ASSEMBLE YOUR STRATEGY

Your Path to Purposeful Growth

*A companion workbook to the
Map, Measure, and Master Workshop*

INTRODUCTION

This workshop equips business owners with the tools to build a flexible, data-driven marketing strategy for 2025.

Through a blend of insights, hands-on exercises, and powerful frameworks like Key Performance Indicators (KPIs) tracking, you'll start shaping a plan for purposeful growth.

By the end, you'll leave with a strategy you can refine and adapt to drive results all year long.

MEET THE FACILITATOR

Nicole Kurtz is an artist and entrepreneur based in Akron, Ohio, and the founder of Aducate Digital. She simplifies marketing for small business owners, offering strategic guidance to help them grow sustainably.

With expertise in instructional design, Nicole transforms complex ideas into engaging, easy-to-use resources that drive impactful results.

Learn more about her services at
www.AducateDigital.com
Nicole@AducateDigital.com

AGENDA

OBJECTIVES

- **Build a Flexible Strategy:** Follow a structured approach to developing a marketing strategy that can adapt to change.
- **Track, Measure, and Adjust:** Learn methods to monitor progress, measure success, and refine goals through regular reviews.
- **Apply Core Marketing Principles:** Put foundational marketing concepts into practice as you plan for specific 2025 goals.
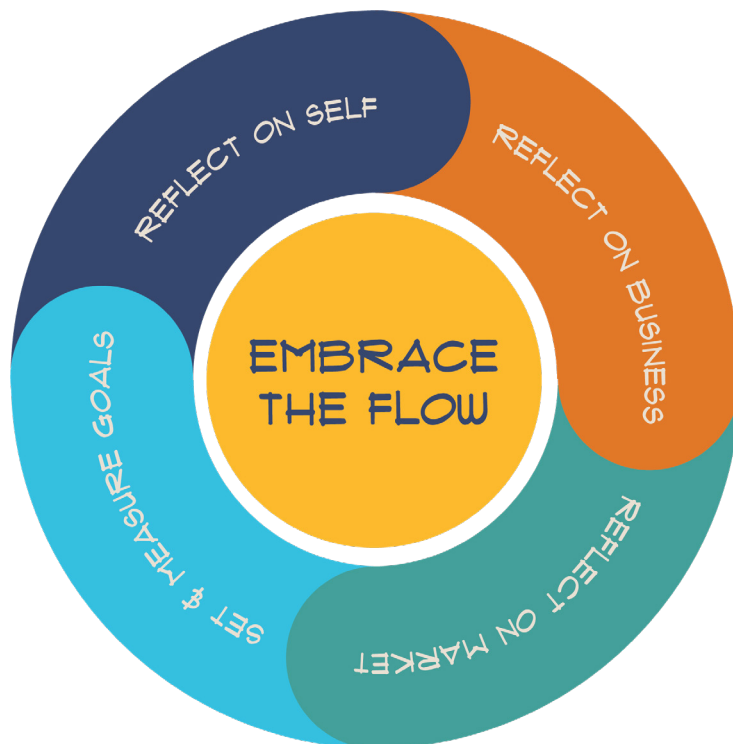
GOALS

- **Develop a 2025 Project Plan:** Outline a clear project for the coming year, complete with specific metrics to track your progress.
- **Establish a Review Cycle:** Build a sustainable process for regular reviews, allowing you to adapt and refine your strategy over time.
- **Strengthen Strategic Skills:** Enhance your ability to think strategically and support long-term growth for your business.

EMBRACE THE FLOW OF CONTINUOUS GROWTH

This workshop encourages a cycle of reflection at every stage so you can set meaningful goals and adapt as you go. Each step builds on the last, creating a dynamic path toward purposeful growth.

- **Reflect on Self:** Start by assessing your strengths, recent achievements, and personal goals as a business owner.

- **Reflect on Business:** Examine your current business strategies and operations to identify areas of growth and improvement.

- **Reflect on the Market:** Gain insights on how to adapt your approach by understanding market trends and customer needs.

- **Set and Measure Goals:** Establish clear, measurable goals and integrate regular reflections to adjust and track your progress.
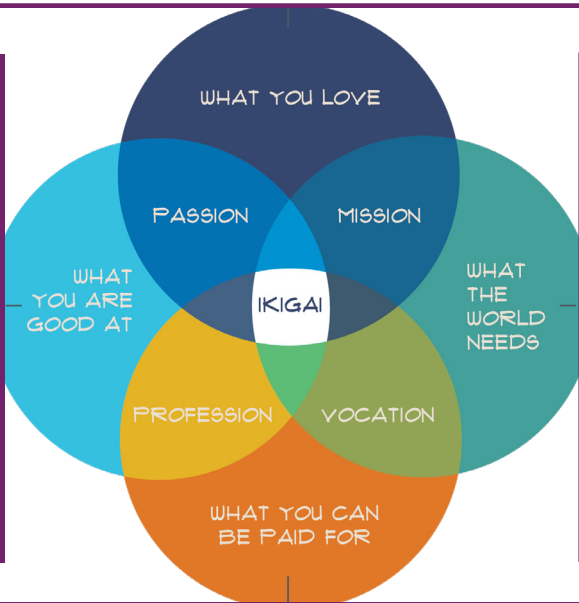
BUSINESS HEALTH CHECK

DISCOVER YOUR IKIGAI

Ikigai is a Japanese concept meaning "reason for being." It represents the intersection of what you love, what you're good at, what the world needs, and what you can be paid for. Defining your ikigai helps you align your passions and strengths with a purpose-driven path, setting a solid foundation for personal fulfillment and business growth. By clarifying these elements, you'll be better equipped to make strategic decisions that feel authentic and sustainable.

In each section of the Ikigai diagram, write down your thoughts in response to the following prompts:
- **What You Love:** List the activities, skills, or topics that excite and motivate you.
- **What You're Good At:** Identify your skills and areas of expertise.
- **What the World Needs:** Consider the needs or gaps in your industry or community that you could address.
- **What You Can Be Paid For:** Reflect on how you can monetize your skills and passions to create value.

Once you've filled in each area, look at the overlaps to find your ikigai: your unique value and purpose.

WHAT YOU LOVE

PASSION   MISSION

WHAT YOU ARE GOOD AT   IKIGAI   WHAT THE WORLD NEEDS

PROFESSION   VOCATION

WHAT YOU CAN BE PAID FOR

DRAFT YOUR IKIGAI STATEMENT IN THE SPACE BELOW

5

How does this align with your business vision?

IS YOUR BUSINESS EXPERIENCING ANY OF THESE SYMPTOMS?

Review the symptoms list in the chart below. Circle the areas causing your business pain or discomfort.

Sales & Market Share
- The lungs provide air, representing how sales and market share keep the business breathing and expanding.
- **Symptoms:** Falling sales volume and/or market share; failed product launches; high rate of returns.

Time Management
- The hands and arms represent action, control, and execution; the physical capacity to manage time, tasks, and deadlines.
- **Symptoms:** Poor task prioritization, missed deadlines, inefficiency in completing key tasks, burnout from overwork.

Customer Service
- The feet support and move the business forward, representing the importance of customer satisfaction and retention.
- **Symptoms:** Loss of key customers or contracts; low/declining levels of customer service.

Strategic Planning
- The brain of the business, overseeing vision, direction, and strategy.
- **Symptoms:** Lack of clear/viable senior leadership succession strategy; lack of review process/inability to manage KPIs.

Employee & Leadership
- The heart pumps life into the business, symbolizing the importance of healthy relationships with the team.
- **Symptoms:** High turnover of key employees/leadership; low employee morale; internal disputes.

