

# SEGMENTOLOGY

HOW TO SCALE A PRACTICE BY DOMINATING  
A MARKET

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ISBN: 9798867613730

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# 1 THE ROADMAP TO GETTING SEGMENTATION RIGHT

**P**icture the disheartening moment of witnessing your financial advisory practice, built on your dreams and dedication to your clients, gradually disintegrate. That's what happened to Alex. His downfall was not due to a lack of expertise or enthusiasm. It stemmed from an attempt to be the economic savior to all.

Alex was a dynamic financial advisor who built a team that loved to help people grow their wealth. But his once-thriving practice began to stumble, losing not only their revenue but also the confidence of his clients. His misstep? He tried to be everything to everyone. Trying to cater to every financial need, from retirement planning to investment strategies for every possible type of portfolio, he stretched his resources too thin and was branded a "generalist."

It seemed right at first. Alex and his team prided themselves on their ability to help anyone, regardless of their financial situation. Their broad approach attracted a diverse clientele. But soon, the cracks began to show. The team, though skilled, found themselves stretched thin, trying to manage complicated financial strategies for any person's needs, from working wealth for affluent clients to advising on debt management for struggling individuals.

The practice's marketing messages became diluted and confusing as they tried to speak to too many different client types, making their expertise appear generalized and non-specific. Clients began to notice the lack of specialized attention. The clients often thought, "They were good for me at one time, but my problems have become more complicated. I need an expert now." Clients started losing trust in Alex's ability to secure their financial future.

Adding to the trouble, the internal operations of Alex's practice became chaotic due to the absence of a clear, focused strategy. The team was constantly pivoting to address their varied client base's diverse and sometimes conflicting needs, leading to inefficiencies, miscommunications, and, ultimately, a decline in service quality.

Client dissatisfaction grew, negative reviews started trickling in, and referrals dried up. Because there was no market segmentation, Alex didn't know where to go to find new leads. He soon burned out emotionally under the stress of not being able to focus his attention on a niche. Alex's revenue plummeted as clients withdrew their portfolios and sought more specialized financial advisory services elsewhere. Once bustling with activity, the practice felt the effects of a financial strain and a whelming reputation. We can trace their troubles back to a lack of a clear, targeted approach to serving a specific market segment.

Alex needed to learn segmentology.

He is not the only one like this. His experience is a reminder to all of us who serve customers for a living. This book emerges to keep you off the path Alex walked and, instead, carve your journey as a renowned expert in your segment.

Because deep down, you know just how much you appreciate working with an expert.

## **WE LOVE OUR EXPERTS BUT ENJOY BEING GENERALISTS**

Imagine visiting a city with a vast array of dining options. You get one shot at a nice, memorable dinner. Do you choose the place that offers a

little something of everything or has only a few menu options, but they do everything with the highest level of expertise? Are you going to eat at a place that serves Italian, Indian, American, and Chinese off the same menu? Of course not. Similarly, you wouldn't rush to a general clinic in a critical situation like a medical emergency. Instead, you'd seek *the* specialist with deep expertise in the area of the body where you need it.

This highlights the inherent value of specialization and expertise in critical aspects of our lives. We're not the only ones. We love specialists.

## WHY WE LOVE SPECIALISTS

Consider these other areas where we rely on specialists over a generalist:

**Finances:** In moments of financial upheaval or golden opportunities, would you prefer the counsel of just any financial advisor, or would you seek out THE expert renowned for navigating the exact challenge you're facing?

**Home Renovation:** Imagine wanting to add a vintage touch to a modern home with stained glass windows. While a general contractor might have a broad understanding of window installations, a stained glass specialist would be sought to ensure the delicate and intricate work is done correctly, preserving the beauty and integrity of the glass.

**Car Repairs:** For luxury sports car owners like a Porsche or Ferrari, when it comes to repairs or maintenance, they'd likely prefer taking their vehicle to a mechanic specializing in luxury sports cars rather than a general auto repair shop.

**Legal Matters:** Someone starting a tech startup would benefit more from a lawyer specializing in intellectual property and tech startups rather than a general practice attorney when patenting new software or navigating the complexities of tech regulations.

**Fitness Goals:** An individual training for a triathlon would likely seek the guidance of a triathlon training coach who specializes in the specific demands of the sport rather than a general fitness trainer.

While we love working with experts on our problems, paradoxically, many proudly wear the generalist badge when running our businesses.

We spread ourselves thin, trying to be everything to everyone, fearing that specialization might limit our reach or opportunities.

However, the narratives that captivate us—the success stories we laud and aspire to emulate—are often tales of specialists. They are stories of individuals or companies that identified a niche, honed their expertise, and became the best in that domain.

Being a generalist might offer the illusion of diverse opportunities, but specialists leave an indelible mark. They understand that their foundation, their “Who,” is not about casting the widest net but diving deep, understanding a segment thoroughly, and serving it with unparalleled expertise.

In business, as in life, it’s not about being a jack of all trades but a master of one. Choose your segment, become the expert, and let your success story be a testament to the power of what we are calling segmentology.

### **Could You Benefit From Segmentology?**

Is this your experience:

- You’re always coming up with new ideas, but you’re not sure there’s a market for them. Maybe it’s a new product idea, and you know it would be awesome. You don’t know who to sell it to.
- You must accept any new lead from your website, even if it means working with difficult people.
- You hope and pray that a new client won’t become another nightmare.



- You spend a lot of time thinking of words that can reach all the potential clients you can work with. In trying to reach everyone, you fear you may be reaching no one.
- Because your clients are so diverse, you're spending so much time learning new software and tools while trying new strategies to appease them.
- Since you spend so much time figuring out what works, you're never sure if something will work.
- You constantly have to prove yourself and your worth on sales calls.
- Since a new client could come from anywhere, you're unsure where to put your marketing energy, time, and resources.
- You wonder if you'll ever be able to package up and sell such a random client list.
- You look back at months and years and wonder what you have accomplished besides random tasks for random people.

If that's you, you're not alone.

These problems come from my journal, as I struggled with them for years.

## THE PERILS OF WEARING TOO MANY HATS: THE DOWNSIDE OF BEING A GENERALIST

I know that the allure of being a generalist is undeniable.

The ultimate strategy is to be versatile, adaptable, and capable of catering to a broad audience. But beneath this veneer of flexibility lies a quagmire of challenges that can hinder growth and stifle potential.

**The Jack-of-All-Trades Dilemma:** By trying to help everyone, you often end up not truly helping anyone. Spreading yourself too thin means you can't offer the depth of service or product that a more focused competitor can.

**The FOMO Trap:** Being everywhere and doing everything might seem like a good idea, but it often leads to a debilitating fear of missing out

(FOMO). Instead of excelling in one area, you're constantly distracted by the next shiny opportunity, leading to a lack of depth in any endeavor.

**Commoditization Crisis:** When you're a generalist, standing out in a crowded marketplace is challenging. With a unique selling proposition, you avoid becoming just another commodity, easily replaceable, and lacking a distinct identity.

**Marketing Malaise:** Generalists often find themselves despising marketing. Why? Because it's incredibly challenging to craft a compelling narrative or brand story when trying to appeal to everyone. Your marketing efforts can feel scattered and ineffective without a clear target audience.

**The Wheel-Spinning Syndrome:** Without a clear focus, you'll spend excessive time on tasks that don't drive your business forward. It's like being stuck in the mud, with your wheels spinning but no forward momentum.

**Systematic Chaos:** One of the most significant challenges for generalists is creating efficient systems and training staff. When your business needs a clear direction, it's easier to develop streamlined processes or provide clear guidance to your team.

While being a generalist might seem like a path to unlimited opportunities, it's often a route filled with pitfalls and roadblocks. On the other hand, specialization allows businesses to carve out a niche, develop deep expertise, and genuinely serve their target audience. In the long run, it's not about how many hats you can wear but how well you wear the one that fits you best.

## THE DIFFERENCE BETWEEN KNOWING AND DOING

Knowing that you should pick a niche is one thing. Learning how to grow a thriving practice with a niche is where the challenge and opportunity lie. In the pages of this book is a roadmap taking you from feeling like a wandering generalist to a focused leader to "your

people.” You’ll learn what successful service providers are doing to thrive with segmentation and how you can follow their path, too.

## WHAT IS SEGMENTOLOGY?

Segmentology is mastering the art and science of building a thriving practice around a clear market segment. But while many are familiar with the idea, only some genuinely understand how to do it.

Segmentology is not an idea but a discipline that gets results. It goes beyond the superficial understanding of dividing the market into smaller chunks. It’s about immersing oneself in that segment, understanding its needs, culture, and aspirations, and tailoring one’s practice to cater to those requirements.

For many, realizing the importance of segmentation comes quickly. Yet, the path to effective segmentation still needs to be discovered. Why? Because while the concept is introduced, the roadmap to achieve it can sometimes be complicated. That’s where segmentology steps in, offering a structured approach to understanding and mastering the art of segmentation.

In the business growth journey, segmentology serves as a compass, guiding professionals to hone in on their target audience, refine their offerings, and ultimately build a practice that resonates deeply with a specific market segment. It’s not about casting a wide net; it’s about fishing with precision.

As we navigate the ever-evolving business landscape, segmentology emerges as a beacon for those looking to truly connect with their audience. It’s not just about knowing your segment; it’s about living, breathing, and mastering it. Welcome to the future of market mastery. *Welcome to segmentology.*

## FROM MINISTRY TO MARKET MASTERY: MY JOURNEY TO SEGMENTOLOGY

Emerging from my role in ministry, I was greeted with a horizon of boundless opportunities. As a pastor, my core mission has always been to guide individuals in crafting their triumphant narratives. It wasn't about financial gain. Money is like oxygen; once you have enough, you don't really think about it. But if you don't have it, that's all you think about. My wife and I had mastered living modestly on a Baptist preacher's earnings, so our needs were minimal.

My true calling was unmistakable: I aspired to empower small business owners with the knowledge and tools to market their businesses effectively.

This would enable them to reach a broader audience and, more importantly, connect with the right audience.

Through my observations, I discerned a curious pattern in business: the most skilled individual or entity sometimes emerges victorious. The most adept politicians might not secure an election, the most formidable teams might not clinch the trophy, and the most exceptional businesses might only sometimes be the ones chosen by clients.

Businesses with outstanding products or services that can genuinely enhance lives should be equipped with every possible resource to flourish. Keeping a stellar business under wraps might be suitable for safeguarding family recipes, but it's detrimental in the commercial realm. Superior businesses deserve the finest tools at their disposal.

When such businesses thrive, they not only elevate their stature but also enrich the lives of their customers.

Conversely, when these businesses remain obscured, the repercussions are manifold. Customers miss out on top-tier services or products, and companies miss out on potential revenue. However, when the right businesses align with the right audience, it creates a ripple effect of prosperity. Clients experience success, leading to heightened satisfaction and sparking enthusiastic referrals. Business owners, in turn,

rediscover their passion for their work. They indulge in leisure, exude a calmer demeanor, and foster a nurturing environment for their employees. This cheerful ambiance leads to a more positive culture, prompting employees to deliver superior service to clients.

When businesses align with their ideal market segment, it's not just a win for the company but a collective triumph for all involved.

You know this already: Where would you rather drink your wine from? The bottom of a barrel or the overflow? You say, "I don't drink by the barrel; I drink from a glass." Okay fine. But you get the idea. You don't want to scrape by as a business owner. You want abundance. You know you're better when there's more to share.

That's what I believe about business.

I want to fight entrepreneurial poverty. The best people should be helping more of the right people so their businesses can thrive. If they do it right, they won't have to work nearly as hard for the resources they deserve.

## FROM PHILOSOPHY TO PRACTICE: MY GROUND-LEVEL EXPERIENCE

Embarking on the entrepreneurial journey to find your niche can be arduous and challenging, often evoking frustration and self-doubt. It can feel akin to observing others indulge in a feast while you're left pondering why you're not partaking.

In my previous role as a pastor, I dedicated years to assisting everyone who sought my guidance without a distinct focus or specialization. However, when our board underwent a restructuring, I was left without a steady income or a community. This pivotal moment led me to establish my venture, aiming to bolster the growth of small businesses.

Initially, my approach was to be a jack of all trades, offering services ranging from website development to social media management and, humorously, even "hiding bodies" if the client asked nicely enough.

This broad approach made progress sluggish and imparting training challenging, as I was essentially charting unknown territory.

Stories of thriving entrepreneurs who had pinpointed their niche, established efficient systems, and managed to balance work and leisure while delivering stellar results for their clients often reached my ears. Yet, despite my earnest endeavors, success remained elusive.

The tide began to shift when a chiropractor from Colorado connected with me on Facebook. After sharing marketing insights with his mastermind group of influential chiropractors across America, I was invited to guest on multiple podcasts. They also asked me to contribute to their expansive Facebook community. Through deeper conversations, I discerned their needs and crafted a solution tailored to the challenges of this group.

The path to success could have been more straightforward. It demanded years of unwavering commitment and perseverance before transitioning from referral partners to selling our enterprise for a seven-figure sum. Our journey was punctuated with myriad obstacles, from financial hurdles to demanding clients, but our vision of aiding small businesses remained our North Star.

Reflecting on this journey, it's evident that pinpointing our niche was instrumental to our triumph. We learned the importance of differentiating ourselves in a saturated market by emphasizing our unique strengths.

For those navigating the tumultuous waters of entrepreneurship and feeling overshadowed by the success of others, remember that carving out your niche is a process that demands patience and dedication, but the rewards are truly invaluable.

## THE JOURNEY TO RE-INVENT MYSELF

While the option to cash out and enjoy a period of relaxation was tempting, I was still in my early forties, brimming with energy and ambition. I was reminded of the stories I'd read about the founding fathers of PayPal.

After selling their company for billions, these entrepreneurs still had gas left in the tank. They didn't just rest on their laurels. Instead, they embarked on new ventures that would reshape the digital landscape. Platforms like YouTube, LinkedIn, and Slack emerged from this entrepreneurial spirit.

With his share, Elon Musk pioneered ventures such as SpaceX, Tesla, and numerous others that might remain unsung.

For these trailblazers, their exit from PayPal wasn't an endpoint but a springboard to even grander horizons. I take inspiration from their stories. I felt inclined to share the playbook I now have to start, build, and scale a business around a clearly defined market segment. The study and execution of this, which I have called segmentology, are the contents of this book.

## WHO IS SEGMENTOLOGY FOR?

**1. The Skeptics:** If you're questioning the merits of the strategies laid out in this book, I aim to change your perspective. This book will illuminate the transformative power of zeroing in on a specific niche by highlighting its advantages over the broad approach of a generalist.

**2. The Newcomers:** This book serves as a roadmap for those embarking on their entrepreneurial journey. It offers insights into achieving efficiency, maintaining focus, and scaling effectively. By embracing these principles, you'll sidestep common pitfalls, thereby saving time and money and fast-tracking your progress by years.

**3. The Seasoned Professionals:** This book is your guide for veterans who've tasted success and are poised to take it to the next level. With a wealth of client interactions and work experiences under your belt, you've discerned your preferences. Now, it's time to refine your approach and optimize your efforts to work more intelligently, not just intensively.

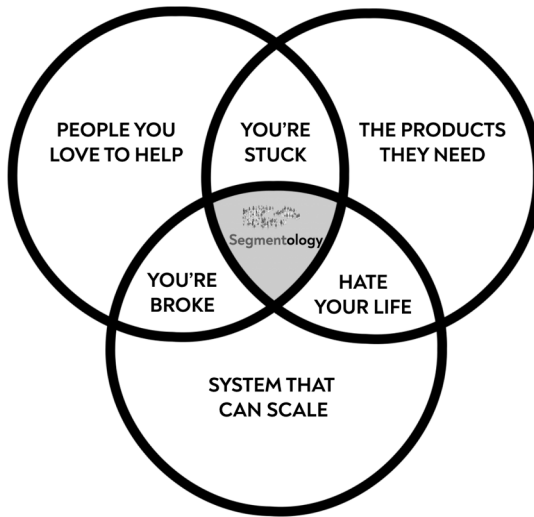
**4. The Strategist Eyeing an Exit:** This book is tailored for you if you're contemplating selling or passing on your legacy. By meticulously segmenting and packaging your offerings, you enhance their appeal

and value, making them more enticing and lucrative for potential buyers or successor.

## THE SEGMENTOLOGY CENTER

It wouldn't be a business book today without a Venn diagram. I am not above the need to illustrate with them. What can I say. I love circles and I love diagrams. Put them together and you have an amazing tool for making a point.

When I created the Segmentology system, I envisioned a Venn diagram to illustrate a thriving, scalable business. It looks like this:



Each circle in this diagram symbolizes a critical element of your professional and personal life, with the ultimate aim of achieving harmony among them. We are going for the type of business known for these characteristics:

- *Clients You Love to Help*: Identify and deeply understand the audience you're passionate about serving. These are the people whose challenges you're uniquely equipped to solve, and



helping them should bring you joy. If you have a great product and a superior system but you detest your clients, you're going to be miserable all day, every day.

- *The Products They Need:* Deliver services or products that precisely meet the needs of your ideal client. Your offerings should be both effective solutions that solve a real world problem. Without a need in the market, you've got a hobby - not a business.
- *Sustainable Confidence:* Live every day with the assurance that you have a system that is delivering repeatable results, creating satisfied clients. If you have no system, you're going to have a random, chaotic business that depends on you.
- *Personal Fulfillment:* When you have all three circles going, you'll enjoy the satisfaction of knowing your business is helping the most amount of people solve a real problem without it blowing up your life.

### ***The Central Principle - Segmentology Creates A Thriving Business Serving The People You Love With A System That Can Scale***

Aiming for the middle circle is finding the sweet spot where passion meets market demand, financial health, growth potential, and personal satisfaction.

When these elements align, your business is set to flourish, scale efficiently, and bring you a sense of achievement and happiness.

Now let's talk about how to get there.

## **THE SEGMENTOLOGY ROADMAP**

This book serves as your compass, guiding you through the intricate terrains of market segmentation and ensuring you harness its full potential. Here's a glimpse of the enlightening journey ahead:

**Find the Right Segment:** We begin by making sure you have a clearly defined ideal client. If you're not sure yet who you love to help, that's ok. We will seek to understand your options along with some of the

nuances of each type. You'll learn to discern which resonates most with your gifts, experience, market needs, and goals.

**How to Choose, Understand, and Serve Your Segment:** Once you've identified your segment, it's crucial to comprehend its intricacies. We explore your chosen segment's problems, aspirations, and needs, ensuring you're poised to serve them as an industry leader.

**Scaling Your Practice With the Right Systems:** Growth is not just about expansion but about doing so smartly. Learn how to implement systems that allow you to scale efficiently, ensuring consistent quality and value.

**Build a Team That Becomes the Authority to Your Segment:** A scalable and sustainable, world-class practice isn't a solo endeavor. Discover how to assemble a team that understands your segment and gets stuff done.

**Lifestyle Marketing That's Clear, Effective, and Fun:** Marketing doesn't have to be a chore. Embrace strategies that are not only clear and effective but also enjoyable, ensuring your brand resonates while you relish the process.

**Build a Legacy Business Around the Four Freedoms:** Entrepreneurs dream of leaving a lasting legacy. Learn how to structure your business around the pillars of freedom—time, financial, emotional, and geographical—ensuring longevity and continued impact.

As you engage each step, you'll be equipped with the tools, insights, and strategies to master the art and science of segmentology. It's a journey of discovery, growth, and ultimately, your success.

Prepare to embark on a transformative adventure that will deliver the entrepreneurial lifestyle you've always wanted.

## 2 SEGMENTOLOGY 101

### FROM “WHY” TO “WHO”

I had this big idea I wanted to share. I needed to know if others felt the same way. I’ve always been drawn to stages. I’m there, asking if I can speak if there’s a stage and a microphone.

I saw TEDx as a place to test new ideas. So, I went there to challenge a popular thought by Simon Sinek. I said people don’t care about your “Why;” they want to know if you can help them. Think about it. If you meet someone and all they talk about is their “Why,” you’ll wonder why you even spoke to them. But if they show they can help you, you’re interested. That was my TED talk’s message: “Forget the why; start with the who.”

This talk became a book. I explored this idea more during the tough COVID times and even studied it in my MBA. My main point? A great “Why” means nothing without the right “Who” to make it happen.

Many of you have big dreams for your work. Your family might support you, but you need more than that.

I believe the answer is focusing on the right group of people, or segmentation. How to do it? It's not easy, but it's worth it.

The thing about TEDx is that it's like an amateur hour at the comedy club. You can try stuff out. That's when I decided to try to pick a fight with Simon Sinek. I argued that people don't care about your "Why;" they care about if you can help them win. This isn't advanced thinking. If you meet someone at an event and they talk about their "Why," you ask, "Why did I talk to you?" But you're interested if you meet someone who takes a legitimate interest in you and helps you solve a problem for them (or you think they can solve it). That's my TED talk.

It eventually led to a book, and then I pursued the idea, focusing on this premise through COVID, eventually completing my MBA with a focus on building a business around a segment. You can sit with a "Why" for a long time and help no one. Inspiring "Whys" needs inspired "Whos."

## **"DON'T BUILD HERE"**

Japan experienced two devastating disasters in 2011: an earthquake and a subsequent tsunami. At the same time, stone markers with messages written in Japanese gained international attention. Some of these stones, which are hundreds of years old, bear inscriptions that warn inhabitants not to build anything below specific points, essentially marking safe zones. These tablets are a testament to Japan's long history with tsunamis and the wisdom of past generations trying to protect future ones.

The stone tablets serve as a poignant metaphor. Just as the tablets were erected to guide and protect future generations from natural disasters, businesses should not be built on the wrong foundation.

When individuals start a business solely for personal gain, they build below the warning sign.

They might wonder why they don't resonate with customers or why their business doesn't thrive. But just as the ancient tablets emphasized community over individual homes, companies prioritizing serving

their community and adding value to others are more likely to stand the test of time and weather storms. Essentially, a business built on the foundation of helping and serving others is like building above the ancient warning sign, ensuring longevity and meaningful impact.

If you don't clearly define your target customer from the start, it'll cost you throughout your business's life. Everything will become more complicated. It's not just about promoting your business; it's about having the proper foundation.

## BEWARE OF THE WANDERING GENERALITY

The late Zig Ziglar, one of the world's most renowned motivational speakers and sales trainers, often used the term "wandering generality" to describe individuals or businesses that lack a clear purpose or direction. In contrast to being a "meaningful specific," a "wandering generality" drifts through life without a clear goal or focus.

In business, a "wandering generality" refers to companies that try to be everything to everyone, lacking a clear target audience or niche. Such businesses often find it challenging to create effective marketing campaigns or sales strategies because they need to speak to a specific group of people or address particular needs. Instead of honing in on what they do best and who they serve best, they spread themselves too thin, trying to cater to a broad audience.

Ziglar's point was that personal and business success comes from having a clear purpose and direction. Individuals and companies can channel their energies effectively, make a more significant impact, and achieve their goals by being "meaningful specific" (a term I've used as the opposite of a wandering generality).

Is that your struggle? Here are four repercussions of being a "wandering generality" you might recognize in your business:

1. **Diluted Marketing:** Without a clear focus on a specific audience or avatar, your marketing messages will lack precision and impact.

2. **Unclear Sales Strategy:** Directing your sales efforts becomes challenging without knowing your target audience, leading to missed opportunities.
3. **Inefficient Processes:** Without a consistent target audience, you'll constantly adapt and change, preventing you from streamlining and automating your operations.
4. **Overextension:** Much like jam spread too thinly over a vast piece of toast, trying to cater to everyone will stretch you thin. The result? A business that attempts many things but excels at none.

## THE POWER OF SEGMENTATION: GRANT'S STORY

Let me introduce you to Grant Strachan, a guiding light in my life. When I was navigating the tumultuous waters of my adolescent years, feeling lost and adrift, Grant emerged as my mentor. I am blessed to have had such incredible men in my life during those formative years, and Grant was one of them. He embodied wisdom, fun, and adventure, especially regarding the great outdoors.

Years passed, and our paths crossed again as I transitioned into my late twenties. Life had thrown its curveballs, and adulthood, with its myriad of challenges, had me feeling lost again.

