



**The  
Marketing  
Dojo**

# **CMO Problems Workbook**

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## Congratulations on joining The Marketing Dojo and committing towards earning your Marketing Black Belt.

Our CMO Problems video series goes over SEVEN common problems that Marketers face and ways to solve them. We encourage you to watch one video a week and then work on the action items from the video before moving on to the next

### Action:

Make the commitment to this learning series a serious one! Schedule a 30-minute block every week to view the video lesson and time to do any of the takeaways from the lesson. There is a notes section at the end of every lesson for you to jot down ideas as they come while watching the videos.

## Video Lessons

All the video lessons are all housed [here](#). You have free lifetime access to these courses.

### Action:

Make sure you have access to this page and can see all the videos. If you're having problems, please [email us here](#).

[Access the video library!](#)

## Marty Fisher

Founder of Sherpa Marketing  
and Creator of The Marketing Dojo.



# What's Inside:

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## What you'll learn

### Lessons



[CMO Problem #1: You're Not Getting Enough Qualified Leads](#)



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### Worksheets and Templates



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[Document Process Index Template](#)



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[Top Marketing Automation Tools](#)

## What you'll learn

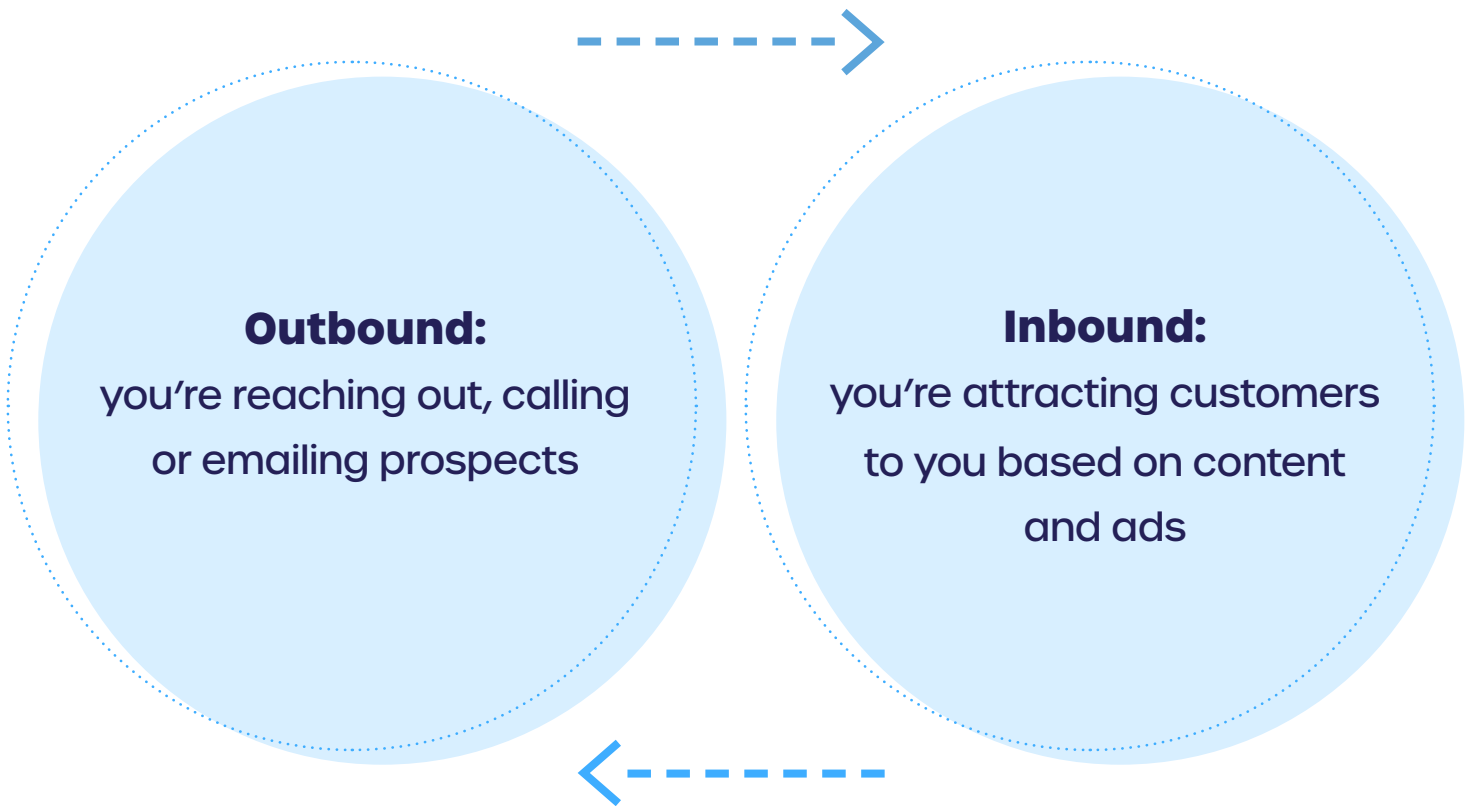
There are seven lessons in the CMO Problems Video series all tackling a specific area that many CMOs have problems with. We've worked with hundreds of companies over the past 25+ years and these are the problems that have risen to the top, even with the most seasoned marketers. We see these problems, over and over, not because you're not a good marketer, but because other high pressing (profit inducing) priorities come first in your day to day.