Financial & Cash Flow
- The digestive system processes resources and sustains energy, much like how cash flow is critical for business health.
- **Symptoms:** Cash flow surprises; declining profit margins.
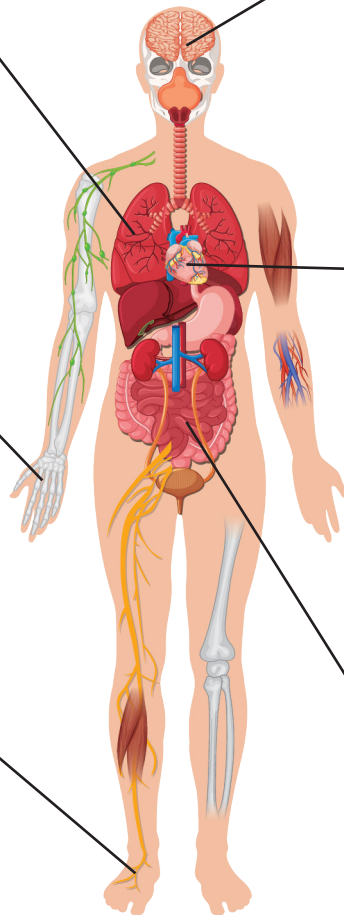
HOW PAINFUL ARE THESE STATEMENTS?

Review each statement. Use the pain scale to indicate the severity by shading in the appropriate block.

I feel confident when to make personnel changes.

I apply the best people to the biggest problem, rather than the greatest opportunity.

I'd rather just do it myself.

IS YOUR BUSINESS A LIFESTYLE OR ENTERPRISE VENTURE?

Understanding whether your business operates as a lifestyle or enterprise business helps you set intentional goals and focus your efforts. This activity will help your assessment.

Lifestyle Business: A business designed to support a specific income level or work-life balance, often run by a sole proprietor or a small team. The focus is on manageable growth, maintaining flexibility, and prioritizing personal satisfaction.

Enterprise Business: A business structured for larger-scale growth, often with a more complex team and operational needs. The focus is on scalability, profitability, and long-term sustainability.

LIFESTYLE	ENTERPRISE

BUSINESS PLANNING

In the pie chart, **shade** the areas where you feel confident and have a strong handle (your strengths). Put a **star** next to areas that require your attention in 2025 (your weaknesses).

Lifestyle pie chart: OPERATIONS, SALES & MARKETING, FINANCIAL

Enterprise pie chart: MARKETING, FINANCIAL, ORG., HR, OTHER, OEPRATIONS

WHO'S IN YOUR CORNER

There are only so many hours in the day and it's impossible to do everything on your own. **Circle** the professionals supporting your daily operations.

Lifestyle: Bookkeeper, Accountant, Mentor, Referral Partner(s), Other:

Enterprise: Bookkeeper, Accountant, Insurance / Compliance Advisor, Lawyer, Mentor, Referral Partner(s), Employee(s), Investor / Partner

MARKETING TACTICS

When evaluating marketing and sales, **shade** in the tools and strategies you currently excel in and put a **star** next to the ones you'd like to improve or expand next year.

Lifestyle pie chart: WEBSITE, SOCIAL, KPI

Enterprise pie chart: WEBSITE, SOCIAL, NEWSLETTERS, KPI, PPC, SEO

GOAL SETTING: OPPORTUNITIES & THREATS

Now that you've identified your strengths and areas of focus, it's time to look ahead and set purposeful goals for the upcoming year.

	LIFESTYLE	ENTERPRISE
OPPORTUNITIES		
Review the list of example opportunities. **Circle** one or two that align with your business needs.	**Operations:** • Improve the onboarding process for clients • Expand service offerings **Sales/Marketing:** • Build stronger referral partnerships • Enhance social media presence **Financials:** • Establish a monthly budgeting routine to track expenses • Save 10% of monthly revenue to build a financial buffer	**Operations:** • Create workflows to save time and make daily tasks easier for the team by Q2 **Sales/Marketing:** • Use analytics software to track campaigns and ads. Make a plan to improve results by end of year **Financials:** • Review spending and find ways to lower costs by 10% while keeping high-quality service by mid-year **Organizational:** • Set up an employee training program to help new team members learn faster and stay longer by Q3
THREATS		
Identify potential challenges and **underline** the ones you want to actively address.	• Over-reliance on a single client or revenue source • Difficulty staying consistent with marketing efforts • Burnout from doing everything solo • Lack of a formalized business plan • Inadequate financial reserves for unexpected expenses • Struggling to set and maintain boundaries with clients	• Employee turnover or lack of engagement • Inefficient processes causing delays or errors • Regulatory compliance or legal risks • Growing too quickly without proper infrastructure • Dependence on outdated technology • Cybersecurity threats or data breaches

DRAFT YOUR GOAL STATEMENT

Using the opportunities and threats you've selected, write a clear and purposeful goal statement that outlines your next steps. *EX: "By mid-year, I will improve customer retention by creating a referral program and streamlining the client onboarding process."*

None of the options match your need? Refer to the goals list on the next page for additional inspiration.

LIFESTYLE	ENTERPRISE
Operations: • Make client management easier by automating appointment scheduling and reminders by Q# • Organize inventory or supplies better to save two hours a week by Q# **Sales/Marketing:** • Create a simple calendar to post regularly on social media and get five new inquiries each month • Host a workshop or event every three months to bring in 10 new leads and grow your local presence **Financials:** • Check and update your bookkeeping to make sure cash flow is accurate by the end of Q# • Review your budget every month to keep spending on track with your income goals by Q# **Referral Partners:** • Build relationships with three new referral sources, like local businesses or industry experts, by mid-year • Start a rewards program to thank clients who recommend your services by mid-year **Customer Experience:** • Create a welcome packet for new clients to make onboarding smooth and improve satisfaction • Add a survey after service to get feedback and make one improvement by Q#	**Operations:** • Set up a Customer Relationship Management (CRM) system to track leads better and respond X% faster in x months • Move to cloud-based tools to help your team work together and finish projects faster by Q# **Sales/Marketing:** • Start an Search Engine Optimization (SEO) and Pay-Per-Click (PPC) ad campaign to get X% more online leads by the end of the year • Create email campaigns for three different customer groups to improve sales by X% **Financials:** • Review your budget mid-year to find ways to save money and increase profit by X% • Use a cash flow tool to plan for gaps and save money for unexpected costs **Organizational Planning:** • Create a training program to help new employees get started faster and stay longer by Q# • Hold a workshop for managers to improve their leadership skills by Q# **Customer Experience:** • Set up a feedback system to learn what customers think and make improvements by Q# • Use CRM tools to personalize how you interact with customers and keep 15% more clients by Q# **Exit Planning:** • Make a plan to replace key leaders so your business can keep running smoothly in the future

EXPLORING YOUR VALUES AND MOTIVATIONS

BANK Profiles

BANK is a personality and communication framework that helps you understand core values and motivations. It categorizes people into four primary profiles: **Blueprint, Action, Nurture, and Knowledge.**

Understanding your BANK profile provides insight into how you make decisions, communicate, and approach challenges. By recognizing these tendencies, you can align your goals and strategies with what truly matters to you.

Scan the code to learn more about BANK profiles

Think about how your BANK profile shapes your business decisions. For example, a Blueprint-driven business owner might prioritize long-term planning and processes, while an Action-oriented owner might focus on rapid growth and bold initiatives.

