

Marketing Strategy Playbook

Turn a clear market choice into an offer, a channel plan and a weekly learning loop.

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I use this playbook to make a small set of decisions the team can execute and review. Start with one buyer, one problem and one offer. Add channels after the proposition and the sales handoff make sense.

Business / strategy owner / planning period

Set the business direction

Strategy brief - write decisions, not aspirations

Decision	Your working answer
Business outcome and deadline	
Baseline and evidence source	
Available budget and team capacity	
Sales or delivery constraint	
What we will deliberately defer	

Write the positioning

For [specific buyer] facing [trigger / job], [offer] is a [category] that helps them [observable change]. Compared with [current alternative], it provides [meaningful difference], supported by [available evidence].

HYPOTHETICAL EXAMPLE - B2B SERVICE FIRM

A hypothetical CRM studio positions a fixed-scope lead-handoff implementation for owner-led service firms. It competes with shared inboxes and improvised spreadsheets. A sample workflow and documented acceptance checks are possible proof assets; revenue gains remain unproven.

Find the buyer and the buying moment

Your ideal customer profile (ICP) describes an account that can benefit and buy. A persona describes a person inside that account. Jobs-to-be-done adds the situation and progress that make the buyer act.

Account and buying group worksheet

Dimension	Best-fit description / evidence
Sector, size and geography	
Trigger and problem in the current workflow	
User, champion, approver and budget owner	
Existing tools and delivery constraints	
Disqualifiers and low-fit requests	

Write the job as a situation

When [situation], I want to [make progress], so I can [desired outcome]. Also record the practical, emotional or social cost of leaving it unresolved. Keep your interpretation separate from the buyer's actual words.

Job statement / source / interview date

Ask about a real recent event

1. Walk me through the last time this happened.
2. What did you try, and what made that difficult?
3. Who was involved in deciding what to do next?
4. What would you need to see before changing the current approach?

Evidence of urgency / access to buyer / reason to exclude

Prioritize accounts with a repeated problem, an identifiable buying process and a realistic path to delivery. Treat unconfirmed attributes as hypotheses, not targeting facts.

Design something a buyer can accept

An offer makes the proposition purchasable. Define the change, deliverables, boundaries, effort required from the customer and acceptance checks. If you cannot explain what finishes the work, narrow the scope.

Offer design worksheet

Element	Decision
Buyer job and starting condition	
Core deliverables and acceptance criteria	
Customer inputs and responsibilities	
Timeline, dependencies and capacity limit	
Price basis, payment events and change scope	
Proof asset and unresolved risk	

Reduce decision risk

Show a sample, a process walkthrough or a small scoped pilot. Use only proof you can substantiate. Explain exclusions before a buyer assumes they are included.

Check delivery economics

Estimate time, direct costs and support load. Compare the price with the full scope. A popular offer that exceeds delivery capacity needs redesign.

HYPOTHETICAL EXAMPLE - TEST OFFER - EXAMPLE AMOUNTS ONLY

A hypothetical service firm tests a USD 500 workflow audit before selling implementation. The audit produces a process map, issue register and prioritized build plan. The buyer supplies process access and a team contact. The price is a test assumption, not a market benchmark.

Offer test / audience / decision threshold / review date

- ☐ We can deliver the stated scope with available capacity.
- ☐ A buyer can tell what they receive and how acceptance works.

Build a messaging house

The roof is one central promise. The pillars are distinct reasons to believe it. Evidence sits underneath each pillar. Keep claims narrow enough to prove, then use the same logic across ads, pages, emails and sales calls.

Roof / primary promise

[Buyer] can [observable change] through [offer or mechanism]. Avoid claims you cannot demonstrate.

Three supporting pillars

Pillar / reason to choose	Evidence available now	Buyer concern addressed

Build the message into a useful asset

1. Open with the buyer's situation and the cost of the current workaround.
2. Explain the mechanism and the deliverables in concrete terms.
3. Show relevant evidence and state the boundary of the promise.
4. Ask for one next step that fits the buyer's readiness.

Objection handling - use real objections

Objection in buyer language	Response / proof to show	Next step

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL CRM STUDIO

Promise: make every new inquiry visible with a named owner and next action. Pillars: agreed handoff rules, tested follow-up, team adoption. Evidence: an annotated pipeline, a QA record and training materials. CTA: book a workflow scoping call.

Primary CTA / destination / owner of responses

Choose channels with a reason

Use the matrix to choose a primary route to demand and a supporting route to trust. The fit notes are planning heuristics. Confirm audience access, account eligibility, cost and measurement before spending.