### After viewing these videos and putting the lessons into action you'll:

- Have strategies and a plan to get more qualified leads
- Be able to measure your marketing efforts to prove that what you're doing is working (or not and then know to pivot).
- Systemize your workflows and processes in order to be more efficient.
- Create meaningful reports for the different levels of the organization in order to properly inform the concerned parties and be able to create insights from the reports.
- Build a system to create and push out content in order to be found by your ideal customers.
- Be able to update your website to optimize it for SEO purposes.
- Create the ultimate Marketing Strategy that includes your goals, objectives, strategies and tactics, without skipping any vital steps, or leaving money on the table.

## You're not getting enough high-quality leads

### Outbound vs Inbound Marketing



In this lesson we're focusing on Inbound Marketing, check out this [article](#) if you want more information about starting an **Outbound Account Based Marketing Strategy**.



# Value Based Selling – You focus on providing VALUE for your customer:

## Step 1: Determine your Ideal Customer Profile (ICP)

An Ideal Customer Profile can also be called a Buyer Persona, Avatar or Target Customer. In this step you are looking to better understand the ins and outs of your ideal customer, uncovering information about their demographics and psychographics. By the end of this exercise, you should be able to identify 1-3 ideal customer profiles and give a detailed description of each - heck, you might even give them names! After creating your ideal customer profile, your marketing efforts should be catered to these ICPs.

### Questions to ask when developing an Ideal Customer Profile

1. What are the typical demographics of this person? Age range, gender, educational background, personality, etc...
2. Household income
3. Geography
4. What motivates this person?
5. Which areas of your expertise/service are most relevant to this person?
6. What makes their purchase hard? What pain points do they have?
7. What pressures or complexities are they facing with this decision?
8. What is the biggest objection you typically face when trying to land their business?
9. What do you know about how this person consumes information? (e.g. Long-form articles, industry publications, short blogs, podcasts, etc.)
10. What do you know about current technology or software this person uses or subscribes to?
11. What questions would this person ask Google to learn more about your product/service?
12. What questions are you asked when this person is vetting your expertise?
13. If you could show up #1 in Google for 10 keywords, what would they be?
14. Is this person the one going to be making the ultimate purchase?

View an example of a Buyer Persona in the Appendix.

- Video: [How to create a Buyer Persona](#)
- Blog Post: [How to create an effective buyer persona](#)

## Step 2: Create a list of your customers priorities

In this step you are going to write down the things that matter to your ideal customer, you'll want to go as broad and as deep as you can. Get everyone in the company involved, go to your sales team or account managers. We also suggest going straight to the source and call your current clients and prospects and ask them:

- What's the number one challenge in your business right now?

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- What do you wish you had more time to do?

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- What are the 3 biggest priorities for next quarter?

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### Some free or low-cost tools to help with keyword search are:

Google Keyword Planner -----> [https://ads.google.com/intl/en\\_\\_ca/home/tools/keyword-planner/](https://ads.google.com/intl/en__ca/home/tools/keyword-planner/)

Ubersuggest -----> <https://neilpatel.com/ubersuggest/>

Google Search Console -----> <https://search.google.com/search-console/about>

Keywords Everywhere -----> <https://keywordseverywhere.com/>

Keywordtool.io -----> <https://keywordtool.io/>

Go back to your Keyword search every quarter to see how trends are shifting and adjust and pivot your content strategy as needed.





## Step 5: Create Content

Now that all the behind-the-scenes work is done, you can now start creating content. Always create content with a focus on helping your Ideal Customer and by providing valuable information to them. You'll want to think quality over quantity and review the performance of your content after a certain time has passed. You might find that some pieces do better than others, and you'll want to figure out why. Each social media platform allows you to review your analytics, but as you grow, you should consider a Social Media content tool such as Loomly, SproutSocial, Hootsuite etc. These platforms help streamline your managing and reporting of social media content.

The key to great inbound marketing is:



### Consistency

Consistency creates trust with your audience, they know what kind of content to expect from you and they follow you for it. You can be seen as an expert on a subject matter.



### Frequency

Pick a posting frequency that you can maintain. Whether it be once a week or multiple times a day, make sure you're not bouncing all over the place, otherwise your audience won't know what to expect from you.



### Persistence

You must continue creating content and sticking to your strategy even if you don't see immediate changes. As the saying goes, Rome wasn't built in a day, and you can't expect people to trust and/or buy from you at the first contact point. Hard work pays off in the end.



### Targeted

If you're trying to target everyone, you're actually targeting no one, so make sure you've gone through the exercise of creating your target personas and target them specifically on the channels they prefer and in a language they relate to.

[See the Blog and Article Brief templates in the Appendix](#)

# Tactics

Now let's run through the **two tactics** that we use to target an audience.

## 1. Buy or Build the List

If you can, buy a list of your Ideal Customer or Build the List, do it. Target these people directly and stack other outbound tactics on top of it.

Unfortunately, in Canada, CASL regulations prevent us from buying lists so depending on your location, you may not be able to buy the list, but rather will need to build your own lists.

## 2. Build Lookalike Audiences

Many of the social platforms allow you to build lookalike audience based on your current client lists.

### Action Items

- **Step 1:** Develop your Ideal Customer/Buyer Persona
- **Step 2:** Find out what's important to your Buyer Persona and do a keyword search and trends search
- **Step 3:** Find out what your customer's pain points are
- **Step 4:** Determine what value you can bring your customers and determine which channel to communicate that value.
- **Step 5:** Create the content – View the Blog and Article Brief Templates at the end of this workbook.
- **Step 6:** Buy or Build the list : Determine if you want to buy or build a list of your Ideal Customers.
- **Step 7:** Build a lookalike audiences: Do this via Facebook based on your current customer list and website data (minimum is 100, but 500 works better)



# Not Measuring Your ROI on Your Marketing Efforts

You already know that [#MarketingWorks](#), but in this lesson, we'll dive into how to measure your marketing efforts in order to make them more efficient.

