



THE WIDEST NET

WORKBOOK

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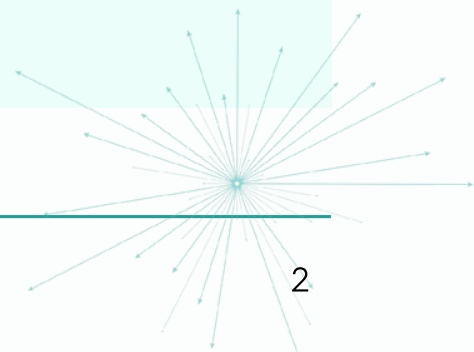
CHAPTER 1

FINDING THE MISSION AT YOUR ROOT

EXERCISE: THE MISSION AT YOUR ROOTS

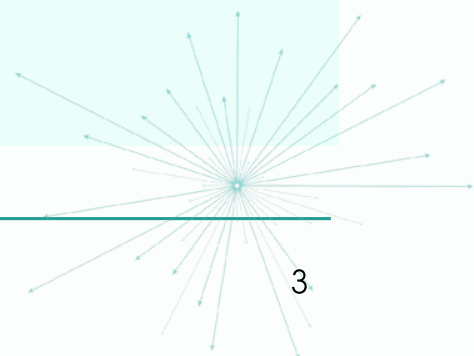
1. What is the mission behind the work you do?

2. Why is it important to you personally?

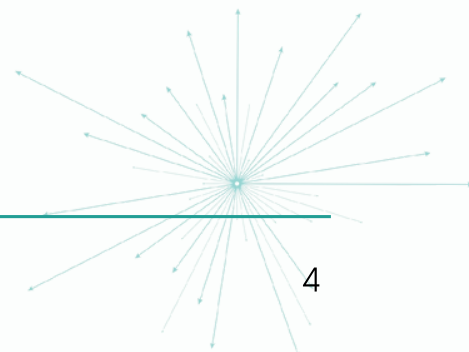
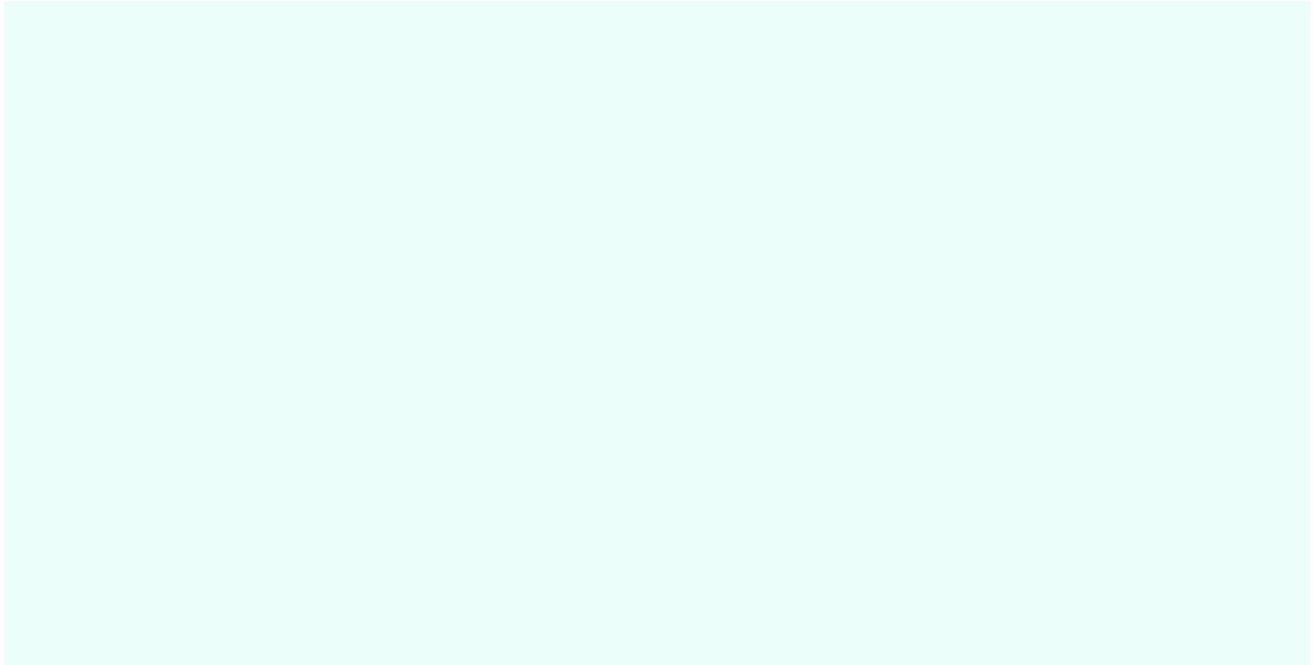


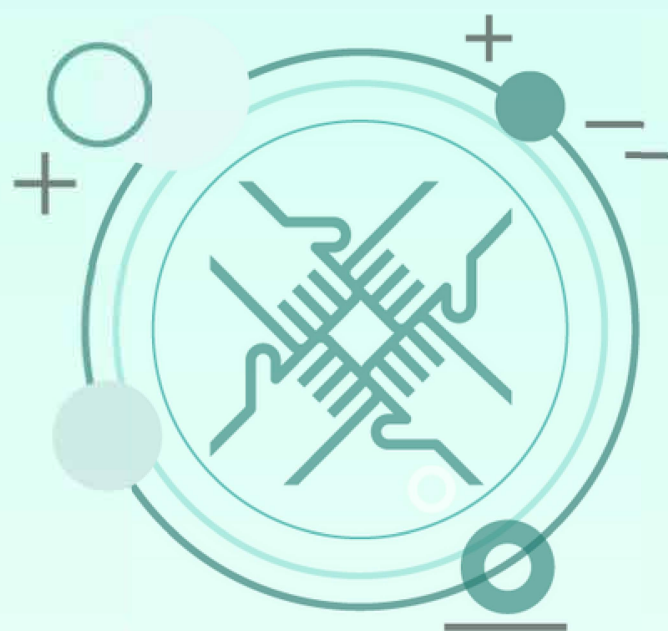
3. When in your life, or in the lives of others you love, has the lack of this mission caused substantial pain or discomfort?

4. When in your life, or in the lives of others you love, has the presence of this mission caused substantial joy or freedom?



5. Imagine that your plan works, and a customer of your dreams has completely solved the problem that your company is designed to solve. How would their life be different? What would they be able to do now that the problem was solved?





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CHAPTER 2

IDENTIFY YOUR VALUES

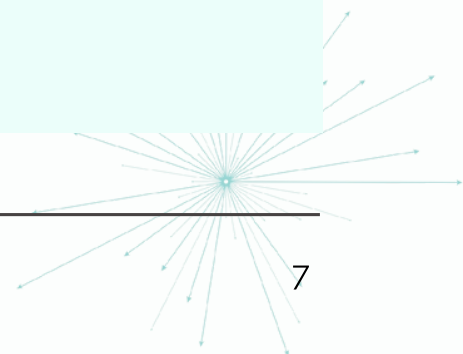
EXERCISE: DEFINE YOUR ALWAYS AND NEVERS

Putting our values into action while growing a business requires us to think about the things we will always do and the things we will never do. Let's define your Always & Nevers.

1. Start by listing as many items as you can think of in the "Always" and "Never" columns on the following page.
2. Re-examine the list with the question: "Can I think of a valid exception to this rule?" If so, take it off the list.
3. Whittle down the list to those things that you feel are clear, feasible and useful in guiding the direction of your business.
4. If you have a team, you can choose to do this process collaboratively.
5. Review your core list of projects, business operations and marketing strategies
6. Ask yourself "In light of my 'Always and Never' list, do I need to make any adjustments in my business?"
8. Make adjustments.
9. Sleep better, and watch your business grow..

EXERCISE: DEFINE YOUR ALWAYS AND NEVERS

Always	Never





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CHAPTER 3

DESCRIBE THE CUSTOMER OF YOUR DREAMS

EXERCISE: DEFINE YOUR IDEAL CUSTOMER

This exercise, developed by Susan Baier of Audience Audit, helps you define your ideal customer.

Start by defining your ideal customer(s) in terms of their problems, challenges, or aspirations.