BLUEPRINT | MOTIVATED BY:

STABILITY
STRUCTURE
ORDER
SYSTEMS
PROCESSES
PREDICTABILITY
RULES
TRADITION

ACTION | MOTIVATED BY:

EXCITEMENT
ACIEVEMENT
QUICK RESULTS
FREEDOM
FLEXIBILITY
SPONTANEITY
OPPORTUNITY
COMPETITON

NURTURE | MOTIVATED BY:

RELATIONSHIPS
COLLABORATION
MAKING A POSITIVE IMPACT
AUTHENTICITY
PERSONAL GROWTH
COMMUNITY
ETHICS
HARMONY

KNOWLEDGE | MOTIVATED BY:

LEARNING
INNOVATION
EXPERTISE
LOGIC
UNDERSTANDING THE "WHY"
RESEARCH AND DEVELOPMENT
THE BIG PICTURE
ACCURACY

IDENTIFY YOUR BANK PROFILE

Review the 4 BANK profiles. Using the space below, put them in order of priority for yourself.

Now think about your Target Audience. Their motivations and decision-making may differ from yours. Use the space below to identify their BANK profile.

How could BANK profiles influence the way your audience responds to your services, marketing, or communication style?

UNDERSTANDING YOUR ROLE AS A BUSINESS OWNER

The eMyth Framework

The eMyth framework highlights the three key roles every business owner balances: The Technician, The Manager, and The Entrepreneur. As a business owner, you likely shift between these roles.

Learn how to work on the business, not in it. Understanding where your strengths lie can help you grow more intentionally.
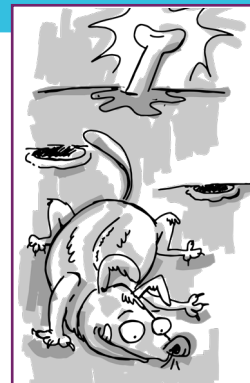
Scan the code to learn more about the eMyth framwork

Technician: The Doer. Focused on the hands-on work and technical skills that drive your business.

Manager: The Organizer. Handles planning, processes, and keeping the business running smoothly.

Entrepreneur: The Visionary. Sets the long-term goals, identifies opportunities, and drives innovation.

Entrepreneur

Technician   Manager
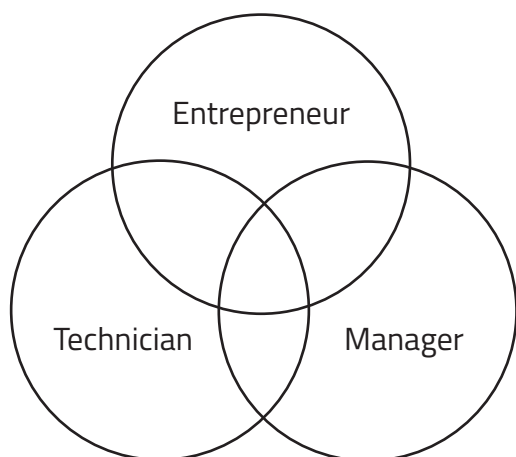
Review the descriptions of each role. Then, **shade** in the role where you feel most confident and capable. These are your strengths. **Underline** the role where you feel less confident or need to develop further. These are areas to focus on improving.

Reflect on Your Leadership Style
Think about how your values and motivations (from the BANK exercise) influence your approach to these roles. For example:

- If you ranked Blueprint highly, you might feel strongest as a Manager.
- If Action is a priority, you might naturally excel as an Entrepreneur.
- If Nurture leads your profile, you might thrive as a Technician who builds strong client relationships.

APPLY THIS TO YOUR BUSINESS

Understanding your balance of these roles can help you decide where to focus your energy and where you might need support. Write down one step you could take to strengthen a weaker role or lean further into your strengths.

ASSESSING YOUR DATA LITERACY SKILLS

Why KPIs and Metrics Matter

In your business, KPIs are like lap times, fuel efficiency, and tire wear in a race. These are essential metrics that tell you if you're on track to win.

Understanding how to create, collect, and analyze this data ensures your business doesn't just finish the race but does so with maximum efficiency and speed.

Work on strengthening your data literacy. This will give you the insights needed to refine your marketing and business operations continually.
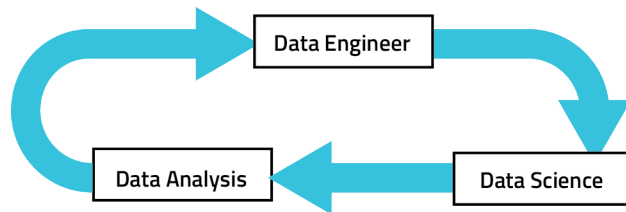
Data Engineer: Builds systems to track KPIs. Think of this as creating the infrastructure to collect the data.

Data Science: Uses that data to uncover trends and make predictions about what's coming next.

Data Analyst: Interprets what's happening now and implements adjustments for continual improvement.

Data Engineer → Data Science → Data Analysis →

Reflect on Your Skills and Confidence in Each Area
- Do you enjoy creating systems and processes? You may be a Data Engineer.
- Do you like identifying trends and predicting outcomes? You might be a Data Scientist.
- Do you like analyzing and acting on current insights? You might be a Data Analyst.

Review the descriptions of each role. Then, **circle** the role where you feel most confident and capable. These are your strengths. **Underline** the role where you feel less confident or need to develop further. These are areas to focus on improving.

MAKE YOUR GAMEPLAN

Use your reflections to consider which aspects of data literacy you might want to develop further. If you struggle with building systems, consider tools like CRMs or automated dashboards. If finding trends feels challenging, focus on learning how to interpret reports or visual data. If you're not confident in making adjustments, work on connecting data insights to actionable business strategies. Remember, you don't have to do everything yourself. If this is an important aspect to your business, consider outsourcing the task. Jot some notes down in the space below.

It's Finger-Clickin' Good

When you're unsure of your next steps in business, your data can provide the answers you need *if you're collecting it*. **Review the list of KPI trackers and circle the ones you currently use. Underline the ones you'd like to implement in the future.**

Keep in mind: Lifestyle businesses and Enterprise businesses have different priorities. You don't need to tackle everything at once! Start with what's manageable and build from there.

