

Worksheet 1: Personal Goal Setting

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|------------------------------|---------------------|
| <i>Name of Person/Studio</i> | <i>Date of Plan</i> |
|------------------------------|---------------------|

During the next 12 to 18 months, I wish to enjoy the following with my family:

During the next 12 to 18 months, I wish to participate with my friends as follows:

During the next 12 to 18 months, I wish to participate in organizations as follows:

During the next 12 to 18 months, I wish to enjoy personal leisure time as follows:

During the next 12 to 18 months, I wish to engage in the following personal-growth activity:

During the next 12 to 18 months, I wish to achieve the following financial goals:

During the next 12 to 18 months, I wish to accomplish these additional personal goals:

Worksheet 2: Business Concept Analysis

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|-----------------------|--------------|
| Name of Person/Studio | Date of Plan |
|-----------------------|--------------|

2A. Business History

In specific terms, describe why you decided to go into the business of photography:

List any types of photography that your business once offered — but no longer offers — and explain why you stopped offering it:

2B. Present Business Focus

Review your key business segments (Babies, Children, Families, Pets, Weddings, Seniors, Schools/Events, Commercial, Headshots, etc). If you are a new business, list those you intend to offer.

List all the business segments you presently serve in order of importance to you:

Describe the geographic area that your business serves, including a list of ZIP Codes:

*If your business has a **Mission Statement**, include it here:*

*List all **identities** by which your business is known — or has been known in the past. Include business name, slogan(s) or tag line(s) and website address(es):*

Worksheet 3: Target Market Analysis by Market Segment

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|----------------|--------------|
| Name of Studio | Date of Plan |
|----------------|--------------|

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|--|
| Market Segment (Product Line or Product Line Category) |
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3A. Who are the clients you are targeting?

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| <p>Describe the demographics of the ideal client(s) whom you wish to interest in this Market Segment. Include age range, income level, location, family status, work status, etc.</p> |
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| <p>List businesses where this ideal client shops or professional offices that this ideal client frequents:</p> |
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| <p>List organizations and activities in which this ideal client might participate:</p> |
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| <p>What does this ideal client value? This can include emotional, physical, social, and/or material needs and wants.</p> |
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List any local retailers, professionals, friends, relatives, or “influentials” you know with whom you can network or ask for advice in reaching this target market:

3B. Putting yourself in the position of your ideal client:

What would you want to purchase, and how would you like to be treated?

List as many **Consumer Benefits** as you can that this ideal client will receive from owning products from this Market Segment:

What **Core Values** are key to impressing, pleasing and exciting ideal clients of this Market Segment with the **Products** and **Services** your business provides:

What **Marketing Media** are likely to be the most effective in impressing the ideal clients of this Market Segment?

Worksheet 4: Market Advantage Analysis by Market Segment

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|----------------|--------------|
| Name of Studio | Date of Plan |
|----------------|--------------|

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|--|
| Market Segment (Product Line or Product Line Category) |
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4A. Assess Your Competition.

Identify your competitors for this Market Segment and list their competitive strengths (such as community image, marketing reach, image style and quality, and product offerings):

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What actions might you take to overcome this competition?

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4B. Define Your Place in the Market.

After reviewing the Core Competencies expressed in Worksheet 2(B), list **competencies** and other **strengths** that will help you to attract your ideal clients in this Market Segment. If these competencies and strengths can be translated into Selling Features, list them below:

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| 1. |
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| Selling Feature: |
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| 2. |
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| Selling Feature: |
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| 3. |
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Selling Feature:

4.

Selling Feature:

5.

Selling Feature:

6.

Selling Feature:

7.

Selling Feature:

8.

Selling Feature:

9.

Selling Feature:

10.

Selling Feature:

List any **weaknesses** that might hinder you in attracting your ideal clients in this Market Segment, then state how these weaknesses can be redirected into selling features.

1.

Selling Feature:

2.

Selling Feature:

3.

Selling Feature:

4.

Selling Feature:

5.