I help people who need to	They haven't solved this problem already because	How I could help them solve it

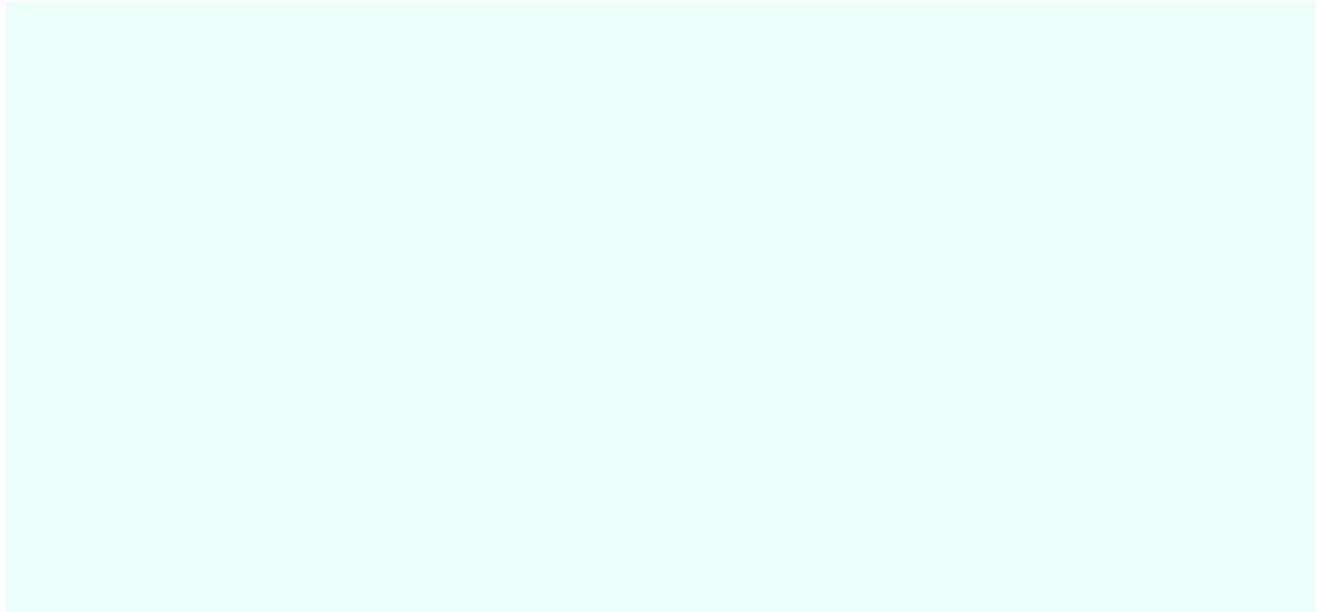
Here are some examples of how different businesses could define their Ideal Customer Profile by the specific problems their ideal clients face or the aspirations they hold:

A landscaper: "I help homeowners who want to showcase a beautiful yard, while maintaining value in their home, but who don't have time to do yard work themselves."

A consultant: "I help organizations save money by automating their most repetitive tasks."

A jewelry maker: "I help people display a unique and bold sense of style that makes them stand out in a crowd."

Next, add relevant demographic information to each audience profile.



Here are examples of Ideal Customer Profiles with demographics added:

A Landscaper: “I help **homeowners who live in planned communities of more than 100 homes in Austin, Texas**, who want to showcase a beautiful yard, while maintaining value in their home, but who don’t have time to do yard work themselves.”

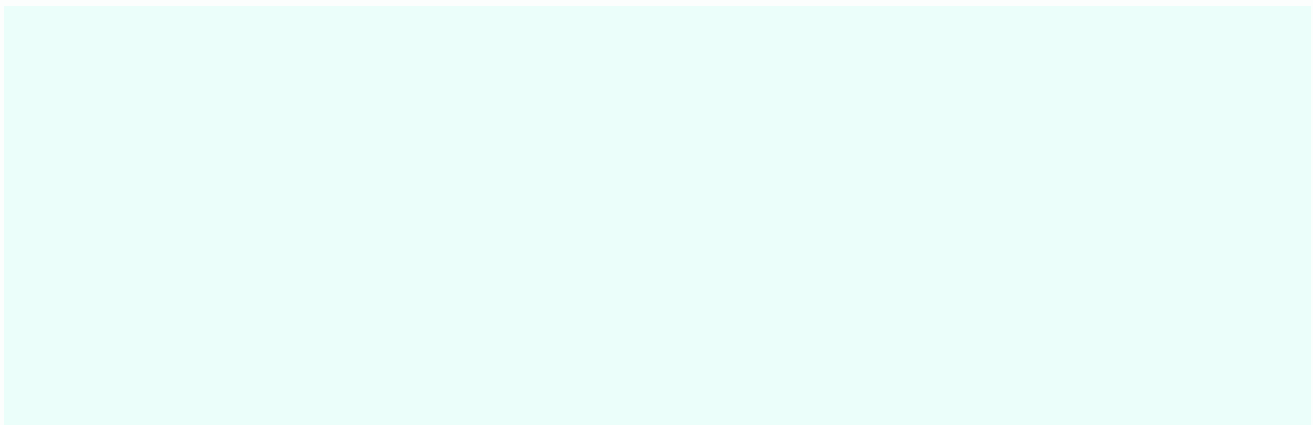
A Consultant: “I help **health care organizations with 500 employees or above in the San Francisco Bay Area** save money by automating their most repetitive tasks.”

A Jewelry Maker: “I help **female African-American business owners** display a unique and bold sense of style that makes them stand out in a crowd.”

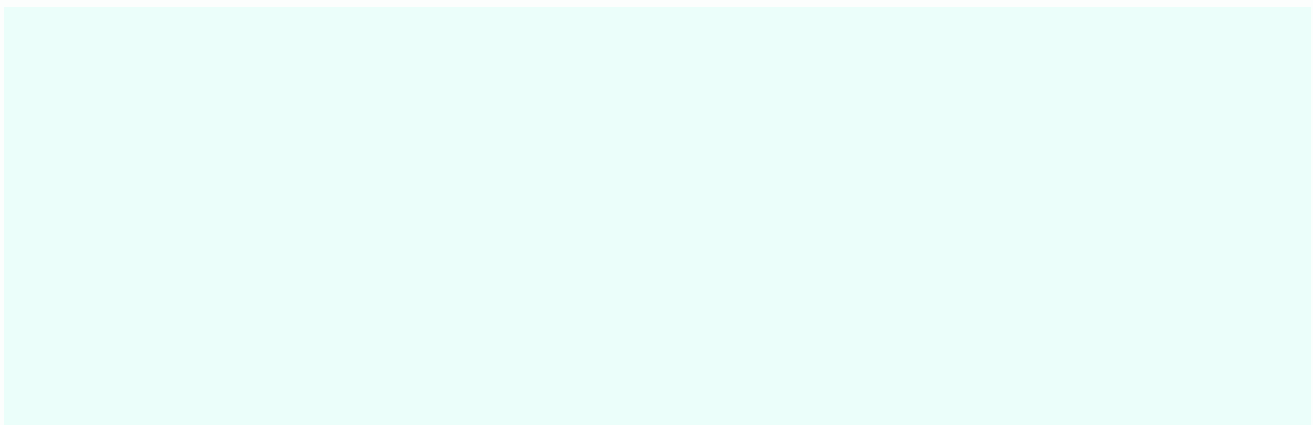
Define the qualities and characteristics of people you want to work with and the people you don't want to work with.

Even when you have a clear idea of the kind of problems you want to solve for your ideal customer, you still need to define the affective characteristics of people who would be ideal to work with.

My ideal client has the following characteristics:



My non-ideal client has the following characteristics:



When you're finished, move on to the next exercise and build an upside/downside decision matrix to qualify prospects.

EXERCISE: UPSIDE/DOWNSIDE

This exercise, developed by Susan Baier of Audience Audit, helps you place yourself in your audience's shoes and to understand from your audience perspective what it would be like to work with you. It is for your eyes only--no one else ever needs to see it.

Take a look at the Upside/Downside matrix on the next page. Start by identifying which audience you're using this worksheet for.

You should do one of these for each of the audiences you're exploring, but don't try to combine multiple audiences on one sheet. We want to focus on the upsides and downsides of a single audience at a time.

In Box 1, list things these audience members will love about you—your expertise, your understanding of their situation, your pricing, the way you work—whatever.