Channel selection matrix

Channel	When to consider it	What must be ready / decision signal
Paid search	A buyer can describe the need in a query.	Relevant landing page, exclusions and inquiry tracking. Review qualified opportunities, not clicks alone.
Paid social	A recognizable situation can be explained visually.	Testable creative, defined audience hypothesis and fast response. Pause weak message / audience combinations.
ChatGPT ads	A conditional experiment, only where available and suitable.	Confirm availability, eligibility, formats and measurement in your account. Keep budget uncommitted until confirmed.
SEO / AEO	Buyers repeatedly ask questions you can answer well.	Useful pages, clear sourcing and accessible structure. Review qualified visits and inquiries; inclusion in AI answers is not guaranteed.
Content	Buyers need education or evidence before acting.	Specific point of view, examples you can substantiate and a distribution plan. Trace engagement to next steps.
Email / WhatsApp	Contacts expect relevant follow-up and permit the channel.	Permission records, preferences, opt-outs, segmentation and reply ownership. Review qualified replies and progression.
Partnerships	Another provider already has trusted access to the buyer.	Shared-fit criteria, introduction process and clear responsibilities. Review accepted introductions and resulting opportunities.

Score the shortlist before committing

Use a simple 1-3 planning score: buyer fit, ability to execute, ability to measure. Write the evidence behind each score. A high total with an unready dependency is still a reason to wait.

Complete for the channels you will actually test

Candidate / score rationale	Readiness gap / owner	Time or spend cap / review date

Primary channel / supporting channel / channels deferred

Plan a campaign the team can finish

Give each campaign one audience, one offer, one main conversion and one sales handoff. Treat the first cycle as a test. Set the evidence needed to continue, change or stop before launch.

90-day campaign plan template

Window	Work and output	Owner / deadline / evidence
Days 1-14	Validate buyer problem; finalize offer and scope; capture baseline; fix tracking and routing.	
Days 15-30	Launch a limited test; QA real inquiries; collect objections and search or reply patterns.	
Days 31-60	Improve one major constraint; test one meaningful change; confirm delivery capacity.	
Days 61-90	Compare mature cohorts; document economics and workload; decide the next cycle.	

Campaign / ICP / offer / landing destination

Primary conversion / sales owner / response SLA

Weekly execution template

Week / asset or action	Owner / dependency	Budget or hours / completion check

Write decision rules

Continue if [minimum evidence] and [quality threshold] are met within [cap]. Change if [specific constraint] appears. Stop if [risk, capacity limit or loss threshold] is reached. Thresholds should come from your economics and capacity.

Leave room for sales follow-up and delivery. An asset is complete when it is published, checked, connected to tracking and assigned a response owner.

Connect activity to business outcomes

Start with the business decision, then choose metrics. Keep booked revenue, collected cash and delivery contribution separate. Compare rates within a defined cohort and time window, allowing for the sales cycle.

KPI tree - a planning model, not a forecast

Level	Definition / relationship	What it helps you decide
Business	Booked revenue = won deals x average booked deal value.	Whether accepted demand becomes business.
Sales	Win rate = won / decided opportunities, using a consistent cohort.	Whether fit, offer or sales handling needs work.
Qualification	Qualification rate = sales-accepted leads / reviewed leads.	Whether targeting and intake produce suitable demand.
Acquisition	Lead conversion = attributable leads / relevant visits.	Whether the message and response path work.

Tracking checklist before launch

- ☐ Define lead, qualified opportunity, won and lost in writing.
- ☐ Use consistent campaign tags; preserve source and timestamp in the CRM.
- ☐ Record consent and contact preferences; exclude test records from reports.
- ☐ Test inquiry capture, deduplication, assignment and event firing.
- ☐ Reconcile form records, CRM records and platform totals; note attribution gaps.
- ☐ Assign one owner for the dashboard and a recurring data-quality check.

Measurement plan template

Metric / exact numerator and denominator	Source / owner / cadence	Baseline / target / window

Record both first known source and latest meaningful source where practical. Platform-reported conversions may overlap. Reconcile them with CRM outcomes instead of adding them together.

Turn evidence into the next decision

I keep the review short and specific. The meeting should produce decisions and owners, not a tour of every dashboard. Bring results by campaign cohort, sales feedback and open delivery constraints.

Suggested 30-minute weekly agenda - example allocation

Time	Discussion	Output
5 min	Check tracking, routing and data exceptions.	Known gaps and a repair owner.
8 min	Review spend or effort, accepted opportunities and sales progression.	The most likely constraint.
7 min	Read buyer objections, lost reasons and handoff failures.	A message, fit or process hypothesis.
7 min	Choose one test or operating correction.	Owner, cap, success rule and deadline.
3 min	Read back decisions and deferred work.	One shared action list.

Experiment and decision log

Hypothesis / change	Evidence / result	Decision / owner / next date

Close the loop

- ☐ Look at lead quality and sales outcomes alongside acquisition metrics.
- ☐ Separate observed evidence from your explanation of it.
- ☐ Change one major variable per test where practical.
- ☐ Stop or defer work that has no owner or no decision it informs.

Next week: one priority / owner / completion evidence

Want help implementing this?

Bring your completed worksheets. I can help turn your next decision into a working growth system.

shoebloodhi.com/contact