4C. Define Your Artistic Style.

Describe the **Artistic Style** of the photography you create for this Market Segment:

Describe any **Unique Factors** about your artistic approach to this Market Segment:

4D. Define Your Product Focus.

List any **Exclusive Products** that consumers can buy from you and not from your competitors in this Market Segment:

List all other **Key Products** you intend to create for this Market Segment:

4E. Define Your Approach to Hospitality and Client Experience (Hospitality Branding).

*Based on the Core Values you listed in Worksheet 3(B), define how you intend to approach **Hospitality** and create a memorable **Client Experience** for this Market Segment:*

4F. Build Community Visibility.

*Define ways to increase **Community Visibility** for this Market Segment:*

Worksheet 5: Marketing Focus Summary by Market Segment

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|----------------|--------------|
| Name of Studio | Date of Plan |
|----------------|--------------|

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|--|
| Market Segment (Product Line or Product Line Category) |
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5A. Ideal Clients & Their Consumer Benefits for this Marketing Segment

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| <p>From Worksheet 3(A), describe, in one sentence, your Ideal Clients for this Market Segment:</p> |
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| <p>From Worksheet 3(B), summarize in a few bullet points the Consumer Benefits of this Market Segment:</p> |
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5B. Your Market Advantage in this Market Segment

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| <p>From Worksheet 4(A), summarize in bullet points what you consider to be your strongest Competitive Advantage(s) over other photographers seeking to influence prospective clients for this Market Segment:</p> |
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From **Worksheet 4(B)**, list by number all **Selling Features** for this Market Segment:

From **Worksheet 4(C)**, summarize the **Artistic Style** of the work you produce for this Market Segment:

From **Worksheet 4(D)**, summarize your **Product Focus** for this Market Segment:

From **Worksheet 4(E)**, summarize how you intend to approach **Hospitality** and create a memorable **Client Experience** for clients in this Market Segment:

From **Worksheet 4(F)**, summarize how you intend to **Community Visibility** for this Market Segment:

5C. Your Key Identity Elements for this Market Segment

Based on the summaries you have provided in this worksheet, create a **Mission Statement** for this Market Segment. Include the following elements:

- *The Purpose: What opportunities we address*
- *The Business: What we do to address these needs*
- *The Values – what principles or beliefs guide our work*

Based on the summaries you have provided in this worksheet for this Market Segment, use **bullet points** to express the elements that comprise your **Sustainable Competitive Advantage** for this Market Segment. A Sustainable Competitive Advantage enables a business to survive against its competition over time by allowing the maintenance and improvement of the company's competitive position.

Based on your **Mission Statement** and **Sustainable Competitive Advantage** bullet points, write no more than five sentences to express your **Unique Selling Proposition** — statements that sum up why consumers should purchase from you rather than competitors. These statements must be compelling enough to persuade them to try your product or services in this Market Segment.

Based on your **Mission Statement**, **Sustainable Competitive Advantage**, and **Unique Selling Proposition** for this Market Segment determine if your existing slogan(s) or tag line(s) for this Market Segment is appropriate. If not, revise it or create one if none exists.

Worksheet 6: Building Marketing Identities for Your Overall Business and by Market Segment

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|-----------------------|---------------------|
| <i>Name of Studio</i> | <i>Date of Plan</i> |
|-----------------------|---------------------|

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|---|
| <i>Market Segment (Product Line or Product Line Category)</i> |
|---|

6A. Establish Your Studio's Overall Business Identity Elements

*To assure that your marketing information remains consistent, establish which of the following **Identity Elements** you wish to use and how you want them expressed in your marketing materials.*

Studio Name with Slogan or Tag Lines:

Studio Mission Statement:

Studio Information (address, city, state, Zip Code):

Phone:

Website Address:

Studio Hours (list exactly as you wish to appear on printed materials):

Satisfaction Guarantee (list exactly as you wish to appear on printed materials):

Other Elements or Information: Check each element you wish to appear on printed materials:

- American Express
- MasterCard
- Visa
- Certified Professional Photographer Logo

- Other
- Other
- Other

6B. Establish Your Marketing Identity for this Market Segment:

Based on your completion of Worksheet 5, list the following items for this Market Segment:

Slogan or Tag Lines:

Website URL:

Mission Statement:

Sustainable Competitive Advantage:

Unique Selling Proposition:

Graphic Design Changes:

6C. Select Business Identity Materials

Business Identity Materials represent a vital first step toward building a meaningful, memorable brand for your overall business and for your major Market Segments.