In Box 2, list things you love about this audience—the characteristics that make you love working with them.

In Box 3, list things they might worry about relative to you. For example, pricing or if you're inexperienced in something that's important to them—whatever might concern them. These are things that will keep them from working with you if you can't change them or eliminate their concerns some other way.

In Box 4, list things that make you reluctant to work with them. Focus on things they can't fix and things you can't get over.

EXERCISE: DETERMINING YOUR TITLE

Even after clearly defining their Ideal Customer Profile, many business owners struggle with what to call themselves.

Your title itself rarely does anything to tell prospective clients or partners what you can actually do for them. But if you combine the title and a problem-focused audience description, this makes your introductions much clearer.

Fill in the blanks: I am a [business title] and I work with [type of client] who are trying to [type of problem you solve].

I am a _____ and I work with _____
who are trying to _____.

Here are examples of how the structure would work with real people:

"I am a [marketing consultant] and I work with [authors] who [want to have a successful book launch without spending too much time, money, or unnecessary energy]." (Tim Grahl)

"I am a [data scientist] and I work with [other data scientists] who are trying to [increase equity in data science]." (Heather Krause of We All Count)

"I am a [professor and author] and I work with [leaders] who want to [lead authentically and inspire meaningful engagement]." (Brené Brown)



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CHAPTER 4

THE OFFER THEY CAN'T REFUSE

EXERCISE: WHAT BOTHERS YOU THE MOST?

Entrepreneur Greg Hartle suggests that an easy way to figure out how to design an offer is to ask your customers: "What bothers you about (fill in the blank with the problem you are trying to solve)?"

Listen closely, then ask a lot of follow up "why" questions.

For example, if you want to solve the problem of teaching your ideal customers how to take action marketing their business, you might ask the question:

What bothers you about taking action to market your business?

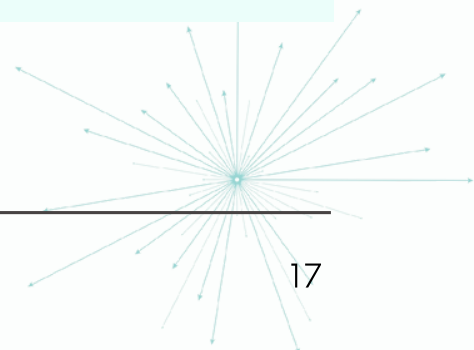
They might say things like:

- There are too many choices of places to market and I don't know where to start.
- I feel like a slimy salesperson if I reach out to a prospect I don't know.
- I am terrible at video and everyone tells me I need to make videos to market my coaching business.

With each answer, ask follow up "why" questions, like "Why do you feel like a slimy salesperson?"

With this information, you can think of ways to eliminate, improve, support, or streamline these bothersome things.

What bothers you most?	Why?

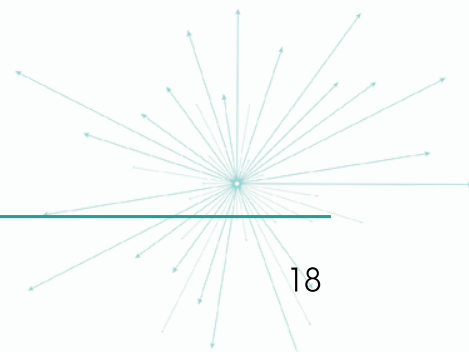


EXERCISE: SIMPLE OFFER FUNNEL

Your offer or product funnel is a helpful way to organize your marketing and sales communications. Answer these five questions to design yours

What are the free ways to attract the attention and interest of our ideal customers? (videos, blog posts, social media stories, free speaking, etc.)

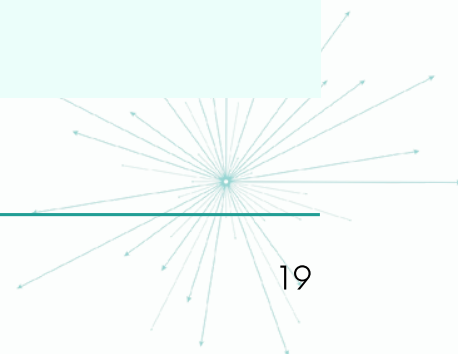
What could I trade for an email address? (ebooks, free tastes, digital downloads or checklists, etc.)



What is a low-cost offer to let my ideal customer develop a working relationship with me? (one-time event, short coaching or consulting engagement, short paid online course, etc.)


What is my primary offer? (The main and most profitable offer that is designed to solve the exact problem you love to solve for your ideal customers.)

What are follow up or deeper ways my ideal customers can work with me? (longer-term engagements, annual programs, follow up memberships or masterminds, etc.)

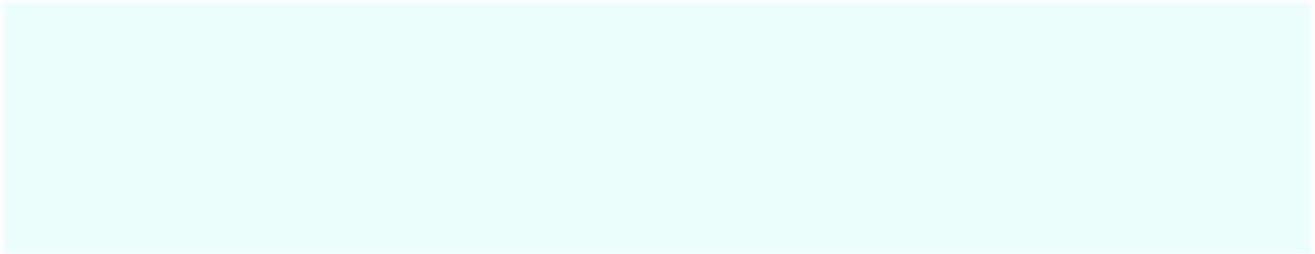


EXERCISE: DREAM CUSTOMER OFFER

The mission of my business is to:

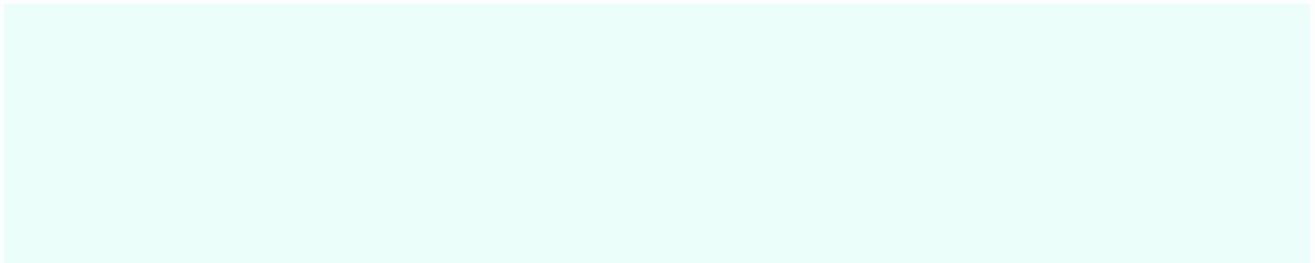


My dream customer, defined by their problem, challenge, or aspiration:

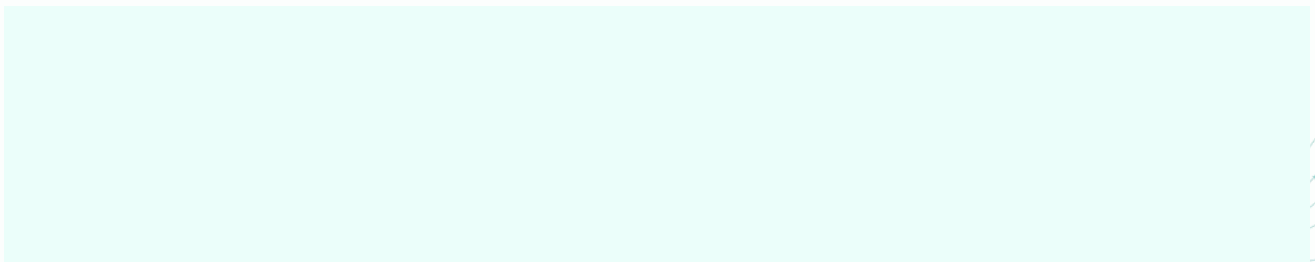


In order to solve this problem, what state are they going from, and what are they going to?