Measuring your Marketing ROI proves that what you're doing is working.

Here's how to calculate ROMI:

[ROMI Calculator \(Return on Marketing Investment\)](#)

$$\frac{\text{(Gross Profit – Marketing Investment)}}{\text{Marketing Investment}}$$

**Return on Marketing Investment**



### PRO TIP

**Aim for a 3:1 ratio**

Meaning: For every \$1 in marketing you spend, you receive \$4 in gross profit

$\$400 \text{ GP} - \$100 \text{ MI} / \$100 \text{ MI} = 3:1$

# If you're having trouble closing the loop, follow the steps below to calculate ROMI.

## Step 1: Calculate the Average Lifetime Value of a Customer (LTV)

If you don't have the exact numbers, give it your best guess and move on.

$$\begin{array}{r} \text{Average Number of years a} \\ \text{customer stays with you} \\ \times \\ \text{The average revenue} \\ \text{for a customer per year} \\ \hline \text{LTV} \end{array}$$

$$\begin{array}{r} \\ \times \\ \hline \end{array}$$

## Step 2: Calculate the Cost to Acquire a Customer (CAC)

$$\begin{array}{r} \text{Marketing Investments required} \\ \text{to generate a lead} \\ \div \\ \text{Close Rate} \\ \hline \text{Cost to Acquire a Customer} \end{array}$$

$$\begin{array}{r} \\ \div \\ \hline \end{array}$$

## Step 3: Look at the Data



### PRO TIP

You want to aim for a 5:1 LTV to CAC ratio

For customers that spread their spend with you over a longer period of time, you want to look at your 3, 6 and 12-month Average Customer Value.

### Action:

- [Download our ROMI Calculator](#)
- Calculate The Average Lifetime Value of a Customer (LTV)
- Calculate the Cost to Acquire a Customer (CAC)
- Review the data and determine your LTV to CAC ration

### Notes:

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# You Rely on People as a Process

When you rely on people as a process, information is not available or transferred when someone is on vacation or leaves the company. The goal of this video is to arm you with the tools you need to create your own process document in order to create transferable, institutional knowledge so you're not left reinventing the wheel every time you onboard someone or need to do a task that happens only once a quarter or once a year.

### What should you create a process for?

You'll want to create a process for things you do on a regular and semi-regular basis:

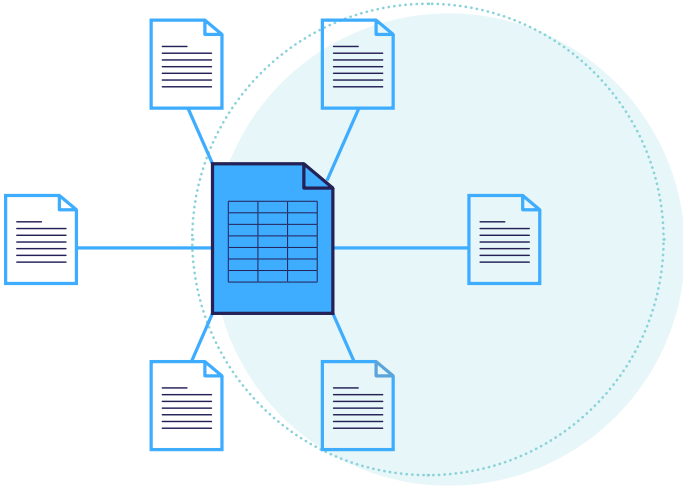
- Monthly reporting
- Marketing campaigns
- Outsourcing talent
- Reports
- Briefs
- Templates
- Etc.

# Here is our Document Process Index Template

[Download a copy now to start the steps below.](#)

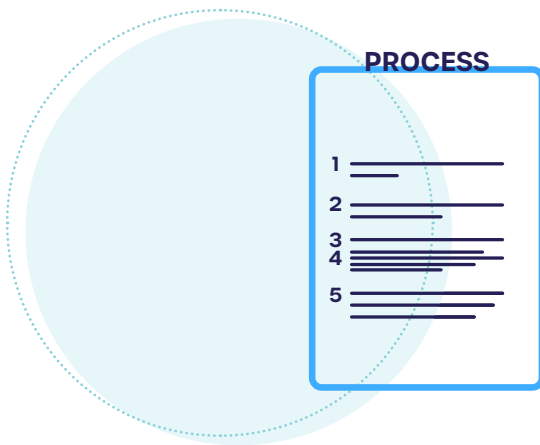
## Step 1: Create an Index Document

Use the **Document Process Index** template listed above to create an index document for your organization. This Index will be your table of contents and will link to the individual Process Documents.