Website
- Google analytics

Social Media & PPC
- Social media analytics
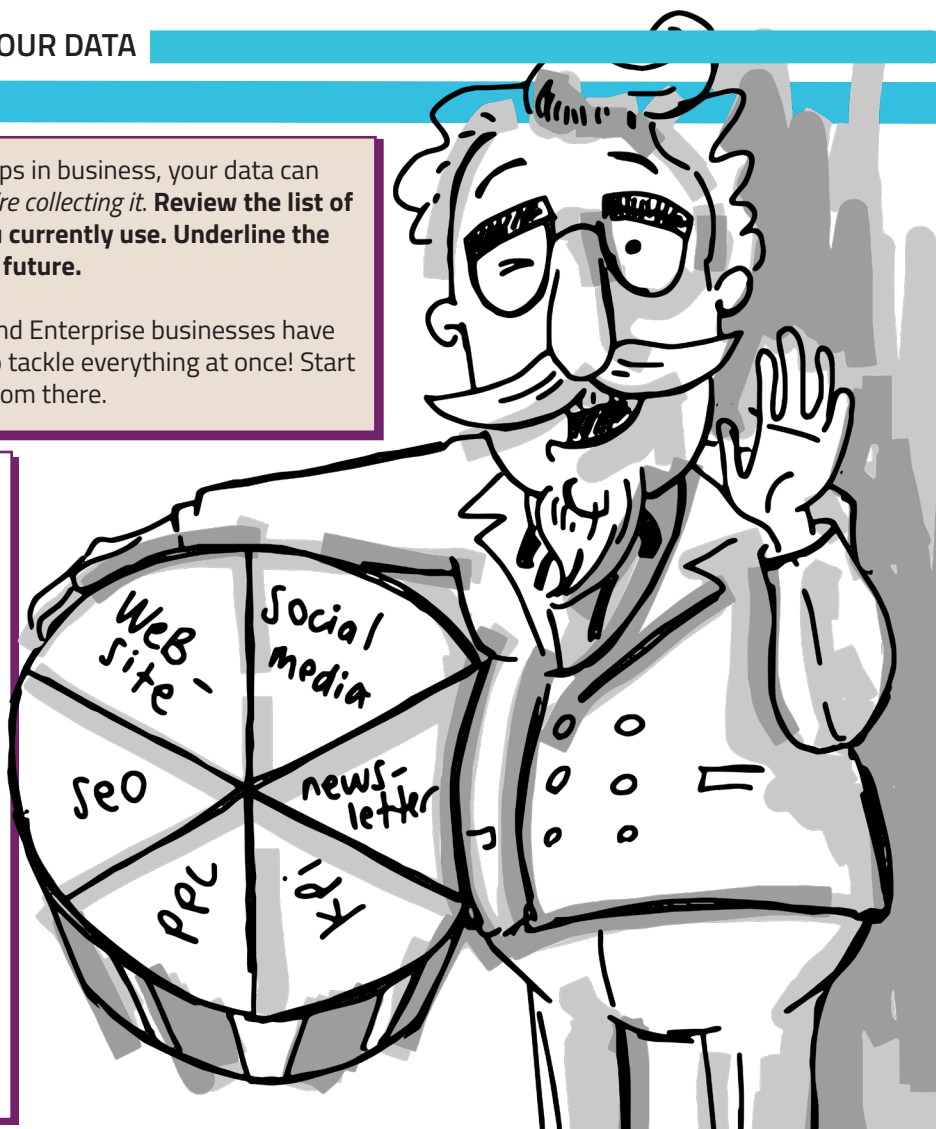- PPC analytics

Newsletters
- Email Blast analytics

SEO
- Ubersuggest
- Google My Business data

KPIs & Organizational
- Google forms
- Survey monkey
- CRM
- Project Management Tools

SKILLS ASSESSMENT

Let's say you're a Massage Therapist who sends newsletters to encourage clients to book their next appointment. You check the analytics and see that 83% of your recipients view the email on a tablet. What does this tell you?

A. You should maks sure the email design is optimized for tablets.
B. You should stop sending emails altogether.
C. Consider surveying clients about their preferences for email content.

Answer:
- A is correct: The data shows 83% of recipients use tablets. Making your email look good on tablets helps clients read and take action.
- B is incorrect: The data doesn't show a problem with emails—people are opening them!
- C is incorrect: Surveying clients could help later, but the data already gives you a clear answer now.

Making Sense of Your Data
If you have a lot of data but struggle to understand it, that might be a sign to bring someone onto your team who can help. Remember, you don't have to do everything yourself! It's about taking small steps to make your data work for you.

Tips for Using Key Performance Indicators (KPIs)

Start Small: Choose a few KPIs that directly align with your immediate project goals. Over time, you can expand to track additional KPIs as needed.

Set Benchmarks: For each KPI, set initial benchmarks based on current performance or industry standards. This will give you a baseline to measure improvements against.

Review Regularly: KPIs are most useful when reviewed periodically. Establish a schedule to evaluate your metrics, whether weekly, monthly, or quarterly, based on your project's needs.

LIFESTYLE	ENTERPRISE
Customer Acquisition Cost (CAC) ▪ Tracks the cost of acquiring a new customer ▪ Why it matters: Helps evaluate the efficiency of your marketing efforts	**Lead Response Time** ▪ Measures how quickly you follow up with inquiries ▪ Why it matters: Short response times improve conversion rates and client satisfaction
Customer Retention Rate ▪ Measures the percentage of customers who continue doing business with you ▪ Why it matters: Indicates client satisfaction and loyalty	**Net Profit Margin** ▪ Tracks the percentage of revenue remaining after expenses ▪ Why it matters: Indicates how efficiently your business generates profit
Conversion Rate ▪ Tracks the percentage of prospects who take a desired action, such as booking a service ▪ Why it matters: Evaluates the effectiveness of your sales efforts	**Employee Turnover Rate** ▪ Tracks the percentage of employees who leave your company ▪ Why it matters: Reflects workplace satisfaction and stability
Average Transaction Value (ATV) ▪ Tracks the average dollar amount spent per transaction ▪ Why it matters: Identifies opportunities to increase revenue per client and price your services appropriately	**Website Traffic** ▪ Measures the number of visitors to your website ▪ Why it matters: Evaluates the effectiveness of online marketing efforts
Social Media Engagement ▪ Measures likes, comments, and shares on your social content ▪ Why it matters: Indicates how well your content resonates with your audience	**Lifetime Value of a Customer (LTV)** ▪ Tracks the total revenue a business can expect from a single customer over their entire relationship ▪ Why it matters: Helps prioritize high-value clients and optimize long-term profitability
Referral Rate ▪ Tracks the percentage of new customers acquired through referrals ▪ Why it matters: Reflects the strength of your referral program	**PPC Campaign ROI** ▪ Tracks the return on investment for Pay-Per-Click advertising campaigns ▪ Why it matters: Helps evaluate the effectiveness of targeted digital marketing efforts

This is by no means a comprehensive list. Just the ones you will likely need to get started.

Want some help with this? Give us a call.

BRAND BLUEPRINT
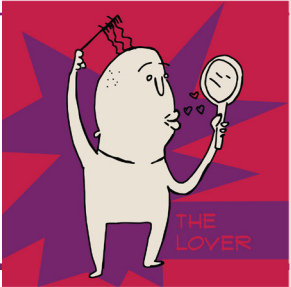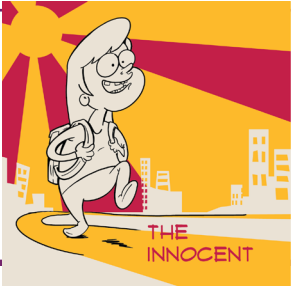
REFLECT ON YOUR BRAND ARCHETYPE

Brand archetypes are universal characters or personalities that represent specific values, traits, and motivations. They help businesses define their identity and connect emotionally with their audience. By identifying your brand archetype, you can create a consistent message that resonates with your audience's values and builds a deeper sense of trust and loyalty.
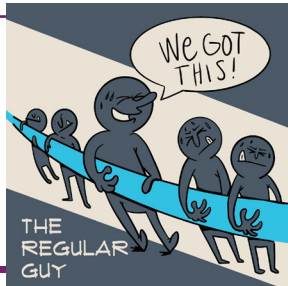
As you read through the 12 descriptions, consider: Which archetype resonates most with your *business* values, goals, and personality? This may be different from your *personal* values and personality. How does this align with how you want your brand to be percieved by others?