From:



To:



In order for this customer to completely solve their problem, what are all the steps they need to take? (It might be easiest to first do this as a mind map, then place each item in the most logical order.)

Step 1

Step 2

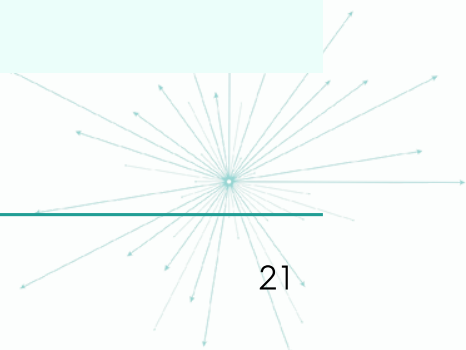
Step 3

Step 4

Step 5

Step 6

Step 7

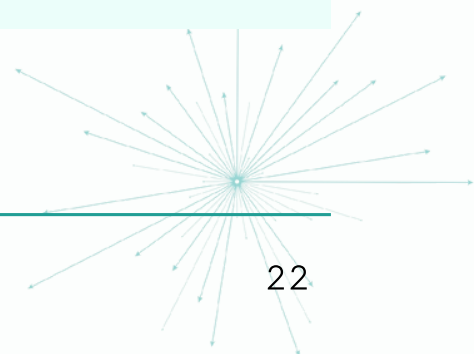


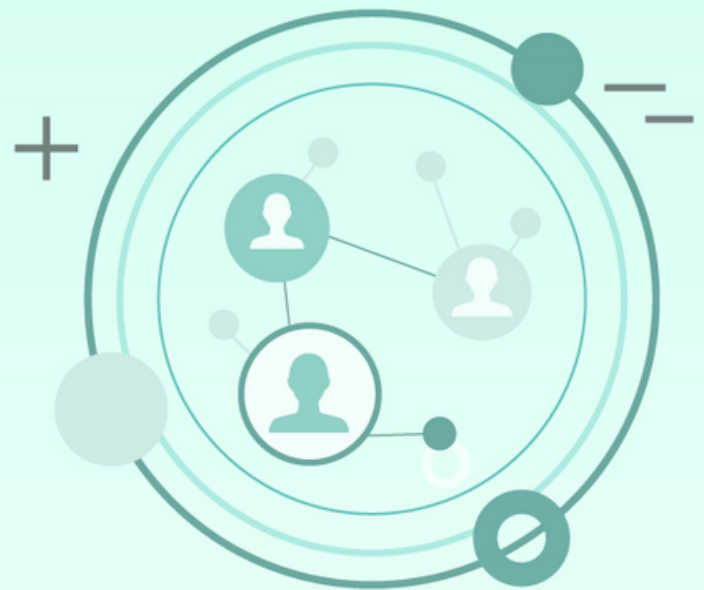
Which of the steps you've outlined do you want to address with your product or service?

What can you do exceptionally well?

Briefly describe your product or service, and which step(s) they correlate to.

Which steps will best be handled by a partner or referral?





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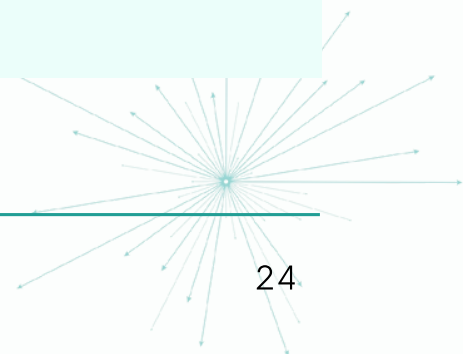
CHAPTER 5

THE WATERING HOLES WHERE THEY GATHER

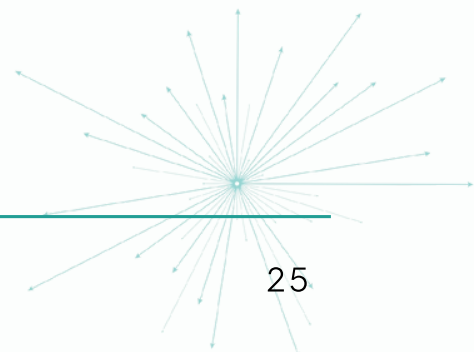
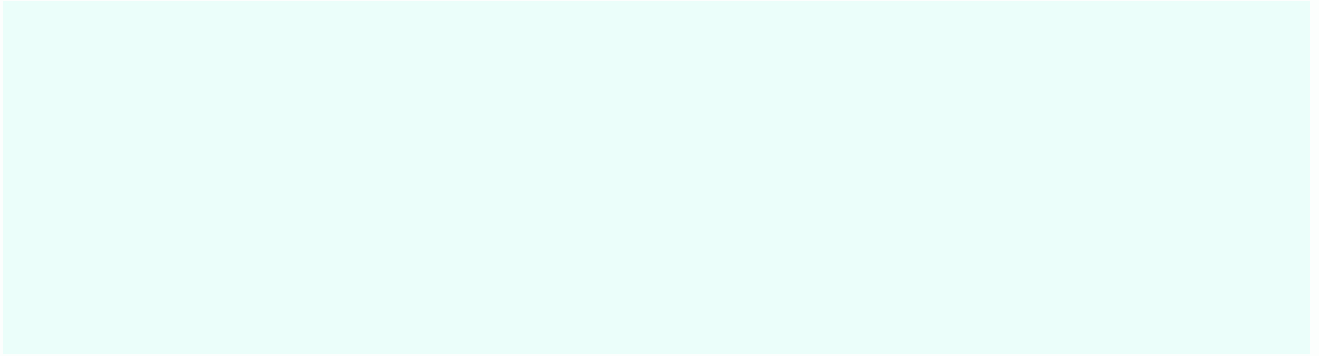
EXERCISE: CREATE YOUR ECOSYSTEM MAP

My business mission (from Chapter 1):

My ideal customer, defined by problem, challenge or aspiration (from Chapter 3):

