

# EXERCISE 1: DECIDING ON YOUR ULTIMATE DESIRED CONVERSION ACTIVITY (UDCA)

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Remember, your UDCA is the ultimate goal you want your Marketing System to achieve.

There may be smaller Desired Conversion Activities along the way (DCA).

**Ask yourself these questions:**

1. What would make a **significant** difference in my business if I could sell a lot of it?

2. What do I (or could I) sell that is **aligned with my mission**, is **leveragable** and is **in-demand**?

3. What do I (or could I) sell that has a **viable profit margin** to justify my expenditure of time and money on creating a marketing funnel?

# EXERCISE 2: DEFINE YOUR ULTIMATE DESIRED CONVERSION ACTIVITY (UDCA)

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Remember, your UDCA needs to be specific in both the literal and underlying meaning.

## **My UDCA is:**

1. Literal meaning – name, what's included, how much it costs, features:

2. Underlying meaning – the transformation my client will experience when they purchase my UDCA:

# EXERCISE 3: CREATE YOUR CLIENT AVATAR

It all starts with understanding your ideal client.

Don't be like this!



By having a very clear idea of your perfect customer, you are creating a solid foundation for your Marketing Ecosystem.

**Go ahead and create your ideal client avatar using the worksheet overleaf...**

## \*\*\* B2C Version \*\*\* (Use this version if your ideal client is an individual Consumer)

### Part A: Complete the worksheet below:

<b>Nickname:</b>	<i>Name this person based on their attitude to your product, their predominant feature or some other characteristic that is going to make it easy for you to remember and distinguish this Avatar from any others you may have.</i>
<b>Name:</b>	<i>It is important you name your Avatar – either use the name of an existing client (first names work well to keep anonymity) or choose a name that would match someone of that profile.</i>
<b>Photo:</b>	<i>Add a photo here – can be an existing client who fits the profile, or simply find a stock photo image to represent someone of a similar age, gender, style etc.</i>
<b>Age:</b>	
<b>Income:</b>	
<b>Lives:</b>	<i>Add location and type of housing/accommodation – think about who they would live with – alone, with friends, with family?</i>
<b>Works:</b>	<i>What do they do for a living?</i>
<b>Education:</b>	<i>What level of education do they have?</i>
<b>Does:</b>	<i>What do they do in their spare time?</i>
<b>Wants:</b>	<i>Name top 5 things they would have on their wish list – make it specific</i>

<b>Is worried about:</b>	<i>Name 5 things they are worried about – make it specific</i>
<b>Big threat:</b>	<i>Name 3 threats to your ideal client's success that can be overcome by using your product or service</i>
<b>Big opportunity:</b>	<i>Name 3 opportunities that could open up for your ideal client when they use your product or service.</i>
<b>Interview:</b>	<i>Think about 5 people who fit this profile you can interview to verify your assumptions</i>

### \*\*\* B2B Version \*\*\* (Use this if your Ideal Client is a Business)

## Part A: Complete the worksheet below as it relates to the PERSON within your ideal client organisation who will make the buying decision regarding your offer:

<b>Nickname:</b>	<i>Name this person based on their attitude to your product, their predominant feature or some other characteristic that is going to make it easy for you to remember and distinguish this Avatar from any others you may have.</i>
<b>Name:</b>	<i>It is important you name your Avatar – either use the name of an existing client (first names work well to keep anonymity) or choose a name that would match someone of that profile.</i>
<b>Photo:</b>	<i>Add a photo here – can be an existing client who fits the profile, or simply find a stock photo image to represent someone of a similar age, gender, style etc.</i>
<b>Age:</b>	
<b>Income:</b>	
<b>Lives:</b>	<i>Add location and type of housing/accommodation – think about who they would live with – alone, with friends, with family?</i>
<b>Education:</b>	<i>What level of education do they have?</i>
<b>Title:</b>	<i>What role do they have in the organisation?</i>
<b>Does:</b>	<i>What do they do in their spare time?</i>

<b>Serves:</b>	<i>Who are their internal and external customers?</i>
<b>Wants:</b>	<i>Name the top 5 things this person wants to achieve within their role.</i>
<b>Is expected to:</b>	<i>What is the main business outcome this person is expected to fulfill?</i>
<b>Is worried about:</b>	<i>Name 5 things this person is worried about in relation to their role, their position, expectations of them, outcomes they need to achieve – make it specific</i>
<b>Big threat:</b>	<i>Name 3 threats to your ideal client's success that can be overcome by using your product or service</i>
<b>Big opportunity:</b>	<i>Name 3 opportunities that could open up for your ideal client when they use your product or service.</i>
<b>Interview:</b>	<i>Think about 5 people who fit this profile you can interview to verify your assumptions</i>

## Part B: Complete the worksheet below as it relates to the ideal ORGANISATION for your offer:

<b>Nickname:</b>	<i>Name this person based on their attitude to your product, their predominant feature or some other characteristic that is going to make it easy for you to remember and distinguish this Avatar from any others you may have.</i>
<b>Photo:</b>	<i>Add a photo here – can be an existing client who fits the profile, or simply find a stock photo image to represent your ideal client organisation.</i>
<b>Turnover:</b>	<i>Annual revenue or sales volume?</i>
<b>Employees:</b>	<i>Number of employees?</i>
<b>Location:</b>	<i>Local / Regional / National / International? Any other details e.g. perhaps planning expansion into other areas?</i>
<b>Industry:</b>	<i>What industry are they in? eg Health, Manufacturing, Retail, Finance etc.</i>
<b>Structure:</b>	<i>Franchise, private company, public company, not for profit etc?</i>
<b>Age:</b>	<i>How long have they been established? Eg 3rd generation family business, new startup, celebrating 5th year in business etc</i>
<b>Status:</b>	<i>What position do they hold in the industry? Are they a market leader, an “up and comer”, newbie, laggard etc?</i>
<b>Personality &amp; Risk Profile:</b>	<i>Is this business staid and traditional? More inclined to try new things/innovate? If you had to describe the organisation like a person, who would it be?</i>
<b>Does:</b>	<i>What are the core outputs of this organisation?</i>



