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

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)

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:

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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:

Nickname:	*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.*
Name:	*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.*
Photo:	*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.*
Age:	
Income:	
Lives:	*Add location and type of housing/accommodation – think about who they would live with – alone, with friends, with family?*
Works:	*What do they do for a living?*
Education:	*What level of education do they have?*
Does:	*What do they do in their spare time?*
Wants:	*Name top 5 things they would have on their wish list – make it specific*

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

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*** 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:

Nickname:	*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.*
Name:	*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.*
Photo:	*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.*
Age:	
Income:	
Lives:	*Add location and type of housing/accommodation – think about who they would live with – alone, with friends, with family?*
Education:	*What level of education do they have?*
Title:	*What role do they have in the organisation?*
Does:	*What do they do in their spare time?*

Serves:	*Who are their internal and external customers?*
Wants:	*Name the top 5 things this person wants to achieve within their role.*
Is expected to:	*What is the main business outcome this person is expected to fulfill?*
Is worried about:	*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*
Big threat:	*Name 3 threats to your ideal client's success that can be overcome by using your product or service*
Big opportunity:	*Name 3 opportunities that could open up for your ideal client when they use your product or service.*
Interview:	*Think about 5 people who fit this profile you can interview to verify your assumptions*

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

Nickname:	*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.*
Photo:	*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.*
Turnover:	*Annual revenue or sales volume?*
Employees:	Number of employees?
Location:	Local / Regional / National / International? Any other details e.g. perhaps planning expansion into other areas?
Industry:	*What industry are they in? eg Health, Manufacturing, Retail, Finance etc.*
Structure:	*Franchise, private company, public company, not for profit etc?*
Age:	*How long have they been established? Eg 3rd generation family business, new startup, celebrating 5th year in business etc*
Status:	*What position do they hold in the industry? Are they a market leader, an "up and comer", newbie, laggard etc?*
Personality & Risk Profile:	*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?*
Does:	*What are the core outputs of this organisation?*

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

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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