



Get Clients Success – Action Worksheets

Identify Bottleneck Area:

Where are you stuck?:

- Awareness/Lead Generation
- Follow Up/Relationship Building
- Presentation
- Close
- Customer Service & Satisfaction/Repeat Business

Goal Setting:

What is your current level of activity in your bottleneck area? (Approximate if necessary). _____

What level of activity would you like to achieve in the next 30 days? _____

Marketing Strategies:

Select 2-3 strategies that you will use over the next 30 days to make progress in your bottleneck area

- Direct outreach & follow up (phone, email, etc.)
- Networking & Referrals (in-person or online)
- Public presentations (in-person, teleseminars, webinars)
- PR (print & online)
- Trade Shows & Events
- Advertising (print or online)

Actions to Move Strategy Forward:

Instructions:

1. Write the strategies you selected above in the indicated spaces below.
2. For each strategy, identify 1-3 specific actions you can take on a daily or weekly basis to move each strategy forward. (Identify a total of 7 actions).

Strategy 1: _____

- What specific actions can you take on a daily or weekly basis to move this strategy forward?

- _____
- _____
- _____

Strategy 2: _____

- What specific actions can you take on a daily or weekly basis to move this strategy forward?

- _____
- _____
- _____

Strategy 3 (if applicable): _____

- What specific actions can you take on a daily or weekly basis to move this strategy forward?

- _____
- _____
- _____

Marketing Tools:

What is missing, that if added, would enable you to take action to forward your strategies and to become more effective in the area where you are bottlenecked?

Instructions:

1. Review the example tools below
2. Circle the 2-3 that would make the most difference for you now.

Strategy: All

A better understanding of market/ideal customers

Training or support. Subject area(s): _____

Strategy: Direct Outreach (phone, email, etc.)

Prospect database

Contact management system

Script

Mailing list

Letter

Autoresponder

Equipment (computer/phone/headset)

Assistant or vendor

New or updated brochure or website

Other: _____

Strategy: Networking & Referrals

Networking venues

Business cards

10 second commercial

30 second commercial

Note cards

Other: _____

Public presentations (in-person, teleseminars, webinars)

Topics

Venues

Presentation

Other: _____

PR (Print & Online)

Topics

List of Publications/E-Zines

Editorial contacts

PR firm

Prepared article(s)

Trade Shows & Events

- Calendar of regular events
- Booth or tabletop
- Event coordinator
- Other: _____

Advertising (print or online)

- Ad
- List of publications
- Other: _____

To Get More Presentations

- Better understanding of the needs and values of your prospects and leads
- Understanding of competitors offerings
- More persuasive marketing message and communications (written or spoken scripts)
- Questions to help you better qualify leads
- More targeted products or services
- Brand image
- Other: _____

To Close More Sales

- Better sales presentation
- Questions to help you better qualify leads
- Improved sales skills
- Testimonials
- References
- Other: _____

To Improve Customer Service

- Customer feedback
- Improved products or services
- Employee training
- Updated marketing materials
- Other: _____

Actions to Create Marketing Tools:

Plan 3 actions you can take on a daily or weekly basis to create your tools:

1. _____
2. _____
3. _____

Consolidated Action Worksheet:

Instructions: Copy and consolidate your daily and weekly action items from the “Actions to Move Strategy Forward” and “Actions to Create Marketing Tools” sections below:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Follow Up:

What will you going to do to ensure that you follow up on your plans?

Wishing you success!