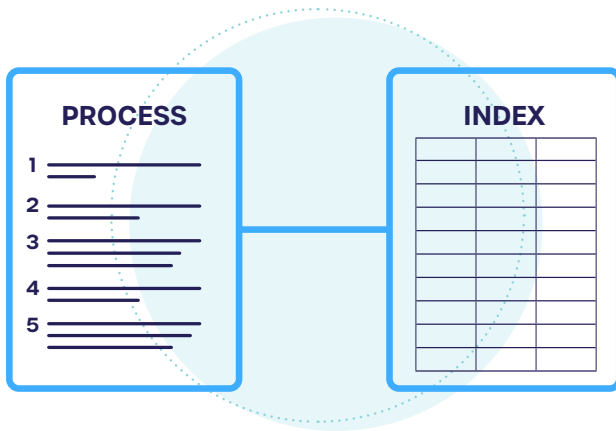
## Step 2: Create the Process Documents

Now this is where we get into the daunting task of creating process documents. Here's what we suggest, get your team together and let them know the project at hand. Then task them to write Process Documents as they go through regular and semi-regular tasks. Include all the steps and information to do the task. This can be done in Word or in a Google Doc. This will not be done overnight, but as your team gets used to creating Process Documents and then subsequently using them and revising them as needed, they will see the benefit.





## Step 3: Link the Process Documents to the Index



Once you've created your **Document Process Index**, named it and saved it as well as created Process Documents, you'll want to link the **Process Document** to the **Document Process Index**.

Follow these steps to create your own Document Process Index:

- In the Document Process Index, give the Process Document a number.
- Write the name in the of the Process Document that has been created by your team.
- Indicate the date it was last updated.
- Indicate if the file is open access or not.
- In the Process Document, you'll want to make sure you name it with the number you gave it in the INDEX.

## Linking

To link the Process Document to the Document Process Index:

- Right click on the NUMBER or the NAME of the process document in the INDEX
- Click INSERT LINK.
- Paste the link to the process document.
- Voila! The PROCESS is now linked to the INDEX.

Now anytime that someone is looking for a process, they just have to open the INDEX to find the appropriate PROCESS document.



## You're not building the right reports

If you're going to write a report about your Marketing Campaign(s) and efforts.... Let's make sure you're creating the right reports!

A marketing report should be built to answer your question in the shortest amount of time possible and provide meaningful insights and recommendations for future actions.

The **CEO** wants to know if the marketing is actually working.

The **CMO/VP of Marketing** wants to know which channels and campaigns are working, whether we're on track to hit all our goals and what the plan is to bridge any gaps.

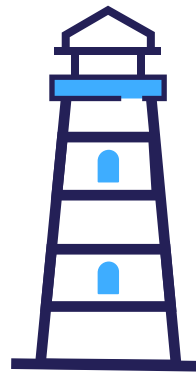
Your **"Marketing Manager"** needs all the details with the insights and recommendations.

### Beacon Metric

A beacon metric is the #1 objective of your marketing campaign, and it must be something you can measure.

#### A Beacon Metric can be:

- Revenue
- Net New Customers
- Sales Demo/Meetings Booked
- Leads
- Gross Sales



Now, in order to have the right impact you need to be sending the right types of reports to the different levels in your organization. Your CEO is not necessarily looking for all the microscopic details, so create your reports accordingly. You'll want to create these three levels of reports.

## Level 1: CEO

Focus on the Beacon Metric – How many new demos did you get this period, is that up or down from last period, how much ROMI did you achieve?

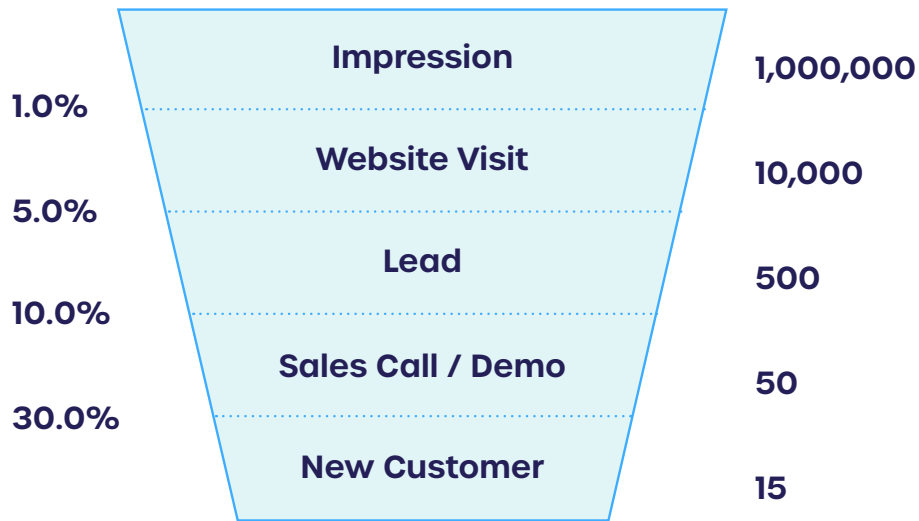
These are the numbers that interest the CEO.

## Level 2: CMO / VP of Marketing

In the report to your CMO or VP of Marketing, you'll want to give a little more detail.

You'll want to include:

- Beacon Metric and break it down by channel or campaign
  - Demos per channel
  - Cost per Demo per Channel
  - Compared to Last Year
  - Projected on Return on Marketing Investment
- High level visualization of your funnel



If you don't have all the numbers:

Take the Close Rate

**X** Average LTV

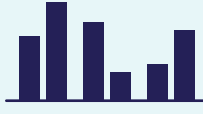
Revenue from Ads

This will fill out the bottom part of the funnel.

## Level 3: Marketing Manager

This report should have the most detail.

- Beacon Metric and cover other metrics that may be indicators of your marketing campaigns that are not doing well.
- Highlight data that should be paid attention to.
- Expand with specific insights that aren't related to driving the beacon metric but are still important to the business.
  - Best performing ads
  - Highest performing search terms
  - Best performing ad groups
  - Targeting analytics
  - Placement details

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## Automate the Process

The next step is to automate the process so that you are saving time every month/quarter.