<b>Wants:</b>	<i>Name the top 5 things this organisation wants to achieve. What is their mission?</i>
<b>Is worried about:</b>	<i>Name the top 5 issues in this organisation right now.</i>
<b>Big threat:</b>	<i>Name 3 threats to your ideal client's success that can be overcome by using your product or service</i>
<b>Big opportunity:</b>	<i>Name 3 opportunities that could open up for your ideal client when they use your product or service.</i>
<b>Research:</b>	<i>Think about 5 organisations who fit this profile – what information and research can you find – eg annual reports, website content, suppliers etc.</i>

## Part C: The Interviews

Remember – you need to **“Take the Imaginative Leap”** and dig for the information that is going to enable you to feel EMPATHY for your Avatar.

This is best achieved by interviewing 5 people who fit the profile of your Ideal Client Avatar.

They can be:

- Existing clients
- Prospects already on your list
- People you'd love to have as clients

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# CONTENT SELLS

## PART 1 – GLOSSARY AND TOOLS

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### Glossary

#### **Marketing System**

Your Marketing System is The Process By Which You Attract, Convert & Keep Your Ideal Clients

#### **UDCA**

Ultimate Desired Conversion Activity

The ultimate goal you want your Marketing System to achieve.

#### **DCA**

Desired Conversion Activity

Sales goals you want your Marketing System to achieve as your customer makes their way to your UDCA.

#### **Client Avatar**

A detailed profile of your ideal client – the person you hope to purchase your DCA and UDCA.

#### **Cost Per Lead =**

\$ spent on advertising / # leads generated

**Revenue Per Lead =**

\$ generated / # leads generated

**Revenue Per Lead (lifetime) =**

\$ generated lifetime / # leads generated

## Tools

**Surveys**

- Survey Monkey  
[www.surveymonkey.com](http://www.surveymonkey.com)
- Wufoo  
[www.wufoo.com](http://www.wufoo.com)

**Quiz**

- Viral Quiz Builder  
[www.viralquizbuilder.com](http://www.viralquizbuilder.com)

**Audio Interviews**

- Audio Interviews – Call Recorder for Skype  
<http://www.ecamm.com/mac/callrecorder/>

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# CLIENT AVATAR INTERVIEW GUIDE

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## Top Tips:

- Allow 20 – 30 minutes for your interview
- Choose existing clients and/or prospects who are most closely aligned with your ideal client avatar
- Also consider interviewing ideal prospects who purchased your product from a competitor (for a broader insight into what may be causing a blockage to your prospects buying from you)
- Ask as many open-ended questions as you can (Who, What, How and the really great one, Why)
- Don't follow this list robotically. It could limit you. If your interviewee mentions something interesting that is worth exploring, feel free to "follow your nose" and ask more about that – you just might make an amazing breakthrough in understanding an issue or desire you never knew your ideal client had
- Wherever possible, record the interview (always ask permission first) and have the interview transcribed (Skype is great for this and I use a tool called Call Recorder for the recording [www.ecamm.com/mac/callrecorder/](http://www.ecamm.com/mac/callrecorder/))
- This is a BIG one – gauge the appropriateness of some of these questions – some people may not want to answer information about their living arrangements or marital status, so be sensitive to that.
- Look for empathy. Aim to go deeper, where possible/appropriate on answers where you may at first get a "stock standard" response for your interviewee
- Create a sense of a "safe place" – preferably not a noisy, public location and assure your interviewee of your confidentiality and encourage them to answer as openly and fully as they can. Often, if you declare to them you are really looking for answers beyond the usual stock standard, people will be happy to assist, if they can.

# **Questions:**

## **Demographics**

- Age
- Income Range
- Gender
- Occupation
- Education
- Address
- Type of accommodation (house, apartment etc)
- Do you live alone or with others?
- Married?
- Children?

## **Firmographics (if relevant ie B2B)**

- Age of business
- Revenue size
- Industry
- Customer size
- Structure (flat or hierarchical)
- Who do you report to and who reports to you?

## **Lifestyle**

- What do you do in your spare time – hobbies, interests etc?
- What kind of car do you drive?
- What is your favourite holiday destination?
- What is your favourite movie?

## **Personal**

- What are the top 5 things you are most worried about in your life right now?
- What are the top 5 things going really well in your life right now?
- How would you describe your personality? Eg extroverted, introverted,
- What would be the top 5 traits you would use to describe yourself?
- Can you describe your typical day to me?

### **Problem/Solution/Purchase-related**

- What associations and networks do you belong to?
- If you could solve 5 problems relating to (XX the solution I offer) by waving a magic wand right now, what would those problems be and what would solving them look like to you?
- Which one of the above is the biggest problem?
- What are the top 3 threats to related to (XX the solution I offer) that you are experiencing right now?
- What are some areas of opportunity that would open up for you if you had a better solution in place for (XX the solution I offer)?
- Tell me about a time when you felt closest to having success with (XX the solution I offer).
- How often have you purchased (XX the solution I offer)?
- Were you the decision-maker in that purchase (if not, who was)?
- Can you tell me about those experiences (where, when, level of satisfaction etc)?
- How do you learn more about (XX the solution I offer) eg blogs, training programs, media sources, friends, family and other information sources?
- What goals do you have that (XX the solution I offer) can help you to achieve?
- Is there anything else you would like to add about (XX the solution I offer)?

Remember... follow your nose... ask other questions opened up by the discussion.



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