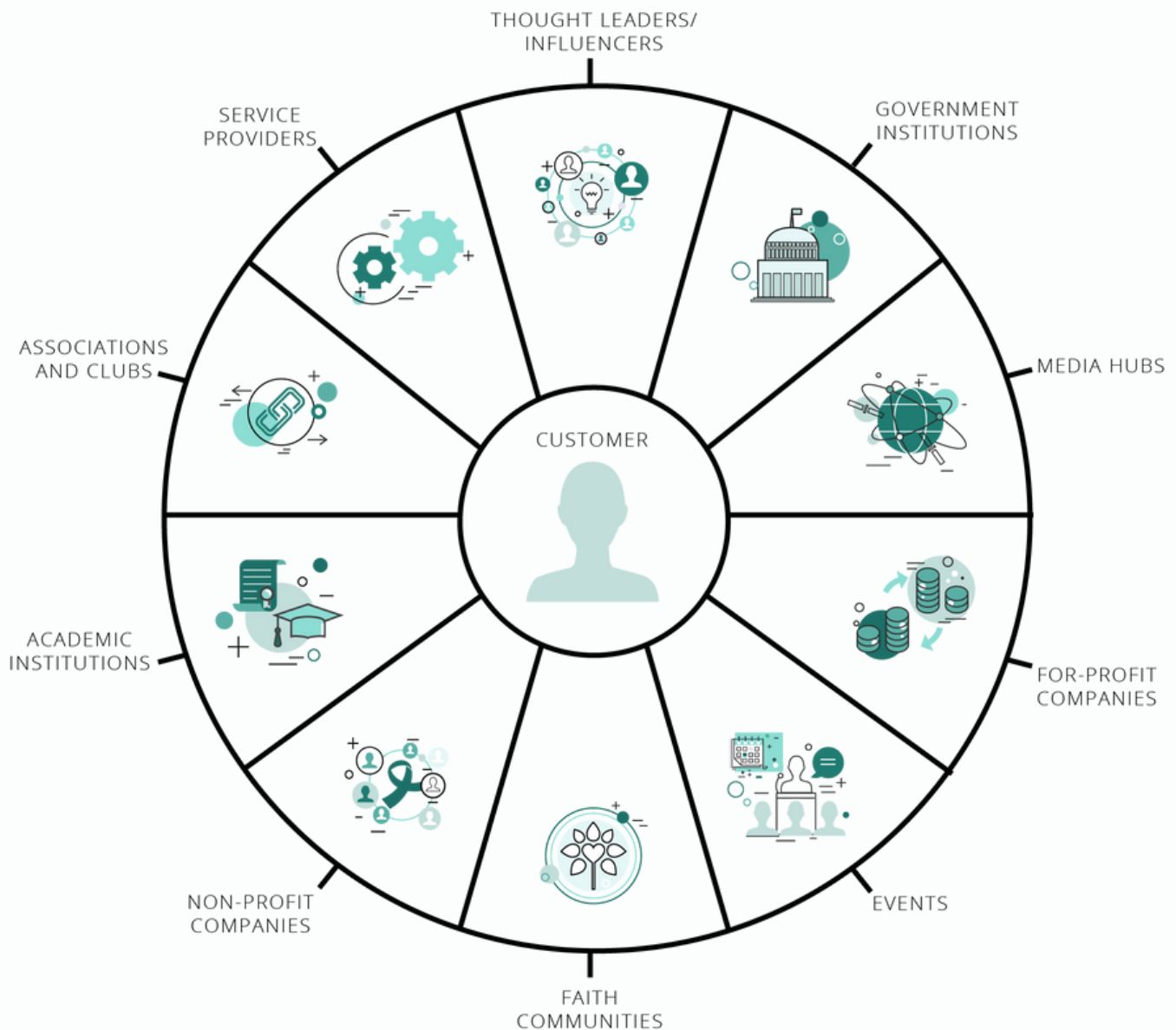


My customer journey steps (from Chapter 4):



STEP 4:

Next, go through each of the sections of the Ecosystem Wheel and note specific people, places, organizations, or watering holes that would be good connections to reach your ideal customers.





SERVICE PROVIDERS

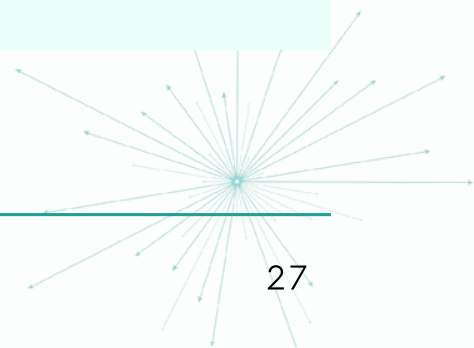
Service providers provide a complementary service to your exact ideal customer. Their service is critical for your ideal customer to completely solve their problem.

If you are a graphic designer working with a business owner, your ideal customer likely needs a photographer and a copywriter to completely solve their problem. If you are a wedding planner, your ideal client also needs an event planner, makeup artist, photographer and caterer. List the service providers that provide complimentary services to your ideal customer below.



THOUGHT LEADERS/INFLUENCERS

Thought leaders are experts in the fields critical to the success of your customer. Some might be in your direct field of expertise, and others in a complementary area of expertise. From a traditional lens, some could be viewed as your competitors. Your ideal customers are likely following their work, liking their posts, reading their books, watching their TED talks, and listening to their podcasts. List the thought leaders and influencers your customers pay attention to below.





ASSOCIATIONS & CLUBS

Associations are amazing watering holes for ideal customers. They are organizations focused on a specific profession for the purpose of professional and personal development. Many have publications, conferences, and member directories. There is even an Association of Associations (ASAE: The Center for Association Leadership at <https://www.asaecenter.org/>). Clubs are very similar, but they can be organized around more personal fan topics. These could be celebrity fan clubs, athletic groups, or local civic organizations like the Rotary Club. List the associations and clubs your ideal customer spends time with below.



FAITH COMMUNITIES

Faith communities are important gathering spots where their members learn more about their religion or tradition, pray, and share fellowship. Increasingly, they also are places that provide a much broader array of supportive services like parenting, marriage, finance, and business support. List the faith communities your ideal customer is a part of below.



MEDIA HUBS

Media hubs include all the places where information is professionally written, recorded, or shared. It includes television, radio, newspapers, magazines, podcasts, blogs, and social media. Depending on the audience you are trying to reach, you may target them differently. List the media hubs your ideal client pays attention to below.



EVENTS

Live events gather people under a theme and main promise. They include attendees, speakers, producing partners, media partners, and sponsors. Virtual events, which became very popular during COVID, can also be extremely powerful. They include the same players as live events. But connecting with people in a virtual event requires more pre-planning, research, and follow up, since you don't have the luxury of bumping into someone in the hallway and having a great spontaneous conversation. List the events your ideal client attends (both live and virtual) below.



NON-PROFIT ORGANIZATIONS

Non-profit organizations are mission-based organizations designed to solve a particular social problem. They come in all shapes and sizes, and some have significant financial resources. List the non-profit organizations your ideal customer is involved and/or interested in below.



GOVERNMENT INSTITUTIONS

Governmental institutions are funded by public dollars and include staff and departments covering a wide range of topics and services, including economic development, health and human services, and many others. Local governments often partner with businesses on specific initiatives, lending their reach and communication access to their residents and constituents. List the government institutions your ideal client engages with below.



ACADEMIC INSTITUTIONS

Academic institutions, especially at the college level, have a variety of departments charged with doing deep research in many areas related to business. They also have career programs for students and adult education departments for the general public. Increasingly, they are partnering with businesses to develop civic projects, joint ventures, and incubators. List the academic institutions your ideal client engages with below.

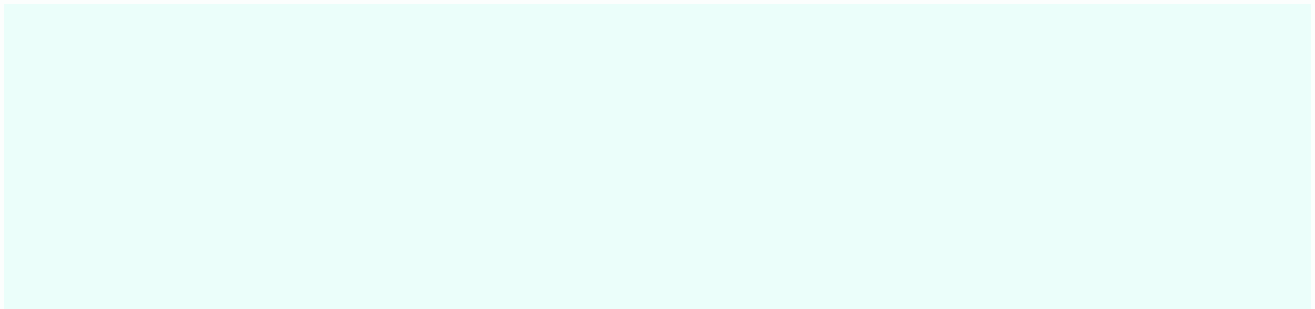


FOR-PROFIT COMPANIES

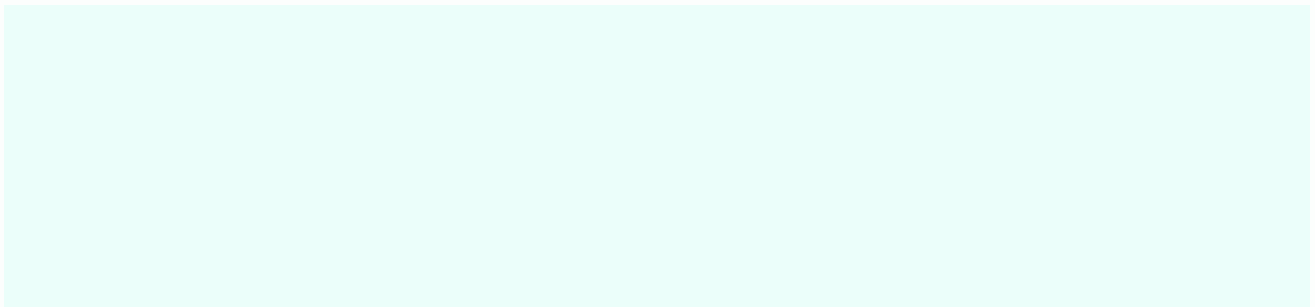
For-profit companies sell a product or service to your ideal client. They can be small mom-and-pop shops or large multinational corporations. Larger companies are connected to thousands and sometimes millions of customers that can be an ideal fit for your product or service. They also partner with experts, thought leaders, and influencers to produce marketing content for their customers. List the for-profit companies your ideal client buys from and engages with below.

