



Unit 3

Creating a Sales and Marketing Strategy

Learning Outcomes

By the end of this unit the learner will be able to:

- Use social media and networking skills to grow your consulting business
- Protect your work with contracts
- Identify ways to stay on top of trends and changes

Unit 3

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The Marketing Cycle

The Purpose of the Plan

Now that your business strategy is in place, it's time to consider how you will market yourself. Marketing processes may vary in terminology or stages depending on the material you read. They may include more or fewer steps than this session will cover. What is common, however, is that marketing is a cyclical process, and it uses very particular terms. We will also use those terms here so that you can plan, speak to, and perform these functions within your business.

Your marketing plan may undergo many revisions until all stages work effectively. This frustrates people who do not like working in a fluid state, or have trouble dealing with change. As a result, you may need to recruit marketing professionals who love their work and have a strong track record.

Cycle Overview

Marketing uses the following steps:



Looking at the Steps

Let's take a closer look at each of the steps in the marketing cycle.

Stage One: Consumer and Market Analysis

This stage involves the following elements:

- Considering who your customer is and what they need
- Grouping target customers into segments
- Outlining the buying process for your service

Stage Two: Analyzing the Competition and Yourself

In this stage, you will want to ask the following questions of your competition and yourself:

- What are your advantages?
- What are your core competencies (the things you do well)?
- What are your weaknesses?
- Where are your shortcomings?
- What can you do to capitalize on your strengths?
- What can you do to exploit the competition's weaknesses and shortcomings?

A SWOT analysis can help you address each question in the list above. SWOT stands for strengths, weaknesses, opportunities, and threats. It is a method of analyzing external factors (opportunities and threats) and internal factors (strengths and weaknesses) in a methodical way.

Once you have gathered this information, you can identify:

- How to position your services to play to your strengths
- Ways to lessen the impact of the competition
- What makes your services unique
- Key aspects of your brand

Stage Three: Analyzing Distribution Channels

Consider how you are going to get your product or service to your client. Will you be on-site for delivery or can you use virtual tools? Will you be required to travel?

Stage Four: Creating a Marketing Plan

Your marketing research gets applied in a marketing plan based on the P's of marketing: product (or service), price, place, promotion, and packaging. All of these P's influence the sixth P: the **positioning** of your service (how your service compares to similar services from other companies or consultants).

Stage Five: Implement the Plan

Now it's time to test out your marketing plan. If possible, do a limited trial run before a full-scale launch.

Stage Six: Evaluate, Review, and Revise

You may recall that earlier we said that marketing is a cyclical process. At any time in the cycle, the marketer can be forced to return to an earlier stage to remedy some kind of problem. Even if things appear to be going well, take the time to closely look at what you are doing and how effective it is.

Leveraging Social Media

Lots of consultants will say that they have a social media strategy. Will you be one of them? Will your business need one to be successful and widen your exposure?

There is plenty of debate about the value of social media in order to widen the exposure of your services. People around the world have embraced social media, and it has become a very popular and even a normal way of doing business. However, we don't want you to be fooled into thinking that spending all your time on social media is the best way to market your product. Social media is simply another way to get your message out. It's not the only way, or the best way, or the worst. You probably need to include social media as a part of your marketing strategy (although it depends on your business), but we have a few guidelines for you so that it works for you and your message gets heard.

Here are seven strategies for using social media in your business.

Stretch

Work with people who have a deep digital reach. Traditional marketers focus on what they know in order to help you establish a niche in the marketplace. They rely on tried and true methods for marketing campaigns. (Think about flyers, brochures, contest entries, or contact forms on a website.) If your usual marketing is not getting you the results that you need, bring in expertise that will boost your reach.

Build a Community

What you really need is to get people talking about you in a way that promotes your brand independently of you. Seth Godin has written about this as **tribes**. The Grateful Dead, a wildly successful band for more than 40 years, focused on providing their fans with experiences at their concerts rather than selling albums. Fans (called Deadheads) went to the concerts because they knew that each one was different from the last. Think of the things that you can do for your customers that are different than what everyone else is doing.

Watch Out for Social Media Experts

Social media is constantly evolving, and it is one aspect of marketing, but it is not all there is to marketing. Marketing consultants who are also specialists in social media understand its fluidity. They

can help you navigate and establish your brand in the social stream as one aspect of your marketing plan. However, make sure that they can do what they say they can do. Ask for references and look at what they've done in the past.

Be There

Whichever social channels that you use (and there are more coming out all the time), make sure that you participate with your community. Don't ask a question on Twitter, for example, and then not be around or available to reply to people's answers, or you will turn them off. Better still, give them something they have not even thought to ask for yet.

Find Your Customers

When you conduct your market analysis, be very clear about where your customers are. Make sure you reach them and their friends so that they are able to talk about you. This doesn't mean that you need to sign up on every social platform out there, because you won't have time. Focus on methods of reach that work for your customers.