	KEY ATTRIBUTES	GOALS	FEARS
THE CAREGIVER	• Supporter • Advocate • Nurturer • Altruistic • Selfless • Compassionate • Generous	• To help and care for others • Protecting and doing things for others	• Selfishness and ingraditude
THE RULER	• Peacemaker • Conductor • Organizer • Productive • Confident • Responsible • Leader	• To create a prosperous, successful community • To exercise power	• Chaos and being overthrown
THE CREATOR	• Innovative • Imaginative • Creative • Experimental • Willing to take risks • Ambitious • Dreamer	• To realize a vision • To develop artistic control and skill	• Mediocre vision or execution
THE HERO	• Warrior • Competitive • Aggressive • Winner • Principled • Idealist • Courageous	• Expert mastery in ways that improve the world • To be as competent as possible	• Weakness and vulnerability

	KEY ATTRIBUTES	GOALS	FEARS
THE JESTER	• Comedian • Teaser • Playful • Carefree • Joyful • Original	• To enjoy the journey and to stand out • To live in the moment and not be too serious	• To come across as boring
THE LOVER	• Passionate • Seductive • To indulge • Follows emotions • Harmonizer • Connector • Partner	• To have a strong connection with people, work, and surroundings	• Being alone or feeling unwanted
THE SAGE	• Expert / Guru • Investigator • Mentor • Thinker • Reflective • Confident • Planner	• To use intelligence and wisdom to understand the world	• Being misled or ignored
THE INNOCENT	• Wholesome • Pure • Forgiving • Trusting • Honest • Happy • Optimistic	• To be happy • To do the right thing	• To come across as unhappy

IT'S NOT ALL ABOUT YOU

Don't forget to think about your target audience.
Which archetype reflects their values, needs, and decision-making style?

	KEY ATTRIBUTES	GOALS	FEARS
THE EXPLORER	- Adventurous - Wanderer - Restless - Independent - Self-directed - Self-sufficient - Values freedom	- To experience a more authentic and fulfilling life - To journey, seek and experience new things	To be trapped and conform
THE MAGICIAN	- Catalyst - Visionary - Inventor - Spirtual - Charsimatic - Leader - Holistic	- To make dreams come true - Develop a vision and live by it	Negative consequences
THE REGULAR GUY	- Everday functionality - Honesty - Dependable - Unpretentious - Straight shooter - People-oriented	- To belong - Be down-to-earth and develop solid virtues	To be left out or stand out from the crowd
THE REBEL	- Shocking - Distruptive - Feared - Powerful - Counter-cultural - Liberated - Radical	- To overturn what isn't working - To improve through disruptions	To be powerless

PUT THIS INTO PRACTICE

How can you use your brand's archetype to connect with your audience's archetype in a way that builds trust and loyalty? Jot down some notes in the space below.

Need help identifying your Brand Archetype? Scan the QR code to find a self-assessment quiz. Answer a few questions we'll figure it out for you!

DITCH THE "SALES PITCH" WITH YOUR NATURAL STYLE

Understanding your sales style is key to building stronger connections with your customers and growing your business. When you know what feels natural to you, you can focus on techniques that align with your strengths, making your sales efforts more authentic and effective. **Read through each sales style and circle the one that feels most natural to you in how you sell and connect with others.**

Authority
People trust you because you're an expert or have special knowledge. When you speak, others listen because they believe you know what you're talking about. In sales, you can use this by sharing your expertise and providing helpful information, which makes people feel confident in buying from you.

Social Proof
This is when people buy something because others have already bought it and liked it. It shows that the product or service is good because others are using it. In sales, you can use reviews, testimonials, or examples of happy customers to show that others trust your product.

Scarcity
When something is rare or in limited supply, people want it more. If something is only available for a short time, people hurry to get it before it's gone. In sales, you can create urgency by offering limited-time discounts or telling customers that a product is almost sold out.

Liking
People are more likely to buy from someone they like or feel connected to. Being friendly, relatable, and building a relationship can make customers trust you. In sales, you can use this by connecting with customers personally, building rapport, and showing you care about their needs.

Reciprocity
When you do something nice for someone, they feel like they should return the favor. Offering a small gift or help can encourage people to buy from you. In sales, you can offer free advice, samples, or bonuses to encourage customers to make a purchase.

Consistency
People like to stay consistent with what they've already done. If someone has agreed to something before, they are more likely to follow through and buy from you again. In sales, you can use this by asking for small commitments first, like signing up for a newsletter, and then asking for bigger commitments like making a purchase.

Need help identifying your Sales Style?
Scan the QR code to find a self-assessment quiz.
Answer a few questions we'll figure it out for you!

HOW PEOPLE MAKE DECISIONS

People make decisions in different ways. Some are quick and spontaneous, while others take a more thoughtful, methodical approach. Understanding how your target audience makes decisions is crucial for tailoring your messaging and building stronger connections. **Read the descriptions and circle the style that best matches your target audience.**

		DESCRIPTION	VALUES	FEARS
SPONTANEOUS		**The Emulator** aspires to achieve status but lacks either the necessary skills or work ethic, often resorting to overspending or purchasing knock-off items to project an illusion of success.	• Status and appearances • Admiration from others	• Being exposed • Losing social status • Facing financial ruin due to overspending
COMPETITIVE		**The Achiever** is a driven and ambitious individual who thrives on productivity, success, and the acquisition of luxury items as symbols of their achievements in life.	• Ambition and success • Productivity and efficiency	• Failure and underachievement • Wasting time on unproductive endeavors
METHODICAL		**The Dooms-Dayer** envision a future filled with catastrophe and despair, adpoting a self-sufficient mindset and holding strong opinions on a wide range of topics.	• Self-sufficiency and preparedness • Independence	• Loss of personal freedoms • Being unprepared for emergencies or crises
		The Survivalist lives on the edge of financial insecurity, balacing paycheck to paycheck with a constant fear of losing everything.	• Security and stability • Self-sufficiency and resilience	• Financial instability and loss • Inability to meet basic needs.
HUMANISTIC		**The Belonger** seeks harmony and connection, finding comfort in blending seamlessly with their community while valuing tradition and stability above all else.	• Harmony and tradition • Community connection	• Isolation and loneliness • Standing out uncomfortably
		The Savior is a selfless champion of social change, dedicated to improving the world for others without seeking personal reward.	• Compassion and empathy toward others • Social justice and equity for all	• Failing to make a meaningful difference in the world • Becoming apathetic
		The Integrator seeks financial success to fuel their philanthropic endeavors, prioritizing giving back to their communities over presonal gain *(this is the least common type).*	• Financial success for the purpose of philanthorpy	• Ineffectiveness

Need help identifying your Audience's Communication Preference?

20

....you know the drill.

CASE STUDIES

Now that we have a good handle on who you are, let's do some market research and get inspired by others.

GET INSPIRED

CREATIVE DESIGN STUDIO

The Challenge: "I have big ideas that need funding."

IKIGAI

Authentic connection through art.

SYMPTOMS

Strategic Planning

Sales & Marketing

PAIN SCALE

Personnel Changes

Right Person for the Job

Desire for Control

SWOT

Adaptable	Lacks Data
Market Expansion	Limiting Beliefs

LIFESTYLE

OPERATIONS

SALES & MARKETING

FINANCIAL

WEBSITE

SOCIAL

KPI

Bookkeeper

Accountant

Mentor

Referral Partner(s)

YOUR ARCHETYPE

NED RYERSON
GROUNDHOGS DAY

THE CREATOR

YOUR SALES STYLE IS
CONSISTENCY

Technician

Entrepreneur

Manager

N K B A

YOUR TARGET AUDIENCE'S ARCHETYPE

WE GOT THIS!

THE BELONGERS

The Belonger seeks harmony and connection, finding comfort in blending seamlessly with their community while valuing tradition and stability above all else.

THE REGULAR GUY

Humanistic / Methodical

Spontaneous / Competitve

N K B A

HYPOTHESIS & METHOD

Creative Design Studio

Desire: Funding for free resources

Comms Stye: Nuture, Consistency

Barrier: Strategic planning

Solution

Target Audience

Desire: Find a community

Comms Style: Nurture, Belongers

Barrier: Analysis Paralysis

I want to create a culture of workshops that support the local community. This will require better data collection.

Use Google Analytics to track sales funnel.