After you do your first pass based on what you know, select three of your ideal customers (or people who fit the description of your ideal customers) and ask them the following questions centered around the problem you solve for them in your business:

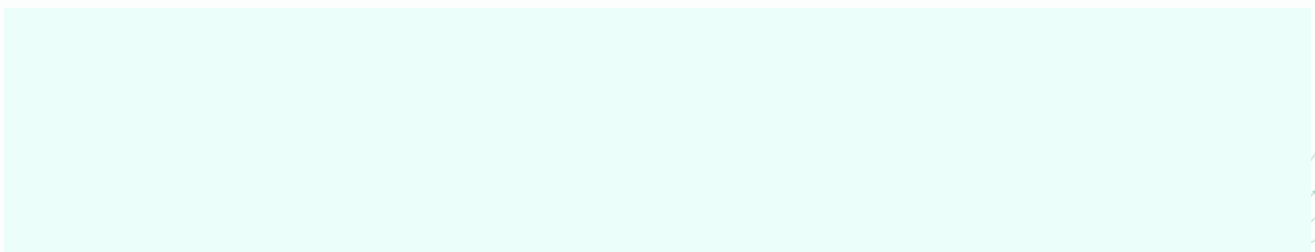
What was the most helpful book you read that helped you solve your problem?



What kind of software or products do you use ("in your business" where relevant, or "to solve your problem" in the case your business is in another area, like health or personal finance)?

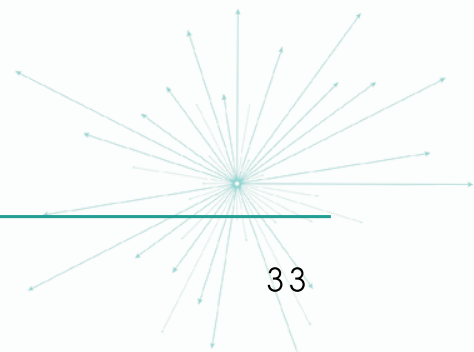


What was the best event you ever attended, and why?



What publication (magazine, blog or newspaper) do you read on the regular? Who is your favorite columnist?

What other service professionals or businesses do you work with besides me?



EXERCISE: EVALUATE YOUR ECOSYSTEM LIST

There are three steps to research and evaluate your initial Ecosystem list.

STEP 1: Empty your brain

Go through the Ecosystem Wheel and list which individuals, events, or organizations might also share the mission of solving the problems of your ideal customers.

STEP 2: Ask three favorite customers

After you do your first pass based on what you know, select three of your ideal customers (or people who fit the description of your ideal customers) and ask them these five questions centered around the problem you solve for them in your business:

1. What was the most helpful book you read that helped you solve your problem?
2. What kind of software or products do you use ("in your business" where relevant, or "to solve your problem" in the case your business is in another area, like health or personal finance)?
3. What was the best event you ever attended and why?
4. What publications (magazine, blog or newspaper) do you regularly read? Who is your favorite columnist?
5. What other service professionals or businesses do you work with besides me?

STEP 3: Research the contacts and expand your list

Expand your ecosystem reach by taking the initial list of watering holes or thought leaders and research the connections they have.



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CHAPTER 6

THE SEEDS YOU PLANT

EXERCISE: SEEDING PLAN

Timeframe (check one):

☐

Month

☐

Quarter

☐

Year

Survey the Ecosystem:

Evaluate the Ecosystem worksheet from Chapter 4. Who are the best seeding partners to start?

List Watering Holes:

List potential PB&J partners for get-to-know-you conversations:

List events you would like to speak at:

List Media Hubs you want to approach:

Preparation Checklist:

What do I need to prepare in order to take Tiny Marketing Actions?

- ☐ Email outreach templates
- ☐ About Page on website updated
- ☐ PDFs or program overviews
- ☐ Scheduling links

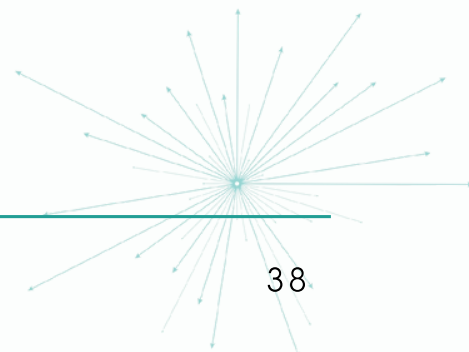
Seeding Outreach: Tiny Marketing Actions

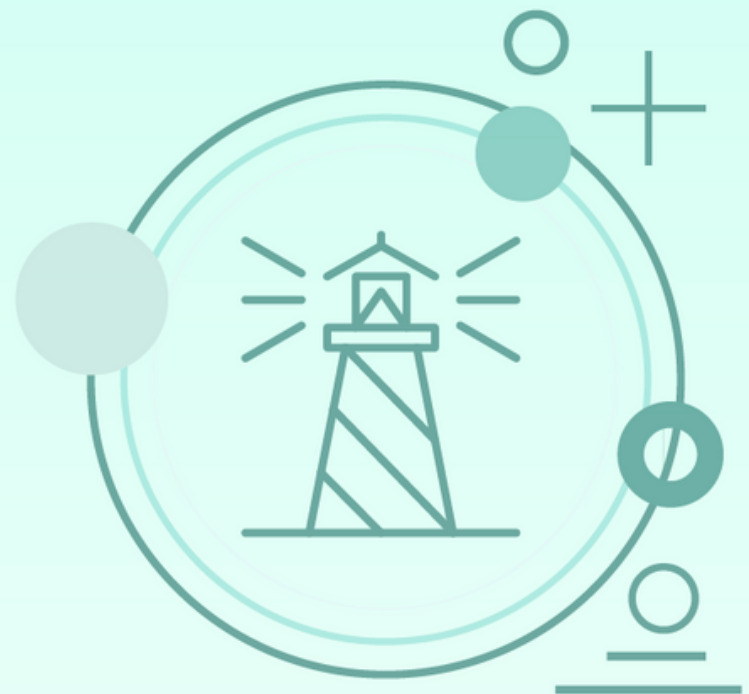
What pace and frequency will I do my Tiny Marketing Actions?

How will I track them?

Watering and Cultivation

What is my follow up plan for my Tiny Marketing Actions?





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CHAPTER 7

THE BEACON YOU LIGHT

EXERCISE: BEACON PLANNING TEMPLATE

My Primary Beacon is (check one):

- ☐ Email newsletter
- ☐ Podcast
- ☐ Blog
- ☐ Regular Meetup
- ☐ Annual Event
- ☐ Social Media Satellite: (Which one: _____)

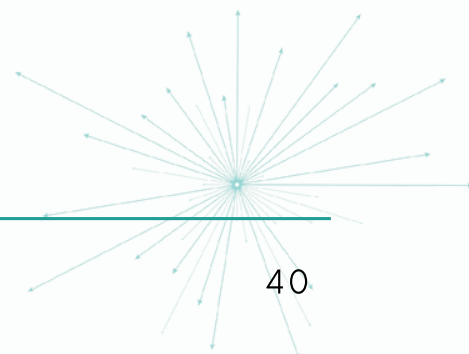
Do I also have a physical space? Yes/No

My Secondary Satellites are where will I cross-post content published on my primary Beacon? (Circle all that apply)

Twitter Facebook LinkedIn YouTube
SnapChat TikTok Pinterest Other: _____

What kind of content do I want to share on my Beacon?
Check all that apply:

- ☐ ETips or How Tos
- ☐ In-depth stories
- ☐ Features of customers/clients
- ☐ Curated links from others
- ☐ Other: _____



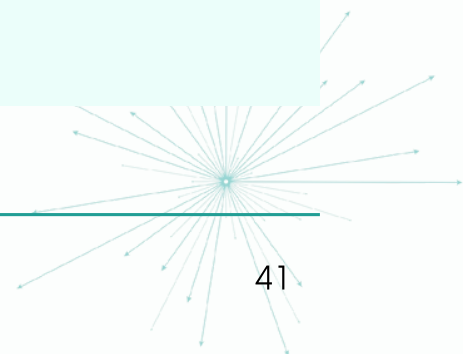
What cadence will I share content on my Beacon?