Be a Person

There is a lot of artificiality in social media. While systematizing and pre-planning updates makes sense, you look like a robot if customers can tell that something has been automated. Make sure that some of your personality and character shines through the things that you say.

Follow Others

It's not appropriate to be a one-way machine in social media. For example, if you are on Twitter and have 2500 followers, and you only follow 20 people, you will not be able to reply to people who are speaking with and about you. We know you cannot read comments from 2500 people a day, but we also know that you can organize people into categories and lists and that you can participate in the community that you are trying hard to build, instead of being a sandwich board on the street corner that simply makes an announcement. If you are blogging, make sure that you reply to people's comments on your blog posts and that those posts provide people with information they can use, rather than just writing them as a billboard for your products.

How will you incorporate social media into your consulting business?

Getting Noticed

Networking for Success

Networking is an extremely valuable marketing tool in the consulting industry. It can help you:

- Get in touch with new trends
- Stay up to date on what's happening in your industry
- Meet new clients
- Identify opportunities to grow your business
- Identify opportunities to help others grow their business

Networking happens every day through many routine activities: sitting on the subway, waiting in line at a coffee shop, or meeting a new client. You can also create networking opportunities by:

- Attending conferences and trade shows
- Joining industry groups
- Maintaining academic and career affiliations (such as alumni groups)
- Becoming active in your community

How can you leverage networking to make your consulting business a success.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Opportunities to Consider

There are a few other ways to get yourself noticed. Consider:

- Creating a blog
- Speaking at a conference
- Writing press releases or white papers
- Entering a competition

No matter what activities you choose, make sure that they are appropriate for your business and send the right message. Anything that you put out in the public eye should be done well.

Getting the Work Done

Identifying Sources of Work

Here are some ideas that you can use to find work and start consulting. No matter what activities you choose, it's important to track what you are doing, evaluate your results, and modify your approach as necessary.

Requests from Businesses

Governments and large organizations will often post requests for information (RFI's) or requests for proposals (RFP's) when starting a large project. As you review these requests, ask yourself:

- Is my area of expertise a good fit for the client?
- Is the client a good fit for my business?
- Can I deliver what the client is asking for?
- Are the questions in the request specific, indicating that the client has thought about the project?
- Are the questions in the request too specific, indicating that the client already has a winner in mind?
- Is this a profitable opportunity for my business?

If you think that this is a good opportunity for your business, complete the request. Make sure to keep your response material and organize it – it may be useful for later requests.

Brokers and Agents

As with anything else, there are firms that will help consultants find clients. These firms usually charge a percentage of contracts that you get through them. If you decide to use such a service, be sure to ask for references and have an attorney review any agreements you sign.

Consulting Websites

There are also websites that try to match up consultants, contractors, and freelancers with clients. These websites may charge less than brokers and agents, but they may also be less effective. Be very sure of what you are agreeing to, especially if it is a paid service.

Networking and Word of Mouth

Networking is a great way to build your consulting business. Or, someone may mention a job opportunity to you, or link you with someone who is seeking the type of services that you offer.

If you receive an opportunity through networking, be sure to send your contact a thank-you note. As well, try to pass on business to your network whenever possible.

Cold Calling and Marketing Campaigns

You can also use traditional marketing campaigns and cold calling to boost your business. Typically, this involves identifying potentially interested clients, sending them an e-mail blast, and then making one or more follow-up phone calls.

Developing Contracts and Statements of Work

Contracts

You should have a contract for every project that you undertake. Make sure that the contract is agreed to and signed by both parties before you begin work for the client. If you are signing a contract, you may want to have an attorney review it first. If you are creating a contract, it definitely should be reviewed by an attorney before you ask the client to sign it.

At the minimum, the contract should include:

- The basic deliverables for the project, with tangible milestones and requirements for completion
- Payment terms (including your rates, the not-to-exceed amount, what expenses will be covered by the client, what expenses will not be covered, when payment is due, and how payment will be submitted)
- What other documents will spell out the project's deliverables (such as a master services agreement, statement of work, project plan, etc.)
- Who is responsible for the project for the client and consultant
- Disclaimer for errors, liability, tax responsibilities, etc.
- Who owns the copyright to works produced during the project, if applicable
- Non-competition, non-disclosure, and confidentiality clauses, if applicable
- Terms for cancellation (such as notice required and fees to be paid)
- Breach of contract clause
- The dates that the contract was drawn up and signed by each party
- Who is signing the contract on behalf of the client and consulting firm (including full contact information)
- A space for signatures

About Master Service Agreements

Some companies will ask you to sign a master service agreement (MSA) in addition to a standard contract, especially if you are going to be completing multiple projects for them. An MSA spells out the obligations of each party entering into the contract for all future projects (or for a defined time period). It typically covers things like:

- Payment and delivery
- Intellectual property
- Warranties and guarantees

- Non-competition, non-disclosure, and confidentiality clauses

Since MSA's will persist through multiple projects, you should have your attorney review its terms before signing it.