Data Engineer

Data Science

KPIs
Workshop sign ups
Post-Survey Engagement

Data Analysis

Host small scale workshop, paying attention to sales and marketing funnels.

Mentor

Referral Partner(s)

PROJECT: STRENGTHEN GRANT PROPOSALS WITH CLEAR DATA

I like collaborating and hosting workshops.

Is this a viable revenue stream for my business?

01

I will know this is viable based on the number of opportunities in my community.

What opportunities already exist within my network?

I found an opprotunity to host a workshop. What now?

What topic will support my business goals?

02

I will use the Sales Cycle Funnel and keep track of conversion rates (how people find out about the workshop, how many sign up, how many show up).

What topic will interest the community?

Workshop was a success! Now what?

Do larger grant opportunities exist supporting this body of work?

03

I will know I'm on the right track if I can find larger grants and justify proposal with data.

Review post-workshop survey data to calculate Net Promoter Score and Attendee Satisfaction Score.

YOUR DEBRIEF

How did this case study resonate with you?

How could a project like this benefit your business?

What might you have done differently?

Does this project solve a problem related to your target audience?

REFLECT ON SELF

REFLECT ON BUSINESS

SET & MEASURE GOALS

REFLECT ON MARKET

STRATEGIC MARKETING PARTNER

The Challenge: "My business is growing, but I don't want employees yet."

IKIGAI

Empowering Purposeful Growth

SYMPTOMS

Time management

Financial & Cash Flow

PAIN SCALE

Personnel Changes

Right Person for the Job

Desire for Control

SWOT

Operations	Cash Flow
Scalable Growth	Staying Focused

LIFESTYLE / ENTERPRISE

MARKETING | FINANCIAL | ORG. | HR | OTHER | OEPRATIONS

WEBSITE | SOCIAL | NEWSLETTERS | KPI | PPC | SEO

Bookkeeper · Accountant · Insurance Advisor

Lawyer · Mentor · Referral Partner(s)

YOUR ARCHETYPE

DEL GRIFFITH
TRAINS, PLANES & AUTOMOBILES

YOUR SALES STYLE IS
SOCIAL PROOF

THE MAGICIAN

Entrepreneur
Technician
Manager

K N A B

YOUR TARGET AUDIENCE'S ARCHETYPE

THE EXPLORER

THE ACHIEVERS
The Achiever is a driven and ambitious individual who thrives on productivity, success, and the acquisition of luxury items as symbols of their achievements in life.

BUY OR DIE!

Spontaneous / Competitve

Humanistic / Methodical

A N B K

HYPOTHESIS & METHOD

Strategic Marketing Partner

Desire: scale sustainably

Comms Stye: Knowledge, Social Proof

Barrier: Time management

Solution

Target Audience

Desire: maintain freedom and control

Comms Style: Action, Achievers

Barrier: Trust & reflection

Automate my core competencies to continue assisting smaller clients while freeing up my time for larger clients.

Mine Intake Forms and CRM. Create surveys to test ideas.

Data Engineer

Data Analysis

Data Science

Utilize mentors and referral partners. Analyze survey data and conversations to refine.

Mentor · Referral Partner(s)

KPIs
Client Satisfaction Score
Survey Engagement Rate

Am I solving a problem for my target audience?

I will look through Intake Forms and CRM to see if my services address clients' needs.

Great feedback, but some survey questions were unclear. Where to go from here?

Idea has value. Is it possible to fund this project?

Grant awarded! How much information is too much information?

How can I quick test content before building resource?

01

02

03

I will send out a survey to my network and review results. I will know I'm on the right track because people take the survey and provide feedback.

Can I find common challenges expressed by clients and network of SBOs?

I will know this worked based on buy-in from network during conversations. If I receive grant funding, I will know there is a larger value.

Conduct follow up survey and conversations with more direct questions. Apply for grant.

Send post-workshop survey to capture CSAT and NPS scores.

Conduct workshop with target audience.

YOUR DEBRIEF

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REFLECT ON SELF

REFLECT ON BUSINESS

REFLECT ON MARKET

SET & MEASURE GOALS

CONCIERGE HOME CARE

The Challenge: "What if something happens to me and I can't make payroll?"

IKIGAI

Innovative and Compassionate Care

SYMPTOMS

- Time management
- Employee & Leadership

PAIN SCALE

- Personnel Changes
- Right Person for the Job
- Desire for Control

SWOT

Innovator	Time Management
Strategic Partnerships	Cash Flow

ENTERPRISE

Pie chart: MARKETING, FINANCIAL, ORG., HR, OTHER, OEPRATIONS

Pie chart: WEBSITE, SOCIAL, NEWSLETTERS, KPI, PPC, SEO

- Bookkeeper
- Accountant
- Insurance Advisor
- Lawyer
- Mentor
- Referral Partner(s)
- Employee(s)
- Investor / Partner