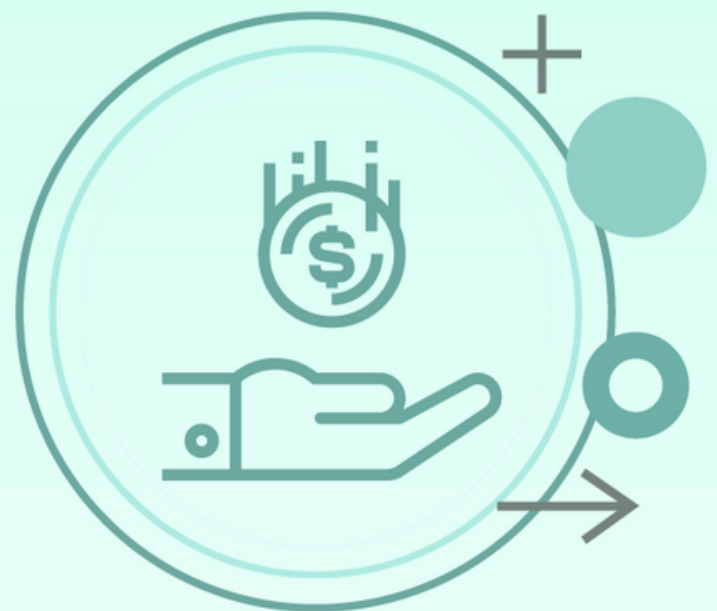
- ☐ Daily
- ☐ Weekly
- ☐ Bi-Monthly
- ☐ Monthly

How will I align my business brand with the content shared on my Beacon? (Add notes in each category):

Brand Voice:

Look/Feel:





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CHAPTER 8

THE SALES YOU MAKE

EXERCISE: SALES CHECKLIST

I am here to solve this problem for my ideal customer (from Chapter 3):

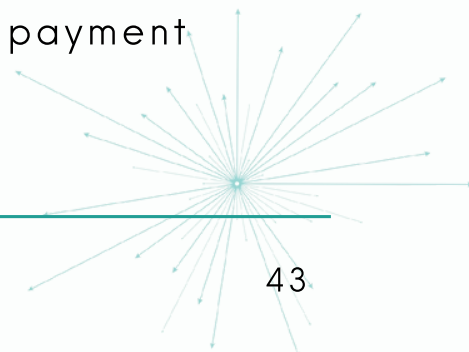
Mindset:

The thought that anchors my mindset for selling is:

Preparation:

I have prepared the following items and identified the following core offers in to engage in a sales process:

- ☐ Determined pricing structure
- ☐ Created proposal template
- ☐ Got case studies or testimonials from past clients
- ☐ Created informational materials for use in the sales process
- ☐ Implemented clear process for receiving payment
- ☐ Finalized agreements and contracts

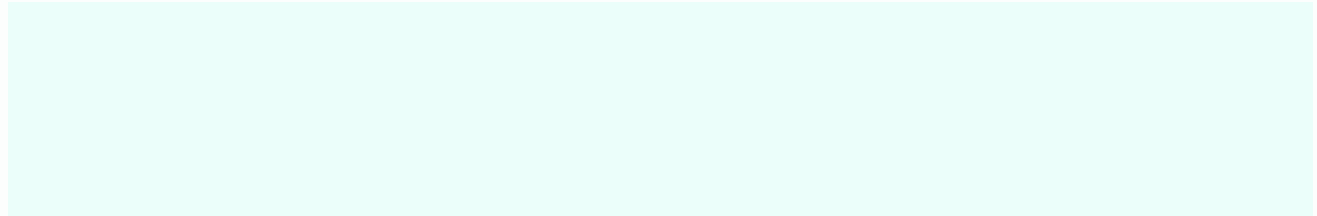


EXERCISE: SALES CHECKLIST

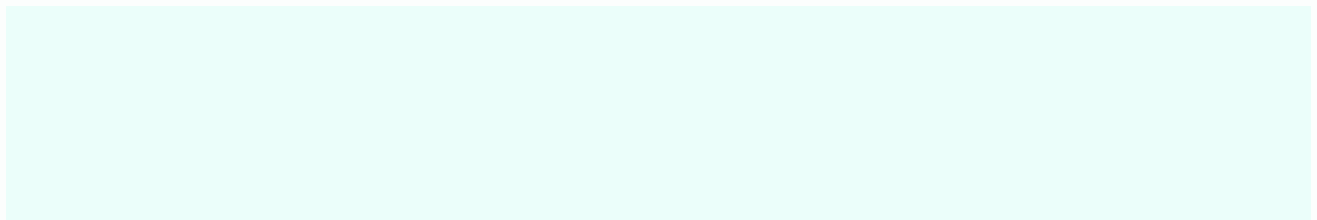
Process:

I will ask the following questions of each prospective customer at different stages of the sales process:

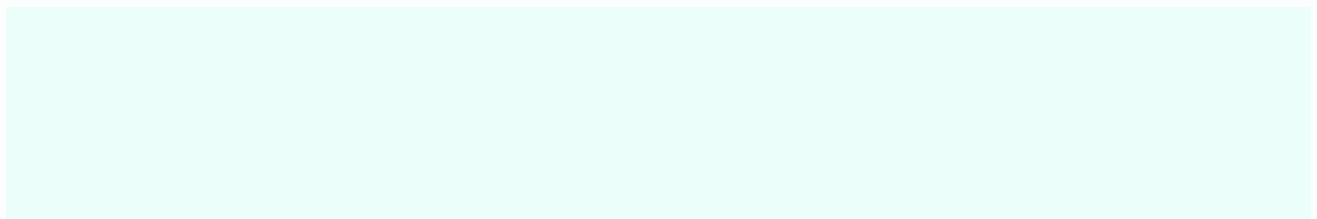
Beginning



Middle

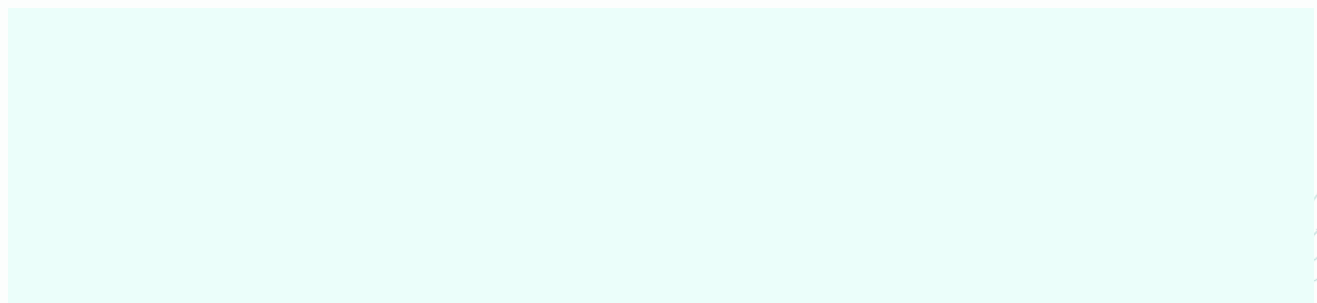


End



Onboarding:

These are the critical steps I need to take to onboard a new customer:





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CHAPTER 9

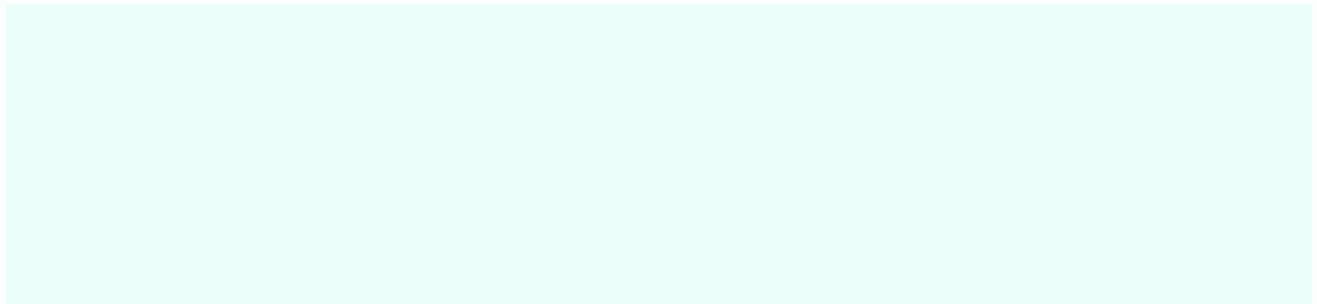
THE PARTNERSHIPS YOU FORM

EXERCISE: DEVELOPING PARTNERSHIPS

Building great partnerships is a crucial part of widening the net, but it's fraught with risk if you don't adopt a good process. Follow this process to create a healthy and productive partnership for both sides.