Developing a Statement of Work

A Statement of Work (SOW) outlines exactly what will be done for each project that you are completing for the client. It is a legally binding document, so it should be reviewed by your attorney. (Most attorneys can help you draft a template that covers all of the essential elements.)

The Statement of Work should include:

- The name and address of the client and consultant
- The date that the SOW was drafted and signed, and by whom
- Specific deliverables and measurement standards
- Timeline of deliverables and milestones
- Resources that will be provided by the client and by the consultant
- Project costs

Sample Statement of Work

Drafted: January 1, 2020

Drafted By: Smith Consulting

123 Main Avenue

Anytown, Anywhere, USA

99999

Drafted For: Jones Manufacturing

2500 Elm Street

Anytown, Anywhere, USA

99998

Project Summary

Smith Consulting will design and deliver a one-day workshop on federally legislated safety practices (per the 2020 Amendment to Health and Safety Act) relevant to Jones Manufacturing.

Project Participants

Smith Consulting:

- Sam Smith, Instructional Designer and Lead Consultant
- Winnie Smith, Trainer and Lead Consultant
- Amy Smith, Research Assistant

Jones Manufacturing:

- William Markham, Director of Human Resources
- Susan Killarney, Chief Operating Officer

Maximum Safety Inc.:

- Martin Wallace, Licensed Safety Inspector

Project Deliverables

Task	Timeline	Duration	Personnel	Estimated Cost
Perform research into safety legislation	Three days (24 hours)	January 15- January 18	Amy Smith	\$600
Develop course outline	One day (8 hours)	January 19	Sam Smith	\$800
Meet with executive team at Jones Manufacturing for course outline approval	Half day (4 hours)	January 22	Sam Smith	\$400
Develop training materials for one-day workshop, including takeaways for participants	One week (40 hours)	January 23- January 29	Sam Smith Winnie Smith	\$4,500
Deliver one-day training workshop	One day (8 hours)	February 1	Winnie Smith	\$1,000
Gather evaluations and perform follow-up with participants	Half day (4 hours)	February 7	Winnie Smith	\$400
Complete on-the-job monitoring	Half day (4 hours)	February 7	Winnie Smith Martin Wallace	\$1,500
Deliver evaluation report to executive team at Jones Manufacturing	Half day (4 hours)	February 10	Sam Smith Winnie Smith	\$400
Project Complete on February 10, 2020				Total Cost: \$9,600

Signed on Behalf of Smith Consulting: _____

Date: _____

Witnessed By: _____

Signed on Behalf of Jones Manufacturing: _____

Date: _____

Witnessed By: _____

The Tough Stuff

Avoiding Tough Situations

Good communication skills are essential for consultants. Being able to listen effectively, clearly express your terms, and watch for body language clues will help you ensure that there are no misunderstandings with the client and that your work can be carried out as planned.

Being clear about the decision making authority that your contact has is important, too. As well, make sure that you have the appropriate documents agreed to and signed before you begin work on any project.

Always be honest with the client. If you need to make changes to the project plan, schedule a meeting and discuss what's happening. Be prepared to explain problems and solutions, as well as the impact to the project's budget and schedule. You may also want to revise the project plan and statement of work. Take these lessons learned with you to future projects as a way to improve yourself and what you offer.

Dealing with Cancellations

The terms for cancellation (including deadlines, fees, and method of notification) should be clearly spelled out in your contract with the client. If the client attempts to cancel the contract without fulfilling these requirements, seek legal advice.

Always ask why the client has cancelled the project. Consider what you learned from the project and what you could do in the future to prevent this situation from happening again.

Firing a Client

Sometimes, despite all your efforts, a project just won't go as planned. Perhaps the client hasn't met payment terms or isn't holding up their end of the deal. If this happens, seek legal advice to make sure you're within your rights to cancel the contract. Then, meet with the client and say, "I feel like this isn't working out for either of us. I think it's in both of our interests to cancel this project."

Next, outline what responsibilities each of you have according to the contract and conclude your business on a positive, professional note. It's also worthwhile to consider lessons learned and how you could prevent this situation in the future.

Staying Current

Here are some ways to stay current in your field:

- Attend conferences and trade shows
- Join affiliated groups
- Network with other people in your industry
- Improve your education by attending workshops and courses
- Read related magazines, journals, blogs, and websites
- Get involved with people and groups from your industry online with Twitter, Facebook, LinkedIn, and forums
- Experiment with new technology
- Identify new opportunities for learning and pursue them

Can you think of any more ways to help yourself stay current?

Further Reading: