

- *What would be the most ideal way for my clients to digest and implement the information/services that I sell?*
- *What types of programs/packages would help them to create the best results in their life or business?*
- *Are my ideal clients tech savvy or not?*
- *How much of my time is needed to create the desired benefits and results for my clients?*

The goal is to create opportunities for you to provide your best service at different price points and let the client choose which option best suits their needs. Don't make the mistake of selling what you THINK the client wants or needs. Offer them what THEY actually want and need.



Here are a few examples that will help you to create your own offerings:

- Virtual Assistants: Offer your clients a package of hours per month, such as 10 hours, 15 hours and 20 hours per month. Quote the package based on the price for the package NOT per hour. (i.e. \$500/month for 10 hours of service, \$675/month for 15 hours of service and \$800/month for 20 hours.)
- Financial Advisors – Offer a 3/6/12 month packages for a set price. Consider offering the client a small (10% discount) if they pay in full. The 3-month package could include 1 call per month, a certain number of documents reviewed, etc. The 6-month package could include 2 calls per month, more document review, one in person meeting every quarter, etc. and perhaps the 12 month program could include week calls, monthly meetings, open call-in hours and other valuable components only available to VIP clients.
- Business Coaches – Create a basic/mid-range/high-end package (similar to the Financial Advisor example) that provides increased access to you and other complementary services the higher the package.
- Interior Designers - You might consider create an introductory consultation package, a one room makeover and a three room overhaul. Alternatively, you could look at the top three service you most often receive requests for and create a packaged offering around those.
- Graphic Designers - Similar to the Interior Designers, take a look at the most common service requests you receive. You might have one package for logo and business card design, another for business logo, business card and other stationary and then a third with logo, business card, stationary and a 5-7 page website.

Based on the services you provide, use your real-life experience to create various information products, if you like, that can add multiple streams of revenue to your business.

After considering these points and the ideas on the following pages, use the following space to map out your own service menu at different price points, with varying components:



## **49 Ways to Package and Sell Your Expertise**

1. Print Books – Published or Self-Published
2. E-Books – Electronic versions of published or self-published books. Can even be a PDF version of a document.
3. Audio Books – Not just a audio version of an eBook or Print Book, but actual original material recorded to an MP3 file or CD.
4. Audio Programs – Usually a multi-volume set of audios
5. Single MP3 Download – Typically an audio class or interview
6. Video Training – Can be of a live event or an online tutorial where you walk participants through certain steps.
7. Multi-Media Programs – Consists of audio/video and written material on a specific topic
8. Workbooks – A training tool that can accompany another product or stand alone to help the reader achieve specific results
9. Coaching Programs – Provided by you based on content you've created
10. Mentoring Programs – Individual or group coaching teaching your systems and methodologies to protégés.
11. Keynote Speaking – Delivering a live presentation to a conference audience based on your expertise. (Can then convert to audio and video products).
12. Breakout Sessions – Delivering topic-specific content and attracting new prospects at a live industry event
13. Public Seminars – Typically lower priced and used to upsell attendees to higher-priced products and programs
14. Train-The-Trainer Programs – Teaching others to present your materials and sell your products/programs.
15. Corporate Training Programs – Your materials licensed for company-wide use
16. Event Speaker – One of several speakers at a live industry event, with the opportunity to sell your products and programs from the stage
17. Boot Camps – Intensive 2-4 day in-person training by you (and other experts if you so choose)
18. Tele-Boot Camps – Same intensive content delivered by you over days or weeks by telephone
19. Hourly Consulting – Personal, one-on-one consulting sessions where you share your expertise with clients
20. Long-Term Consulting Contracts – Consulting with an organization to meet specific goals over a longer time period.
21. Subscription Consulting – Ongoing monthly consulting for a monthly or annual fee
22. Spokesperson Contracts – Your reputation and expertise utilized to sell products & services
23. Licensing - Your products, services and content distributed by others under your name or theirs
24. Infomercial Product – Product designed to sell on the radio or via television infomercials



25. Home-Study Courses – Multi-media product format designed to be a complete system in a box
26. Infomercial Product – Product designed to sell on the radio or via television infomercials
27. Home-Study Courses – Multi-media product format designed to be a complete system in a box
28. Teleseminars – Seminars conducted via one or more group telephone conference calls.
29. Webinars - Seminars conducted online via one or more groups training sessions.
30. Weekend Retreats – Typically self-help or personal-growth weekends delivered to foster change
31. Subscription Audio CD Series – Your subscribers receive monthly CDs for a fee
32. Newsletters – Printed or electronic, free or for profit
33. E-zines (Email Newsletters)– Weekly, bi-weekly, monthly, semi-monthly or quarterly communications, either for free or paid subscriptions sent via email
34. Digital magazines– Weekly, bi-weekly, monthly, semi-monthly or quarterly communications, either for free or paid subscriptions sent via email or available on a mobile site (such as Apple's Newstand)
35. Private-Label Magazine – Magazine with your name and title, but produced by others for your use
36. Branded Retail Products – Hard and soft goods produced for retail consumers with your logo or name
37. Mini-Books – Smaller versions of your book with cut-down content used as premiums
38. Rights –Yours - Foreign, serial, broadcast, syndication and derivative product rights
39. Special Reports & White Papers – High-priced information on a specific business topic
40. CD-ROM / DVD Training – Typically sold for use as a training tool, but can be used for marketing too.
41. Counseling Services – Usually one-on-one, personal growth counseling
42. Adult Professional Education (Continuing Education Units) – For industry associations or for consumers through local seminar companies
43. Compiled Reference Guides – Directories and other compilations on useful forms, resources and material
44. Software – Your own or templates designed for use with off-the-shelf applications
45. Industry Conventions & Trade Shows – With revenues from workshops and trade show booths
46. Business-Building & Practice-Building Systems – Materials developed to help others increase revenue
47. Seminar Company Workshops – Your material developed and licensed for presentation by others at public seminars
48. Membership Sites – Your premium content that is only available online on a protected website with a free or paid ongoing membership online
49. Done For You Services - Implementing specific strategies, methodologies or tasks on behalf of your client so they gain the benefit of your expertise without doing the work themselves.