Automate the Process (and don't forget to create a Process Document for building these reports - See CMO Problem #3)

- Tools
- Integrations
- Dashboards

### Action Items

- Prepare a template and a process for each level of report
- Create a process document and link it to your Process Index
- Automate the process as much as possible to save time

### Notes:

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## Congratulations!

Let's take the time to celebrate that you are over halfway done the course and you are on your way to earning your Marketing Black Belt on the 7 most common problems today's CMOs face.

By this point, you might have ideas, questions, or just want a sounding board and that's **FANTASTIC!**

A member of my team or I are/am available to hop on a call with you and talk strategy or how to close the gap from where you are now to where you want to be.



[BOOK A CALL](#)

# Your Content Isn't Good Enough

# 94%

of people use at least one search channel for the consideration of the purchase of a good or service

[source](#)

Everything that you put out to your audience, blog articles, social posts, product guides, annual reports... It's all content.

The more you meet users in their intent rich moments and the stronger that recognition and recall is, the more likely prospects and customers are to act.

## Here are our 6 steps to Content Creation:

### Step 1: Position yourself – Determine Your Buyer Persona(s)

In this step, you really want to ask yourself some insightful questions and be brutally honest with yourself on the answers. If you're trying to market to everyone, you're marketing to no one. Have your buyer personas in front of you and ask the following questions:

- Whose attention do I want to get and what do they want to know about?
- What do they care about?
- What can I teach them?

By answering these questions, you'll be able to find overlap in what it is your clients are looking for and what it is you can teach them. Also, by sticking to themes or as we like to call them, Content Pillars, you'll be seen as an authority on a particular topic.

If you haven't already done so, go back to Video CMO Problem #1: **You're not getting enough qualified leads** and go through the exercise of creating your Buyer Personas. You can't skip steps on the way to greatness.



## Step 2: Decide on your Channels

Based on the information in your Buyer Personas and knowing where and how they consume content; you'll want to pick your social channels accordingly. When you're first starting out, you'll want to stick to doing 2-3 channels and do them really well instead of 5 channels poorly.

From there, you can pick what format you'll want your content to take. Remember that each platform can have multiple ways to deliver content. For example, Instagram has Posts, Stories, Reels, IGTV, Lives and features like Highlights and Guides. Don't try to tackle these all at once when you're just starting out, instead start small and then go up from there.

## Step 3: Find the Repurposing Formula

You can repurpose content across many different channels with a few extra steps rather than creating new content. We like working SMARTER not HARDER. We always recommend starting with longer form content such as Video or a Blog post and creating shorter pieces of content from those longer pieces. You should aim to get 4-10 shorter pieces of content from a long form piece of content. The goal is to take the content that you've painstakingly researched and written copy for and adapt it appropriately for the relevant channels.

Shorter pieces of content can take the form of:



- Quote cards



- Stats



- Emails



- Newsletter highlights



- Social Posts



- Infographics



- Memes



- Etc.

## Step 4: Build a Release Plan

In this step, you're going to build out the process your team is going to take in order to create consistent content without reinventing the wheel each time or dropping the ball.

You'll want to document the steps your team needs to take to write a long format piece of content and then turn it into the post and images for your selected channels.

You'll want to determine the following roles:

- Writing
- Storyboarding
- Filming
- Design
- QA
- Posting

Remember, you want to create a scalable process that doesn't bog your team down, you want it to run like a well-oiled machine!

## Step 5: Batch

If you're going to take the time and effort to film someone, have them record 3-4 videos.



### PRO TIP

Have your subject bring changes of clothes to give the appearance of filming over multiple days

Since blog posts and videos are typically going to be your long format posts, why not brainstorm your next 3-4 content piece titles, delegate or outsource the writing so that you can film them all at once OR post them one week after each other to maintain consistency. Then, while those items are being posted, that's your time to come up with more content pieces and repeat the cycle.