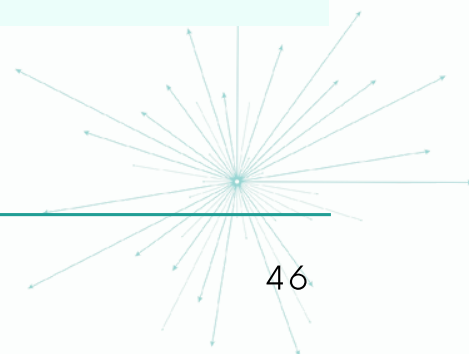
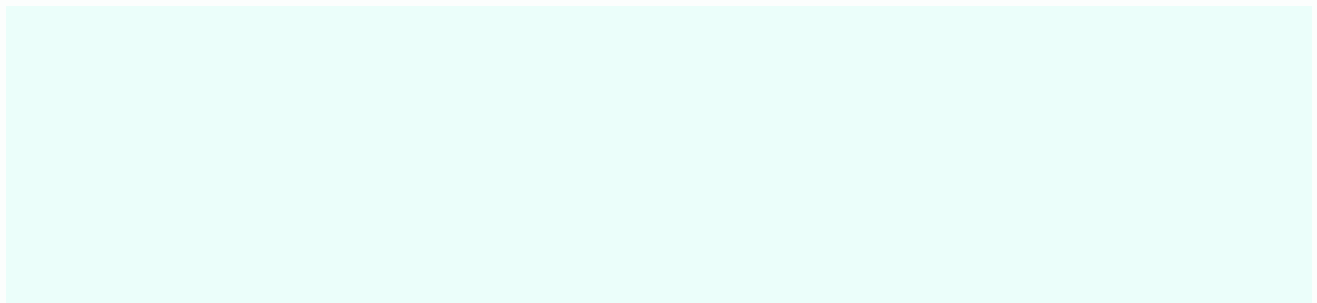
STEP 1: Define your service as a problem solved

For example, if you own a pool cleaning service, this might be "a busy homeowner who prides herself on a clean, tidy living environment but hates to do the work herself."



STEP 2: Look for the jelly to your peanut butter

A good way to identify natural partners now that you've identified the core problem you solve is to write down the answers to the following question: "What else would be necessary to solve this problem?"



STEP 3: Date first

Remember, you aren't just looking for a partner whose work is a natural complement to yours, you're looking for someone whose work process is highly aligned with your values, work style, and the needs of your customers.

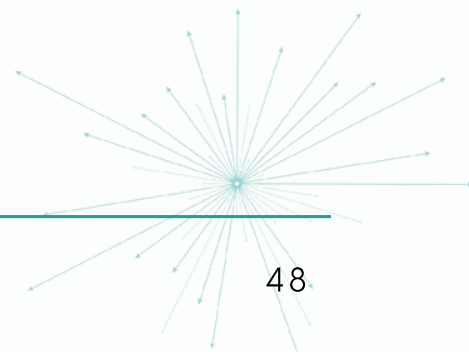
Take your time to get to know your partner across different environments and observe their habits:

- Are they late to meetings?
- Do they step aside on sidewalks to let people pass?
- Are they constantly looking at their phone?
- How do they talk about their loved ones, if they talk about them at all?
- Do they return your calls or texts promptly?
- How do they respond to feedback?
- Do they hit their deadlines? If not, do they blame someone or something else for the delay instead of taking ownership for their actions?

STEP 3: Do your due diligence

Each partner should feel comfortable asking for specific data to validate the hunch that there will be a benefit in working together. Some of the information that can be helpful in evaluating a potential partnership includes:

- Social media profiles
- Interviews with past partners or clients
- Business financials
- Legal documentation (sample contracts)
- Business policies
- Website copy
- Business plans
- Any past financial or legal issues (Have you ever gotten in serious financial trouble or been sued?)





THE WIDEST NET - WORKBOOK

CHAPTER 10

THE ECOSYSTEM YOU PROTECT

EXERCISE: STACK YOUR OPPORTUNITIES

Look ahead to this quarter. What unique opportunities do you see?

What type of business development activity am I focused on this quarter?

Select the stacking opportunities

How can I expand the impact of this activity by adding the following things:

Partnership

Who else might want to participate in this activity with me and work together to expand opportunities for both of us?

Press Coverage

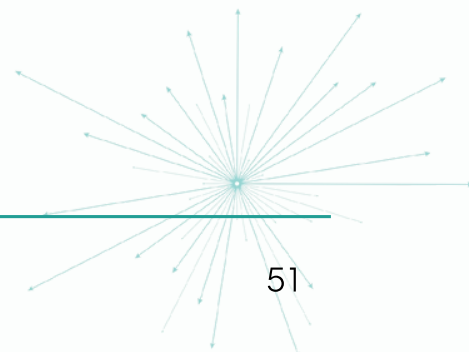
Is there a great story or press event that I could use to extend the impact of this activity?

Invite prospective clients/partners to attend so they see you in action

Where appropriate, can you invite a prospective client or partner to an event so they see your work in action?

Use Facebook or Instagram Live to stream an event or activity

Instead of hosting a private call where you answer questions, why not do it on a live stream so you can involve more people? If you are speaking at an event, can you livestream part of it, or at least capture yourself backstage before you go on?



EXERCISE: ECOSYSTEM MARKETING REVIEW

To keep your business growing and your business culture healthy and dynamic, carve out time to complete this reflection on a quarterly or bi-annual basis.

Mission and Values

- | Y | N | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Have we been consistent in our application of our principles, values, and ethics? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do we need to update our Always and Never lists? |

Customers

- | Y | N | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do we still have the right customer segments? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do we need to adjust or refine our ideal customer problems? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are our offers designed to solve the problem we are best at solving? |

If not, who would be better?

Partnership Assessment

Y N

☐☐

Do we have the right partners?

☐☐

Are they delivering in a way consistent with our brand and values?

☐☐

What do we like best about this partnership?

☐☐

What do we want to fix in this partnership?

☐☐

Is there reciprocity at work?

☐☐

Is it profitable?

Staff Skills

Y N

☐☐

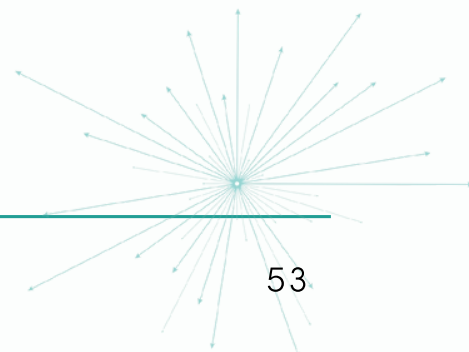
Do we have the right capabilities on our team?

☐☐

Are we over- or under-staffed in any areas?

☐☐

Is there any step or process a person is doing that could be more efficiently done by automation?



Markets

Who is here? Who is not here? Why aren't they here?

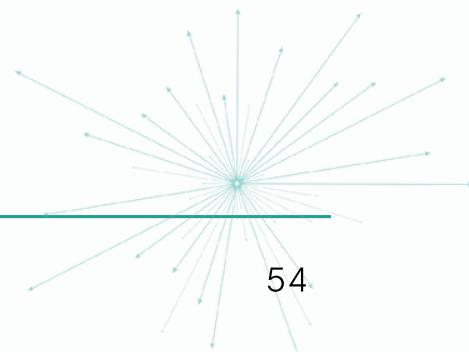
Which new watering holes are we excited to explore next?

Products & Customer Experience

What is bugging our customers?

What is bugging us?

What improvements can we make to remove obstacles that get in the way of solving our customer problems?



Marketing Analytics

Y N

☐ ☐ Are we meeting our KPIs?

☐ ☐ Are your metrics trending in the right direction?

What do we need to fix to improve our numbers?

Leadership Behaviors

What behaviors are getting in the way of building a vibrant company and ecosystem?

What do we need to change in how we market and run our company to create a welcoming, equitable, and innovative environment for customers, employees, and partners from many different backgrounds?