My wife and I charted a clear financial path with Grant's guidance. From life insurance and wills to budgeting, tax planning through charitable giving, and even taking care of our mortgage, Grant was a huge help again during this season of life.

Our bond grew more vital when we became neighbors. Our casual fence chats and neighborhood strolls became a regular affair. I remember one conversation centered around the disruptive Questtrade commercials. Curious, I asked Grant how he felt about this wave of disruption in the financial world. He shared how he was pivoting at his company. His strategy? Segmenting his market to cater to incorporated professionals, predominantly doctors.

Our discussions often revolved around this topic, a subject close to my heart. I believe I offered some valuable insights during those chats. But, as life would have it, the onset of COVID-19 distanced us all. My life became a whirlwind of pursuing an MBA, authoring a book, managing two businesses, and raising three kids.

One day, I bumped into Grant, fresh from a mid-week bike ride with a group of doctors. Intrigued, I inquired about these rides. He casually mentioned, “We ride together. Sometimes, they seek advice about their businesses, but we mostly enjoy the outdoors on our bikes. I’m onboarding five of them this week.”

Connecting the dots in my head, it was evident: Grant’s passion for the outdoors had seamlessly merged with a segment he deeply understood: professionals with the means to support his livelihood.

And that, my friends, showcases the sheer brilliance of segmentation!

## 10 REASONS FOR SEGMENTATION

I’ve created a list (in no particular order) of the top reasons why I think it is a no-brainer to find a segment of the market that you love working with and then build a world-class practice serving it.

### 1. Deep Market Understanding

Having a niche allows businesses to connect with their customers, fostering a profound understanding of market dynamics.

Remember, consumers are always in search of solutions to their problems. By understanding their needs, businesses can tailor their offerings more effectively. Consider the complexities of tax planning or crafting an investment portfolio. Entrepreneurs who can pinpoint their customers’ needs can adeptly fill these market gaps. Regularly engaging with customers and staying attuned to their evolving requirements is the key to thriving in today’s competitive landscape.

## **2. Work With People You Love**

Choosing a niche allows you to focus your business on the people who make you light up. You're not choosing blindly; you benefit from experience and knowledge when selecting which customers to work with. When deciding who to work with, ask yourself if the person is someone you'd love to meet again and maintain a relationship with. If not, they may not be suitable for your market.

Audit your client's hall of fame to determine who you like to work with. When thinking about the ones you loved working with and what type of client you would like to work with in the future, create two columns of attributes. Label them "Characteristics my next clients must have" and "Characteristics my next clients must not have."

## **3. Clone Your Best Clients**

We, as a society, are segmented. We tend to hang out with people who think the same, vote the same, believe the same, parent the same, earn the same, and live in the same area code.

Referrals are a potent tool for businesses of all sizes. A referral from a friend or trusted acquaintance will not only instantly establish trust, but it can also help spread the word about your products or services and make them more visible to potential customers.

When customers refer their friends and family members to your business, they are doing so because they are happy with the service they have received and believe that others may also benefit from it. This means that when customers make referrals, you can be sure that these new customers will have similar interests and preferences as your existing customer base.

This type of targeted marketing is highly effective in helping you reach audiences who may be interested in your products or services while also providing valuable insights into customer behavior, which can inform future marketing strategies and product development plans. Moreover, referral programs are an effective way for businesses to



build relationships with their customers individually and create long-term loyalty, which is essential for sustained growth.

#### **4. Create a Consistent Message**

By staying focused on one particular area, copywriting becomes much simpler and quicker since you can quickly hone your writing skills and learn the necessities of that market. Having a concise and memorable message that you and your team can memorize also means that when you share what your business does, people get excited about it.

Having a concise and memorable message easily memorized by your team ensures that the same clear and consistent message will be communicated every time you reach out. This makes copywriting much easier and quicker, so the right people can be quickly and effectively engaged.

*“I do \_\_\_\_\_ for \_\_\_\_\_ who are struggling with \_\_\_\_\_ so they can enjoy \_\_\_\_\_.”*

#### **5. Streamlining for Efficiency: The Power of Specialization**

Specializing in a specific area or offering allows you to hone your skills and deliver precisely what your customers seek. Consider a marketing company that provides many services, from website development and IT support to copywriting and even hiring bodies for your clients.

But when such a company narrows its focus to designing websites specifically for chiropractors, it can refine its process to such an extent that it can execute tasks in mere hours. This laser-focused approach not only streamlines service delivery but also simplifies training. New team members can quickly learn and manage the process, freeing you to tackle other responsibilities.

The beauty of specialization? The time you save. Everyone craves more hours in their day, and one surefire way to achieve this is by minimizing wasted efforts. My marketing company’s journey mirrored this: from offering a wide range of services to exclusively crafting chiro-

practic websites. The result? Rapid turnaround times, consistent results, and heightened efficiency.

Imagine the clarity and efficiency you'd achieve by having a well-defined customer base and a standardized process tailored to their needs. Instead of getting lost in the vast expanse of information on diverse topics like mortgages, wills, or cryptocurrencies, you could focus your energy and expertise on a singular niche. The outcome? More satisfied customers, successful campaigns, and a lot more free time on your hands.

## **6. Deliver Consistently Outstanding Results**

Imagine a renowned open-heart surgeon contemplating a shift to knee replacements. The advice? Stick to what you excel at!

When you meticulously craft and fine-tune your processes, you ensure consistent, high-quality results. Deviating from this path can erode your confidence and undermine your ability to promote your services effectively. A proven track record not only establishes authority but also instills trust.

Consistency is the cornerstone of success. The principle of Kaizen, a Japanese term that means "continuous improvement," It involves making small, incremental changes and improving processes, products, or practices to achieve better results and efficiency. Emphasizes producing quality consistently. Every product or service delivered should meet the highest standards, reducing the chances of defects, recalls, or dissatisfied clients. This consistent quality assurance boosts everyone's confidence, ensuring that what's offered holds immense value for the consumer. When you're clear about who you're serving, you can identify their starting point, understand their challenges, recognize the process to assist them and predict the outcome of your intervention.

My MBA had an emphasis on companies that centered around their customers. Such companies boasted the most efficient supply chains. The primary objective of a supply chain is to enhance the value deliv-

ered to the end consumer. The leaner a company's operations, the more value it imparts to its customers.

Every company, regardless of its size, should aim to offer unparalleled value to its clientele, ensuring happy customers, increased loyalty, and a larger market share. This is where the lean business approach shines. It ensures that resources are utilized optimally to maximize customer value. We will discuss this in a later chapter.

## 7. You Become an Indie Celebrity

I don't even want to be a B-list celebrity—the guy who is on sitcoms. Still too famous for me.

I want to be a C-list celebrity. Unknown and invisible to the world, but as soon as I walk into a convention center, people shake my hand and say how much my work has helped them. I want them to quote a podcast I was on and say they are finally ready to hire me in the new year. Then they tell their spouses they met me, and the spouse says, "Who is that?" That's a C-list celebrity.

Many social media influencers and teenagers would love to become celebrities when they "make it." From everything I've learned, it looks like hell. It might be fun for a day, but being constantly interrupted everywhere you go sounds terrible. Who wants to be sitting down at a restaurant for dinner with their family and have their moment interrupted by fans or photographers?

I don't want the reality TV show *Big Brother* to give me a casting call to do a career death row stunt at the end. Indie celebrity offers ambivalence from fame without compromising on the rewards, ultimately allowing you to enjoy the fruits of your work while keeping some privacy.

If I had to choose which level of celebrity I would be, it would be a C-list celebrity. Leave the A-list to the royal family, astronauts, and movie stars. I don't want to be on a sitcom or reality TV show. I like the next tier down, the C-list. You know, the person sought after for their expertise in a particular area. Like being a guest on a podcast or a speaker at

an industry-specific conference. People want you to be in the room, but then they leave you alone when you're not. As a C-list indie celebrity, you can often enjoy the spotlight without dealing with the pressures of mainstream fame.

A respected authority in your field has advantages, especially when making sales. Rather than convincing people of the value you offer, you can jump on a call knowing that people are already persuaded to work with you. This saves time and removes the stress of lengthy sales pitches and convincing conversations—now it's just about delivering the results!

Your reputation as an authority in your segment has done all the hard work for you, allowing you to focus on what matters most: providing critical solutions to solve customer problems.

## **8. The Precision of Targeted Marketing**

Marketing's true power is unleashed when directed towards a well-defined market segment. Consider this: If your ideal client base consists of Toronto Maple Leafs fans, would investing in a billboard in Vancouver make sense? Or, if your target audience is entrepreneurs, would it be strategic to sponsor an event or party that doesn't align with entrepreneurial values or interests?

Absolutely not.

The essence of strategic marketing lies in its precision. It's not just about making your presence felt; it's about ensuring it is felt in the right places, among the right people. When you clearly understand your target segment, you can tailor your marketing efforts to resonate with them specifically. This not only maximizes the impact of your campaigns but also ensures optimal resource allocation. After all, effective marketing is not just about visibility; it's about being visible to the right audience in the right place at the right time.

## 9. The Value of a Segmented Practice in Business Sales

Selling a business is one of the most direct routes to amassing wealth. But what exactly are potential buyers seeking? They're looking for a ready-made, streamlined business they can seamlessly integrate into their existing operations.

From my experience navigating the intricacies of business acquisitions, I've discerned that buyers prioritize two critical assets: a well-defined process and a curated list of customers. A customer base that's neatly segmented is particularly enticing, especially if it aligns with a segment they're already targeting.

Consider this: would potential buyers be interested in a customer base that consisted of your Uncle Al, your next-door neighbor, or the parents from your child's school?

That's possible if these individuals belong to a specific, strategic market segment. However, if the sole link binding these customers is a personal connection to you, building a scalable, sellable business around such a foundation is challenging.

## 10. The Fulfillment of Serving a Segment: A Career With Purpose

In the vast expanse of one's professional journey, dedicating years or even decades to serving a specific market segment can be the cornerstone of a deeply rewarding career. Beyond the immediate benefits of expertise and recognition, this dedication taps into our intrinsic desire for purpose and meaning in our work.

Humans are not solely driven by monetary gains. While financial stability is essential, our souls yearn for more profound connections and impacts. Serving a segment consistently allows us to deeply understand that group's needs, aspirations, and challenges. Over time, this understanding evolves into a relationship. This bond offers insights into the market's dynamics and the very lives and stories of the people within it.

In his work, *The 7 Habits of Highly Effective People*, Stephen Covey emphasized the principle of “beginning with the end in mind.”<sup>1</sup> Applying this to our professional lives urges us to envision the legacy we wish to leave behind. By dedicating ourselves to a segment, we’re not just building a career but also crafting a gift of service, understanding, and impact. We’re laying down a path that, when looked back upon, is lined with meaningful interactions, genuine contributions, and the profound satisfaction of having made a difference. In such a career, every day becomes a step towards a purposeful end, making the journey as enriching as the destination.

## CONCLUSION – THE POWER OF SEGMENTATION

In this chapter, we’ve looked at the clear benefits of market segmentation, and it’s worth revisiting these advantages as we wrap up.

By zeroing in on a specific market segment, businesses can keenly understand its ever-changing needs and dynamics. This focus fosters genuine collaborations with like-minded individuals and allows for the replication of successful client traits, ensuring uniform quality. A well-defined segment paves the way for a consistent brand message, streamlined operations, and outstanding results. Moreover, such precision in approach positions you as a notable figure in your niche, amplifying marketing efficacy. The tangible benefits extend to enhancing the business’s overall value, making it more attractive for potential sales. Ultimately, dedicating oneself to a segment culminates in a career that’s both successful and deeply fulfilling.

Without a clear market segment, businesses risk becoming what Zig Ziglar termed a “wandering generality.” Such entities often face diluted marketing efforts, inconsistent messaging, and a lack of direction, leading to missed opportunities and potential stagnation.

## STUMBLING INTO THE IDEAL SEGMENT: MY CHIROPRACTOR EPIPHANY

In my quest to find the perfect client for my website agency, I stumbled into the realm of chiropractors. It was like striking gold in the vast mine of potential segments. After years of reflection on why this worked so well, these are my conclusions as to why chiropractors turned out to be the dream clients for website services:

- **Speedy Decision Makers:** Chiropractors are quick on their feet, making decisions promptly, a breath of fresh air in the business world.
- **Entrepreneurial Spirit:** Their drive and entrepreneurial mindset mean they're always looking for ways to innovate and improve, making them receptive to fresh ideas.
- **Valuing Expertise:** Since website design and management are far from their professional wheelhouse, they genuinely appreciate and value the expertise I bring to the table.
- **Low Maintenance:** Their busy schedules mean they trust the experts they hire, resulting in a hassle-free working relationship.

Now, let's flip the script and imagine the polar opposite. Picture collaborating with companies that are the antithesis of all the qualities I cherish in chiropractors. Think about the agonizing pace of businesses bogged down by bureaucracy, where every decision requires multiple meetings and endless email chains. Envision working with risk-averse entities paralyzed by the fear of making the wrong move, stalling projects indefinitely. And the best part? Dealing with super demanding clients who, despite their indecisiveness, expect you to read their minds and deliver perfection. It's a nightmarish scenario that makes one truly appreciate the beauty of finding the right segment.

## CONCLUSION: WHO DO YOU THINK YOUR SEGMENT IS?

As we conclude this chapter, here's a call to action: Don't let your business drift aimlessly in the vast ocean of possibilities. Anchor it firmly in the harbor of segmentation. Define your segment, get to know the people in your segment, and tailor your offer to serve them best. Doing so will ensure your business's success and craft a legacy of meaningful impact.

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1. Covey, S. R. (1989). *The seven habits of highly effective people: Powerful lessons in personal change*. Free Press.



### 3 SELECTING YOUR SEGMENT

I've always been bewildered by running enthusiasts. I don't get them because I'm not like them. In high school, I played every sport I could... except cross-country. I don't mind running to something like a ball or an opponent. I just don't like running as both the means and the end. Most short and stocky guys I know feel the same. Running is the sport where you just show up and run. Cross-country is marketed as an epic adventure, but the reality of it is that you're just doing laps around a park. Over and over.

Those who do cross country in high school graduate to become... runners. Give them an inch, and they'll give you a marathon. Literally. They'll tell you about every mile, every hill, and every puddle they jumped. Their social media is like a daily running journal. Morning jogs, shiny new shoes, that post-run glow—it's all there. Kudos for the dedication, but sometimes I can't help but think, "Got it, you ran today. Again."

There's another kind of runner that boggles my mind. They're even more dedicated than the other runners. I'm talking about those who run with extra weights attached. As I understand it, the basic premise

of running is to move from A to B. Why make it feel like you're also dragging a boulder?

Most of us run to lose weight, not add it voluntarily.

There's a parallel here to Segmentology. Lugging around the burden of bad clients is like those runners who run with weights. It's extra tiring, it slows you down, and I think you're a fool for doing it. Okay, that came across a bit strong, but I hope you at least see my point. I'm here to help you offload that baggage to help your practice run faster and further.

Let's get focused, declutter your client base, and find a rhythm that lets you hit your stride for good.

## HOW TO GROW A PRACTICE AROUND YOUR SEGMENT

We have already established that segmentation is critical to a thriving business. The truth is this: every professional should identify a segment they resonate with, genuinely appreciate, and are passionate about serving for a significant period of their career.

This chapter will guide you through the intricate process of selecting that perfect segment, ensuring that your dedication translates into tangible success.

We'll start by outlining the various segments available in the market. Next, we'll focus on identifying segments that are relevant to your experience and profitable. To assist in making informed decisions, I provide guidelines on selecting the segment most suited to your expertise and goals.

Finally, we will offer concrete steps to implement your chosen segment effectively.

## Understanding Different Market Segments

Understanding the different types of market segments is crucial for any business aiming to target its audience effectively. Segmentation is not a one-size-fits-all approach; instead, it's a tailored strategy where a primary category, such as demographic or firmographic, is chosen as the foundation. This primary category is then further described and enriched using other segmentation types, like behavioral and psychographic.

Let's look into various segmentation categories. These include geographic, demographic, psychographic, situational, behavioral, and company-based segments.

## SEGMENTATION BY GEOGRAPHY

Many organizations use this form of targeting to better understand their customer base when it comes to geographic segmentation. By looking into postal codes and rural or urban areas, businesses can tailor their services to better suit the needs and interests of customers based on geographical location. This segmentation technique helps companies decide where to sell, advertise, or expand their business operations. It is a key component in helping them reach their desired market and succeed.

Geographic segmentation is often one of the easiest to identify, grouping customers according to their physical location. This can be defined in any number of ways:

- Country
- Region
- City
- Postal code

By leveraging geographic segmentation, businesses can better understand the needs and interests of their customers. By splitting up their market according to location, they can create personalized and targeted

ads tailored specifically to each customer. This segmentation strategy provides an invaluable tool for businesses as it helps them identify key areas where they should focus and direct their marketing efforts for maximum success.

Geographic segmentation is essential for businesses looking to reach a specific audience. If, for example, you run a local business, foot traffic is mission-critical for you. This type of segmentation also helps companies tailor their messaging to different regions based on language, interests, cultural norms, and more. By understanding these differences in needs, they can craft more effective ads.

Adapting language and content to the different regions you're targeting is essential. For example, while baseball is very popular in the US, cricket is more prevalent in India. When marketing sports equipment or articles, this should be taken into account. Additionally, businesses can adjust ad messaging based on regional needs; warmer clothing ads will show in cooler climates, and vice versa.

## SEGMENTATION BY DEMOGRAPHICS

Demographic segmentation is a straightforward way of targeting specific customers. Retailers segment their customers based on gender, age, location, number of assets, or income level. All these factors can significantly influence purchasing decisions. Other demographic characteristics include age, sex, marital status, family size, occupation, education level, income, race, nationality, and religion.

One advantage of demographic segmentation is that obtaining information can be evident and low-cost. Products are often tailored to particular demographics, such as in the case of a personal care company creating two distinct deodorant lines—one designed for men and one designed for women.

By understanding various demographic profiles, businesses can target their product offerings more precisely and maximize sales.

Automotive companies commonly divide their audiences by income level to deliver targeted offerings. Depending on the company, they

may offer a luxury segment, an economy segment, and a mid-range segment of vehicles, each appealing to different socio-economic groups within a demographic.

There are numerous ways to gather demographic data. One way is to ask your customers directly. This can be time-consuming, but getting customer information directly will help ensure its accuracy.

Here's a quick exercise: Demographics likely matter when choosing your segment. Write down any distinguishing factors of your ideal customer:

- Age
- Gender
- Ethnicity
- Income
- Assets/Net worth
- Level of education
- Religion
- Profession/role in a company

## SEGMENTATION BY PSYCHOGRAPHY

Psychographic segmentation looks at consumers' motivations, values, and attitudes to identify different market segments. By examining shoppers' lifestyles, interests, and opinions, a business can target specific groups more effectively with tailored products and services. For instance, a fitness store could use psychographic segmentation to group customers based on their commitment to healthy living or exercise regimes. This allows them to tailor their offerings to suit the needs of each segment better.

Psychographic segmentation defines the market by:

- Personality traits
- Hobbies
- Life goals
- Values

- Beliefs
- Lifestyles

Psychographic segmentation is one way businesses can focus on a market that will be interested in their product. By considering customers' mental, emotional, and psychological traits, marketers can better adjust their messaging to resonate with consumers. Examples of psychographic segmentation include understanding an audience's personality traits, interests, values, and attitudes when crafting content. This helps to create content that speaks more directly to the target market.

While demographics give you an overview of who you're targeting, psychographics provides insight into the motivations, values, beliefs, and attitudes that drive consumer behavior. By considering these mental and emotional elements, marketers can create more persuasive and relevant content for their target market segment. This helps to increase engagement with ads, products, and services.

Say you're a furniture and home decor company targeting newlyweds in their 20s and 30s with a household income of over \$60,000; some members of this demographic segment may be buying your products, but others are not. By considering psychographic factors such as values, attitudes, and lifestyle choices, you can understand why certain customers respond differently to your content. For example, those who purchase from you may value community, friendships, and the environment; creating ads to depict people entertaining friends in their homes and highlighting the environmentally friendly aspects of your brand could help increase conversions from this market segment.

## SEGMENTATION BY SITUATION

Sometimes, you are not segmenting based on a demographic or trait. Sometimes, your segment is a group in a similar life situation. Segmenting this way has its advantages. First, it allows you to focus your energy and resources on solving one issue, making it easier to create specialized solutions that address that particular problem. This

also makes it easier to market your services more effectively since it's easier for potential customers to understand what you are offering when there is one clear solution.

Here are some examples of situational segments that I've helped clients work with:

- **New Parents:** Catering to first-time parents navigating the challenges of raising a newborn. They might be looking for guidance on baby care, sleep training, or postpartum recovery.
- **Recent College Graduates:** Individuals who have just graduated and are entering the job market. They might need help with resume building, job interviews, or managing their first salary.
- **Home Buyers:** People who are in the process of buying their first home. They require assistance understanding mortgages, home inspections, or buying.
- **Divorcees:** Individuals going through a divorce and needing legal advice, emotional support, or financial planning.
- **Retirees:** Those who've just entered retirement are looking for advice on managing their pensions, exploring new hobbies, or considering downsizing their homes.
- **Expatriates:** People who've moved to a new country and are trying to navigate the challenges of a different culture, legal system, and perhaps even a new language.
- **Startup Founders:** Entrepreneurs in the early stages of their business who need guidance on funding, business planning, or market research.
- **Accident Victims:** Individuals who've experienced a significant accident need legal advice, medical consultation, or therapy.
- **Travel Enthusiasts:** People planning a long-term travel or sabbatical and seeking advice on budgeting, destinations, or travel insurance.
- **Dietary Restrictions:** Individuals with specific dietary needs or restrictions, like gluten-free, vegan, or those with allergies, looking for specialized meal plans or products.

Each of these situational segments has unique needs and challenges. Professionals can tailor their services to offer specialized solutions by focusing on one, making them the go-to experts in that particular area.

In short, choosing a situational segment allows you to emerge as an expert who solves a specific problem. Whenever someone is experiencing that problem, you are known as the expert to talk to. This makes it easy to refer you. Someone may be experiencing a crisis, but it's just a Thursday morning for you—no problem at all. You're the person they can trust to help.

## SEGMENTATION BY BEHAVIOR

By closely observing customers' behaviors, businesses can gain invaluable insights into why they purchase certain goods and services. Behavioral segmentation primarily benefits e-commerce businesses, providing invaluable insight into customers' purchasing behavior. Segmenting shoppers based on their willingness to spend during a sale offers valuable information to marketers. Behavioral segmentation allows for targeting markets with different decision-making patterns, lifestyles, usages, and purchases. For example, younger customers may be more likely to purchase bottled body wash, while older consumers may prefer soap bars. By focusing on what shoppers will likely buy and tailoring your approach accordingly, you can develop a highly targeted approach that pays off in the long run.

Segmentation by behavior could mean identifying your customers' activities regarding the following:

- Spending habits
- Purchasing habits
- Browsing habits
- Interactions with the brand
- Loyalty to the brand

It's essential to consider user behavior when it comes to developing targeted messaging and marketing. By monitoring online shopping



habits, you can better understand the likelihood of customers making an online purchase. Tracking their interactions on your website can provide insights into their preferences, likes, and dislikes. The benefits they seek must also be considered to cater to their specific needs.

Last but not least, usage rate is a critical indicator that you can use for categorizing customers and crafting messages geared towards each segment. By understanding these components of customer behavior, companies can ensure maximum effectiveness in delivering the right message to the right people at the right time.

You know what they say: knowledge is power. Understanding how consumers interact with your brand or product is precisely the knowledge that can empower you to market more effectively. Behavioral data gives us just this type of valuable insight, and thankfully, it's easy to collect through cookies placed on your website, customer relationship management (CRM) software, and third-party datasets.

As long as you have a bit of data (which your website should provide), this segmentation strategy will quickly become one of your most powerful tools.

## SEGMENTATION BY COMPANY TYPE

For B2B organizations, you don't want to work with any company. You want to only work with your ideal companies. All we have to do is figure out who that is. This is called *firmographic segmentation*.