YOUR ARCHETYPE

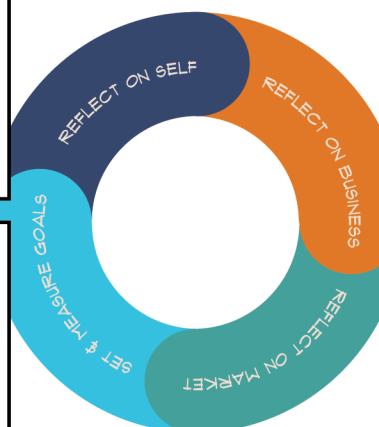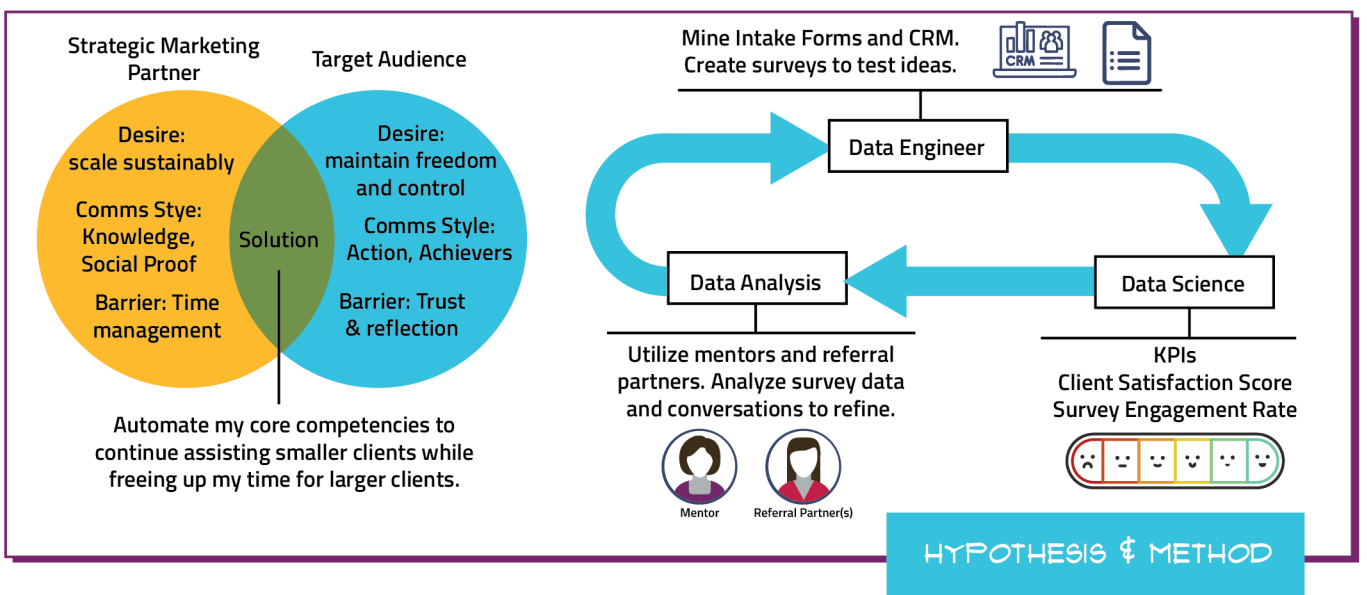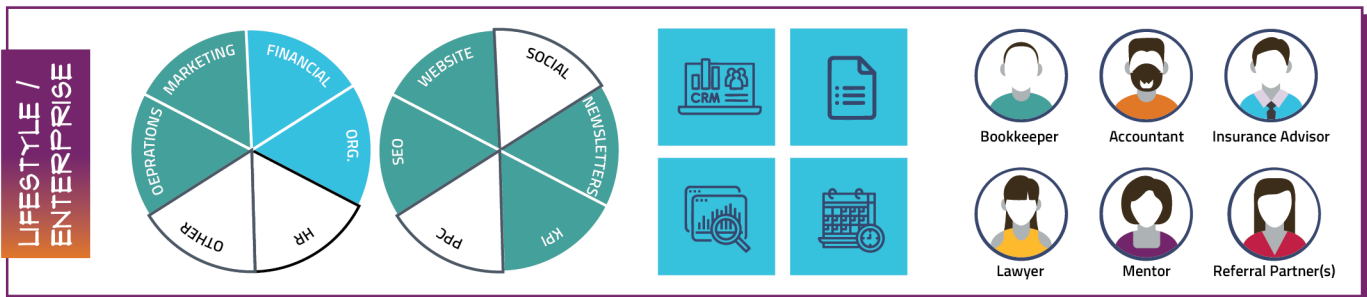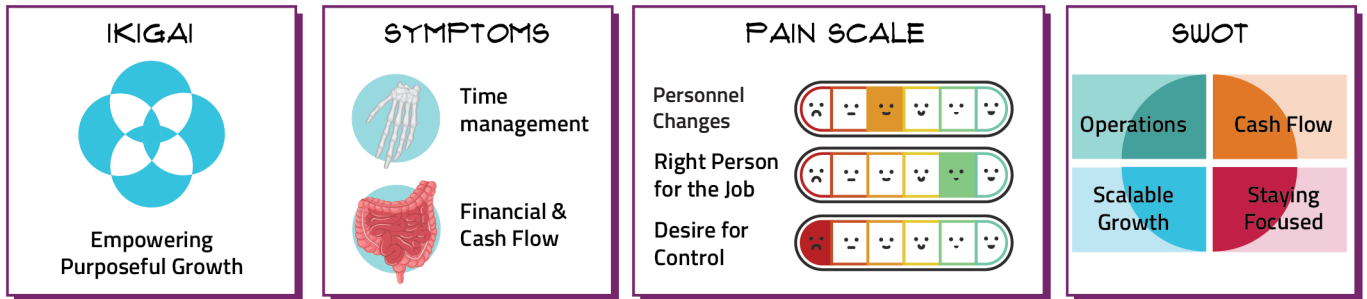STAY FRESH, CHEESE BAG

ADUCATE DIGITAL
UNCLE RICO
NAPOLEON DYNAMITE

THE REBEL

YOUR SALES STYLE IS
RECIPROCITY

- Technician
- Entrepreneur
- Manager

A N B K

YOUR TARGET AUDIENCE'S ARCHETYPE

THE SAVIOR
The Saviors are selfless champions of social change, dedicated to improving the world for others without seeking personal reward.

THE CAREGIVER

- Humanistic / Methodical
- Spontaneous / Competitve

N B K A

HYPOTHESIS & METHOD

Concierge Home Care

Desire: Distrupt healthcare

Comms Stye: Action, Reciprocity

Barrier: Looking for a unicorn

Solution

Target Audience

Desire: Have more control over my work

Comms Style: Caregiver, Saviors

Barrier: Healthcare system

I need to find someone who can replace me! I need to find someone I can turn all of this over to in an event and build redundancies.

Map out client cycle to identify where my time is best used.

Data Engineer → Data Science → Data Analysis →

Where is my time being spent? Who can I trust to take over in an emergency?

- Mentor
- Employee(s)

KPIs
Employee Readiness Score
Tasks Delegation
Stress Level

PROJECT: MAP OUT DAILY TASKS TO DELEGATE

My father passed away suddenly.

What happens if I'm in an emergency? How will I make payroll?

A lot of tasks only take 20 minutes...I can still do it.

My business partner is refusing to take on more.

Rather than look for a unicorn to replace me, I need to separate tasks.

Better project management tools would help me delegate.

01

02

03

First, I need to figure out what I do everyday and see who I trust enough to take over.

I need to figure out a succession plan ASAP.

I need to update job descriptions and turn some 1099s into W2s.

What are my current employees' responsibilities? Can any of them take on more?

I'm finally ready to take a vacation and grieve. When I come back, I'll continue to delegate and grow.

Who on my team can look into and set up project management tools?

YOUR DEBRIEF

How did this case study resonate with you?

How could a project like this benefit your business?

What might you have done differently?

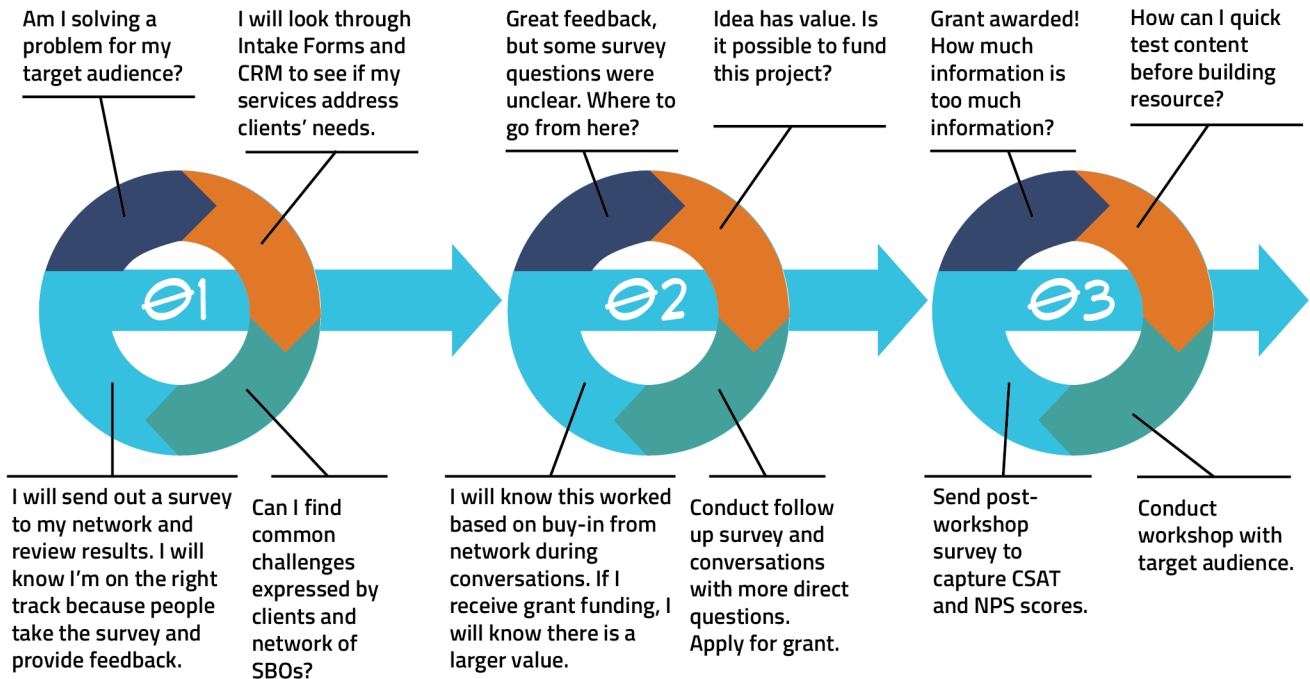Does this project solve a problem related to your target audience?