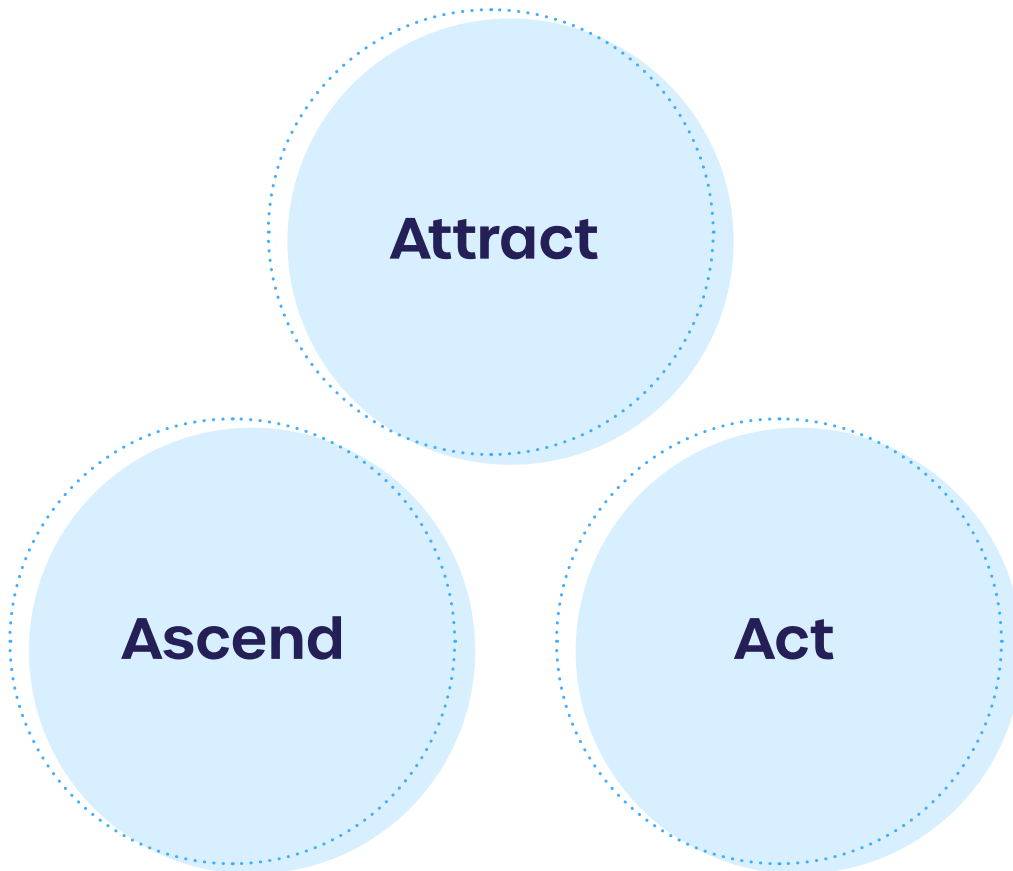


# Your Website Sucks

We run into this problem all the time, some companies throw a website together quickly and cheaply just to say that they have one, then when it doesn't convert, they get frustrated not realizing that there are holes and dead ends in their site. Some companies don't even think through what it is they want their site to accomplish and what defines success.

We also see lots of website admins with the good intention of creating and updating content, but they never follow through and their content is stale and old.

We have a solution for these problems, in this lesson, we share our Gravitational Website Formula Model that will help avoid having your website go down the proverbial suck hole.



# Attract

It doesn't matter how great your website is if people aren't finding you online.

To attract the right people to your site you need the following two things:

## Visibility

There are people out there looking for what you offer, but if you're not visible, nothing else matters. Also, you want to make sure that you're being found for what you want to be found FOR. Appearing in search engine results is a big factor for visibility, and we should add, if you're not on the first page, you're not being found.

In order to rank high on the search engine results page, you want to ensure that you site is indexed correctly, you need the right site structure and content on your site.

**Structure:** is about setting up your website so that it is search engine friendly.

- Page title
- Header tags
- Meta descriptions
- Image sizes



### SEO 101: BAM presentation

We have a video with SEO Tips and Tricks that you can implement to help you optimize your site.

**Content:** Think of the search terms that your customers are using and making sure that your site's content revolves around those keywords. Make sure to use Longtail keywords, using a minimum of 4-5 words. Jot down some search terms that your customers use.

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## PRO TIP

Google Search Console is a free service offered by Google that helps you monitor, maintain and troubleshoot your site's presence in Google Search Results.

### Convert

To compel people to click and go to your site you want to write for organic search and great copy for your ads. You also want to be creating gravitational content, meaning content that provides value to the reader, this could be in the form of tools, offers, resources, advice etc.

### Act

For each target subset you need to determine exactly what action you want them to take:

- Call your team
- Schedule an appointment
- Book a demo
- Subscribe to your newsletter
- Sign Up
- Buy/Try



## PRO TIP

Take the little extra time to create 2 creative assets and copy variations in order to do some A/B testing. Remember that you only want to have one element be different from one version to the next when testing.

1. Compelling CTAs: the copy around the thing you want them to click. Evaluate your CTAs, do they:

- Start with an action verb
- Evoke emotion
- Create FOMO (Fear of missing out)
- Are they time sensitive
- Provide reason to take action
- Connect to their pain

2. High value offers: This goes hand in hand with your CTA. You want to create a sense of:

- Exclusivity
- Urgency
- A great deal that they can't pass up.

**For example: Instead of "Subscribe" think "Get Free Lifetime Access Limited to First 500 that Sign Up!"**

# Ascend

Ascend is all about creating the user experience that is required to ascend your audience to the point in the buying cycle where they're ready to act.

There are 3 elements that you need to focus on:

## 1. Speed

- a. Your website needs to be fast. The faster your site loads, the better you'll rank in Google search results.

## 2. Flow

- a. Do the 9 second test with someone who doesn't know your site or business
- b. Check out your site's analytics to know your bounce rate, this will help you understand if there is something missing in your customer experience.
- c. Use heat mapping software to see where people are clicking and how far down they are scrolling on your site.
- d. Use sessions recording software to see how people are using your site. We like to use Crazy Egg software.

## 3. Seduce

- a. Make sure to speak your customer's language
- b. Make your content irresistible



This framework should help you understand what you really want a website to do and HOW to achieve that.



## Action Items

### Attract

- Run an SEO audit of your site to ensure that it is optimized. Assign your development team any fixes and changes that need to happen. Think site structure and indexing, meta descriptions and image sizes.
- Go to Google search console and conduct a search on your website(s).

### Act

- Write down all your customer subsets and beside each one write what action you want them to take after they have visited your website.
- Test and measure your CTA and offers.

### Ascend

- Review your content:
  - Create new content if there are any gaps in your Inbound efforts. Think of blog posts, resources, tools.
  - Modify content to speak to your customers in their language.
- Review the page load speed
- Perform the 9 second test with someone who doesn't know your website and ask them who you help and how you help them.
- Use analytic tools to see bounce rates and see where the user experience could be improved
- Use heat mapping software to help you see where people are clicking and how far down they are scrolling.
- Use sessions recording software to watch recordings on how people use your site.