Ensure you're reading that clearly: it's not a body-type segmentation, firm, or flab. We're talking about a firm, as in a company. I just wanted to make sure you saw that because it took me a minute to learn about this in my MBA.

Business leaders identify segments by analyzing seven key factors of firmographic segmentation and developing tailored strategies to engage them.

- Industry
- Company Size

- Status
- Number of employees
- Performance
- Executive Title
- Sales Cycle Stage

Unlike demographic segmentation, which targets individuals, firmographic segmentation looks at the bigger picture of companies. It's like taking a step back and studying the intricacies of an organization—size being a key factor. No matter what others tell you, it is a factor.

Different strategies are needed when targeting a small business compared to an enterprise-level company. One way to ensure success is by utilizing the power of firmographics to customize your marketing efforts into separate buckets that cater to each target audience.

Firmographic segmentation allows B2B companies to differentiate themselves by understanding their customers more deeply. It's the more sophisticated version of demographic segmentation used in B2C marketing.

Analyzing and classifying customers based on their shared attributes allows businesses to shed light on trends and design marketing strategies based on the unique makeup of their customer base. Regarding targeting your customers, firmographic segmentation is your ideal segmentation strategy.

Now that we know the different types of segments, we can create an avatar of what this segment looks like.

## CREATING YOUR SEGMENT AVATAR

You might have enjoyed reading about all the segmentation options. But maybe it was overwhelming.

We now look to take all those options and create a picture of your ideal client. This is called, in the marketing world, creating an avatar.

Creating a segment avatar involves defining a detailed and specific representation of your ideal customer within a chosen market segment. This avatar is a composite of the characteristics, needs, wants, and challenges of the people in that segment. Here's a step-by-step guide to creating a segment avatar:

**1. Define the Segment:** Start by clearly defining your target segment. It could be based on demographics, geography, psychographics, behavior, situation, or company type. For instance, if you are targeting young professionals in urban areas, that's your segment.

**2. Research Your Segment:** Take the time to understand the needs, desires, and challenges of your segment. Use market research, surveys, interviews, and any available data to gather insights about your segment. Understand their buying behavior, preferences, and pain points.

**3. Create a Detailed Profile:** Based on your research, create a detailed profile of your ideal customer within this segment. This profile, or avatar, should include:

- **Demographics:** Age, gender, income, education, and occupation.
- **Psychographics:** Interests, hobbies, values, and attitudes.
- **Behavioral Traits:** Buying patterns, brand loyalty, and product usage.
- **Needs and Wants:** What are they looking for in a product/service?
- **Pain Points:** What problems are they facing that your product/service can solve?
- **Goals and Aspirations:** What are they aiming to achieve?

**4. Give Your Avatar a Name:** Humanize your avatar by giving it a name. This makes it easier to refer to and helps keep the customer in mind when making business decisions. For example, "Urban Professional Paul."

**5. Visualize Your Avatar:** Create a visual representation or sketch of your avatar if possible. This helps make your avatar more tangible and real, aiding in empathizing with your ideal customer.

## CRAFTING A TWO-WORD SEGMENT AVATAR

In the journey of refining your marketing strategy, the creation of a two-word segment avatar stands as a pivotal moment. This concise avatar is more than just a label; it's a crystallization of your ideal client's core identity, distilled from the rich and detailed profile you've already developed.

Begin by revisiting the comprehensive avatar you previously crafted. Amidst this wealth of brainstorming, your task is to find one adjective and noun that encapsulate your ideal customer's essence.



The adjective should portray the most dominant trait or need, while the noun should capture its fundamental identity.

For instance, if your detailed avatar is a young, tech-savvy professional who prizes efficiency above all, you might arrive at "Efficient Executive" as your succinct avatar.

Here are five examples following the given principle:

- **Tech-Savvy Entrepreneurs:** This target audience is comprised of business owners who are well-versed in technology and likely to be interested in tools or services that enhance their digital operations.
- **Health-Conscious Seniors:** These are older individuals who prioritize their health and would be interested in products or services that promote a healthy lifestyle.

- **Overwhelmed Students:** This group includes individuals in educational settings who may be looking for services or products to help manage their workload and reduce stress.
- **Adventurous Travelers:** These are people who seek excitement and new experiences in their travels, and would be interested in products or services that cater to adventurous activities.
- **Eco-Friendly Homeowners:** Homeowners who are interested in sustainability and would likely invest in products or services that are environmentally friendly and help them reduce their carbon footprint.

The art of simplicity is your ally here.

Strive for clarity and immediacy in your choice of words. The two-word avatar should be instantly graspable and relatable, avoiding complexity or ambiguity. It's essential that this avatar not only resonates with the core of your business but also paints a specific and vivid picture of your ideal customer.

As you align this avatar with your business objectives and offerings, it becomes a beacon guiding your marketing strategies and business decisions. It's a concise yet powerful reminder of the market segment where your impact resonates the most.

Once you have your two words, don't hesitate to seek feedback on your chosen avatar. Sharing it with colleagues or mentors can provide valuable insights, helping you refine it to represent your ideal customer better. This feedback loop is crucial as it ensures that your avatar resonates with you and the external perception of your business.

Once finalized, this two-word avatar should become a staple in your business lexicon, a constant reference in marketing discussions and strategy planning. It's a tool designed to keep your focus sharp and your strategies aligned with your target audience.

However, remember that this avatar is not set in stone. As your business landscape evolves and you gain deeper insights into the market, be prepared to revisit and revise your avatar. It should be a dynamic

tool, adaptable to the changing tides of your business environment and market trends.

Your two-word segment avatar is a powerful, concise representation of your ideal client, a lighthouse guiding your business strategies toward the shores of success and relevance in a competitive market.

## CONCLUSION

In this chapter, we've learned some of the characteristics you'll consider when you pick the right group of clients, or "segment," around which you will build your practice. This is important if we want our businesses to be able to scale. We looked at different ways to understand our clients better, grouping them into categories like where they are from or what they like to do. We also talked about how sometimes, we need to say goodbye to some clients to make room for new ones, kind of like how a gardener has to trim some plants to help others grow better.

Remember, growing our business is about finding the right people to work with and helping them in the best way possible. So, let's use what we've learned to improve our businesses and help our clients.

Keep it simple, keep it focused, and keep moving forward!

## 4 HOW TO PICK A SEGMENT

### THE CHALLENGE OF CHOICE IN SEGMENTOLOGY

Imagine standing at the crossroads of a forest. There are multiple paths stretching out before you. Each path represents a potential segment, and while all of them promise unique adventures, you can only choose one to embark on. This is the dilemma of segmentology. You've just been introduced to the myriad types of segments, and now, you're faced with the daunting task of picking just one. It's like being a kid in a candy store and being told you can only choose one treat.

Overwhelming, right?

This chapter is your trusty compass, guiding you through the dense woods of decision-making. We discuss the nuances of choosing a segment that aligns with your business goals and resonates with your passion and purpose. So tighten your laces and get ready to embark on this exciting journey of discovery. By the end, you'll have a clear path ahead and the confidence to walk it with conviction.

## HOW TO CHOOSE THE RIGHT SEGMENT FOR YOU

### 1. The Importance of Enjoyment

Picking a segment isn't just about making money or following trends; it's also about what makes you happy. Enjoyment plays a big role in this choice. We spend a lot of our lives working, so it makes sense to enjoy what we do.

If we pick a segment and don't like working with those clients, our job can quickly become something we dread. And when we have the choice, why not pick clients we like? After all, life's too short to work with people or in areas that make us miserable.

### 2. You Have to Get Results

Choosing a segment is not just about liking the clients; you must also deliver for them. Being good at what you do is crucial. You won't get referrals or be seen as an expert if you're not at the top of your game.

And if you're not getting results, it can make you feel like you're just pretending, which nobody wants. I believe it's clear: to pick the right segment, you need to enjoy working with them and be sure you can get them the desired results.

### 3. The Profit Factor: Picking a Segment That Pays

While passion and proficiency are critical in choosing your segment, profitability is another vital piece.

Remember, you're running a business, not a charity.

It's essential to target a segment that recognizes the value of your services and is willing to pay for them. This doesn't mean you're just chasing the money; it's about ensuring that your hard work and expertise are adequately compensated. After all, a business that doesn't turn a profit will only be around for a while.



When you're considering which segment to focus on, make sure it's one where the clients see your worth and are ready to invest in what you offer. It's a win-win: they get top-notch service, and you get compensated for your skills and dedication.

#### **4. Tapping into Networks: The Role of Connectedness and Influence**

Selecting the right segment goes beyond just identifying a group of people. It's crucial to consider how interconnected that group is. A well-connected segment, whether through online platforms, conferences, or trade networks, can amplify your reach and influence.

Think about it. If your segment actively engages in podcasts or regularly participates in industry conferences, the potential for word-of-mouth referrals grows exponentially. Deliver exceptional service to one client, and they might mention you in these vast networks, leading to a domino effect of opportunities.

A segment that's deeply interconnected signals a lively and engaged community. It's a space where ideas are exchanged, and there's a shared drive for growth. Being part of such a dynamic environment boosts your credibility and ensures a consistent stream of clients who've heard good things about you from their connections. So, when you're zeroing in on your segment, ensure they're not isolated. Dive into a community, not just a category.

#### **5. Scalability: The Cornerstone of a Thriving Business**

When picking your ideal segment, it's not just about the present; you've got to also think about the future. That's where scalability comes into play. A segment might seem perfect now, but you could hit a ceiling pretty quickly if there's no room to grow. Scalability ensures that as your skills, resources, and ambitions expand, your segment can grow with you.

Imagine choosing a super-specific segment with only a handful of people. Sure, you might become the go-to expert for that tiny group, but once you've reached all of them, where do you go next? Or

consider a segment that's just outside the reach of your license or expertise. It might seem like a good challenge at first, but it could be a roadblock to growth.

In contrast, a scalable segment offers endless possibilities. It's like planting a tree in an open field rather than a small pot. Given the space and the right conditions, it can grow tall and wide, branching out in all directions. So, when you're weighing up potential segments, think big. Choose one that won't just serve you well now but will also offer opportunities for growth in the years to come.

## AUDITING YOUR CLIENT BASE: A PRACTICAL EXERCISE TO FIND YOUR IDEAL CLIENT

To truly understand which of your clients align best with your ideal segment, it's helpful to quantify your experiences and results with them.

Here's a straightforward, five-step exercise to help you do just that:

**1. List Your Clients:** Start by creating a table or spreadsheet. List all your clients on one side.

**2. Create Criteria Columns:** Across the top, label five columns with the criteria: enjoyment, results, willingness to pay, scalability, and reach & accessibility.

**3. Rate Your Clients:** For each client and under each criterion, assign a score between 1 and 5. A score of 1 indicates that the client doesn't meet that criterion well at all, while a score of 5 indicates they meet it perfectly.

- **Enjoyment:** How much do you enjoy working with this client?
- **Results:** How effectively can you deliver results for them?
- **Willingness to Pay:** Are they willing to pay appropriately for the value you provide?
- **Scalability:** Is there potential for growth in your relationship with this client?

- **Reach & Accessibility:** How easily can you serve this client within your operational and legal boundaries?

**4. Total Your Score:** After scoring each client on all criteria, sum up the scores for each client to get a total. This will give you a number between 5 (not an ideal client) and 25 (a perfect client).

For example, let's say you have a client named Tony Tiger. They're delightful to work with, always pay on time, you've achieved great results for them, there's potential for more projects in the future, and they're well within your operational reach. Their scores might look something like this:

- Enjoyment: 5
- Results: 5
- Willingness to Pay: 5
- Scalability: 4 (there's potential, but it's not unlimited)
- Reach & Accessibility: 5
- Total Score for Tony Tiger: 24/25

**5. Assess Your Results:** Which clients scored the best? By the end of this exercise, you'll have a clear, quantified understanding of which clients align best with your ideal segment. Focus on those with the highest scores as you refine your business strategy and seek to name a category for your new clients.

## NAMING YOUR MARKET SEGMENT: FINDING THE COMMON DENOMINATOR

Creating a segment avatar involves defining a detailed and specific representation of your ideal customer within a chosen market segment. This avatar is a composite of the characteristics, needs, wants, and challenges of the people in that segment. Here's a step-by-step guide to creating a segment avatar:

**1. Define the Segment:** Start by clearly defining the segment you are targeting. It could be based on demographics, geography, psycho-

graphics, behavior, situation, or company type. For instance, if you are targeting young professionals in urban areas, that's your segment.

**2. Create a Segmentation Profile:** Based on your research, create a detailed profile of your ideal customer within this segment. This profile, or avatar, could include notes from the previous characteristics, such as:

- **Demographics:** Age, gender, income, education, and occupation.
- **Psychographics:** Interests, hobbies, values, and attitudes.
- **Behavioral Observations:** Buying patterns, brand loyalty, and product usage.
- **Situational Characteristics:** What problems are they facing that your product/service can solve?
- **Goals and Aspirations:** What are they aiming to achieve?

**3. Give Your Avatar a Name:** Humanize your avatar by giving it a name. This makes it easier to refer to and helps keep the customer in mind when making business decisions. For example, "Urban Professional Paul."

**4. Visualize Your Avatar:** If possible, create a visual representation or sketch of your avatar. This helps in making your avatar more tangible and real, aiding in empathizing with your ideal customer.

## **Final Thoughts**

Building a segment avatar is not merely a thinking process. You have to experiment with it as well. But taking the time to think this through allows you to gain some clarity on the type of people you love working with. Keep in mind that the more detailed and accurate your avatar is, the more effectively you can serve your target segment.

## CUSTOMER AVATAR EXERCISE

Take the results of your client audit and see if you can create a unifying profile that summarizes your best clients. Let's create a representation of your ideal client to define your segment.

### Instructions:

Complete the following fill-in-the-blank exercise to define your customer avatar. Be as specific and detailed as possible.

#### 1. Define the Segment:

My ideal client is based on: (Demographics, Geography, Psychographics, Behavior, Situation, Company Type).

*Example: Young professionals in urban areas.*

#### 2. Create a Client Profile:

##### Demographics:

Age: \_\_\_\_\_

Gender: \_\_\_\_\_

Geographical Considerations: \_\_\_\_\_

Income: \_\_\_\_\_

Education: \_\_\_\_\_

Occupation: \_\_\_\_\_

##### Psychographics:

Interests: \_\_\_\_\_

Hobbies: \_\_\_\_\_

Values: \_\_\_\_\_

Attitudes: \_\_\_\_\_

**Behavioral Traits:**

Buying Patterns: \_\_\_\_\_

Brand Loyalty: \_\_\_\_\_

Product Usage: \_\_\_\_\_

Needs and Wants: \_\_\_\_\_

Pain Points: \_\_\_\_\_

Goals and Aspirations: \_\_\_\_\_

**3. Give Your Avatar a Name:**

Avatar Name: \_\_\_\_\_

Example: Urban Professional Paul.

**4. Visualize Your Avatar:**

Sketch or describe a visual representation of your avatar:

**WHAT TO DO WHEN YOU HAVE MULTIPLE IDEAL CLIENT SEGMENTS**

It's not uncommon for businesses to identify multiple ideal client segments, especially as they grow and diversify. However, clarity and focus are crucial for effective marketing and service delivery.

Here are six recommendations I have for you to make it a little easier:

**1. Deep Dive Analysis:** Before making any decisions, closely examine both segments. Analyze the profitability, scalability, and enjoyment of serving each segment. Which one aligns more closely with your business goals and values?

**2. Resource Allocation:** If both segments are equally promising, consider the resources available. Do you have the capacity to serve

both segments effectively? If not, you might spread yourself too thin, which could dilute the quality of your service.

**3. Tailored Marketing Strategies:** If you decide to cater to both segments, creating separate marketing strategies is essential. Remember, what appeals to one segment might not resonate with the other. Tailor your messaging, offers, and channels to each segment's unique needs and preferences.

**4. Consider Specialization:** If one segment stands out as more aligned with your business's future direction, consider specializing in that segment, at least for a defined period. Specialization allows you to become an authority in that area, enhancing your reputation and potentially increasing referrals.

**5. Feedback and Iteration:** Engage with clients from both segments and gather feedback. Their insights can guide you in refining your approach and deciding which segment to prioritize.

**6. Re-evaluation:** The business landscape is dynamic. What works today might need adjustments tomorrow. Regularly revisit your decision to cater to both segments and adjust your strategy as needed.

Remember, while catering to multiple ideal client segments is tempting, clarity and focus are paramount.

By being clear on your particular segment, you can tailor your services, enhance client satisfaction, and ultimately, drive business growth. If you're passionate about both segments, consider phased approaches or even separate business units or brands to serve each segment distinctly.

## THE CHALLENGE OF MULTIPLE SEGMENTS

It's entirely possible to cater to multiple ideal client segments, but it's essential to recognize that you're taking on an added layer of complexity by doing so. Just as leveraging debt in business introduces risk and requires meticulous management, trying to serve two distinct segments simultaneously demands extra effort and strategic finesse.

Think of it as juggling. While managing one segment is like juggling two balls—straightforward with some practice—adding another segment introduces a third ball into the mix. It's not impossible, but it requires more skill, attention, and precision.

Having two segments means doubling the marketing strategies, the tailored services, and the marketing resources you need. Each segment will have its own unique needs, preferences, and challenges. Balancing the demands without compromising the quality of service in either is a delicate act.

However, it can be done if you're up for the challenge and approach it with a clear strategy. But always be aware of the added difficulty you're taking on. Regularly evaluate the effectiveness of your approach, be ready to adapt, and ensure that you're staying within your resources. Remember, focusing on depth in one area can sometimes lead to more significant success than covering breadth in multiple areas.

## WHEN GROWING A PRACTICE IS LIKE GROWING PUMPKINS

In his book, *The Pumpkin Plan*, Mike Michalowicz discusses the concept of firing bad clients as a strategy for business growth. He draws an analogy between growing a business and farming giant pumpkins.

Like a farmer would prune away smaller, less promising pumpkins to channel nutrients to the ones with the most potential, Michalowicz suggests that business owners should “prune” or “fire” less profitable, more problematic clients. By doing so, businesses can focus their resources and energy on serving their best clients, who appreciate and are willing to pay for the value provided, leading to more substantial and sustainable growth.

Michalowicz argues that keeping problematic clients can drain a company's resources, hinder its ability to serve other clients effectively, and even impact the morale and productivity of its employees. By identi-



fying and focusing on serving the ideal clients—those who value the service or product and are willing to pay appropriately for it—a business can enhance its profitability and sustainability. This approach requires business owners to reassess their client base, identify their ideal clients, and reallocate their resources to serve and attract more of such clients.<sup>1</sup>

## WHEN IT'S TIME TO LET THEM GO

Once such clients are identified, Michalowicz recommends having an honest, clear, and respectful conversation with them. It's crucial to communicate the misalignment between their needs and what the business can offer and to suggest alternatives that might be a better fit for them. This conversation should be approached with empathy and understanding, acknowledging the client's needs and frustrations while firmly maintaining the business's stance.

Michalowicz stresses that firing clients is not about burning bridges but building the right ones. It's about creating a client ecosystem that is harmonious, mutually beneficial, and conducive to growth. By letting go of clients who are not the right fit, businesses can focus their energy and resources on serving their ideal clients more effectively, increasing satisfaction, loyalty, and referrals.

## CONCLUSION – YOU JUST NEED 1,000 TRUE FANS

Kevin Kelly has been made internet famous for his idea titled *1,000 True Fans*<sup>2</sup>. In this work, Kelly offers hope for those who want to be industry leaders but don't want to become dancers on TikTok, aspiring for 50 million followers. Kelly emphasizes that a successful practice doesn't necessarily need a vast audience; just 1,000 dedicated supporters can be sufficient. These individuals resonate with a brand, eagerly await the next offering, and are willing to invest in a vision. These are the fans we aspire to have around us.

If you envision a larger enterprise, you might think 1,000 fans seems limited. But the essence of Kelly's idea is about depth rather than

breadth. It's about cultivating genuine relationships with a select group who genuinely value what you bring.

Here's the exciting part: Throughout the book, we've been working on identifying who those 1,000 fans could be for you. Every step we've taken has been geared towards understanding, defining, and connecting with these potential loyalists.

Starting might feel humbling. But with the insights, you're strategically aiming for those genuine connections that will escalate soon.

Kelly's philosophy serves as a reminder: It's not about reaching everyone but about deeply connecting with the right ones. And with our focused approach, you're well on your way to finding and nurturing those invaluable relationships.

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## 5 WHAT YOU DO FOR YOUR “WHO”

### THE CONNECTION BETWEEN BUSINESS, MARRIAGE, AND PARENTING

**T**he epiphany struck me one day like lightning: “Marriage is not for me.” This simple yet shocking realization became the cornerstone that saved my marriage.

In my single days, my twenties were marked by a clear sense of purpose and routine. I had my way of doing things, and I liked it that way. But marriage caused a seismic shift. Suddenly, my cherished independence seemed to be slipping through my fingers. I missed the days of hanging out with my friends. My bride desired shared moments, like cutting our wedding cake together. Adjusting to this new reality took time. A lot of it.

Many believe marriage begins when you walk down the aisle, exchange rings, and share a public kiss. But that’s just the ceremony. The real essence of marriage is tested in mundane moments, like forgetting passports on the way to the honeymoon or deciding who does the dishes.

The crux of my revelation was this: *Marriage thrives when it's not centered on oneself.*

Marital fulfillment lies in serving our partner. My counselor once said that the most fulfilling marriages are those where partners strive to serve each other. It's not about what you can get but what you can give. And when you approach marriage with the intent to serve, the joy and satisfaction are unparalleled.

This lesson extended beyond my marital life. When we embraced parenthood, I soon discovered, "Parenting is not for me either." While society doesn't demand much from parents—just basic safety and care—the selfless, everyday acts of service make the journey meaningful. Whether it's attending to a child's midnight cries or simply being present when they call out to you, parenting, like marriage, is about putting someone else's needs above your own.

Similarly, when discussing business, it's crucial to understand that our ventures aren't solely for our benefit. Like marriage and parenting, the most rewarding businesses are those built around serving others.

As we continue into this chapter, let's keep this foundational truth at the forefront: *Whether it's business, marriage, or parenting, true fulfillment comes not from serving ourselves but from dedicating ourselves to the service of others.*

### **We Live to Give, Not to Take**

Wendell Berry, the American novelist and poet, gives us a lengthy quote that has impacted me profoundly. He contrasts our desire to get as rich as possible as quickly as possible (he calls it "the exploiter") with being a person who methodically builds a system that blesses the world. Berry explains,

Whereas the exploiter asks of a piece of land only how much and how quickly it can be made to produce, the nurturer asks a question that is much more complex and difficult: What is its carrying capacity? (That is: How much can be taken from it without diminishing it? What can it

produce dependably for an indefinite time?) The exploiter wishes to earn as much as possible by doing as little work as possible; the nurturer certainly expects to make a decent living from his work, but his characteristic wish is to work as well as possible. The competence of the exploiter is in organization; that of the nurturer is in order—a human order, that is, that accommodates itself both to other orders and to mystery.<sup>1</sup>

I love this quote from Berry because it snaps me out of my “profit and exit as soon as possible” shadow side and reminds me that as a business owner, I can nurture a process, clients, and my staff team. It’s a tremendous opportunity to serve others. We should not waste it by exploiting everyone and keeping everything to ourselves.

Here’s the great part. I’ve always done business with the words of the late Zig Ziglar in mind. Ziglar once said, “You can have everything in life you want if you will just help other people get what they want.” This quote underscores the principle of reciprocity and the idea that success often comes from serving others.

## SEGMENTOLOGY PUTS CLIENTS AT THE CENTER

Focusing on your clients is not just the role of sales and marketing. Everyone plays a vital role in serving clients by adding maximum value to their lives with quality products or services delivered efficiently while maintaining long-term relationships based on trust.

Before creating their solutions, service-based businesses should focus on knowing their customers’ problems and providing solutions. They don’t sell products or services to boost earnings, satisfy shareholders, or outperform the competition. They do business with the core motivation to add value to customers’ lives.

The following framework I have created shows how a commitment to customer centricity gets applied from the leadership to the staff and affects the customers.