REFLECT ON SELF

REFLECT ON BUSINESS

REFLECT ON MARKET

SET & MEASURE GOALS

TECH SOLUTIONS PROVIDER

The Challenge: "COVID kicked my butt. I don't want to do this anymore."

IKIGAI

Tech-Savvy & Still Human

SYMPTOMS

- Strategic Planning
- Financial & Cashflow

PAIN SCALE

- Personnel Changes
- Right Person for the Job
- Desire for Control

SWOT

Proven Service	Time Management
Brand Identity	Over-confident

ENTERPRISE

Pie chart: MARKETING, FINANCIAL, ORG., HR, OTHER, OPERATIONS

Pie chart: WEBSITE, SOCIAL, NEWSLETTERS, KPI, PPC, SEO

CRM

- Bookkeeper
- Accountant
- Insurance Advisor
- Lawyer
- Employee(s)
- Referral Partner(s)

YOUR ARCHETYPE

THE SAGE

ADUCATE DIGITAL
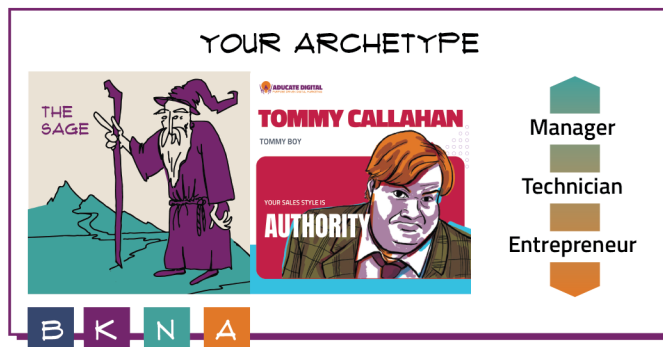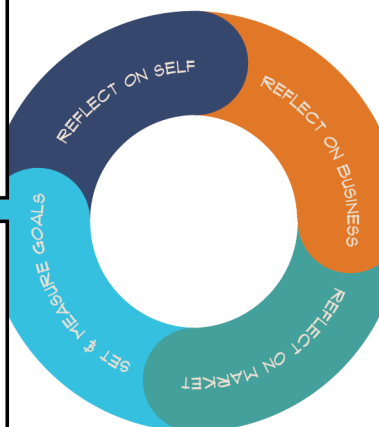TOMMY CALLAHAN
TOMMY BOY
YOUR SALES STYLE IS
AUTHORITY

- Manager
- Technician
- Entrepreneur

B K N A

YOUR TARGET AUDIENCE'S ARCHETYPE

THE RULER

THE SURVIVALIST

The Survivalist live on the edge of financial insecurity, balancing paycheck to paycheck with a constant fear of losing everything.

DING DONG

- Humanistic / Methodical
- Spontaneous / Competitve

N B K A

Hire a Director of Business Development and Marketing Agency.

Tech Solutions Provider

Desire: Sell business and retire
Comms Style: Blueprint, Authority
Barrier: "It's my way or the highway"

Solution

Target Audience

Desire: My business is struggling.
Comms Style: Ruler, Survivalist
Barrier: I don't have money but I need help!

We've been in business for 25 years. We want to sell but we need to increase profits for a better deal. Let's go full force on business development to sell with 3 years.

Referral Partner(s)

Data Engineer → Data Science → Data Analysis →

Data Analysis
Review HubSpot data and develop a strong account-based marketing gameplan.

Data Science
KPIs
Client Satisfaction and Loyalty Scores
Engagement Metrics on Social

HYPOTHESIS & METHOD

PROJECT: ACCOUNT-BASED CONTENT MARKETING GAMEPLAN

I know we are very good at the service we provide.

Where can we innovate on our services?

We provide a sense of calm for our stressed out clients.

Our brand is outdated and doesn't match this tone.

I'm having fun again! Maybe let's push the sale date back a bit...

Turns out I didn't want to quit, I just needed to let go of some draining clients.

01

02

03

Let's collect metrics on client satisfaction via surveys. This will give us direct feedback and (a bonus) updated Google reviews.

What industries do we serve best?

Let's push out a content marketing plan and track engagement to see what messaging works best.

How can we improve our messaging and close deals faster?

I know this was a good decision because my employees are happier.

Who are our IDEAL clients and where can we find more of them?

YOUR DEBRIEF

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REFLECT ON SELF

REFLECT ON BUSINESS

REFLECT ON MARKET

SET & MEASURE GOALS

Does this project solve a problem related to your target audience?

NEXT STEPS

CONTINUE THE JOURNEY

You've made great progress in planning your 2025 marketing strategy. Now let's build on that momentum! At Aducate Digital, we're here to support you in turning your vision into lasting success. Here's how we can help you continue the journey:

PURPOSEFUL GROWTH

For lifestyle business owners, scaling your business doesn't have to mean sacrificing work-life balance. We offer free workshops and research tools on our website to help you grow your business at your own pace.

Whether you're looking for tips or step-by-step strategic planning advice, we've got resources to help you build your dream business, on your terms. **Explore our resources at: www.aducatedigital.com/resources.**

STRATEGIC GROWTH

Break free from the daily grind. At Aducate Digital, our Fractional CMO services help enterprise businesses scale fast and smart. We create strategies that drive growth while freeing you to focus on the big picture.

Take the first step: Complete our Marketing Evaluation Survey to see how we can help you grow smarter.

Scan the code or visit: https://shorturl.at/oo1lR

WE VALUE YOUR FEEDBACK

We want to ensure we're providing you with the best resources and support possible. Please take a moment to fill out our survey by scanning the QR code below. You can also access the survey by visiting: https://forms.gle/3wrAYmrooQjZDtkY7

Your input helps us improve and continue to offer valuable tools that make your business journey easier.

NEW RESOURCES COMING SOON!

We are thrilled to introduce our MarkED Interactive Learning Course! This course is designed to help early-stage entrepreneurs develop actionable growth strategies. With hands-on learning tools and assessments, MarkED will provide you with the skills and resources needed to turn your business vision into reality.

We're looking for individuals who are willing to provide feedback to help shape the course.

Interested? Contact Nicole for more information and to get involved in the next phase of this exciting project.

LET'S GROW TOGETHER

Whether you're a lifestyle business owner or scaling to enterprise-level growth, Aducate Digital has the tools, resources, and expertise to help you succeed. Visit us at www.aducatedigital.com to learn more about how we can partner with you for continued growth.

Assemble Your Strategy
Your Path to Purposeful Growth

This workbook is your step-by-step guide to creating a flexible, data-driven marketing strategy for 2025. With simple exercises and actionable insights, you'll discover how to reflect on your strengths, set purposeful goals, and measure progress along the way.

Whether you're growing a small business or scaling to new heights, this tool will help you stay on track and build lasting success.

Let's turn your vision into action!

BOUNCE
INNOVATION HUB

ADUCATE DIGITAL
PURPOSE DRIVEN DIGITAL MARKETING

Special thanks to the Bounce Innovation Hub leadership for organizing and hosting this workshop.

Connect With Us

www.AducateDigital.com
Nicole@AducateDigital.com
330.780.9139
@AducateDigital