## You Don't Have A Marketing Strategy

Don't leave the success of your business to chance with disconnected tactics. You want to put in the work to create a proper marketing strategy to then get the results that will have a significant impact on your business.

A strong marketing strategy requires:

- Work
- Creativity
- Resources

### What is a Marketing Strategy?

A marketing strategy refers to a business's overall game plan for reaching prospective consumers and turning them into customers of their products or services. A marketing strategy contains the company's value proposition, key brand messaging, data on target customer demographics, and other high-level elements.

[Source](#)



## Step 1: Goals & Objectives

The first step to build an effective strategy is to have clearly defined goals and objectives, this gives your strategy direction and purpose. Here are our steps to creating a robust marketing strategy.

A **Goal** refers to the overarching business goal you are trying to achieve.

Ex: Increase sales by \$400K in 6 months

**Objectives** refers to the components driving or enabling that goal.

Ex: 100 Sales Demos and Increase Average LTV by 20%

What is your number one **goal** this quarter?

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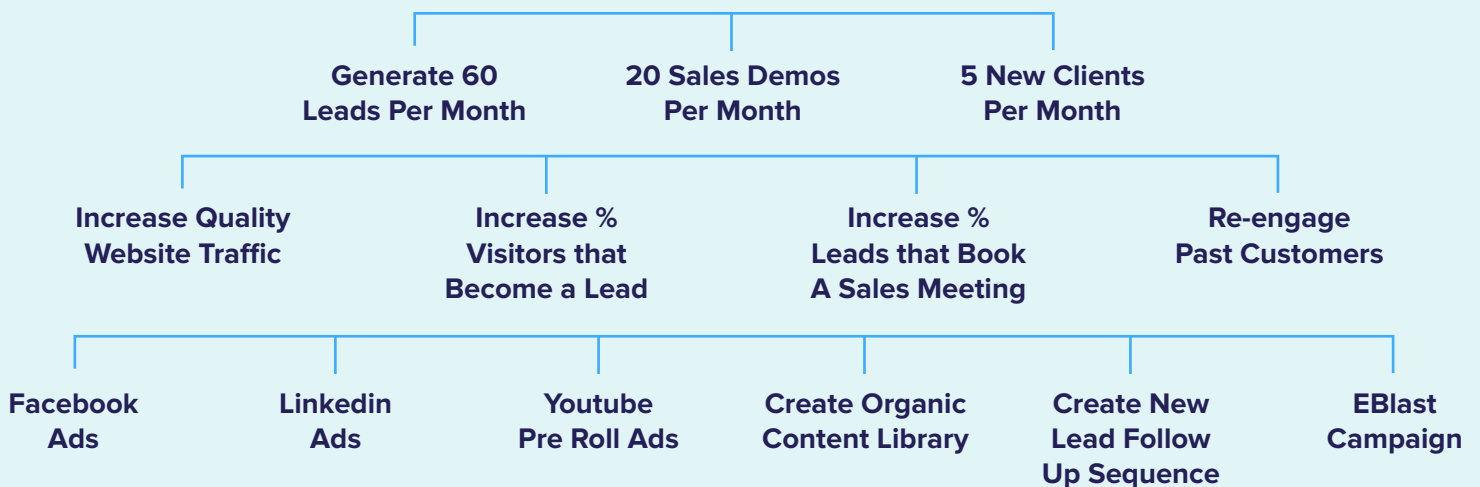
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Write down at least 3 objectives that would support that goal

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Example

## Increase Revenue By 20%



## Step 2: Strategy and Tactics

Once you define your strategy, the “What to do”, then you can move into tactics, the “How to do”



The **BIG IDEA** - what you do,  
levers off your unique selling  
proposition



How you deliver your strategy

To build a **strategy**, start by thinking through what things need to be true in order to hit your objectives.

In our example, to get 60 leads per month, we will have to engage with new potential customers and drive them to the website.

We know that, of all website visitors the percent that will fill out a quote request is 0.1%. We know if we work on the website experience, we can get this number up and that will make a massive difference in the number of leads we get.

**So the strategy = Increase the percentage of website visitors that become a lead.**

Continue to think through all the things you need to do in order to hit your objectives, don't worry about how you're doing it just yet. Then let your strategy guide your tactics.

**Brainstorm some strategies** that align with your objectives.

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Now it's time for **tactics**, using your strategy as a guide, take the time to brainstorm tactics that align with your strategy.

Here are some examples of tactics.

- Send an eblast to our existing customer base
- Run paid ads on XX social channel(s)
- Work on your organic content

Brainstorm some tactics that align with your strategies, this gives direction to your tactics and makes sure that you're not missing anything.

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### Truth bomb:

If you're going straight from Goals to Tactics you could be leaving out entire aspects of your business that you could easily change to have a positive impact.

# Strategy is HARD

Correctly deciding on and prioritizing which strategies you pursue is neither intuitive nor obvious.

Remember, even if tactics are executed well, if you didn't build a tight strategy or left out a key piece, you are definitely leaving something on the table.

## Action Items

- Go through step by step to establish your Goals and objectives, then develop your strategies followed by your tactics. Get your team involved. It will not just take an hour, you'll have to evaluate many aspects and take the time to brainstorm.

You got this!