## **Module #5 – Establish Your 12 Month Goals**

The Smart Simple Marketing™ formula for creating goals is:

Specific Action + Something Measurable + Completion Date = Achievable Goal

Some aspects of your business that you want to consider setting goals around are as follows:

- |                    |                   |
|--------------------|-------------------|
| Profit             | Public Speaking   |
| # of Clients       | Publishing        |
| Average Engagement | Product Sales     |
| Project Sales      | Marketing         |
| Retainer Sales     | Community Service |
| Billable Hours     | Time Off          |

Here are some templates to use to outline your 12-month goals for your business:

- I will generate \_\_\_\_\_ in profit in 20\_\_.
- I will work with \_\_\_\_\_ clients in 20\_\_.
- I will take \_\_\_\_\_ weeks of vacation in 20\_\_.
- I will sell \_\_\_\_\_ billable hours per month in 20\_\_.
- I will sell \_\_\_\_\_ packages in 20\_\_.
- I will launch (A NEW OFFERING) in 20\_\_ that generates \_\_\_\_\_ in revenue.
- I will increase my fees from \_\_\_\_\_ in 20\_\_ to \_\_\_\_\_ in 20\_\_.

Feel free to create your own goals, just make sure that the goals you outline are S.M.A.R.T.

For details on how to outline S.M.A.R.T. goals, please review the bonus article on the following page.

Then use space provided to outline your top 10 goals for the next 12 months.

NOTES:



## How to Set S.M.A.R.T. Goals

**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

|        |                                                                  |
|--------|------------------------------------------------------------------|
| Who:   | Who is involved?                                                 |
| What:  | What do I want to accomplish?                                    |
| Where: | Identify a location.                                             |
| When:  | Establish a time frame.                                          |
| Which: | Identify requirements and constraints.                           |
| Why:   | Specific reasons, purpose or benefits of accomplishing the goal. |

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as.....How much? How many? How will I know when it is accomplished?

**Achievable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them.

**Relevant** - To be realistic, a goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress and fits your goal of a successful business. Don't get caught up pursuing someone else's dream! Decide on what YOUR version of a successful business looks like and then set your goals accordingly. If you do so, it will be much easier for you to stick with your goals and your plan when you hit a bump in the road.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.

**T can also stand for Tangible** - A goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight or hearing. When your goal is tangible you have a better chance of making it specific and measurable and thus attainable.



## **My Business and Marketing Goals for the Next 12 Months**

- Goal #1

- Goal #2

- Goal #3

- Goal #4

- Goal #5

- Goal #6



- Goal #6

- Goal #7

- Goal #8

- Goal #8

- Goal #9

- Goal #10



## **Additional Notes**



## A Note From Sydni

I started my company in 2005 as a Virtual Marketing Assistant and filled my practice with clients in just six months. I soon realized that marketing strategy and implementation was my greatest strength and filled a desperate need faced by many solo service professionals – trying to figure out how to quickly attract more client, more money and more freedom to their businesses.

Since then, I have started two additional businesses and filled both with ideal clients to capacity. I've worked hundreds of service professionals clients in over 50 different industries to help them create a stronger online presence, develop multiple streams of revenue and boost their bottom line. The work that we've done together has helped my clients to generate over \$3mil in NEW revenue in JUST the last two years.



As a trusted marketing mentor and consultant, I'm known for my tech-savvy, integrated approach to marketing. I'm also known for finding untapped profit centers in my client's businesses so they can create money NOW. I've been doing this long enough to know what works and what doesn't, and in the process have create a business that generates multiple six figures and allows me to travel around the world whenever I choose. I don't say that to impress you, rather quite the opposite. I want you to see that having YOUR version of a successful business is entirely possible and I want to help you create that reality.

I've created my programs especially for small business owners just like you who are ready to create a thriving, profitable, freedom focused business. My mentoring is completely implementation focused. It is NOT just a lot of concepts, theories and ideas. It's you and me working together side by side. It's homework and accountability. It's implementing strategies customized to your business, your goals and your vision of success. You can be a business newbie or a seasoned entrepreneur. You simply have to be clear about what you want and ready to make it happen.

Everyone has their own specialty in coaching. Let me be perfectly upfront with you. Mine is based on honesty, authenticity and getting you the results you desire as quickly as possible. I happily share with you everything that has worked for me (and everything that hasn't!) plus all of my expert marketing advice applied to your personal business situation.

I'd like to invite you to participate in a private "Clarity Call" strategy session where we can discuss your current goals and how we can work together to achieve them. [Click HERE to schedule your session!](#) I can't wait to talk with you.

With warmest regards,