## THE SEGMENTOLOGY SUCCESS CYCLE

Figure 1.1 shows the framework that I have designed to show how a commitment to serving customers starts with leadership and ends with happy, loyal customers who increase profits, encouraging the leaders to double down on their commitment to be more customer-centric.

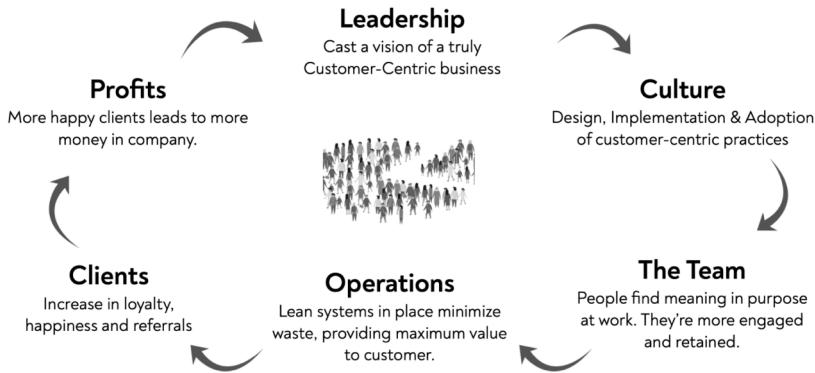


Figure 1.1 - The Segmentology Success Cycle

### 1. Leaders Love Their Clients

A founder’s vision is the compass for a company, and when it’s centered on serving the customer, it’s transformative. Leaders must embrace the essence of business philosophy: a company exists fundamentally to serve its customers, making them the core of every decision and action. This isn’t just a strategy; it’s a culture and a way of life within the organization, focusing on exceeding customer expectations.

Amazon and Lululemon exemplify the success of a customer-centric approach. Amazon has revolutionized retail with its commitment to customer satisfaction. Lululemon, as detailed in Chip Wilson’s autobiography, was built on a commitment to resonate with a specific demographic’s lifestyle and values.<sup>2</sup>

Building a successful brand requires a vision deeply rooted in customer service. It’s about cultivating connections, being empathetic,

and being committed to excellence. Those who place customers at the heart of their business are poised to thrive in today's competitive landscape.

## **2. Leaders Create a Client-Centric Culture**

When leaders value customers, they strategize and design a culture that values customers. They talk about the vision of serving customers, create customer-friendly policies, and consider the customer in every decision. Now famous in business lore, Amazon CEO Jeff Bezos always ensured an extra chair at every Amazon meeting. This was a physical reminder that the customer must always be considered in every meeting.

## **3. Client-Centric Practices Attract and Develop Client-Centric Team Members**

A customer-centric company is not for everyone. It's for people who value helping other people and making an impact in their lives. They buy into the vision about the importance of putting customers first, and they thrive in that environment. The interesting thing is that psychologically, it is a client-centric company that your team members will find fulfilling. "Task significance" is one of the five job characteristics that lead to the best performance for staff and company.<sup>3</sup> These customer-centric staff are the pearl of any company and have a powerful impact on the customers they interact with.

## **4. Operations Are Kept Lean to Add the Most Value to Clients**

With a staff team committed to delivering quality work, operations management is about creating efficient systems that minimize waste and maximize customer value. Lean operations are a key part of this, as they strive to eliminate waste in all forms to improve efficiency. Lean systems are designed to be as lean as possible, with little to no wasted effort or resources.

## **5. Clients Appreciate a Knowledgeable, Authoritative Staff Team**

Employees significantly shape the customer experience. We've all had poor experiences with a new employee. Research shows that customers have better interactions with staff members who have been around for a long time; they add more value to the customer than someone new to the job.<sup>4</sup> An employee's loyalty will be transferred to customer loyalty. Loyal customers will also be avid promoters of the business.<sup>5</sup>

## **6. Loyal Clients Make the Practice More Profitable**

Cloning happy, loyal customers is a fantastic way to increase profit. Because customer-centricity prioritizes adding value to the customer, the customers reciprocate that value by making the company more valuable through repeated purchases and advocacy.

## **7. Leaders Appreciate Profits and Double Down On Client-Centricity**

This is where my unique contribution begins within the framework. When leaders understand that client-centricity is the most profitable model for growing their business, they will become excited about reinvesting in the process. The cycle will continue again with more enthusiasm and less skepticism than when it began.

The cycle repeats with even more momentum which leads to growth. We now move to how you carry out your company operations.

## **IT'S ABOUT YOUR WHO, NOT YOU**

The COVID-19 pandemic tested many of us unexpectedly. The prolonged isolation of the lockdown weighed heavily on me. Despite being surrounded by my family of five, the loneliness was palpable. I often wondered how those living alone coped.

Instead of succumbing to the gloom, I channeled my energy into completing my book, *Now Start With Who*. Stemming from my TEDx talk, this book is my maiden voyage into the world of business litera-



ture. Its core message? “To truly realize your ‘why,’ you must first identify your ‘who.’” This belief underscores my conviction that the essence of business is service. Think about it: every product we use, and every service we rely on exists because someone saw a need and sought to address it. From the food we eat to the homes we live in and even the air conditioners that cool our summers, each is a testament to human ingenuity and the desire to serve.

I wrote *Now Start With Who* to challenge a common misconception: *that businesses primarily exist for the benefit of their owners*. While it’s true we engage in business to earn a living, the heart of any enterprise is solving problems and serving others. In return for our efforts, we’re rewarded financially.

Keep in mind that our products and services are solutions to real-world problems. As service-based professionals, our primary role is to enhance the lives of those we serve. So, let’s explore how best to serve your chosen segment.

## WHAT DO YOU DO TO HELP?

Every soul knows the sting of living in an imperfect world where pain, sadness, and uncertainty are inevitable companions. But within this universal truth lies a silver lining: the chance for each of us to step up, address these challenges, and, in doing so, make the world a slightly better place for all.

In our previous chapter, we discussed the intricacies of market segments. We broke down the various types and helped you understand their unique characteristics. By now, you should have a clearer picture of your target segment, aligning your practice with a group that matches your passion and expertise.

But identifying your audience is just the beginning. With a clear segment in mind, the next step is determining the specific problems you can address for them. How can you offer a unique solution that stands out? And once that solution is identified, how can you systematize it for efficiency and consistency? In this chapter, we’ll tackle these

questions, guiding you in crafting a solution tailored to your chosen segment and setting up the right systems to deliver it effectively. Let's move forward by turning your insights into actionable strategies.

## UNDERSTANDING THE NEEDS OF YOUR SEGMENT

Individuals face a specific pain or challenge in every human heart, as in every market segment. As a service provider or product creator, your primary goal is to alleviate that pain. But before offering a solution, you must first understand the problem deeply.

It's essential to approach this discovery process with sensitivity and precision. You're not aiming to expose your potential clients' vulnerabilities but to identify the specific pain points your product or service can address.

Once you've uncovered the specific pain of your segment, you're in an excellent position to offer a solution. By addressing this pain directly, not only do you provide genuine value, but you also establish trust and credibility within your market segment. After all, there's no better way to earn loyalty than by making someone's life a little easier or better.

### **Mapping Out Solutions: Your Product and Service List**

Now that you understand the specific pain points of your segment, it's time to align your offerings directly with their needs. This alignment ensures that your offer isn't just another product or service but a genuine solution to their challenges.

The most successful products and services address specific pain points of a target audience. It's not just about selling something; it's about providing a solution to a genuine problem. When products align with a customer's pain, they resonate more deeply, leading to higher trust, loyalty, and sales.

Think of it this way: if someone has a persistent headache, they're not looking for just any medicine; they're seeking relief from that pain.

Similarly, when your offerings directly address the unique challenges faced by your segment, they see the value immediately. It's not just another product on a shelf; it's a solution to their problem.

This alignment between pain and product is crucial. It ensures that businesses aren't just pushing products but are genuinely understanding and addressing the needs of their customers. In doing so, businesses enhance their reputation and trustworthiness and ensure long-term success and sustainability.

## OPTIMIZING AND SYSTEMATIZING YOUR OFFERINGS

In the chapters ahead, we will refine how you deliver your products or services. The goal will be efficiency and precision. But it doesn't stop there. As you get to know your segment more, we'll also look at the importance of improvement, using valuable customer feedback and the latest technological advancements to keep your offerings relevant and at the forefront of your industry.

Continuous improvement will be a recurring theme, emphasizing its pivotal role in product optimization. We'll uncover the secrets behind building a systematic approach, laying out clear steps to craft a repeatable and efficient system for delivering what you promise. This includes the crucial aspects of documentation and training, ensuring that every team member is aligned and equipped to execute flawlessly.

Remember, no system is set in stone. We'll discuss the importance of monitoring your systems and adapting and evolving them as the market, technology, and customer needs change. Stay tuned as we embark on this transformative journey to elevate your business operations.

## TAKING ACTION

Here are six ways you can get clarity on how your product or service is helping people:

**1. Engage in Active Listening:** Begin by conversing with individuals from your segment. Listen more than you speak. The most profound insights often come from offhand comments or stories shared in passing.

**2. Ask Open-Ended Questions:** Instead of asking questions that can be answered with a simple 'yes' or 'no' pose open-ended questions. For instance, "Can you describe a typical day for you?" or "What challenges do you face regularly?"

**3. Conduct Surveys:** Surveys can be a gold mine of information. Craft questions that lead respondents to describe their pain points about your industry or niche.

**4. Observe Behavior:** Sometimes, actions speak louder than words. Observing how your segment interacts with existing products or services can give you clues about their unmet needs.

**5. Empathize, Don't Sympathize:** Remember, your goal is not to feel sorry for your segment but to understand their challenges deeply. Empathy will drive you to create solutions that genuinely make a difference.

**6. Stay Focused:** While it's essential to understand the broader challenges your segment faces, always bring your focus back to the specific problem your product or service can solve. This ensures that your solutions remain targeted and effective.

## LIST YOUR SOLUTIONS

**1. Start With a Blank Slate:** Begin with a fresh piece of paper or a new digital document. This exercise is about brainstorming and alignment, so give yourself space to think and jot down ideas without constraints.

**2. List Your Offerings:** Write down every product or service you currently offer. Don't think about their relevance yet; this step is about getting everything out in the open.

**3. Reflect on Each Offering:** For each product or service, ask yourself:

- How does this alleviate the pain points of my segment?
- In what ways does it enhance their lives or bring them joy?
- Is it a direct solution or a complementary offering better?

**4. Prioritize Based on Impact:** Once you've reflected on each offering's relevance, rank them based on their potential impact. Which ones address the most pressing needs? Which ones offer the most value?

**5. Refine and Adjust:** This exercise lets you identify gaps in your offerings or realize that some products or services might need tweaking to serve your segment better. Feel free to make adjustments. Remember, the goal is to provide the best solutions for your segment's challenges.

**6. Keep the List Dynamic:** As you engage with your segment, their needs might evolve, and new pain points might emerge. Regularly revisit and update your list to ensure your offerings remain relevant and impactful.

By the end of this exercise, you should have a clear and prioritized list of products and services tailored to your segment's specific needs. This list isn't just a catalog of what you offer; it's a roadmap to making meaningful differences in the lives of those you serve.

## CONCLUSION

In wrapping up this chapter, it's essential to underscore the profound benefits of a well-orchestrated solution. For businesses, it means streamlined operations, reduced inefficiencies, and a clear roadmap to success. For customers, it translates to consistent, high-quality experiences that meet their needs and exceed their expectations. The symbiotic relationship between a business and its customers thrives when a system prioritizes both parties' best interests.

But understanding these principles is just the beginning. The real magic happens when you take action. I encourage you to put the insights and strategies discussed in this chapter into practice. By doing so, you'll set your business on a trajectory of growth while also

ensuring that your customers remain satisfied and loyal. Remember, in the world of service, actions speak louder than words.

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## 6 SCALING YOUR PRACTICE WITH THE RIGHT SYSTEMS

### THE TALE OF TWO SHOE COMPANIES

**W**e turn our attention to the pursuit of creating repeatable and scalable systems in your business. Without this, you'll have a random business. With the right system, you'll be able to franchise your proprietary system. There's an excellent case study in this with two iconic brands, Nike and Reebok. Both Nike and Reebok have been colossal names in the athletic footwear industry. They've employed many different strategies. These journeys have, over time, led them to distinct brand identities and financial outcomes.

#### **Nike: Systematic Expansion**

Nike's methodical approach of diving deep into one sport at a time allowed it to establish a robust, authentic connection with athletes and sports enthusiasts. By initially immersing itself in track and then expanding its focus to sports like basketball, soccer, and tennis, Nike not only garnered the respect of professional athletes but also solidified its position as the go-to brand for high-performance gear.

The outcome of this systematic approach is evident. Today, Nike is a global powerhouse with a strong brand identity anchored in performance, innovation, and athletic excellence. Its collaborations, ranging from Michael Jordan to LeBron James, testify to its deep-rooted commitment to sports.

### **Reebok: The Generalist Approach**

In contrast, Reebok's trajectory can be best described as eclectic. While it rode the aerobics wave in the 1980s to great success, its subsequent forays into various domains, from lifestyle branding partnerships with rappers to simultaneous ventures into multiple sports, rendered its brand identity somewhat nebulous.

Reebok's acquisition journey added another layer of complexity to its identity crisis. After being acquired by Adidas in 2005, it struggled to carve out a distinct space for itself amidst its parent company's strong brand presence. Today, after a series of acquisitions, Reebok grapples with an identity challenge, reflected not just in its brand perception but also in its sales figures. While it has had moments of brilliance and iconic products, its lack of a consistent strategy has left it trailing in the shadows of giants like Nike.

### **Contrasting Growth Strategies and Their Outcomes**

As of today, Nike's success is a testament to the efficacy of a focused, athlete-centric strategy. Its brand narrative is clear, consistent, and resonant with its target audience. On the other hand, Reebok's multifaceted approach, although innovative at times, failed to solidify a concrete brand identity. The frequent changes in ownership further muddied its positioning, leaving it in a challenging spot in terms of both identity and sales.

For those of us watching these two companies, the contrast underscores the importance of knowing our segment and consistently delivering via an operations strategy.



## WHY YOU NEED A SYSTEM

Here's a hard truth: *If you don't have a system, you've got a random business.*

If you have a random business, you're spending too much time on each client, lowering your pay, and you'll never be able to scale your practice.

I want to teach you the segmentation success cycle. It's a way to run your practice that consistently delivers maximum value to each client.

As a reminder, this can only be done when you have a clear client segment that you serve with a common problem and a repeatable solution. Again, it's worth saying: *You need to find a system that delivers consistent results.*

Segmentology is about building a practice around the service of a client. I will work through the theory with you first, and then we will move to the practical part.

## KNOW YOUR PROCESS, LOVE YOUR PROCESS, IMPROVE YOUR PROCESS, AND REPEAT YOUR PROCESS

Efficiently run practices consist of numerous small systems and repeatable processes that work together to maintain smooth operations. Your system will include many time-tested methods, from onboarding new team members to servicing clients and delivering reviews. This process transforms your practice into an efficient machine. However, remembering and implementing everything learned may feel overwhelming despite having the necessary tools and resources.

### **Reflecting and Organizing**

Creating the manual for your practice can be a fun and rewarding experience. Take a moment to reflect on all the recurring actions in your typical week. These actions occur multiple times and should be

executed consistently every time. Next, list all the categories that represent these recurring actions and write down the step-by-step process or system associated with each. While this exercise may be new, it's an exciting opportunity to streamline your practice and ensure everything runs smoothly. Once you've mastered the process, you can build a team to master each task so that you can slowly step away. Your clients get the same service and outcomes; it doesn't all depend on you.

Understanding and optimizing your processes is paramount. Nestled somewhere within all you do, serving your clients is what they appreciate most. What's that thing? That's the part we will figure out because it will drive your success, generate referrals and give you the most satisfaction. Clients will tolerate all your quirks, weaknesses and mistakes because you do that one thing so well.

Identifying and protecting your business's most vital function, often called the "Queen Bee Role" (QBR). This concept, introduced by Mike Michalowicz in his book "Clockwork: Design Your Business to Run Itself," draws its inspiration from the operational dynamics of a beehive.<sup>1</sup>

### **The Essence of the Queen Bee Role (QBR)**

Michalowicz points out how, in a beehive, the queen bee's primary role is to lay eggs. Everyone depends on her for it. This job ensures the continuity and survival of the colony. All other bees, whether worker bees or drones, perform tasks that directly or indirectly support and protect the queen bee in performing this crucial function.

Translating this metaphor to a business context, the Queen Bee Roles is not a person but a pivotal task or function that is indispensable for the survival and prosperity of the business. Without this getting done, the company becomes bland, underwhelming and unimpressive.

Let's look at some examples of Queen Bee Roles and what they look like in action.

## SOME EXAMPLES

The pivotal Queen Bee Role in a consulting firm can be their industry-leading knowledge. Having the right consultant provides insightful, expert advice and innovative solutions to address a company's complex challenges. This role becomes the bedrock upon which the firm builds its reputation and client trust, ensuring that the advice resolves immediate issues and strategically positions clients for future success. This firm may have a quirky culture, casual dress code or even respond to emails late. But these will be overlooked, and the firm will get hired if their problem-solving insight is better than any competitor.

I was surprised when I discovered the QBR for my own company. It wasn't what I thought. A consistent theme emerged as I sifted through our client feedback and reviews. Like I said, it wasn't what I had initially expected. We had ventured into the market to serve chiropractors with top-notch websites as our "main thing." Naturally, I assumed that our software's technical prowess and design capabilities would be the stars of our show. But as I read review after review, it became abundantly clear that our Queen Bee Role was entirely different: It was our customer service.

Each five-star review was a testament to our team's dedication to our clients. The words "personal," "attentive," "knowledgeable," and "kind" echoed across the feedback. It was an epiphany. While we were a website company on the surface, our clients truly valued and raved about the human touch we brought to the table. They loved that we were always there for them, ready to listen, advise, and assist. I guess that's something they hadn't received elsewhere. Our customers appreciated our deep understanding of their needs and genuine kindness in every interaction.

It was a profound moment for me. I realized that these days, where automation and depersonalization are often the norms, our commitment to genuine, heartfelt customer service was our unique value proposition. It wasn't just about building websites; it was about building relationships. Our clients didn't just see us as another service

provider; they saw us as partners in their journey, always ready to support and guide them.

They could look to other pieces of software for hosting and managing their website. But they couldn't get the customer service we provided anywhere else. That's when the words "local, human, technical support" became our new QBR.

While we continued to hone our technical skills and offer the best website solutions, we also doubled our customer service, ensuring every client felt valued, understood, and cared for. It was a game-changer for us, and I'm forever grateful for that moment of clarity that highlighted our true Queen Bee Role.

## WHAT KNOWING YOUR QBR DOES FOR YOU

Having a clear QBR means that a company can dive deep into a specific service area, creating solutions that perfectly fit the unique needs of its niche customers. It's about becoming an expert in a particular field, slowly building a reputation as a leader, and attracting customers who want the best service.

As bees obsess about protecting their Queen, every bit of time, energy, and money must be focused on improving and protecting this vital service area. This ensures every customer interaction is not just a service but an exceptional experience that goes above and beyond. This focus on the QBR doesn't just meet customer expectations but often exceeds them, boosting satisfaction and creating loyal customers within the niche.

The QBR becomes your unique selling point, setting your practice apart in a busy market. It's about addressing specific, often unmet needs in the niche, offering a value that is hard to find elsewhere.

Trust and credibility are built through consistently excellent service in the areas that matter most to the customers. When the QBR is done with excellence, it shines brightly. Customers become more than just clients; they become advocates, promoting the business within their networks and enhancing its reputation and reach.

In this way, the QBR provides a lasting competitive advantage, creating a unique market spot associated with expertise, quality, and unparalleled value. Competitors may find it challenging to move into this space as the business becomes known for the very service the niche values most. So, the QBR is not just a role but a commitment, a promise of exceptional value, and a demonstration of the business's ability to deliver what the niche needs, ensuring sustainability, growth, and a lasting presence in the market.

## **IDENTIFYING AND NURTURING YOUR BUSINESS'S QUEEN BEE ROLE (QBR)**

To identify your business's Queen Bee Role (QBR), begin by pinpointing the most critical task or function that your business performs. This is a task that, if it didn't exist, would significantly impact your ability to serve your clients and generate revenue successfully. It's essential to understand what your clients value the most in your service and what uniquely positions your business in the market. Furthermore, consider which function is paramount for ensuring your business's long-term sustainability and growth.

## **SAFEGUARDING AND ELEVATING THE QBR**

Protection and prioritization of the QBR involve ensuring that adequate resources, including time, human resources, and financial investment, are consistently allocated to support and enhance this pivotal role. Identifying potential risks and challenges to the QBR and developing strategies to mitigate them is crucial, ensuring that this vital function is not disrupted. Moreover, regularly evaluating and refining the processes related to the QBR to enhance efficiency and effectiveness becomes a continuous endeavor.

## **ALIGNING ROLES TO UPHOLD THE QBR**

Ensuring that all tasks and roles within the business are aligned to support and facilitate this task, even if indirectly, becomes a strategic

necessity. Your team must understand the significance of the QBR and how their roles contribute to supporting it. We will focus on this next chapter. For now I will say that by prioritizing what you do best, the quality and reliability of the service provided to the clients are enhanced, boosting client satisfaction and loyalty.

## HARNESSING EFFICIENCY

Efficiency is leveraged by streamlining and optimizing related processes to minimize bottlenecks and enhance service delivery. Employing technology to automate and facilitate tasks related to the QBR ensures consistency and reduces manual effort. Implementing quality assurance mechanisms to ensure that the QBR is performed to the highest standards is also crucial in delivering superior service.

In essence, by identifying, protecting, and optimizing your business's QBR, you create a robust framework that enhances operational efficiency, ensures sustained growth, and delivers exceptional value to your clients. This strategic approach allows you to design your business to seamlessly operate and even thrive, even when you step away from the day-to-day activities, thereby truly allowing your business to run itself.

Having established the significance of identifying and nurturing your business's QBR, the journey doesn't end there.

The QBR lays the foundation, but the next pivotal step to build a resilient and efficient service-based business involves developing and honing your operational processes. The essence of the QBR is safeguarded and amplified when embedded within a framework of well-orchestrated, repeatable processes. When understood, loved, and continuously improved, these processes protect the QBR and transform your practice into a well-oiled machine, where every cog, big or small, plays a vital role in maintaining smooth operations.

The Queen Bee Role is vital in a service-based business and critical in the company's day-to-day and big-picture operations.

## WHAT HAPPENS IF YOU DON'T

Neglecting the QBR can lead to various troubles, including inconsistent service delivery and a loss of client trust. It can also bring about financial instability by disrupting the business's primary source of income and creating operational disarray by causing a lack of focus and direction. It can also slow your growth if it's not adequately protected and prioritized. It can result in the business losing its competitive edge by failing to deliver unique and consistent value to its clients.

The QBR isn't just a theoretical concept but a practical strategy ensuring a service-based business's health, sustainability, and growth. Implementing and safeguarding the QBR ensures your practice can consistently deliver exceptional value to its clients, maintain operational efficiency, and navigate the market with a clear strategic focus. Failing to do so can bring about various challenges that may jeopardize the stability and future of the business.

Once you have that role firmly in place, it's time to make sure it gets done over and over again...and over and over some more. To learn how to do this, we take some insight from a global superpower - McDonalds.

## EXERCISE: IDENTIFYING YOUR QUEEN BEE ROLE (QBR)

You've likely been thinking about it already, but let's name the QBR in your company. Reflect on how recognizing your QBR might alter your current business strategies and resource allocation. Consider how this clarity can refine your business model, elevate customer satisfaction, and enhance overall sustainability.

By the conclusion of this exercise, you should have a clear perspective on your company's Queen Bee Role.

### **1. List and Define Your Core Functions**

Begin by jotting down all your company's core functions and tasks, spanning every department from product development and customer service to marketing and sales.

## **2. Analyze Customer Feedback**

Dive into customer reviews, testimonials, and feedback, paying close attention to recurring themes, consistent praises, or common complaints. Identify the aspects that customers consistently highlight and appreciate.

