

Developing Your Client Specific Playbook©

By Kathy Ellis, The Business Lab Marketing Coach

As a big football fan (just counting the days to see the Texans walk out onto the field) I like to watch the coaches on the sidelines checking their playbook, then calling in the play from a rather long list of possibilities. It got me to thinking about the way they analyze the situation then send in the play they feel best suits the circumstance. It's a similar process in business, where we gather as much information as we can about our prospect then tailor our marketing plan to best suit the prospect's situation. In this month's article (inspired by Geoffrey Moore's *Crossing The Chasm* — a book we highly recommend) we will discuss the development of your client specific playbook and how this information can lead to increased business.

Target Specific Customers: Rather than focusing on an industry, identify as many specific people (clients and prospects) as you can that either have bought from you or to whom you have presented your company information recently.

Tip From The Business Lab: With your team, list the names of 20 to 50 clients and prospects and provide the following information: Their name, job title, their company's industry and geographical location.

Developing Your Playbook: With this preliminary information in hand, you can now begin to develop your playbook by writing play-by-play scenarios for each of the people you identified above. Craft your story around the following information:

- **Beginning Play:** Start at the moment of your client's pain or frustration. What are they just about to attempt? What does this scene look like?
- **Goal:** What is your client trying to accomplish? What is their goal and why is this important to them?
- **Lining Up:** Without your product or service, how does your client go about achieving their goal?
- **Execution:** What goes wrong? How and why does it go wrong?
- **Score:** If your client isn't able to achieve their goal and accomplish their task efficiently and effectively, what is the impact to them and/or their company?

Sample Scenario

Beginning Play: During their monthly executive meeting Jane, the company's CFO, looks over the Health Insurance Report and asks the HR Director, Bruce, why they spent \$500,000 on wellness programs but their health insurance premiums have increased 20% and, by the way, what is that 20% increase representative of?

Goal: Everyone in the company would like to see the wellness programs be effective at improving overall health and reducing insurance premiums.

Lining Up: Bruce whips out the report the managed care provider has given him begins his explanation—"Well, it appears as if the increase is due to increases." Jane looks quizzical and asks, "what kind of increases?" Bruce stares back at his report and mumbles, "there was an increase in plan utilization because there was an increase in the number of office visits and an increase in outpatient surgical encounters." Back to her quizzical look, Jane says, "but why?"

Execution: The current method of reporting health information is to consolidate general information to arrive at general solutions. Everyone knows there were increases, but no one seems to know why and/or what can be done about the increases.

Score: Bruce's wellness budget gets cut; Jane has to go to the board to ask for the increase. Jane shakes her head at Bruce; the board shakes their head at Jane; the managed care provider continues to provide general information.

By going through this scenario a company like Dynamic Health Strategies that offers a new and innovative service can now replay the down and insert their play into the Line Up.

New Line Up: Bruce grabs his report from Dynamic Health Strategies and states that there were increases in plan utilization but the increases were actually very positive. For example, 90% of participating employee's children received their immunizations, which decreased the number of sick days taken, which improved overall company productivity. Additionally, the information allowed us to implement a new diabetic section into our wellness program, which improved the consistency of doctor visits, which significantly decreased hospital stays. Together Bruce and Jane go through the report and determine that they can actually reduce their health care premiums next year and direct the managed care provider to implement specific programs that the Dynamic Health Strategies report suggested.

Tip From The Business Lab: Once you have 20 or so stories, get with your team and identify patterns. These patterns will lead you to specific and effective marketing opportunities. With our example above, enough stories would lead us to understand when/where/how a company realizes they don't have enough information to justify the increases or make good decisions for their employees. It would also help us to understand our prospect's "situation" and target our message to speak directly to this situation.

More Information? If you would like to learn more about this important topic or would like to receive our FREE Service Ideas Booklet, please send an E-mail to kathy@thebusinesslab.com, visit our Web site at www.thebusinesslab.com, or fax a note on your letterhead to 281-517-0789.

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