

# The Ultimate Marketing Checklist for Service-Based Small Businesses

**The foundation of every successful service business is a high-quality client list.**

One that is full of raving fans who will tell other people about your services and create amazing testimonials and referrals to help grow your business.

But how do you create that?

What steps do you need to take?

**It can be hard, I know!**

That's why I've created this comprehensive checklist to help you end your marketing frustration and create a marketing strategy and plan that will work best for your business.

You will find this checklist split into four areas to help you create:

- A solid marketing strategy to guide your marketing decisions;
- A professional-looking brand to increase awareness;
- A website that works and gets found on Google; and
- A broad communications plan to increase your visibility.

You'll be able to check a lot of these items off yourself (and may have already completed some of them).

If there are tasks you get stuck on, value your time and consider asking for help rather than spending too much time on them.

Cheers, Hayley



# The Ultimate Marketing Checklist for Service-Based Small Businesses

## 1. Marketing Strategy

Your marketing strategy is the foundation – it guides all your future marketing decisions. Through analysis and market research you will be able to identify your most viable market position and your target market as well as how you can differentiate your business by communicating and delivering exceptional value in the area that matters most to your clients.

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**SWOT Analysis** Analyse your industry and your competitors and make a list of your Opportunities and Threats.

Review your business resources and performance and make a list of your Strengths and Weaknesses.

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**Market Positioning** Evaluate your SWOT (Strengths, Weaknesses, Opportunities and Threats) and strategically choose where you will position your business. Consider Product/Service, Price, Place, and Promotions.

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**Target Market** Create a profile of your target market including common demographic, geographic and socio-economic characteristics.

Research your target market to identify what their needs and wants are as well as their most significant pain points or problems.

**TIP:** Interview potential clients, conduct a survey, read feedback forms and review social media comments.

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**Unique Value Proposition** Identify what benefit will be the most important to your target market when solving their biggest pain point or problem.

When delivering this benefit, determine what makes your service offering different or better than the competition.

Write down how you will communicate your service offering to your target market in the form of a unique value proposition statement.

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## 2. Branding

The branding of your business is essential as it helps with attracting the right clients to your business and with creating a positive first impression. When you are clear about the look and feel of your business, it will also save you an incredible amount of time when it comes to building your website and other marketing materials.

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**Mission Statement** Write your business mission including what you do and whom you do it for. Place this at the top of your About page on your website.

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**Values** Brainstorm five words that describe the values that you want your business to represent.

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**Business Name** Register and set up your domain name and social media profiles to match your business name.   
**TIP:** Don't wait to do this as you may miss out on using your name on one of the social media platforms. Lock it in now!

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**About Copy** Write an About profile for you and your business. Include your achievements, experience, words that describe you and something personal about yourself.

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**Brand Copy** Drawing from your unique value proposition, write some short and long descriptive statements about your business that you can use consistently on your website and in your marketing materials.

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**Logo** Hire a designer to create a logo that looks professional and is reflective of your market positioning.   
**TIP:** This doesn't need to be an expensive exercise. Try freelancer websites like Upwork and Fiverr if your budget is limited.

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**Fonts**

Choose two main font types. One stand-out font type for headlines and one easy-to-read font type for body copy. You may also choose a have a third font type for sub-headings, that could be minimalist or feminine or something else that reflects your brand.

**TIP:** Visit the Canva website for help with picking font combinations that work well together: [www.canva.com/font-combinations](http://www.canva.com/font-combinations)

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**Colours**

Choose a colour palette with around five colours that you will use consistently. Find out their HEX codes and RGB numbers.

**TIP:** For colour palettes, visit the Design Seeds website: [www.design-seeds.com](http://www.design-seeds.com) or search for inspiration on Pinterest.

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### 3. Website

Your website has technical, functional and design elements that you need to get right for it to work as a lead and sales generating machine for your business. These elements assist with potential clients finding your website in the first place and with conversion once they are there. You can choose to do-it-yourself with a WordPress or Squarespace site, or you can hire a website developer or designer.

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**Navigation**

Ensure your navigation is along the top of your website and is easy to read. Your theme should change the colour of the words when you scroll over them, and the drop-downs should be easy to select.

Order your navigation in the same way you would nurture a relationship with someone. Start with 'Home' followed by 'About' (who you are) then 'Services' (what you do) then 'blog' (show your expertise) and finally 'Contact' (close the sale). You may have additional menus between Services and Contact.

Place your logo in the top left-hand corner and link it back to your home page.

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**Design**

Choose a website theme that is responsive, meaning it will automatically resize for desktop, tablet or mobile.

**TIP:** Whenever you change something on your website, be sure to check how it looks on your desktop, mobile and tablet to make sure it resizes correctly.

Set your website theme to use your brand colours and fonts.

Edit any copy that has been placed on top of busy images or block colours that makes it too hard to read.

Remove sliders and unnecessary plug-ins and pop-ups that slow your website down.

Set pop-up messages to open after at least 45 seconds of your visitors landing on your site. Turn off pop-up messages for mobile.

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**Copy**

Check there are at least 150 words on each website page.

Break up any large sections of copy and use sections, sub-headings, shorter sentences and bullet points to make it easier to read.

Research popular keywords and use these to create stand-out headlines and blog titles.

Include enticing and catchy words on your call to action (CTA) buttons (not the boring 'subscribe' or 'download').

**TIP:** When trying to work out a CTA, start with "I want to..." and then add: Learn More, Buy Now, Take Action, Join Today...

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**Media**

Arrange a photo shoot and use a high-quality headshot of yourself looking at the camera.

Remove or replace any poor-quality images or photos that are not reflective of your brand.