## **3. Evaluate Financial Impact**

Reflect on which functions, if disrupted, would pose a significant financial threat to your company. Consider aspects directly influencing revenue generation, customer retention, and overall costs.

## **4. Assess Dependency**

Determine which functions are pivotal because other tasks and roles depend heavily on them. Identify those whose disruption would cascade into other operations within the company, causing a domino effect.

## **5. Consider Uniqueness**

Ponder on the unique selling points of your company. What does your company do that sets it apart from competitors? Identify the unique value or service that you provide to your customers.

## **6. Get Input**

Engage people you trust or team members and ask them what they perceive to be the most critical function of the company. This step can provide diverse perspectives and may unveil insights that might be overlooked.

## **7. Synthesize Insights**

Merge the insights derived from the previous steps, identifying patterns or consistencies. Look for a function or task that consistently emerges as crucial across multiple areas.



## 8. Give the Role a Name

Identify the function that stands out as your QBR, ensuring it is crucial for customer value, financial stability, operational flow, and market positioning.

## 9. Develop a Protection and Enhancement Plan

Formulate a strategy that ensures your QBR is protected and enhanced. Consider how resources can be allocated, risks managed, and continuous improvement can be facilitated to ensure sustainability and optimization.

Have a clear QBR will empower you to strategically channel your efforts, resources, and innovations to ensure that this pivotal role is always protected, optimized, and aligned with your business objectives and customer needs.

## YOU ARE NOT THE QBR

Understanding and putting the Queen Bee Role (QBR) into action means making sure the leader or boss of the business doesn't become the only person who can do it. When a business is just starting, it's pretty normal for the leader to do the QBR because they know the business inside and out. But as the business grows, it's important for the leader to step back from being the only one doing the QBR.

If a business always depends on one person, especially for its QBR, it can get stuck. It's hard to grow the business if every important decision or job has to go through one person. Also, the business could be in trouble if the leader can't work or decides to leave. When a leader is always seen as the QBR, the business might depend too much on them. This means the business's identity and how it works are too tied to the leader and not the whole team.

Letting the leader step back from the QBR allows different team members to bring new ideas and skills to it, which can help it work better and adapt to changes in the market. A business that can work well without the leader always having to do the QBR is stronger. It can

handle problems, adapt to changes, and try new things without being held back by relying on one person, making the business stronger and able to stand on its own.

Your QBR is the linchpin of your company – safeguard it, and your business will flourish.

If your stuck thinking that you have to be both Queen Bee and the only one who can fulfill the Queen Bee Role, let me inspire you with the story of one entrepreneur who designed a business that could reach across the world. It started with a system.

## SOME GOLDEN INSIGHT FROM THE GOLDEN ARCHES

Entrepreneur Ray Kroc franchised the McDonald's hamburger stand in 1952. He promised McDonald's would be run quickly, efficiently, affordably, and similarly. Kroc figured out the Queen Bee and then put it on repeat. Seventy years later, McDonald's has grown to 28,707 locations globally, generating \$40 billion in revenue.<sup>2</sup>

If my children's present attitude toward McDonalds is any reflection of the view of future generations, McDonalds has a very bright future.

One of the main reasons for the success of the McDonald's brand is the process of replicating its system through franchising. Ray Kroc created a culture that meticulously documents their systems so that any franchisee can take the McDonald's model and successfully run it in any location worldwide.

The good news is that Kroc's system can be emulated by any business owner who wishes to scale his or her business. That was the argument made in *The E-Myth Revisited* by Michael Gerber. Gerber argues that this idea of documenting a company's processes, what he calls "the Turnkey Revolution," has changed how business is done, who goes into it, how they do it, and how to scale it.<sup>3</sup>

## WHAT WE CAN LEARN FROM MCDONALD'S

The best leaders create organizations that deliver consistent, high-quality results without them. I encourage all the business owners I work with to strive for that. Build a company that can operate and execute reliably and predictably without their continual presence and supervision.

In *E-Myth Revisited*, Michael Gerber recommends replicating what Kroc did with McDonald's in every small business. Even if they don't aspire to go international, there are many benefits to having well-documented systems that direct how business is done in the company. It's ideal for staff training and consistency, helping the owner be free from day-to-day operations; it's more appealing to an acquirer and can be replicated elsewhere. Gerber prescribes creating a franchise prototype model for every business. A franchise prototype is "a proprietary way of doing business that successfully and preferentially differentiates every extraordinary business from every one of its competitors." This system provides an organization with an entire system of how they do business. Gerber suggests they label their process "The [Company Name] Way."

A turnkey, as illustrated by Gerber, is a metaphor for a well-designed business system. In this context, if a small business crafts an effective franchise prototype, it simplifies the process for the franchisee. Instead of getting bogged down in creating or tweaking the business model, the franchisee only needs to master the existing system. Once they've grasped how to manage this system efficiently, they're essentially handed the "key" to operate and drive success. Like a turnkey property where one only needs to "turn the key" to start living in it, in a turnkey business system, one simply needs to "turn the key" to start operating successfully.

## WHAT TO THINK ABOUT WHEN YOU'RE CREATING YOUR TURNKEY SYSTEM

If a business owner wants to create a prototype of their business, here's how Michael Gerber recommends doing it: Chapter 9 of *The E-Myth Revisited* gives the following steps for creating a franchise prototype. You can follow these as you build your scalable system:

### 1. Make Sure You Have a Valuable Offer

As any successful business owner knows, it's essential to provide constant, above-and-beyond value to your customers, employees, and suppliers. This means always striving to give them the best possible product or service, working hard to keep them happy and satisfied, and going the extra mile to show them how much you appreciate their business.

By providing this level of value, you help create long-term relationships built on trust and mutual respect. These relationships are essential for the success of any business, so make sure you're always giving your customers, employees, suppliers, and lenders the VIP treatment.

### 2. Design the Process With the Lowest Skill Level in Mind

When designing systems, it is vital to keep the end user in mind. After all, the goal is to create something easy and intuitive. One way to ensure this is to design your process for those with the lowest possible skill level. By making your system accessible to as many people as possible, you can replicate and scale your business more effectively. Of course, this doesn't mean that you should sacrifice quality or functionality. But remember that not everyone is a tech expert. Keep your audience in mind when designing your systems, and you can create a more effective and user-friendly product.

When crafting a system, prioritizing user friendliness for individuals with varying skill levels is crucial, as a complex system can lead to frustration and discouragement among less skilled users. By focusing

on simplicity and ease of use, the system becomes more accessible, allowing for enhanced replication and scalability.

### **3. Provide a Repeatable Structure**

The franchise prototype is more like making recipes than writing poems. We are engineering success and outlining the process to get there. A business process is a sequence of events and activities that leads to achieving an organizational goal. As your company grows from a small- to a medium-sized business, a point is reached where the lack of process becomes obvious.

“Impeccable order” may not be the first thing that comes to mind when we think of our businesses. However, ensuring the structure is organized is essential to any successful franchise prototype. The structure provides fixed points of reference to track progress. Without a clear structure, a business will quickly devolve into chaos. This is why it is so important to have a well-designed business structure.

A good business model will provide a clear framework for your business operations, helping you avoid chaos and keep things running smoothly. Of course, designing a good business model is no easy task. But it is well worth the effort because a well-designed model can help your business run like a well-oiled machine.

### **4. Document Everything**

Documentation is an important part of any business operation. It helps to ensure that all work is carried out according to established procedures and standards. A well-documented process also makes it easier for new employees to learn how to carry out their tasks.

A company’s operations manual is essential for documenting all work processes. For each task, the documentation should provide the purpose, steps, and standards for the process and result. This ensures that all employees know the expectations and requirements for each task. Additionally, it provides a reference point for troubleshooting and quality assurance.

In Chapter 7 of *Traction*, Gino Wickham recommends following these guidelines when reviewing the documentation:

- **Schedule a Day Away.** You'll need to block off one day off of the calendar to work on this project. He recommends taking the meeting off-site to avoid day-to-day distractions. Many leaders think they can do it in an hour or two. It's seldom done effectively at this pace. Define who is accountable for each core step in the process.
- **Simplify When You Can.** During this step, everyone can evaluate if all the steps need to be there. This is the opportunity to eliminate unnecessary steps and clarify the confusing ones. Wickham recommends documenting only the core processes, not every single step. It should be around six pages, not fifty pages.
- **Create Checklists.** Employees love the structure that comes with a clear checklist. Checklists, when followed, create consistent outcomes and are a key part of quality control.
- **Use Technology When It Works.** The right software, appropriately placed, can improve efficiencies, save time, and streamline operations.<sup>4</sup>

By having a clear and concise operations manual, a company can ensure that its workflows are efficient and effective.

## 5. Provide Consistent Outcomes

Consistency is key to providing a great customer experience. Employees and customers should always know what to expect. This means providing the same level of service with the same attention to detail every time they come in. You'll want to ensure that everyone who works for you is on the same page regarding customer service. By providing a uniformly predictable service, you'll make your customers feel valued and appreciated, and that's the key to keeping them coming back.

First, you need well-trained staff who understand your company's procedures and standards. Second, you must regularly monitor your service to meet customer expectations. Finally, be responsive to feedback and willing to make changes when necessary. By following these steps, you can create a uniform and successful service.

## 6. Always Be Improving

Kaizen is a Japanese term that translates to "change for the better" or "continuous improvement." Originating in Japan, it became a foundational element of its post-World War II economic success. At its core, Kaizen emphasizes small, incremental process changes to improve overall efficiency and quality.

While Kaizen is often associated with manufacturing, particularly in its role in the Toyota production system, its principles are universally applicable, including in the service industry. Here are four reasons:

1. **Customer Focus:** Customer Focus: Kaizen places the customer at the forefront. In the service industry, understanding and meeting client needs are paramount. Regularly reviewing and refining service processes ensures that customer satisfaction remains high.
2. **Efficiency:** Service providers can deliver faster and more cost-effective solutions by continuously identifying and eliminating waste or unnecessary steps.
3. **Team Morale:** Kaizen involves all levels of employees in the improvement process. This inclusive approach fosters a sense of ownership and pride in one's work, leading to higher job satisfaction and better service delivery.
4. **Adaptability:** In the ever-evolving service industry, adapting and innovating are crucial. Kaizen promotes a mindset of continuous learning and adaptation.

Understanding and implementing Kaizen in the service industry can enhance service quality, increase customer satisfaction, and drive overall business growth.

## CONCLUSION

You've now got the Queen Bee role clarified and a blueprint to make it happen over and over. Remember, a plan is only as good as its execution. So, grab a pen and paper, or your favorite digital tool, and start jotting down every step in your system. As you list each step, challenge yourself: Can this be automated? Can it be delegated? And most importantly, how can it be refined to deliver even more value to your customer?

Don't just create a system; give it a unique identity. Name, nurture, and consider licensing it when it's robust and proven. Who knows? Your system could be the next big thing to your segment, earning you the millions you know your expertise deserves.

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  2. Latson, J. (2015, April 15). How a Late-Blooming Entrepreneur Made McDonald's the World's Largest Burger Chain. Time. <https://time.com/3774670/mcdonalds-ray-kroc-history/>
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## 7 BUILDING A TEAM

In the mythical town of Melodyville, there lived an entrepreneur named Oliver. Oliver was a talented musician, and like too many talented musicians we know, he held a deeply-held belief that he was the sole holder of the most refined taste in music.

His passion for music was unparalleled, but so was his arrogance. Oliver wanted to share his music, so he created a symphony. He didn't do this by assembling a team of skilled musicians but by becoming a literal one-man orchestra, attempting to play every instrument himself, convinced that his solitary efforts would produce a masterpiece.

The day of the concert arrived, and the audience gathered, intrigued by the spectacle of witnessing a single man attempting to carry out an orchestra all by himself. Surrounded by a sea of instruments, Oliver frantically dashed from one to another, trying to strike the chords, hit the drums, and blow the trumpets, all while keeping the rhythm and melody intact. The result, however, was a chaotic cacophony that evoked laughter rather than awe. Chords were off, drums were hit out of time, and the horns blared the wrong notes. Amidst the disarray, Oliver, panting and exasperated, realized that he had lost his ability to create excellent music. He understood now how the beauty of a

symphony lay not in playing every instrument flawlessly but in the harmony created by each musician playing their part, contributing to a rich, resonant, and enchanting work.

Oliver learned that creating beautiful music was not a solo endeavor but a collaborative creation of all musicians playing in unison.

### **Can You Relate?**

Much like Oliver's ambitious yet chaotic one-man show, a solopreneur often finds themselves in a similar symphony of disarray when trying to manage every aspect of their business single-handedly. The parallel between Oliver, the one-man orchestra, and a solopreneur is strikingly apparent. I debated with my editor about using the title "One Man Orchestra". That title won over "One Person Orchestra" because not only does "One Man" roll off the tongue better, it's mostly just men who have the hubris and stupidity to think they can do everything on their own.

In his pursuit of creating the perfect melody as a One Man Orchestra, Oliver stretched himself thin across various instruments. He lost the essence of the harmonious music he sought to share with others. Similarly, a solopreneur, in an attempt to maintain control and perfection across all business facets, might juggle various roles - from marketing and sales to customer service and product development.

In both scenarios, the intent to produce impeccable results by oneself dilutes the quality of the output. Just as Oliver's music lost its melody amidst the haphazard playing of instruments, a solopreneur might find their business losing its harmony amidst the chaos of managing every task. It's a reminder that understanding the melody of success involves:

- Recognizing when to invite other skilled players into your orchestra.
- Allowing them to contribute their expertise.
- Creating a harmonious symphony of collaborative success.

Much like a symphony, the beauty of a thriving practice lies in the collaboration of different elements, each expertly managed and given due attention.

Let's talk about why you shouldn't be trying to create an outstanding practice that serves a segment with excellence all by yourself.

## THE HEARTBEAT OF A SCALING PRACTICE

Imagine waking up every day knowing that your business is running smoothly without your constant intervention. Sounds like a dream, right? But if everything revolves around you, this dream remains elusive. Instead of enjoying the freedom of a thriving practice, you're tethered to a demanding job.

Consider the human body, the crown of all nature. Every part and organ plays a crucial role in ensuring we function optimally. Now, imagine going for a walk and stumbling upon one body part lying on the ground. How unsettling. Not only will it make you throw up, it's totally useless there. One body part all by itself can accomplish nothing except trigger our gag reflex. An eye is an amazing wonder of the world. But eyes work only when they are part of a body to complement it.

Similarly, a practice that relies solely on you is like that isolated body part—it lacks the synergy of a complete system.

This brings us to our central theme: To create a practice that serves a segment, you need to build a team. A team that can serve clients by seamlessly operating your systems with a manual to guide them. Your practice will run on autopilot. In this chapter, we'll work on building that kind of team, ensuring that you transition from merely having a job to leading a self-managing practice. I've even got an unexpected team member to introduce to you that you have at your ready but perhaps haven't used it to its potential.

Spoiler alert: It's artificial intelligence. I'll show you how to save so much time and money by getting AI to do work for you.

First, let's talk about why you shouldn't be trying this alone.

## THE IMPORTANCE OF SCALING WITH A TEAM

Scaling a practice isn't just a buzzword; it's a necessity. As your practice grows, so do your time and energy demands. The reality is, you can't be everywhere at once. Juggling marketing efforts while simultaneously managing day-to-day operations can stretch you thin. There's a delicate balance between working on your business—strategic planning, envisioning the future—and working in it, handling the daily tasks and client interactions.

This is where the power of a team comes into play. Teams inherently bring a wealth of diverse skills, experiences, and perspectives. While an individual might excel in one area, they might struggle in another. However, a well-rounded team can cover all bases, ensuring that every aspect of the business receives expert attention.

Moreover, each team member has their own unique strengths and passions. When individuals operate within their areas of unique ability, the output is of higher quality, and the process also becomes more fulfilling and joyful for them. It's a win-win situation: the business benefits from their expertise, and they find joy in their work.

Automation is another crucial aspect of scaling. With a team in place, you can delegate tasks effectively, ensuring that processes run smoothly even in your absence. Automation doesn't mean removing the human touch; instead, it's about optimizing operations so that the team can focus on what they do best.

## TRANSITIONING TO A SELF-RUN PRACTICE: THE POWER OF SYSTEMS AND TEAMS

Having a clear, well-documented system for delivering value to clients is the foundation of any successful practice. But it's just the beginning. The true mark of a thriving business is when it can operate efficiently and effectively without the constant oversight of the owner. This transition from a hands-on approach to a self-run practice is the key to

unlocking new levels of freedom, income, and satisfaction for business owners.

Imagine the scenario where every process in your practice is so streamlined and well-documented that anyone on your team can pick up the reins and run with it. This doesn't mean that the owner's vision or touch are lost. Instead, it signifies that the vision is so clear and the processes so robust that the team can execute them seamlessly, even in the owner's absence.

Without this transition, the owner becomes the bottleneck. They find themselves entangled in every decision, every problem, and every client interaction. This not only limits the growth potential of the practice but also leads to burnout. The owner is perpetually working in the business, leaving little time to work on the business and not enough time to strategize, innovate, and plan for the future.

On the other hand, a self-run practice, powered by a competent team, offers numerous benefits:

### **1. Freedom**

The owner can take a step back, take vacations, or even take sabbaticals, knowing the business will continue to thrive.

### **2. Increased Income**

With a team managing daily operations, the owner can focus on expansion strategies, exploring new revenue streams, and building partnerships.

### **3. Enhanced Satisfaction**

There's a unique joy in seeing something you've built run smoothly. Watching your team take the initiative and drive the business forward can be immensely satisfying.

#### **4. Scalability**

A self-run model is scalable. As the business grows, systems can be replicated, and teams can be expanded without overburdening the owner.

#### **5. Legacy**

Over time, a self-run practice can continue to operate and flourish even after the owner decides to retire or move on to other ventures, ensuring their legacy and vision live on.

In essence, transitioning to a self-run practice is about leveraging the power of systems and a team's strengths. It's about building something bigger than oneself: a business that serves clients, provides employment, and is a testament to the owner's vision and hard work.

Let's look at some of the practical ways to start building your team.

### **1. SHARE THE COMPANY SYSTEMS IN A MANUAL EVERYONE CAN ACCESS**

Any small business must have a documented operations manual if it is going to have a chance to prototype. The manual doesn't have to be big or complicated; all that matters is that it is there and useful.

Any business owner who wishes to maintain a high standard needs a company manual. Like a skeleton serves to keep the body in place, the manual keeps a company on track, held by its core. A manual ensures everyone is on the same page and working toward the same objective. A company manual accomplishes this by clearly describing policies and procedures that deliver brand promises (outcomes). A manual can also be a key training tool for new staff members.

A document like this requires much time and energy invested in its creation and completion. If such resources are demanded, the value must be there.

## THE VALUE OF A MANUAL

This manual is a valuable resource with its many uses in a company. Leaders can use this manual for:

### **1. Casting Vision**

Since it contains the mission, vision, values, and process used for delivering successful outcomes, the company manual can be used by leaders to inspire the team. I envision a leader standing in front of his team and discussing how the manual was the blueprint for ensuring everyone was working together to pursue the same goal.

### **2. Training of Staff**

Whether to retrain existing staff or onboard new staff, the manual should be mandatory reading so that everyone knows how the company works, where it is going, and what is expected of them to get there. Since the manual includes both the big picture and the little details, it takes time to make things run smoothly. Additionally, the manual serves as a set of boundaries for employee behavior. Should they seek to operate outside of the boundaries of the manual, you have a policy in place for moving them on.

### **3. Continuous Improvement**

One benefit of having a company manual is that it becomes a standard that should be aspired to (and then improved on). This resource should be a revisable document that should be evaluated each year to see if there's something that the company has learned to do better or should look at improving in the coming year. A manual gives a snapshot of how things "used to be done" and is en route to becoming the gold standard for how things should be done.

#### **4. Franchising**

With a manual in place, all the processes are documented to achieve successful outcomes. This means a successful turnkey business can be replicated in other markets or market segments.

#### **5. Getting Acquired**

A potential acquirer will not be interested in whether or not they are acquiring an actual business or just a job for the owner. A business with set processes documented in a manual will be more attractive to an acquirer because it will be clear what the business does. The acquiring company will want to know what they are buying. The operations manual will have everything laid out.

### **THE FIVE SYSTEMS TO INCLUDE IN THE COMPANY MANUAL**

These five essential systems are required in every company. According to Gerber, these are the five major systems of a turnkey firm.<sup>1</sup>

#### **1. The Marketing System**

Lead generation attracts and converts strangers into customers, or at least into prospects, subscribers, or followers. Businesses do this by creating attractive offers that draw people in and entice them to take action, such as making a purchase, signing up for a newsletter, or requesting more information. The key to successful lead generation is understanding what your target audience wants and needs, and then creating an offer that meets those needs. There are many ways to generate leads, including traditional advertising, referral marketing, digital marketing, relationship marketing, and social media marketing. The best way to generate leads is to combine these methods. By using various lead generation strategies, you'll be able to reach a larger number of potential customers and increase your chances of converting them into actual sales.



## **2. The Selling System**

Selling is essential to generating revenue and keeping cash flowing in the front door. Without a steady stream of sales, a company runs out of money, bringing everything to a grinding halt. Businesses must have a well-defined selling system in place. A selling system is a process that helps businesses convert leads into paying customers.

There are many different selling systems, but they all share one common goal: to help businesses close more sales and generate more revenue. By defining, documenting, and refining their selling system, businesses can maximize their sales potential and stay in business for years to come.

## **3. The Customer Fulfillment System**

A business is only as good as its customer fulfillment process. This system ensures the product or service is always delivered with excellence and quality. A turnkey business first documents how customers are served so that anyone who needs to can deliver the product or service with the same level of excellence.

This can be done with checklists and measurable outcomes. By documenting the customer fulfillment process and training employees to follow it, a business owner can sleep well at night, knowing customers will always receive the high level of service everyone expects from the business.

## **4. The Administrative System**

A good administration system is the backbone of any successful company. They handle all the behind-the-scenes work that keeps the business running smoothly. This includes bookkeeping, data management, and tax and employment law compliance. A well-functioning administration team can save a company time and money, and they often play a vital role in the growth and success of the business.

When choosing an administration team, selecting individuals who are organized, efficient, and have strong attention to detail is essential. With a good administration team, businesses can focus on their core objectives and leave the back-office worries to someone else.

## 5. The Human Resource System

A human resource system covers responsibilities like talent acquisition, training and development, coaching and correction, conflict resolution, and performance management. All of those things are key pieces of your human resource (HR) system.

By creating a set of HR policies and job descriptions and following them, a business owner ensures that all the functions of a business do not fall on their shoulders and still receive the attention they deserve. With a team set up with clear expectations, the business owner is free to focus on other aspects of running their business.

The problem is that most HR systems happen on the fly without proper planning or careful thought. This is especially clear in partnerships where tasks and responsibilities are handed out early with no plan to scale. Relationships break down quickly without clear boundaries and policies in place between employees (including founders). I have benefited from the recommendations of Gino Wickham in *Traction*.

Right from the start of a company, Wickham recommends creating an organizational chart with all the roles carried out in a company. Each role should have a job description and a contract. In order to set clear expectations, the roles should be divided among the stakeholders with signed contracts stating that they will do what is required of them in order to make the business work. As the business grows, the goal is to find someone else to take a job, accept the job description, and sign the contract that the work will get done.

My experience shows that the best way to document these is through a company manual.

## **ACTION STEP 2. START WITH SOME KIND OF ASSISTANT**

As a busy leader, it's time to face a crucial decision: either you have an assistant, or you are the assistant. If you juggle administrative tasks, manage schedules, and handle routine operations, you're essentially working two jobs. You're not just the visionary driving your business forward; you're also the assistant bogged down in the minutiae that could be efficiently managed by someone else.

### **The Mindset Shift**

The transition from sole service provider to a business owner represents a fundamental shift in mindset, crucial for scaling a practice. As a sole provider, you are the business; your skills, time, and energy directly translate into the services offered. While gratifying, this model has inherent scalability limitations due to its reliance on your personal capacity.

Embracing the role of a business owner requires a paradigm shift. You must start viewing the business as an entity separate from yourself, one that can operate, grow, and thrive independently of your direct, hands-on involvement in every task.