## Notes:

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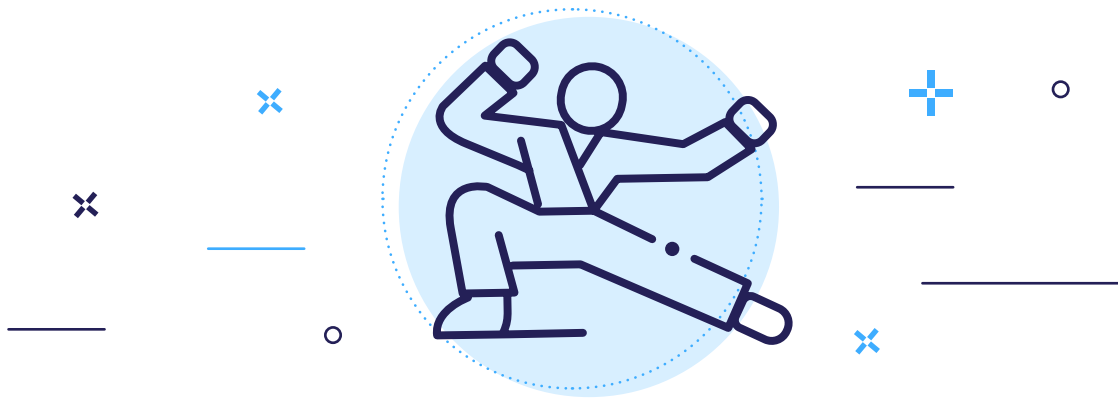
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# Congratulations on earning your Black Belt for the 7 most common problems CMOs face today.



Did you know that only 3 to 12% of people complete any online course they start, that means that you just went further than 90% of the people that signed up for this training. If that isn't worth celebrating, we don't know what is.

If you've reached this point, it tells us that you are invested in your growth as a marketer and want to see your organization thrive. Book a free strategy session with us now while the momentum is pumping.

**Let's talk strategy**

## Marty Fisher

Founder of Sherpa Marketing and Creator of The Marketing Dojo.



### Want More?

[Take our 10 CMO Rules course](#)

In this series you'll go through the top 10 Rules every CMO should follow, such as how to WOW your customers, designing the perfect funnel, using automation, dominating your niche and more.





## Example of a buyer persona:

Vice President of Marketing – Decision Maker

### Personal Background

- Age: 45-55
- Married with one child in university and one in high school
- Education: one or more undergraduate degree or Masters degree

### Role: VP of Marketing

- Job is measured in leads and sales
- Skills required: people management, analysis, industry knowledge
- Reports to: CEO or General Manager
- Manages: Marketing, PR and Communications

### Company Information

- Industry: Manufacturing, Financial Services, Higher Education, Agriculture
- Annual revenue: \$10M
- Company size: 100+

### Goals & Challenges

- Success means: Year end bonus, no budget cuts for the follow year
- Values: Growing the organisation, recognition and growing their team
- Biggest challenge: regulations, resources, juggling a lot of projects, managing budgets, hitting targets
- Biggest objections: cost

### Shopping & News Preferences

- Preferred communication: email, phone
- Use of the internet: Relies on the internet for research and staying up to date
- Industry news: trade magazines
- Social media: Uses LinkedIn from time to time, frequents industry forms

# Article Brief - Template

## Working Title:

Example: Why Strategic Grain Marketers are More Profitable

## Article Type:

Content Format: Blog

Length: Approx. 1,000 words

## Topic summarized in two sentences:

Explain in 2 brief sentences what this article is about; state the thesis statement. Include relevant keywords

## Why this topic matters to prospects in 5 sentences:

Put yourself in your audience's shoes: why do they care about this topic? Think back to your data. What pain point(s) do(es) this article touch? How does this provide a solution to that pain point? Can include any relevant data to support this.

## Potential Framework:

1. Sub Topic 1, Point 1
2. Sub Topic 1, Point 2
3. Sub Topic 2, Point 1
4. Sub Topic 2, Point 2

## What questions would prospects ask Google to find content? (Keywords)

1. Keyword 1: What is...
2. Keyword 1: What is...
3. Keyword 1: What is...

## Content Upgrade – Downloadable Resource Ideas for Gated Content

Any lead magnets that would be good to attach to this article

## Resources

1. Website 1
2. Website 2



# Blog Article Template

## Introduction (don't need a title for the introduction)

Sometimes you may want an Introduction to your topic. Your introduction should hook the reader and make them want to continue reading your post. Here are four good hooks to use in your blog post introductions.

- Start with an interesting/shocking fact.
- Use an anecdote/example.
- Ask a powerful question.
- Use some gentle confrontation (call them out, but gently)

## Header 1

Start by having a punchy header with a strong topic.

## Header 2

**Sub Topic One** - *sometimes there will be multiple subtopics within your post.*

Here is where you add additional information into your post. Topic one text goes here

**Sub Topic Two**

Topic two text goes here.

## Header 3

Topic three text goes here.

## Conclusion (Final Thoughts) (optional, but encouraged)

This is where you sum up your final thoughts and big takeaways.

Ex. It all boils down to XX...

# Blog Article Template

## Key Takeaways/Steps

The purpose of this section is to have a quick recap of everything the reader will have learned in this blog post.

- Step 1
- Step 2
- Step 3

## Final CTA

You always want to guide your customers to the action that you want them to take. Maybe you want them to download a really cool lead magnet you've created to aid them in the challenges they're facing related to this topic. Or, maybe you want them to sign up for your exclusive online community. Whatever it is, you want to make sure it is SUPER clear and easy for them to do.

*Example CTA: Sign Up for a Free Trial!*