Upload or rename images with a suitable file name and alt description. Use keywords where appropriate.

Optimise the size of your media files, so it does not slow down the speed of your website. (Check your speed: [www.pingdom.com](http://www.pingdom.com)).

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- Traffic**
- Update your social media profiles to include a link to your website.
  - Promote your website address on all marketing materials and business cards.
  - Implement a traffic strategy that could include both organic and paid marketing activities.

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- Technical**
- Install an SSL certificate to ensure your site is HTTPS (not HTTP). Check that both the www and non-www URL for your website directs to HTTPS.
  - Ensure you have installed and activated the necessary tools or plugins to back up and secure your website.
  - Install the Yoast plugin to assist you with your SEO (if you're using WordPress).
  - Seamlessly integrate other marketing automation, payment, and scheduling platforms with your website to serve your clients.
  - Set up a Google Analytics account to track your website statistics.
  - Set up Google Search Console and submit your XML Sitemap so that Google crawls and indexes your website.
  - TIP:** If you're using WordPress, the Yoast plugin will create an XML Sitemap for you. Type: [www.yourdomain.com/sitemap.xml](http://www.yourdomain.com/sitemap.xml) to check if you have one.
  - You may also choose to add your sitemap to your robots.txt file (using the Yoast plugin or ask a developer to do this for you).
  - Find and correct any broken links using: [www.brokenlinkcheck.com](http://www.brokenlinkcheck.com)
  - Check that each page has a title and a meta description to help Google find your content. (The Yoast plugin will guide you on the appropriate length of these.)
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## 4. Communications

Once you've developed your marketing strategy and brand and have your website live, it's time to create a marketing plan to increase your visibility. Your marketing plan will incorporate how you create content and leverage social media and traditional marketing channels. As well as how you nurture relationships and close sales.

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|-------------------------|--|-----------------------|
| <b>Service Offering</b> | Understand what your client wants and needs and communicate a consistent and clear service offering.   | <input type="radio"/> |
|                         | Write a list of 20 reasons why someone would buy your services and use these ideas to write brilliant content for your sales pages.  | <input type="radio"/> |
|                         | Compare your prices and promotional offers to your competition and adjust if necessary.  | <input type="radio"/> |
|                         | Using your Unique Value Proposition, create one or two main pieces of promotional advertising to promote your services.  | <input type="radio"/> |
|                         | Set up an online sales page on your website and use landing page software to increase your sign-ups and convert more leads.  | <input type="radio"/> |
|                         | Review your website and check that it is easy to find your enticing sales pages and contact forms from the home page.  | <input type="radio"/> |
|                         | Practise your sales pitch (using a script if that makes you feel more comfortable). Test what works and once you find the right words, continue to use these as your fixed sales script. | <input type="radio"/> |
|                         | Map your sales and client onboarding processes and make the experience as easy as possible for your client.  | <input type="radio"/> |
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- Content Strategy** Consider what your target market's most significant pain point is and create a list of ideas of what your potential client might search for to solve it. (This list will ensure you never run out of content ideas).
- Pick the best idea on your list and use this to develop a lead magnet or free trial (voucher) to exchange for an email address to build your list.
- Set up an email auto-responder and welcome email sequence to deliver the lead magnet and nurture the potential client.
- Write two or three blog articles that relate to the lead magnet. Promote these blogs to get your lead magnet in front of your target market.
- Create more lead magnets and promote associated blog articles to increase your visibility.
- Link your brand values to your content strategy. For example, if one of your brand values was happiness then find quotes about happiness that you could create graphics for and share.
- Collect client testimonials and use these in promotional activities.

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- Social Media** Decide which social media platforms are most appropriate for finding your target market and set up business profiles for each.
- Add a professional photo and write a bio for each platform and link to your website or landing pages.
- Set up a Facebook Business Page and share it with your existing contacts to add followers.
- Create templates using Canva (or another design software) that reflects your brand.
- Create a calendar for your social media content around specific themes and share the same content on certain days. For example, share quotes on Mondays (motivation Monday) and ask questions on Wednesdays, share behind the scenes on Thursdays, and blog posts on Fridays.
- Insert a promotional offer for your services into your social media calendar now and then.
- TIP:** Be sure to give, give, give value before you promote your business or it will appear spammy.



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**Visibility** Choose which media you are going to use to reach your target market and focus on that.

**TIP:** Don't spread your money too thin across multiple advertising mediums as it will dilute your message.

Write a plan for how and when you are going to be visible to your target market. At a minimum, include paid advertising, blog articles, social media posts, and networking events.

Contact past clients and family and friends and ask for referrals.

Find your voice and start writing a blog. Also look for opportunities to host an event or speak in front of your target market.

Join a networking group or membership association to expand your network. Focus on helping others who in return could help you.

Collaborate with other businesses to expand your reach and increase your business profile.

Attend training events or industry conferences where you can network with potential clients. Be sure to have a follow up plan post the event.

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## That's it!

By completing these actions, you'll be well on your way to creating a high-quality client list with a solid marketing strategy, a professional-looking brand, a website that works and a communications plan to increase your visibility.

For more downloads and marketing resources visit: [www.myclientstrategy.com](http://www.myclientstrategy.com)

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### About Hayley Robertson

Marketing Strategist & Business Coach | Founder of My Client Strategy

I provide marketing strategy and business coaching services because I've seen first-hand that working in a small business can be hard work, overwhelming and lonely.

However, if you have someone to strategise with, it can help to develop clarity, structure, and roadmaps that lead to greater success.

Visit [www.myclientstrategy.com](http://www.myclientstrategy.com) to find out more about how I could help you to market and grow your service-based small business.