This mindset shift from a doer to a leader and strategist is not just necessary for scaling; it's essential for creating a business that can continue to grow and succeed, independent of the limits of any individual's capacity. It's about building a legacy that outlasts the daily grind.

### **Measuring Opportunity Cost**

Two of the most haunting words I learned during my MBA studies were "Opportunity Cost." Those words send a chill up every entrepreneur's spine. Opportunity cost refers to the potential benefits an individual, investor, or business misses out on when choosing one alternative over another. It's the value of the next best option that is foregone as a result of making a decision.

In reality, every hour you spend on tasks that an assistant could handle is you paying an opportunity cost. It's an hour not spent on strategic planning, growth initiatives, and high-value activities that only you can do. It's not just about freeing up your time but investing your energy where it matters most to the value of your clients and business.

Hiring administrator or a virtual assistant is not an expense; it's an investment in your productivity and the scalability of your business. An assistant can manage the myriad of tasks that, while necessary, don't require your unique expertise. From scheduling appointments to handling email management, organizing events, and managing social media, these are all areas where an assistant can significantly contribute.

Leaders must confront a pivotal truth: believing they can do everything best is not just impractical but fundamentally flawed. Clinging to the notion that no one else can match your standards in every task is a recipe for burnout and stunted business growth. It's not the mark of prudence to shoulder every responsibility; it's a strategic misstep. Smart leadership involves recognizing your unique strengths and delegating other tasks to capable hands, thereby fostering a more efficient, dynamic, and sustainable business model. Letting go of this 'do-it-all' mindset is not just about efficiency; it's about embracing a smarter way of leading.

By delegating tasks, you're not losing control but gaining freedom. Freedom to focus on your core competencies, to engage more deeply with your clients or team, and to strategize for future growth. Remember, great leaders aren't those who do it all themselves; they're the ones who recognize the power of teamwork and leverage it to achieve greater heights.

### **ACTION STEP 3: START DELEGATING THE JOBS BELOW YOUR PAYGRADE**

Time is your most precious commodity, and your expertise is your currency; understanding your worth is not just important—it's essential. Imagine you're at the helm of your business, steering it towards

success, but you find yourself swamped with tasks that don't match the value you bring to the table. It's time for a strategic reassessment, a moment to pause and calculate your worth in clear, unequivocal terms.

Let's look at a simple yet profound formula that can revolutionize how you view your time and effort. This formula isn't just about numbers; it's about understanding the actual value of your expertise and ensuring that every hour you invest in your business is aligned with your financial aspirations.

First, consider your income goal and the financial summit you aim to reach each year. This number isn't just a figure; it represents your aspirations, hard work, and the value you provide to your clients. Next, factor in the number of hours per week you're willing to dedicate to this endeavor.

This isn't just about clocking in hours; it's about the quality, focus, and intensity you bring to each hour. Finally, think about the number of weeks per year you plan to work. This isn't just about time spent; it's about the balance you seek between your professional and personal life.

Now, let's bring these elements together in a formula that's as enlightening as it is practical.

Your Hourly Wage =  $\frac{\text{Income Goal}}{(\text{Number of Hours/Week}) \times (\text{Number of Annual Weeks})}$

Simplified, it looks like this:



We can plug some numbers in to bring it to life. If your income goal is \$300,000, and you plan to work 30 hours a week for 46 weeks, you are earning an hourly wage of approximately \$217 per hour.

$$\begin{array}{c}
 \text{INCOME GOAL} \\
 \$300,000 \\
 \div \\
 \left\{ \begin{array}{cc}
 \text{\# OF HOURS/WEEK} & \text{\# OF ANNUAL WEEKS} \\
 30 & 46
 \end{array} \right\} \times \\
 \hline
 \text{MY IDEAL WAGE} \\
 \$217 / \text{hour}
 \end{array}$$

### Your Wage Is Not Just A Number

This number isn't just a calculation; it reflects your worth, a benchmark that guides you in deciding which tasks merit your attention and which should be delegated or outsourced.

This formula is a wake-up call for the service-based business owner doing too much. It's a reminder that your time is valuable and should be spent on tasks that genuinely reflect your worth. It's about recognizing that some tasks, while necessary, don't require your expertise and can be efficiently handled by others. This realization isn't a sign of weakness; it's a strategic move towards efficiency, focus, and, ultimately, greater success.

So, take a moment to ponder this formula and what it reveals about your worth. Let it be the catalyst for a change in how you operate, leading you to build a team that complements your skills and frees you to focus on what you do best. Remember, in service-based businesses, understanding and leveraging your worth isn't just brilliant—it's essential for scaling new heights of success.

If you value your time as a business owner at \$217 per hour, focusing on tasks that add equivalent or greater value to your business is crucial. The following activities, while important, are generally not the best use of your time at this rate and could be delegated:

- *Administrative Tasks:* Data entry, document preparation, general administration, scheduling appointments, email management, answering phone calls, and managing mailings.
- *Transaction and Resource Management:* Overseeing transaction coordination and logistics for resources and materials.
- *Lead Management:* Sourcing, qualifying, nurturing, monitoring leads, CRM management, and prospecting.
- *Marketing and Content:* Event planning for lead generation, social media management, content creation and scheduling, social engagement, audience building, analytics and competitor monitoring, website updates, designing flyers & brochures, organizing ad campaigns, and managing speaking opportunities.
- *Client Relations:* Arranging client follow-up meetings, sending thank you notes, mailing holiday cards, or remember milestones like anniversary greetings.

While essential for the smooth operation of a business, these tasks are typically not the most effective use of an owner's time, valued at \$217 per hour. Given the rate of inflation these days, I won't state the market rate for those jobs, but I guarantee someone else will do them for a fraction of what you charge your company.

It's unrealistic and economically imprudent to assume that you, as a business owner valuing your time, can or should handle all these tasks personally. Not only is it unlikely that you have the time to manage them effectively but it's also a poor allocation of your valuable skills and expertise. Engaging in activities that don't match the high value you place on your time is underutilizing your potential and can hinder the growth of your business. Delegating these tasks to capable team members or outsourcing them is a strategic move, allowing you to focus on high-impact activities that truly warrant your expertise and command the wage you're aiming for. This approach maximizes your productivity and drives your business forward more effectively.

## ACTION STEP 3: THE POWER OF AI WORKING FOR YOUR TEAM

AI technology is not just a fleeting trend; it's a game-changer with immense potential to revolutionize how you run your business. While many are still merely experimenting or overlooking its capabilities, you have the unique opportunity to embrace AI as a key player in your team.

By taking AI seriously and integrating it strategically into your workflow, you can elevate it from a mere technological curiosity to a vital asset in productivity and innovation. This approach isn't just about staying current; it's about harnessing a powerful tool to secure a substantial competitive advantage in your field.

As a business owner, you might be questioning the real impact of AI on your business. Is it truly as transformative as claimed? The answer, backed by a comprehensive study from Boston Consulting Group and leading social scientists, is a definitive *YES*.<sup>2</sup>

A pivotal experiment involving consultants revealed that those utilizing AI, particularly the ChatGPT-4 model, significantly surpassed their non-AI-using counterparts in performance. The benefits observed in those who integrated AI into their workflow were remarkable:

1. *Increased Task Completion by 12.2%:* One company handled over a tenth more customer inquiries or wrapped up extra projects within the same timeframe.
2. *Enhanced Speed by 25.1%:* AI's ability to expedite responses to market shifts and client demands is invaluable in the fast-paced business world.
3. *Improved Quality of Results by 40%:* Every business strives for excellence in its products or services. AI not only boosts efficiency but also elevates the quality of your output.

Imagine the potential transformation in your business with a 10% increase in effectiveness, a 25% boost in speed, and a 40% improvement in the quality of your work.



In the rapidly evolving landscape of service-based businesses, AI is a game-changer. Here's just one way to leverage the power of AI on your team.

### **The Role of AI: A Brilliant Intern at Your Service**

Imagine Your AI assistant as the ideal intern for your business – competent, always available, and tirelessly efficient.

This AI tool is like having a brilliant assistant at your disposal, ready to tackle various tasks with precision and speed. Here's how Your AI assistant can be a game-changer in your daily operations:

- *Versatile Skill Set:* Your AI assistant is like an intern who has studied extensively and can pass exams with flying colors. It has a vast knowledge base covering various topics and skills. Whether drafting emails, creating content, or conducting research, Your AI assistant can handle it all.
- *Strategic Understanding:* Just like a top-tier intern who grasps business strategies, Your AI assistant can assist in formulating plans and strategies. It can provide market insights, suggest business improvements, and even help in brainstorming sessions.
- *Exceptional Writing Skills:* Need a copywriter? Your AI assistant excels in crafting well-written content. From blog posts to marketing copy, it can produce engaging and relevant material that resonates with your audience.
- *Incredible Knowledge Base:* Your AI assistant has virtually 'read the internet', making it a powerhouse of information. It can provide quick answers to queries, offer summaries of complex topics, and keep you updated with industry trends.
- *Reliability:* Unlike human interns who might fall ill or need breaks, Your AI assistant is available 24/7. It works around the clock, ensuring your business keeps moving forward even outside regular working hours.
- *Efficiency and Productivity:* With Your AI assistant, you can delegate tasks and focus on more critical aspects of your

business. It handles the time-consuming work, allowing you to concentrate on strategy and growth.

- *Learning and Adaptation:* Just like a keen intern who learns and adapts, Your AI assistant can be fine-tuned to suit your business needs over time. The more you use it, the more it understands your preferences and style.

However, just like with a real intern, reviewing the work is a wise move. While Your AI assistant is highly capable, it's still an AI tool that requires human oversight to ensure accuracy and relevance to your business context.

By effectively integrating Your AI assistant into your workflow, you can significantly enhance your business operations' productivity, creativity, and efficiency.

## CONCLUSION: BUILDING A FUTURE-READY PRACTICE

The journey of transforming a business from a solo venture to a thriving, self-managing practice is both challenging and rewarding. Throughout this chapter, we've delved deep into the significance of having not just a clear system but also a dedicated team to bring that system to life. A self-managing practice isn't about sidelining the owner; it's about magnifying their vision through a collective, coordinated effort.

The importance of a comprehensive company manual cannot be overstated. It serves as the blueprint, guiding every member of your team and ensuring consistency, clarity, and commitment to the shared goals. With a manual in place, every process, every role, and every expectation are crystal clear, eliminating guesswork and fostering a culture of excellence.

As we wrap up this chapter, reflect on the potential that lies ahead. With the right team, clear systems, and a detailed manual, your business is poised for growth, sustainability, and success. But remember, knowledge without action remains just potential. So, take the next step.

Begin the process of documenting, refining, and implementing what you do for your clients. This doesn't involve starting from scratch. It's just documenting what you do.

Let's turn this potential into reality. Don't settle trying to be a one-man orchestra.

Start building your team, crafting your manual, and setting your practice on the path to a brighter, self-sustaining future.

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1. Ibid, Gerber.
  2. Dell'Acqua, F., & Rajendran, S. (2023). Navigating the jagged technological frontier: Field experimental evidence of the effects of AI on knowledge worker productivity and quality. Harvard Business School & Boston Consulting Group.

## 8 MARKETING THAT'S CLEAR, EFFECTIVE, AND FUN

**M**ost professionals I know have a love-hate relationship with marketing - but it's a lot more hate than love, sadly.

I don't blame them. There's a lot of people who gave marketing a bad name. But if Jon Bon Jovi could be shot through the heart and recover his love for love, I believe you can get over your struggle and give marketing another shot.

The problem is that our traditional view of marketing does not make the love of marketing come easily.

If you're like me, you have experienced what I call the "Marketing Sucks Cycle". It's a diagram that unites us all. This is what it looks like.

I'll explain how it works:

## The Marketing Sucks Cycle



### 1. Need to Market

As mentioned, you're this far into the book so you've got a clear client, a problem you solve for them, tight systems that deliver results and a team that wants to get paid for their efforts. You soon recognize the need for marketing is a crucial part of business. You wish it wasn't. But it is. The necessity of marketing often feels overwhelming, especially if you're not equipped with marketing skills or resources. It's a common challenge that many in your profession face.

### 2. Get Excited

The catalyst to once again believe that marketing can work begins with a spark of inspiration. Perhaps a webinar you attend, a case study you hear about, or a social media ad that catches your eye, you find yourself feeling marketing motivation and hope. You start to believe that successful marketing is within your reach, igniting a sense of optimism.

### 3. Try It Yourself

Emboldened by this newfound enthusiasm, you decide to take on the marketing challenge yourself. After all, you have a team to do other things, right? However, this phase can be a reality check. The complex-

ities of copywriting, mastering various software, and the nuances of self-promotion are not everyone's forte, leading to unexpected hurdles.

#### **4. Despair**

When your marketing efforts don't pan out as expected, it's easy to fall into despair. Doubts about the effectiveness and necessity of marketing start to creep in. This stage is marked by frustration and disillusionment as your time and resources have been wasted.

#### **5. Outsource It**

In hopes of turning things around, you might consider outsourcing your marketing. This step, however, comes with its own set of challenges. The process is slow. The design is ok. The social media posts are a little too generic...

Who understands your unique needs and can deliver results without draining your time, patience, and budget?

Everyone wants thousands of your hard-earned dollars and in exchange you get all the risk. You soon find out there's not a lot of trustworthy marketing experts you actually trust.

#### **Resignation**

You resign the fact that maybe marketing just isn't for you. Maybe you can be one of the unicorns that grows a thriving practice without ever having to market...

But that's a risk too. And you're back to the realization that you, your family and your team need to get paid.

You realize you should do some marketing. And that lands you back to step one, the realization that *you need to do marketing*.

#### **Breaking the Cycle**

The Marketing Sucks cycle highlights the struggles many service providers face with marketing. It's often seen as a necessary but cumbersome part of your business, requiring skills and resources that are outside your expertise. Breaking free from this cycle involves

finding an authentic, manageable, and, most importantly, rewarding marketing approach that works for you.

*Thankfully, there are so many ways to do effective marketing.*

## UNRAVELING THE MARKETING ENIGMA

We often toss around the term “marketing” with confidence, assuming everyone is on the same page. Yet, when pressed for a clear definition, many of us fumble. This lack of clarity can lead to misaligned strategies, wasted resources, and missed opportunities. Before we go deeper, let’s take a moment to demystify this cornerstone of business.

## REDEFINING MARKETING: A PERSPECTIVE SHIFT

After being in marketing for over eight years and two MBA classes later, this is my working definition of marketing.

*“Marketing is any way you strategically communicate how you offer and deliver value to your clients.”*

This definition resonates with me, and here's why:

### **1. Strategic Communication**

At its core, marketing is about communication. But not just any communication – it's strategic. This means every message, image, or interaction is thoughtfully crafted to convey something meaningful about your service. It's not about bombarding potential clients with sales pitches; it's about meaningful engagement.

### **2. Offering and Delivering Value**

The essence of this definition lies in the focus on value – both in the offer and the delivery. It's not just about what you provide, but also how you provide it. This approach to marketing shifts the focus from simply selling a service to creating and delivering value in a way that resonates with your clients.

### Why This Definition Matters

This definition simplifies it to its most basic and essential elements – communication and value. It's a reminder that marketing isn't just about tactics, tools, or online tactics and tools. It's about any way you connect with your people in a way that is authentic, clear, and valuable.

In a world where marketing is often seen as a necessary evil, this definition offers a refreshing perspective. It's an approach that aligns with the core values of service-based businesses, where the relationship with the client is paramount. It's about building trust, understanding needs, and delivering solutions in a way that enriches your clients' lives. This is why I find this definition of marketing so compelling and relevant, especially for service-based professionals. But maybe definitions don't do it for you. There's another way to describe what marketing is that I quite like.

### MARKETING IS WHEN YOU PLAN THE WHOLE THING

Allan Dib's 1-page marketing plan provides a vivid analogy to help us understand its various components. I created the illustrations to bring it to life a little more:

Imagine the circus is coming to town. You create a sign that reads, "Circus Coming to the Showground Saturday." This act of informing the public about the event is *advertising*.



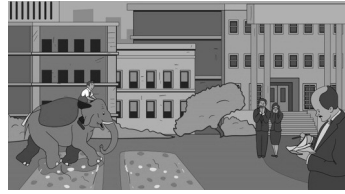
Now, place that sign on an elephant's back, marching it through the town. This added flair and visibility is what we call *promotion*.



Suppose the elephant, in its journey, tramples the mayor's flower bed. The local newspaper catches wind of this and writes an article. This unintended attention and coverage is *publicity*.



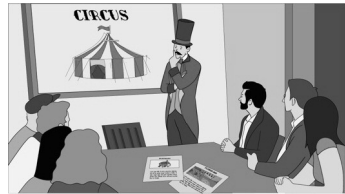
If you make the mayor see the lighter side of the situation and he chuckles about the mishap, you've just ventured into the realm of *public relations*.



On the day of the circus, as the townsfolk arrive, you guide them through various entertainment stalls, explaining the fun experiences each offers. You address their queries, and they end up spending generously. This act of direct persuasion and transaction is called *sales*.



If you planned the whole thing, *now that's marketing*.




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## MARKETING THAT WORKS FOR YOU

When it comes to all the ways you can market your business, there are five major types of marketing you can explore. They are:

- Digital Marketing
- Remarkable Marketing
- Partnership Marketing
- Lifestyle Marketing
- Thought-Leadership Marketing

We will go through each one, explaining what it is and how it works. You can choose one or a smorgasbord of what you like and what works for you.

## 1. DIGITAL MARKETING

The cornerstones of marketing for any service-based business are websites and social media. These platforms are not just optional tools but essential components of a successful marketing strategy.

### **Websites: The Front Door Of Your Practice**

In a previous era of business, you had to keep a nice clean office. It was where people first met you. Now, your website is often the first point of contact between your business and potential clients. Like your office used to be, your website is there to greet visitors and invite them to learn more about what you offer. If we had more time, I could talk forever about how important your website is and what you need on it. A well-designed website with clear messaging are the foundation of your marketing. It'll be the place you send prospective clients to learn more and where your clients send referrals to learn more. It's a platform where you can showcase your expertise, show you're an expert problem-solver through a blog, and a guide to show visitors how you help them. Your website encourages visitors to take the first step in working with you. It's undeniable that a website is an essential part of your marketing.

### **Social Media: The Pulse of Engagement**

On the other hand, social media is where the dynamic, ongoing conversation with your audience happens. It's a pulse of engagement in your industry. Social media is the place to build and nurture relationships. Video content, in particular, has emerged as a powerful tool on these platforms. It allows you to convey your message more personally and engagingly, often leading to higher engagement rates than traditional text posts.

### **Leveraging AI To Make It Easier**

But how do you keep up with the constant demand for fresh, engaging content? Here's where Artificial Intelligence, especially tools like ChatGPT, comes into play. AI in marketing is like having a tireless, creative assistant who is always ready with new ideas. ChatGPT can help you

generate unique, plagiarism-free content that resonates with your audience. From crafting compelling blog posts to creating engaging social media updates, AI can significantly streamline your content creation process.

However, the key to effectively using AI in your marketing strategy is personalization. While AI can provide the framework and bulk of your content, infusing it with your personal touch - your voice, insights, and unique perspective is crucial. This blend of AI efficiency and personal authenticity will set your marketing efforts apart in a crowded digital landscape.

To summarize this section, websites and social media are the twin pillars of modern marketing essentials. They are unavoidable and indispensable for any service-based business looking to thrive in today's digital world. You may need to outsource this kind of marketing as it's not within the skillset of many. The good news is that with AI tools like ChatGPT, you can get it done faster and cheaper than ever before.

## 2. REMARKABLE MARKETING: TURNING CLIENTS INTO RAVING FANS

In service-based businesses, the most potent form of marketing often comes from your existing clients. This is the essence of Remarkable Marketing – creating exceptional experiences that your clients can't help but talk about. It's about exceeding expectations, not just meeting them.

### **The Power of the Unexpected**

The key to Remarkable Marketing lies in the difference between what is expected and what you deliver. The surprise element, the 'wow' factor, makes your service memorable. When clients receive more than they anticipated, they are naturally inclined to share their experiences with others, especially those who are like them. This word-of-mouth is incredibly valuable, as it comes with a built-in trust factor that no traditional advertising can match.



### Referrals: The Growth Engine

Referrals are the lifeblood of any service-based business. They are a testament to the quality of your work and the satisfaction of your clients. By delivering remarkable service, you're essentially cloning your best clients. Happy clients lead to more referrals and more satisfied clients – it's a virtuous cycle. Remember, people don't generally talk about mediocre experiences. They talk about the extraordinary.

#### Take Action

To harness the power of Remarkable Marketing, ask yourself: *What do I do that is remarkable in my industry?* This doesn't mean you have to perform grand gestures for every client. Instead, focus on what makes your service unique and how to go above and beyond the industry standard. It could be your personalized approach, innovative solutions, or exceptional customer care. Find the one thing that makes you stand out and leverage it to create memorable client experiences.

Remarkable Marketing is about creating stories worth telling through your service. It's about being so good that your clients become your most vocal advocates. So, take a moment to reflect on what makes your service remarkable and how you can consistently deliver those unexpected, delightful experiences that will keep your clients talking.

### 3. PARTNERSHIP MARKETING: COLLABORATING FOR COLLECTIVE SUCCESS

Partnership Marketing is a strategic approach that involves aligning with other businesses or individuals to benefit from each other's client bases mutually. It's about recognizing that collaboration is often more

powerful than competition, especially in service-based industries. This method expands your reach and adds value to your services, creating a win-win-win situation for you, your partners, and most importantly, your clients.

### **Synergy with Aligned Companies**

The core of Partnership Marketing is finding companies or individuals who serve a similar customer base as yours but in a different capacity. This synergy allows you to offer complementary services to the same demographic, enhancing the overall customer experience. For instance, if you're a financial advisor, partnering with an estate planning attorney could provide a comprehensive package for your client's planning for the future.

### **Incentivizing Partnerships**

A successful partnership often involves incentives, such as affiliate programs or gifts. These incentives encourage your partners to refer clients to you, knowing it will benefit them somehow. It's a reciprocal relationship where both parties have something to gain, which fosters a long-term, sustainable partnership.

### **Action Item: Identifying Potential Partners**

To start with Partnership Marketing, identify other vendors or service providers serving a similar client base. Ask yourself how you can work together to benefit everyone involved. It's not just about finding any partner; it's about finding the right partner who aligns with your values and business goals.

### **A Personal Success Story In Partnership Marketing**

My own experience with Partnership Marketing has been incredibly rewarding. I discovered a powerful referral partner in the online medical field. Their vast client base was continuously growing, but many of their clients had ineffective websites. By partnering with them, we provided these clients with more attractive and effective websites, which led to increased patient bookings. This was a classic win-win-win scenario: the clients got better websites, our partner

enhanced their service offering, and we tapped into a steady stream of new clients.

Partnership Marketing is about building mutually beneficial relationships. It's about understanding that your success can be amplified through strategic collaborations. So, take the time to identify potential partners, understand their needs, and propose a partnership that creates value for everyone involved. Remember, in the service world, collaboration can often be the key to unlocking new levels of success.

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## WHY CLEAR SEGMENTATION DRIVES REFERRALS

In the world of business, particularly for service-based professionals, referrals are the lifeblood of sustained growth. Yet, many overlook the profound connection between having a clear segment and the ease with which others can refer to it. Let's explore why:

**1. Clarity in Messaging:** When you specialize, you send a clear message about what you do and for whom. This clarity makes it easier for others to understand your unique value proposition. Think of it this way: if you're known as the expert in pediatric dentistry for toddlers with special needs, anyone who encounters a parent facing challenges in this area will instantly think of you. On the other hand, if you're "a dentist," the connection isn't as immediate or obvious.

**2. Avoiding the Needy Perception:** Generalists, by trying to cater to everyone, often spread themselves too thin. This jack-of-all-trades approach can inadvertently project an image of desperation or neediness. It's as if they're saying, "We'll take any work we can get." This is not an attractive proposition for potential referrers. In contrast, specialists exude confidence and expertise in their chosen niche, making them more referable.

**3. Easy Identification of Problems and Solutions:** With a clear segment, you're not just offering a service; you're providing a solution to a specific problem faced by a specific group. This problem-

solution dynamic is easy to communicate and understand. When someone in your network encounters an individual facing the problem you solve, the referral becomes a natural, almost automatic response.

## LEVERAGING THE POWER OF REFERRALS

It's well-known that most service-based professionals gain a significant portion of their business from referrals. Yet, surprisingly, few have a strategic approach to cultivating and increasing these referrals. By clearly defining your segment, you're not just waiting for referrals to happen; you're making them more likely and more frequent.

While referrals are a powerful tool for business growth, their potential is maximized when combined with clear segmentation. By defining your niche and the specific problems you solve, you make it easy for others to see your value, remember what you offer, and connect you with those in need of your expertise.

## REFERRAL-BOOSTING STRATEGY FOR TOP CLIENTS IN YOUR SEGMENT

If you like the idea but are unsure what to do, here are some proven ideas you can consider to boost your referrals:

- 1. Client Appreciation Events:** Host exclusive events for your top clients. This could be a dinner, a workshop, or even a fun outing. Encourage them to bring a friend or colleague who might benefit from your services. This not only shows appreciation but also introduces you to potential new clients in a relaxed setting.
- 2. Referral Incentive Program:** Offer incentives for every successful referral. This could be in the form of discounts on future services, gift cards, or even a small token of appreciation. Ensure the incentives resonate with your top clients' preferences.
- 3. Testimonial Requests:** Ask your best clients for testimonials. A positive review from a satisfied client can be more convincing than any

advertisement. Display these testimonials prominently on your website, brochures, and social media.

**4. Stay Top-of-Mind:** Regularly check in with your top clients through personalized emails, newsletters, or even a quick call. This keeps the relationship warm and makes them more likely to think of you when a referral opportunity arises.

**5. Provide Referral Materials:** Equip your best clients with brochures, business cards, or even a short presentation about your services. This makes it easy for them to share information about your business when they come across someone in need of your services.

**6. Educate Your Clients:** Clients often do not know how to refer. Take a moment to explain to them the kind of clients you're looking for and how they can introduce you. The clearer you are, the easier it becomes for them to spot potential referrals.

**7. Acknowledge and Thank:** Always acknowledge a referral, whether it converts into business or not. A simple thank-you note or call can go a long way in showing your appreciation and encouraging more referrals in the future.

By implementing this strategy, you not only encourage your best clients to refer more but also strengthen your relationship with them, ensuring long-term loyalty and mutual growth.

### 3. LIFESTYLE MARKETING: BLENDING PASSION WITH PROFESSION

Lifestyle Marketing is a unique and enjoyable approach that blends your interests with your professional goals. It's about leveraging your hobbies and passions to connect with potential clients with similar interests. This method is particularly effective because it allows you to engage with your target market in a comfortable and enjoyable setting.

#### **This Is Not A New Idea**

The concept that one can gain profound insights into a person's character through observing them in leisure and play, rather than through



prolonged conversation, is often attributed to the ancient Greek philosopher Plato. Plato, a pivotal figure in the development of Western philosophical tradition, believed that leisure activities reveal more about a person's true nature. This is because, during leisure or play, individuals are likely to act more freely and authentically, unencumbered by the formalities and constraints typically present in structured, goal-oriented environments. While the popular quote "You can learn more about a person in an hour of play than in a year of conversation" is not directly found in Plato's writings, it succinctly encapsulates the essence of his views on the revelatory power of leisure and play in understanding human character.

### **What Does Lifestyle Marketing Look Like?**

Whether it's playing a sport, engaging in a hobby like snowmobiling, attending professional sports games, or hosting a fancy dinner, these activities provide a natural and relaxed environment for building relationships. The key here is authenticity; you're not just selling a service but sharing a part of your life and creating genuine connections, established by trust.

Let me tell you a story of one of the best examples of lifestyle marketing in action.

### **Merging Passion With Profession: What You Need to Know About Grant's Approach to Marketing**

In the picturesque landscapes of British Columbia, where the outdoors beckons with its majestic beauty, the mentor of mine you met in chapter one, Grant, found a unique way to merge his passion with his profession. An avid lover of the outdoors, Grant never missed an opportunity to be amidst nature. One of the activities he loved most was mountain biking.

The problem is that Grant was a successful financial advisor whose growing practice (and family) didn't allow him nearly enough time to enjoy the outdoors. The work of a financial advisor is established through trust in relationships. Relationships take time. He found himself spending more and more time in a seat at a coffee shop or on

his clients' couches instead of on a bike seat, where he really wanted to be.

Grant struck a golden idea when he wondered if he could continue to grow his practice while doing outdoor activities as part of his business. It came to him: *What if he could enjoy bike riding with clients?*

He started to spread the word: Wednesdays at 2 p.m., he was going biking. He began organizing weekly mountain bike rides, inviting local doctors to join him. If you're wondering where all the doctors in Canada are, there you go—some of them are out on bike rides with Grant.

The rides weren't just about the thrill of the trail; they were about camaraderie, shared experiences, the joy of the outdoors, and, of course, the building of relationships with Grant's segment.

As the weeks went by, these doctors began inviting their friends, turning these rides into a steady stream of new medical professionals coming into Grant's pipeline. Amidst the groomed nature trails and beautiful views, conversations flowed naturally. Sometimes, they'd discuss the challenges of their professions, and sometimes, they'd ask questions of Grant regarding their unique financial challenges.

Grant's genuine passion for the outdoors and his authentic way of connecting with people turned these rides into more than just recreational outings. They became networking events but without the regulatory disdain of his compliance department. In this relaxed, genuine setting, trust was built, relationships were forged, and Grant found himself signing up new clients every month.

All because of a bike ride.

This was marketing done his way. It was organic, genuine, and rooted in shared passions. Grant had discovered a goldmine, not by pushing a service but by simply being himself and sharing what he loved. This, indeed, is the essence of authentic marketing!

## DISCOVERING YOUR UNIQUE LIFESTYLE MARKETING APPROACH

As we've journeyed through Grant's authentic approach to marketing, it's evident that genuine connections can be forged when we merge our passions with our professions. Now, it's time for you to reflect and envision your own unique lifestyle marketing strategy.

Everyone has activities or hobbies that they're passionate about, and these can be the foundation for building authentic relationships with potential clients. For some, it might be the thrill of taking prospective clients to a local sports team. The shared highs, lows, and post-game discussions can all be natural conversation starters.

For others, it might be the intimate setting of a dinner party. Imagine hosting themed dinners where discussions aren't just about the shared food experience but also about shared interests, industry trends, or even the challenges faced in your respective fields. Such settings provide an opportunity for meaningful conversations, allowing you to showcase your expertise in a relaxed environment.

The key is to identify what resonates with you and your target audience. It's about creating an environment where business discussions feel natural, not forced. So, take a moment to reflect: What activities are you passionate about? How can you integrate them into your marketing strategy? Remember, when you're genuine in your approach, potential clients will be drawn to you, not just for your services but for who you are. Embrace your uniqueness and let your lifestyle lead the way in your marketing efforts.

### **Engaging With Your Segment at Their Favorite Gatherings**

One of the most effective ways to connect with your segment is to be present where they naturally congregate. Events, conferences, golf tournaments, and other gatherings are prime opportunities for this. These aren't just places to network; they're venues where shared interests and passions come alive.

Since you genuinely enjoy being around these types of people (a prerequisite to determining your segment), attending these events won't feel like a chore. Instead, it's an opportunity to immerse yourself in activities and discussions you love. Whether you're actively invited, or you take the initiative to show up, your genuine interest will shine through. This authenticity not only strengthens existing relationships but also paves the way for new connections. Mark your calendar for important gatherings, and make it a point to be where your segment gathers. Your presence there is both a business strategy and a personal pleasure.

From hosting workshops to attending industry conferences, sponsoring local events, and collaborating with complementary businesses, the avenues to showcase your brand should be vast and varied. It's about being where your audience is and making genuine connections.

#### 4. THOUGHT LEADERSHIP: THE OFT-NEGLECTED MARKETING FREEBIE

In the dynamic world of service-based businesses, thought leadership marketing, when intertwined with strategic public relations, can be transformative. This approach doesn't just amplify your voice; it strategically positions you as a trusted authority in your niche, leveraging various platforms to connect with your audience and beyond.

**1. Hosting a Podcast:** Create a podcast that directly speaks to the interests of your target segment. This medium allows you to explore relevant topics, host industry experts, and offer invaluable insights while solidifying your position as a knowledgeable leader in your field.

**2. Podcast Guesting:** Identify and appear on popular podcasts within your segment. By offering unique perspectives and valuable content, you establish your authority and tap into an existing, engaged audience, broadening your reach.

**3. Active Online Group Participation:** Engage in or establish online communities that cater to your segment, like Facebook groups. Regular interaction, advice sharing, and problem-solving within

these groups can significantly enhance your reputation and recognition.

**4. Contributing to Publications:** Write articles or opinion pieces for esteemed magazines or online platforms frequented by your target audience. This exposure demonstrates your expertise and connects you with a broader audience that values insightful content.

**5. Speaking Engagements:** Seek opportunities to speak at industry conferences, workshops, or webinars. Presenting your knowledge to a live audience builds trust and cements your status as a credible expert in your domain. If you get paid to be there, bonus! Imagine that: getting paid to have your ego stroked and call it marketing.

**6. Collaborative Events:** Partner with businesses or influencers who share your target segment to organize events, workshops, or webinars. Such collaborations allow you to leverage each other's audience, expanding your reach and influence.

**7. Community Engagement:** Actively participate in your community by volunteering or sponsoring local events that align with your segment's values. This enhances your brand visibility and demonstrates your commitment to social responsibility, fostering trust and goodwill.

Thought leadership marketing and effective public relations strategies offer a multifaceted approach to elevate your brand. It's about crafting a compelling narrative and choosing the channels to disseminate it. From podcasts to community involvement, each avenue provides a unique opportunity to connect with your audience, build trust, and establish yourself as a leading voice in your industry. Remember, in thought leadership, it's not just about being seen; it's about being remembered for the value you bring.

## MY FISHING EPIPHANY: A LESSON IN MARKETING

On a sun-drenched day in British Columbia, my family and I embarked on a bike ride along a picturesque river. Amidst the chaos of children tumbling and the occasional scraped knee, a moment of

profound clarity struck me. Along the riverbank, I observed three distinct fishing methods.

First, there was the weekend warrior, knee-deep in the water, with all the right gear and actively catching fish. A few meters away, a young boy, armed with just a rod and bait, diligently worked to reel in a catch. Then, in a swift, graceful motion, a blue heron descended, effortlessly snatching a fish and soaring away. No gear, no bait—just innate skill. Three different strategies, all effectively catching fish.

But here’s the catch: the ideas in this chapter are just that—ideas. The real question is, “What do I need to do in order to be effective?”

As we wrap up this chapter on marketing, it’s evident that the realm of marketing is vast, dynamic, and brimming with potential. At its essence, marketing is about forging genuine connections, understanding our audience, and delivering value in ways that resonate.

## THE MARKETING SUCCESS CYCLE

Previously, we talked about all our experiences, trapped in the Marketing Sucks Cycle. Now we’ve seen the way out. I introduce to you the Marketing Success Cycle. It looks like this:



**1. Need To Market:** The journey begins with acknowledging the essential role marketing plays in reaching a broader audience and growing

the business. This realization is not seen as a burden but an exciting opportunity to connect and expand.

**2. Get Excited:** Inspiration is the next step. Service providers find themselves motivated by the potential of marketing, fueled by success stories from webinars, case studies, and social media. This excitement is about the possibilities that effective marketing can unlock.

**3. Develop A Strategy:** Rather than jumping into action without a plan, the service provider takes a thoughtful approach. They carefully consider and craft a marketing strategy that aligns with their business goals and personal strengths, setting the stage for success.

**4. Get Help:** Understanding the complexities of marketing, the service provider seeks professional assistance. They collaborate with marketing experts, coaches, and vendors to develop resources and implement strategies, ensuring a blend of their vision and professional expertise.

**5. Show Up:** The final stage is where the magic happens. With a solid plan and professional help, the service provider engages in various marketing activities. This brings success and allows them to scale their systems and teams, leading to sustainable growth and a more efficient marketing practice.

This cycle is about transforming the daunting marketing task into a fulfilling and successful aspect of running a business that reaches the right people.

## HOW WILL YOU MARKET YOUR BUSINESS?

As you determine how you will market your practice, remember to blend creativity with authenticity, leverage the tools at your disposal, and never underestimate the power of shared passions and experiences.

Reflecting on my fishing story, it's essential to recognize where you stand. The young boy couldn't wade deep into the river or fly like the

heron. But he had a spot on solid ground and a determination to be where the fish were. Similarly, understanding where your target audience gathers is pivotal. Just as each fish has its own preferred habitat and bait, your audience has specific platforms and content they resonate with. The key is to identify these and tailor your approach accordingly.

In choosing the right marketing strategy for your service-based business, consider what aligns best with your strengths and interests. Whether it's establishing a solid online presence through Digital Marketing, creating memorable client experiences with Remarkable Marketing, building mutually beneficial relationships in Partnership Marketing, connecting over shared interests in Lifestyle Marketing, or positioning yourself as an industry expert through Thought Leadership Marketing, each opportunity offers a chance to do what you love with people you like.

While digital platforms are crucial, the world of marketing is vast and varied. It's about finding the right way to do it to reach the most amount of people *and love every minute of it*.



## 9 THE MARKETING TOOL KIT

**Y**ou've got a clear customer, a clear product, and a tight process; now, you just need to get more clients.

Talking about what you do (and how well you do it) is difficult for everyone. If you've ever felt like your business is one of the world's best kept secrets, you're not alone.

The sad truth that haunts me is that too many great ideas are ignored by the people who need them most.

This is very frustrating when you're convinced that what you've got is better than anything else on the market. If you have what you feel is something the world needs, like a product, a cause, or an idea, I bet you live with a daily anxiety that it's not getting the traction it deserves.

It feels like a fight. Like you have a battle every day—it's you against the world, and because you believe in what you're doing, you're willing to duke it out.

You are doing everything you can to show you're different from your competitors. You're working hard to get noticed, recognized, or funded.

It's not easy. People are hit with thousands of messages every day. How do you stand out? How much harder do you have to work until you make it?

What's worse? The frustration that comes from seeing other people with worse ideas have more success. That's a soul killer.

Imagine how great it would feel if you didn't have to fight for attention. What if you could just show up each day and help people who are eager to work with you? How would things be different if you could just give people what they need, and because you have helped them, they become raving fans of what you do?

They tell everyone. Instead of you having to fight to spread your idea, they spread it for you. That's when you've truly figured out marketing: other people are doing it for you.

## MAKING THE MOST OF EVERY OPPORTUNITY

Opportunities to make an impression can arise in the most unexpected places. Whether it's a chance meeting in a coffee shop, a networking event, or a formal presentation, being prepared to articulate what you do is paramount. This chapter is designed to equip you with the tools you need to always be ready, ensuring you never miss a chance to captivate and connect.

You're going to learn how to put the right words together in three forms:

- **Pitches:** Learn how to harness the potential of a pitch to ignite excitement about your services in any setting.
- **Taglines:** A well-crafted tagline can travel far and wide across the digital landscape, becoming a beacon for your brand.
- **Biography:** Learn the art of biography writing, where the focus isn't just on you but on creating a bridge of empathy and authority with your audience.

By the end of this chapter, you'll have what you need to always be ready to present yourself and your services with clarity and confidence.

### **Why It's So Tough to Talk About What You Do**

Do you suffer from a common expert's dilemma? It's not a physical ailment but rather a communication challenge. It's known as the "curse of knowledge." Lee Lefevre highlighted this well in his book, *The Art of Explanation*.<sup>1</sup>

Essentially, the curse of knowledge means that when you're deeply immersed and skilled in your field, you might find it challenging to explain your expertise in simple, relatable terms for those less familiar. It's like operating at a level 9 or 10 (out of 10) in your industry and then struggling to simplify your message to a level 4 for a layperson.

This becomes particularly problematic when you're trying to talk about your business. It might be over the fence to a neighbor, at an event, or in a sales meeting.

Those moments are golden opportunities to ignite excitement about what you offer.

Over the years, this challenge has been labeled in various ways, but for our purposes, let's refer to it as perfecting your pitch.

## **THE NEED TO TELL OTHERS ABOUT WHAT YOU DO**

At the dawn of commerce, competition was low, and pitching was unnecessary. Each town had a single individual responsible for every aspect of a task. Consider the town's breadmaker; he was the guy you went to when you needed bread. One shoemaker. One blacksmith. There was no need to advertise skills or differentiate. Every role was clear to every townperson.

As more competitors entered the scene and professions diversified, clarity and brevity in communication became essential. We even used elevator rides to seize these opportunities.

Legend has it that, days before I was an adult, people seized the opportunity to talk about their businesses in elevators. That's right. Before people stood nervously silent in elevators, professionals would take advantage of the captive audience inside the elevator by using the time to describe their jobs. What you said about "what you do" during these elevator rides coined the term "elevator pitch." In the time between the 1st and the 18th floors, you had to convey not just what you did but why you were unique and why someone would want to work with you.

While elevator conversations have dwindled, the need for a concise pitch remains. Today, we use pitches at networking events, during public introductions, in webinars, on LinkedIn profiles, and even when joining a Facebook group.

The modern pitch was born out of necessity. As roles became more intricate, explaining one's job became crucial. With rising competition, standing out was imperative. And in an age of dwindling attention spans, brevity became king.

### **What Is the Goal of a Pitch?**

This is the goal: *Raised eyebrows*. We are all so polite these days that we tell everyone their idea is exciting and pretend to understand. This is especially true in Canada, where I'm from. I've learned not to believe what anyone says anymore and just read the eyebrows. If someone says, "That's exciting. How very interesting to hear that," with eyebrows up, you've got them.

If they say, "That's exciting. How very interesting to hear that," but their eyebrows are down, they're lying, and you've confused them.

So, let's discuss how to talk about what you do so that eyebrows go up.

## THE PLUG AND PLAY SYSTEM FOR TALKING ABOUT WHAT YOU DO

I've tried to make this as simple as possible. The system works as a "plug and play" framework where you fill in the blanks based on what you have determined about your segment. For the system to work, you need to be clear in your answers to these questions:

1. How do you describe your ideal client in three or less words?
2. What is the external problem you solve for them?
3. What is the emotion that is triggered by the problem?
4. What is your process for solving the problem?
5. What is the outcome you deliver?
6. Who do they become as a result?

Once you have clarity on those, you can move forward by creating four important resources. They are the following:

1. The formal pitch
2. The informal pitch
3. Your one-liner
4. Your bio

### 1. The Formal Pitch

First impressions are critical. Whether you're at a networking event, a conference, or even in a casual social setting, having a formal pitch at the ready is invaluable. This concise monologue, tailored for presentations and introductions, ensures you present your business in the best light, capturing the essence of what you offer in a succinct manner.

More than just a rehearsed speech, it's your business's elevator pitch, giving listeners a clear and compelling snapshot of what you do. With a formal pitch, you eliminate the risk of stumbling over words or freezing up when put on the spot. It's your safety net, ensuring you always leave a lasting positive impression.

Here's the framework for doing it:

*Too many \_\_\_\_\_ (this is your segment) are \_\_\_\_\_ (the emotional problem) because of \_\_\_\_\_ (the big picture problem that has caused them all this emotion). We have a \_\_\_\_\_ (process) that \_\_\_\_\_ (the outcome you promise) so that \_\_\_\_\_ (the final result they can expect).*

### **Examples of the Framework in Action**

Sometimes, it's nice to see some examples of how we've applied this framework to various industries. I'm happy to share a few to help you. Together with a financial advisor client, my team at Get Clear Consulting created this pitch for his practice:

*"Most Canadians can't get their heads around their financial future. That's why we make the path to wealth clear for them. We've created a financial roadmap that puts your data on a weekly dashboard, giving you peace of mind about your finances."*

Chiropractors were my previous segment, so I helped hundreds of them across North America write a pitch. Many sounded like this:

*"Too many active individuals in Vancouver are hindered by persistent injuries, preventing them from enjoying daily activities. Our treatment plan is tailored to alleviate this pain, enabling them to fully embrace life once again."*

I also own a website-building piece of software. Here's how we pitch that:

*"Most business owners are embarrassed about their website because it looks dated, they can't make changes to it, and they're not getting any leads from it. We have a platform that helps you build an outstanding website so you can capture the attention of your ideal customer and easily add content. If you're looking for a website that you and your clients love, try Get Clear Sites today."*

Finally, my sister-in-law used to own a local clothing company. Here's what we came up with for her:

*"Most people do not know where the clothes they wear came from. So we source our clothing from trusted local vendors to ensure your clothes look and feel amazing."*

Your pitch doesn't have to be cute, clever, or even creative. It just has to be clear and at the forefront of your mind whenever you get asked.

## 2. The Informal Pitch

You're not always going to be invited to give a monologue when you're asked what you do. It's not always appropriate.

There's one other way to share information about your business that I want to share with you. It's called the "informal pitch." You use this in conversations with people at the grocery store, on an airplane, or anywhere you don't want to jump into a monologue when someone asks what you do for a living. I've adapted this from Michael Port in his book, *Book Yourself Solid*.

*"Have you ever noticed how \_\_\_\_\_ (your segment) feel \_\_\_\_\_ (emotional problem) because of \_\_\_\_\_ (physical problem)?"*

*You pause and wait for them to respond with something like, "For sure...I have a brother who..." Then, let them talk for as long as they want. The conversation has room to breathe here.*

*"For the past years, we've developed a \_\_\_\_\_ (your process) that helps \_\_\_\_\_ (the outcome). I've found that when they do this \_\_\_\_\_ (client aspiration)."*

*"Very cool...I'd love to learn more..."*

*"No problem. Why not \_\_\_\_\_ (call to action)?"*

This is how you talk clearly about what you do in a way that doesn't come across as salesy, cheesy, or pushy.

That's how you put together a formal and an informal pitch. Make sure you write your own down, bring it before some people you trust, and get their feedback. Practice it. Tweak it as you go, but make sure you never leave without it. You're going to get asked what you do sometimes shortly. You need to be ready for the precious opportunity to win someone over with the exciting work you do, the problem you solve, and the outcome you deliver.

### 3. Your One-Liner

Imagine if you ran into Elon Musk one day, and after a few minutes, he passed you his phone with the X app open and gave you the chance to say something about your business.

What would you want that message to be?

While Musk may not hand his phone to you, there are numerous other platforms where a concise message is crucial:

- Your website's headline
- Email signatures
- Business cards
- LinkedIn profiles
- Social media posts
- Printed or digital ads

The one-liner is about distilling the essence of your company into a succinct statement.

Note: There's a stark difference between global brands and smaller enterprises. Brands like Nike or Starbucks can afford to be abstract because their logos alone convey their identity. However, for smaller businesses, clarity trumps creativity. Until your brand reaches global recognition, prioritize clarity in your tagline.



## Creating the Perfect One-Liner: A Guide

1. Aim for clarity: Avoid the temptation to be overly clever or flowery. Just keep it simple: I do (solution) for (segment) so that they can (outcome).
2. Aspire and inspire: Your tagline should resonate with your customers' goals and desires.
3. Brevity is key: Think of newspaper headlines; they're short and impactful. Emulate that.
4. Survey the landscape: Review competitors' taglines. They can offer inspiration or even highlight what not to do.
5. Leverage AI: Modern AI software can be a game-changer for generating taglines. These tools can provide a plethora of options, serving as a foundation or even the final choice.

After crafting your tagline, revisit the above points to ensure it aligns. Seek feedback from clients, team members, peers, or mentors.

In conclusion, while a tagline might seem trivial, its impact can be profound when executed correctly. It's a small investment of time that can yield significant dividends in brand recognition and clarity.

## 4. Your Bio

The power of a biography lies not just in telling your story but in forging a connection with your ideal audience. It's a tool that, when used correctly, can bridge the gap between you and potential clients, partners, or followers. The fourth and final tool in your lifestyle marketing arsenal should be a compelling biography.

Here's how to craft one that truly resonates:

### Understanding the Audience of Your Biography

Before you write a word, remember: your biography isn't for you. It's for your audience. It's for that potential client who's trying to understand if you're the right fit, the podcast listener deciding if they should

tune in, or the event attendee wondering if your session is worth their time. Your biography should speak directly to them.

### **The Dual Pillars of a Great Biography: Empathy and Authority**

In crafting a compelling biography, two foundational elements stand out as essential: empathy and authority. These dual pillars not only define your role as a guide but also determine how effectively you connect with and convince your audience.

- **Empathy:** Your biography should resonate with the emotions, challenges, and aspirations of your audience. It's about showcasing that you understand their needs, fears, and desires. This creates a bond, making them feel seen and understood.
- **Authority:** While empathy draws them in, authority assures them you're the right person to listen to. Highlight your credentials, experiences, and achievements to establish credibility.

## **FRAMEWORK FOR CRAFTING THE PERFECT PERSONAL BIO**

Here are the six components of an effective bio. The good news is that you already have them all in place:

### **1. Introduction: Your Connection to the Ideal Client**

Begin by expressing your understanding or connection to the ideal client.

Example: "As someone who is passionate about serving [segment], I've dedicated my career to addressing their unique challenges."

### **2. The Problem You've Observed**

Share the external problem you've seen them face and the emotion it triggers.

*Example: "I've seen many grapple with [an external problem], often leading to feelings of [emotion]. It's a struggle I've become intimately familiar with."*

### **3. Your Solution Approach**

Describe your personal approach or process to solving this problem. You can also list your experience or educational background here.

*Example: "Over the years, I've developed a [specific process] that directly addresses these challenges. I learned it from my time at..."*

### **4. The Outcome You Aim for**

Share the outcome you consistently strive to deliver.

*Example: "My mission has always been to ensure [specific outcome], making a tangible difference in the lives of those I work with."*

### **5. The Transformation You've Witnessed**

Highlight the transformation or change you've seen in those you've helped.

*Example: "Time and again, I've had the privilege of witnessing individuals not just achieve [a specific outcome], but truly evolve into [who they become]."*

### **6. Closing Statement**

Conclude by reflecting on your journey or your future aspirations in the field.

*Example: "Every day, I'm reminded of why I started this journey, and I remain committed to making a difference, one individual at a time."*

## Using the Framework: Two Bio Examples

Sometimes, it's nice to see a framework in action. Let's say you're a mental health counselor. Here's how you could write your bio:

*As someone who resonates with individuals battling anxiety, I've dedicated my career to offering them a safe space and effective strategies.*

*I've encountered countless individuals paralyzed by their fears, often leading to feelings of isolation and despair. It's a struggle I've become intimately familiar with.*

*Over the years, I've honed a holistic counseling approach that prioritizes understanding, validation, and actionable coping mechanisms.*

*My mission has always been to restore hope and equip individuals with the tools they need to navigate life's challenges.*

*Time and again, I've been humbled to witness my clients not just manage their anxiety but truly reclaim their joy and confidence.*

*Every day, I'm reminded of the profound impact of empathy and understanding, and I remain committed to being a beacon of hope for all who seek my guidance.*

Here's another example from a financial advisor:

*With a passion for helping young families navigate the complexities of financial planning, I've dedicated my career to ensuring they build a secure future.*

*I've met countless families overwhelmed by the myriad of investment options and the looming uncertainty of future expenses, often leading to feelings of stress and apprehension. It's a challenge I've come to understand profoundly.*

*Over the years, I've cultivated a comprehensive financial planning approach that demystifies investments, savings, and future planning, making it accessible and actionable for every family.*

*My primary goal has always been to empower families to achieve financial independence, ensuring they can comfortably meet life's milestones, be it their child's education, a dream home, or a serene retirement.*

*Time and again, I've been privileged to witness families transition from financial uncertainty to a place of confidence and clarity, ready to embrace their future with optimism.*

*Every day, I'm inspired by the dreams and aspirations of the families I work with. My commitment remains unwavering: to guide, educate, and support them in their financial journey, every step of the way.*

## SOME NEXT STEPS

Before we wrap up this chapter, here are actionable steps to ensure your messaging remains impactful and aligned with your brand's evolution:

1. Revisit and refine your formal and informal pitches, ensuring they resonate with your target audience.
2. Evaluate your tagline's effectiveness. Does it truly capture your brand's essence?
3. Continuously update your biography, ensuring it remains a true reflection of your journey, expertise, and the value you bring.

## CONCLUSION

Let's reflect on the invaluable tools we've equipped ourselves with. In the realm of professional services, the ability to articulate our value proposition is not just a skill; it's a necessity.

We've recognized that a well-delivered pitch isn't merely about sharing information; it's about sparking excitement and curiosity about our offerings.

Beyond just catchy phrases, taglines serve as our digital footprints, leaving lasting impressions across the vast expanse of the internet.

We've discovered the art of biography writing, understanding that it's not a self-centered narrative but a bridge built on empathy and authority to connect with our audience.

Remember, the tools and techniques discussed in this chapter are dynamic. As you grow and evolve in your profession, so should your pitch, tagline, and biography. Always be prepared, and seize every opportunity to present yourself and your services with unwavering confidence.

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1. Lefever, L. (2012). *The Art of Explanation*. Wiley.

## 10 BUILD A LEGACY PRACTICE AROUND THE FOUR GREAT FREEDOMS

### WORK IS A DRAG FOR SO MANY, BUT THAT WON'T BE YOU

In the quiet corridors of our minds, many of us grapple with a silent yearning, a subtle discontent, echoing Henry David Thoreau's observation that "Most men lead lives of quiet desperation." But what if there was a way to break free from this silent struggle? What if you could craft a career that not only brings prosperity but also joy, purpose, and fulfillment? A career where you don't merely exist but truly thrive?

This chapter will illuminate the path to a rewarding career spent serving a segment. It will be one where you're not bound by the mundane but are propelled by passion and purpose. The concept of segmentology, as we've explored in previous modules, is not just about business strategies; it's about crafting a life where work becomes an extension of our passions. After all, considering we dedicate a significant chunk of our lives to our profession, shouldn't we ensure it's something we genuinely love?

In this final chapter, we'll introduce you to the guiding stars of a fulfilling professional life: The four great freedoms. These freedoms—time, money, relationships, and purpose—are not just objectives to aim for; they are the pillars upon which you can build a legacy practice.

Building a legacy is not a sprint; it's a marathon. And with the right tools, strategies, and mindset, you're not just running; you're soaring.

## THE FOUR GREAT FREEDOMS

Like thousands of other entrepreneurs across North America, I have had the privilege of being taught by Dan Sullivan, the founder of Strategic Coach. Dan is a treasure trove of tools and resources to help me. Most importantly, it was Dan who inspired me with how attainable it is to experience the four key freedoms we can achieve through our practices. These freedoms include the following:

- **Freedom of time:** The ability to control and manage one's own time, allowing entrepreneurs to allocate their time more effectively and efficiently. This freedom lets them focus on what truly matters in their personal and professional lives.
- **Freedom of money:** Financial independence and stability, providing entrepreneurs with the resources they need to invest in their businesses and personal lives. This freedom allows them to make decisions based on their values and priorities rather than being driven solely by financial concerns.
- **Freedom of relationship:** The ability to choose and cultivate relationships with clients, team members, and partners who align with the entrepreneur's values and vision. This freedom helps create a supportive network and fosters collaboration and mutual growth.
- **Freedom of purpose:** Pursuing a passion or purpose-driven business allows entrepreneurs to make a meaningful impact on the world and find fulfillment in their work. This freedom helps inspire innovation and long-term success.



The journey of entrepreneurship is not just about profits and growth; it's about crafting a life of significance and fulfillment. Dan Sullivan's teachings have illuminated the path for many, including myself, showcasing that the four freedoms are not just aspirational goals but tangible realities. For every service-based professional reading this, know that these freedoms are not reserved for a select few. They are attainable for anyone willing to embrace the journey with passion, purpose, and persistence. Whether you're yearning for control over your time, financial independence, enriching relationships, or a deeper sense of purpose, remember that these freedoms are within your grasp. Let them be your guiding light, propelling you towards a practice that doesn't just succeed but truly thrives. Embrace the possibilities, for a life of unparalleled freedom and fulfillment awaits you.

## SEGMENTOLOGY: THE ULTIMATE GAME OF BUSINESS MASTERY

Imagine stepping into the world of a video game where the objective is to build an outstanding practice. Welcome to segmentology, a game with 100 intricate levels, each designed to test your skills, knowledge, and determination.

Just like in any video game, the initial levels serve as a training ground. They introduce you to the basics, helping you understand the core principles of your practice. But don't be fooled by the early stages; while they may seem straightforward, they lay the foundation for the challenges ahead.

As you progress, the levels become more intricate. The challenges aren't just about overcoming obstacles but also about strategizing, innovating, and adapting. You'll encounter scenarios that require you to think on your feet, make quick decisions, and sometimes even rethink your entire approach.

But here's the beauty of segmentology: with each level you conquer, you're not just moving closer to the end goal, but you're also acquiring skills, insights, and experiences that make you better equipped for the subsequent stages. The game mirrors the journey of building a prac-

tice. It starts simple, but as you delve deeper, the complexities of the business world unfold.

However, remember this: every video game, no matter how challenging, is designed to be beaten. With persistence, strategy, and a willingness to learn from mistakes, you can navigate the intricacies of segmentology. And when you reach that 100th level, the sense of accomplishment will be unparalleled, for you wouldn't have just beaten a game; you'd have mastered the art of building a legacy practice.

## THE NOBLE PURSUIT OF SEGMENTOLOGY: CRAFTING GENUINE CONNECTIONS

At its core, segmentology is not just a business strategy; it's a pursuit of one of the most fundamental human desires: connection. As humans, we are inherently social beings. We thrive on interactions, seek understanding, and yearn to be understood. We are driven by the need to belong, to find our tribe, and to connect with others on a profound level.

While the term "segmentation" might initially sound divisive, it's quite the opposite. It's about identifying that specific group of people with whom you can forge the deepest connections. It's about recognizing that in a world teeming with diverse needs and desires, there's a particular group whose challenges you understand best and whose problems you're most passionate about solving.

Segmentology offers hope. It presents the idea that, in the vast expanse of the market, there's a niche, a segment, where genuine connections await. It's not about isolating oneself but about finding that space where your skills, passion, and values align perfectly with the needs of a specific group.

By focusing on a segment, you're not just targeting a market; you're reaching out to individuals. You're saying, "I understand you. I know your challenges, and I'm here to help." This approach transforms busi-

nesses from mere commercial entities into platforms of genuine human connection.

Segmentology is a call to service. It's about making the world a better place, one segment at a time. By dedicating yourself to solving the unique problems of your segment, you're contributing to a larger purpose. You're creating ripples of positive change, which, when combined with the efforts of others, can lead to a wave of global betterment.

In essence, segmentology is a reminder that business, at its best, is about people. It's about connecting, serving, and enriching lives. It's a noble pursuit, beckoning us to look beyond profits and see the profound human connections that lie at the heart of every successful venture.

## SEGMENTOLOGY AND THE PURSUIT OF HAPPINESS: THE POWER OF CONNECTION

A groundbreaking study from Harvard University, one of the most comprehensive longitudinal studies on happiness, has shed light on the profound impact of human connections on our well-being. Spanning over 80 years and encompassing multiple generations, the Harvard Study of Adult Development has consistently found that the happiest and healthiest individuals are those who maintain close, meaningful relationships with others. [Reference: "The Harvard Study of Adult Development," Harvard Medical School].

The study's findings underscore a simple yet profound truth: our happiness is inextricably linked to our relationships. It's not wealth, fame, or success that guarantees a fulfilling life, but the depth and quality of our connections with others.

This is where the beauty of segmentology shines. At first glance, it might seem like a business strategy focused on market niches. But delve deeper, and you'll find it's a pathway to genuine human connection. By identifying and serving a specific segment, you're not just targeting a

demographic; you're building relationships with individuals who share common challenges, aspirations, and values. You're creating a community where you and your clients understand and support one another.

Segmentology, in essence, provides a platform for these meaningful connections. By understanding and addressing the unique needs of your segment, you're forging bonds based on trust, empathy, and mutual respect. These are the very connections that the Harvard study identified as keys to happiness.

In business, where transactions often take precedence over relationships, segmentology offers a refreshing perspective. It reminds us that beyond the products, services, and profits, it's the human connections that truly matter. By embracing segmentology, you're not just building a successful business; you're cultivating relationships that enrich lives, including your own, and in doing so, you're journeying toward the happiness that we all seek.

## WHAT TO DO IF IT'S NOT WORKING OUT

You can't think your way into this kind of success. Segmentology is not a mere academic exercise; it's not something you can simply theorize or intellectualize. True mastery in segmentology comes from immersion, from genuinely experiencing and engaging with your chosen segment. It's a hands-on endeavor where real-world interactions, feedback, and experiences shape your understanding and approach.

It's great to have a plan, but no plan is ever executed without unplanned twists, turns, and unexpected detours. I've found that it's the bumps along the way that often lead to the most profound growth and understanding.

Take the story of Mark Ewert, for instance. Mark is one of the most successful financial advisors in Canada. Mark approached segmentation with a clear plan for serving doctors. He soon realized that he didn't love working in this segment and that everyone seemed to also be targeting them. Competition was tough, and signing up new clients was even tougher. Mark pivoted to steelworkers in his town, where he

found he could solve a problem for them that was appreciated and scalable. Shifting away from doctors wasn't a sign of defeat but a testament to adaptability and recognizing when a change in direction is necessary.

Challenges and setbacks are not only inevitable but also invaluable. They provide us with opportunities to reassess, learn, and adapt.

In the face of adversity, it's essential to remember that every experience, whether deemed a "success" or "failure", contributes to our growth. Personal growth is a hallmark of a meaningful career. Each challenge faced, and each lesson learned strengthens our resolve and enriches our story. And in that process of continuous learning and evolving, we find a reward that's often overlooked: the profound satisfaction of having true character and resilience. Even if things aren't turning out as envisioned, take solace in the knowledge that you're growing, evolving, and becoming stronger with each step. That, in itself, is a victory worth celebrating.

## CONCLUSION - SARAH'S DANCE WITH THE FOUR FREEDOMS

As we close this chapter, I encourage you to read the story of a medical professional who mastered the art and science of segmentology. Sarah felt like another face in a crowded room as a young physiotherapist. But when she embraced segmentology, her eyes were opened to the power of a niche. She had all kinds of ideas at first. Helping active moms, high school athletes, or golfers. All could've worked, but things started picking up for Sarah when word of mouth began to spread about her in the local dance community. She started working closely with teams, sponsoring competitions, and being invited into the lives of the families (one family represented five people).

With her newfound success, the four freedoms began manifesting in her life:

*Freedom of time:* No longer bogged down by the demands of generalist practice, Sarah could set her hours. This meant more time for her

passions. She rekindled her love for ballet, attending classes twice a week. Weekends were spent hiking with her family or indulging in her newfound hobby, pottery.

*Freedom of money:* Financial stability allowed Sarah to reinvest in her business and her personal dreams. She sponsored local dance events, took her family on dream vacations, and even started a scholarship for young dancers in need.

*Freedom of relationship:* Working with dancers meant like-minded individuals constantly surrounded Sarah. This led to deep, meaningful connections. She became a mentor to many, and her social circle expanded to include choreographers, dance teachers, and performers. Her personal and professional lives became beautifully intertwined.

*Freedom of purpose:* Sarah felt a deep sense of purpose every day. She wasn't just healing physical wounds but also nurturing the dreams of many dancers. This fulfillment spilled over into her personal life, making her more present and joyful in every moment.

Sarah's days now have a harmonious blend of work and play. Mornings might involve treating a renowned ballerina, while evenings could be spent watching her daughter's dance recital or enjoying a quiet dinner with her husband at their favorite restaurant.

Sarah's journey is a testament to the transformative power of segmentology. By aligning her profession with her passion, she didn't just build a successful practice; she crafted a life filled with joy, purpose, and the freedom to dance to her own rhythm.

# CONCLUSION – YOU’VE NOW BECOME A SEGMENTOLOGIST

## THE HAPPY ENDING FOR ALEX’S STORY

After witnessing the gradual disintegration of his financial advisory practice, Alex stumbled upon a book that promised a new perspective on scaling a practice with a clear market segment. Intrigued and desperate for a change, he integrated the principles of focusing on a clearly defined market segment.

Alex took a step back and revisited the drawing board with a new lens, focusing on the principles of segmentology. He analyzed his existing clientele, identifying a segment where his practice had succeeded and genuinely enjoyed working with. He defined his segment as “young professionals eager to navigate the complexities of building wealth while managing their careers.” He was uniquely positioned to serve them and emotionally drawn to this group. Alex realized that his team had the ability to craft innovative, easy to understand, entrepreneur-friendly investment strategies that appealed to this segment.

He began to reimagine his practice. Services were tailored to solve the problems that young professionals face. The marketing messages to speak directly to their needs, aspirations, and pain points followed

easily. His team developed specialized packages that addressed their unique financial challenges, such as managing student loans, investing in the early stages of their career, and planning for a financially secure future.

Alex rebranded his practice, emphasizing his newfound focus and expertise in serving young, incorporated professionals in his area. His marketing messages became clear, concise, and resonant with this segment. They understood him because he understood them. Alex positioned his practice as the go-to financial advisor for young professionals seeking to build a robust financial future.

Internally, operations became streamlined and focused. The team, now with a clear direction, worked cohesively, developing and enhancing their expertise in addressing the specific needs of their niche. They created content, workshops, and webinars tailored to their segment, further establishing their authority and expertise.

Clients began to notice the shift – the newfound clarity in communication, the specialized services, and the deep understanding of their unique challenges. Satisfaction soared, positive reviews started flowing in, and word-of-mouth referrals grew. Once on the brink of collapse, Alex's practice started to blossom, becoming a beacon for young professionals nationwide seeking financial advisory.

Alex's story transformed from a cautionary tale into an inspirational journey of rediscovery, focus, and success, all thanks to the power of choosing and expertly serving a clear market segment. His practice now stands not as a generalist but as a specialist, celebrated and sought after by those he and his team are most passionate about serving. In this transformation, Alex found financial success and a deeper, more meaningful connection with his work and clients.

Alex is a perfect bearer of the title “Segmentologist”. Like most of us, he struggled with the consequences of being a generalist. But with the right help, he figured it out and now enjoys the benefits of segmentology applied.



## YOU’RE A SEGMENTOLOGIST TOO - YOU MADE IT

Way to go. You made it to the end of the book. Most folks don’t even get past the introduction of a book, but here you are, defying the odds. I’d say you deserve a medal or at least a self-congratulatory pat on the back. Remember, it’s not just about finishing the book; it’s about applying what you’ve learned.

In the journey of building a thriving practice, envisioning the path forward as a ladder can be immensely helpful. Each rung represents a critical step, and as you ascend, you not only gain a clearer perspective but also gather the tools and insights necessary for the next phase. Let’s delve into the segmentology ladder.

**Your Ideal Client:** This is the foundation of your ladder. Before you can offer solutions or market your services, you need to identify who you’re serving. Who is your ideal client? What are their needs, aspirations, and challenges? By understanding your target segment, you can tailor your services to meet their specific needs.

**Your Solution:** Once you’ve identified your “Who,” the next step is defining the unique solution you bring. What sets you apart? How do you address the specific challenges faced by your target segment?

**Your Process:** With a clear solution in mind, you’ll need a streamlined process to deliver it consistently. This involves mapping out each service delivery step, ensuring clients have a seamless and effective experience.

**Your Team:** You can’t do everything alone as your practice grows. Building a team is crucial. This isn’t just about hiring staff but ensuring that each team member aligns with your vision and can uphold the standards of your practice.

**Your Marketing:** With the foundational elements, it’s time to inform the world about your services. Effective marketing is about more than just promotion; it’s about connecting with your target segment meaningfully, building trust, and establishing your brand.

**Your Rewarding Lifestyle Practice:** The pinnacle of the segmentology ladder. Here, all the previous steps coalesce into a practice that serves your clients and rewards you. This is where you enjoy the fruits of your labor, achieving a balance between a successful professional life and a fulfilling personal life.

As you progress to the top of the segmentology ladder, each step builds upon the last. By the time you reach the top, you have a robust, sustainable, and rewarding practice that stands the test of time by the time you reach the top.

# ACKNOWLEDGMENTS

It takes a village to write a book. I want to thank those who helped make this one possible.

To Hayley Morrison, your ongoing patience and support to my endless AI musings and half-baked “what do you think about this...” ideas have been so helpful. I know AI is a bit of a stretch for you but you listened anyway. Thank you for being my sounding board and for your insights.

Gavin Dew, your insightful feedback on the draft was invaluable. Your contributions truly elevated this book to a new level. Thank you for your wisdom and guidance.

Dr. Johann Roduit, for the countless conversations, the endless ideas, and the introduction to so many tools – you're a wizard in the AI world. Your genius and friendship has been such a blessing.

Jeremy Kyle, your belief in me and your encouragement to share my learnings with the world has been a tremendous source of motivation to get this book done. Thank you for being a constant friend.

Justin Chevrier, your meticulous editing has been instrumental in shaping this book. Your tireless efforts have truly brought my thoughts and words together.

Dr. William Morgan, thank you for giving me the opportunity to share my insights and for your unwavering encouragement. Your leadership in the chiropractic community is inspiring.

Joshua Lim, your incredible tool has opened my eyes to the possibilities of AI. Thank you for brandmessage.ai and for showing the practical magic of AI.

Matt Morrison and Phil Schalm, your innovative work with the Clinic Sites platform using AI is nothing short of remarkable. It's been an eye-opener to what AI can achieve. Kudos for your excellent work.

Eddie Plenert, our many walks and your encouragement to continue writing have been invaluable. Your enthusiasm for AI's potential keeps me inspired.

Garnett Zapf, David Hill and Jordan Hynd, your companionship as fellow dads and our discussions about AI have not only made me a better person but also a better father and writer. I'm grateful for your friendship and insights.

Tim Dumas, my amazing coach, thank you for helping me get clarity on what I'm supposed to be doing with my life and time.

Grant Strachan, it's been a joy to talk about AI with you. I hope you continue to leverage the opportunity to grow your practice.

I'm thankful for Brent Groen, Ian Angell and the business faculty at Trinity Western University who taught me about the intersection of AI and business during my MBA program.

Dr. Bobby Maybee, I'm grateful for the chance you gave me to present my work for the first time. Your passion for innovation and leadership is contagious and inspiring.

To the members of the FTCA. It's been a joy to serve your community. Thanks for your openness to explore how AI can help you build a faster, smarter and more efficient practice.

Finally, to those who continue to work hard and free me up to write books, I'm thankful. I'm thinking of Daniel Goertz, Joshua Redekop, and Jonathon Vogel. Your efforts and creativity are so appreciated.

Thanks to those who were willing to take the kids while I spent hours on my laptop: Daryl Goertz, Diane Goertz, and D.J. Groen. You are a gift to us all.

To my parents who modelled that being an entrepreneur is a cool and crazy way to do it - to take risks and try new things, I thank you and love you dearly.

To all the small business owners who keep our economy going, our people employed and work so hard to build a great life for their families - I acknowledge you. I hope AI can be another one of the tools you use to make your business just a little better so that our lives can be a little better.



## ABOUT THE AUTHOR

Jon Morrison knows the ins and outs of the struggles and successes of entrepreneurship. His first venture, Clinic Sites, not only thrived while serving a clearly defined segment (clinic owners) but also experienced a successful exit.

Now, as the Founder and Lead Consultant of Get Clear Consulting, Jon channels his passion for equipping small business owners by teaching them about the power of segmentology.

Holding both an MA (Biola University) and MBA (Trinity Western University), and with a rich educational stint at Oxford University, Jon combines academic knowledge with real-world experience.

He's shared his expertise on stages like TEDx and at conferences all over North America.

In 2021, he penned the book "Now Start With Who," offering readers a tangible approach to customer-centric business strategies.

Jon lives in Abbotsford, BC, with his wife and three daughters. He balances his entrepreneurial pursuits with a fulfilling family life and service to his community (like being a die-hard hockey coach).

For more insights and strategies from Jon, visit [segmentology.ca](https://segmentology.ca).