Business Identity Materials List:

Studio Logo Design *Product Line Logo(s)* *Product Logo(s) or Wordmark(s)*

Marketing Design Elements

Studio Business Cards *Product Line Business Cards*

Studio Letterhead and Envelopes *Product Line Letterhead and Envelopes*

Studio Notecards (for correspondence) *Studio Postcards (for correspondence)*

Product Line Notecards (for correspondence) *Product Line Notecards (for correspondence)*

Other Studio Business Identity Materials

Other Product Line Business Identity Materials

Worksheet 7: Marketing / Branding Strategies by Market Segment

| | |
|-----------------------|---------------------|
| <i>Name of Studio</i> | <i>Date of Plan</i> |
|-----------------------|---------------------|

Market Segment (Product Line or Product Line Category)

7A. Opportunity Marketing Strategies and Materials

Opportunity Marketing Strategies and Materials allow you to promote your business by providing prospects and clients with appropriate marketing materials whenever one-on-one opportunities present themselves.

On-the-Spot Marketing Materials

- Teeny-Tiny Brochures*

- Be My Guest Cards*

- Information Fulfillment Materials*

7B. Client Acquisition Strategies

The purpose of Client Acquisition Strategies is to get prospects and repeat clients in the door and to expand your marketing reach when your objective is to grow your business.

Invitational Sessions

Do you need samples for marketing purpose? If so, Revisit the last item on section A of Worksheet 3. List any local retailers, professionals, friends, relatives, or "influentials" you know whom you can photograph or ask for referrals to photograph for marketing purposes or to stimulate traffic through your business.

List marketing material(s)* needed to accomplish this strategy:

****Client Acquisition Promotion Materials Possibilities:*** *Marketing Cards / Mini-Brochures / Booklets
High-Concept Marketing Mailers or Handouts / Gift Certificates / Gift Card Promotions / Websites, Blogs & eNewsletters*

Business-to-Business Partnerships

Revisit the last item on section A of Worksheet 3 to identify any appropriate local retailers or professionals with whom you can engage in co-marketing activities, especially those who might be willing to display your work at their premises. Plan joint-venture proposals appropriate to each.

List marketing material(s)* needed to accomplish this strategy:

 Public Displays

Identify public display possibilities for images specific to this Market Segment and plan a strategy for proposing display opportunities to the owners and/or managers of these premises.

List marketing material(s)* needed to accomplish this strategy:

 Charitable Marketing

Identify community charities involving community leaders and other supporters who would be a good fit for your business and plan a strategy for partnering with them.

List marketing material(s)* needed to accomplish this strategy:

***Client Acquisition Promotion Materials Possibilities:** Marketing Cards / Mini-Brochures / Booklets
High-Concept Marketing Mailers or Handouts / Gift Certificates / Gift Card Promotions / Websites, Blogs & eNewsletters

Direct Marketing

Determine what kind of direct marketing strategies (mail or handouts) would be appropriate for attracting clients to this Market Segment.

List marketing material(s)* needed to accomplish this strategy:

 Internet Marketing

Create an integrated Internet marketing strategy to attract clients to this market segment, designing it to facilitate viral marketing to existing or prospective clients.

Internet strategy will include the following products:

- Website:
- Blog:
- eNewsletter:

List Internet marketing products(s) needed to accomplish this strategy:

Complete your Internet Marketing Strategy on Worksheet 9.

 Social Network Marketing

Determine which social network marketing media you wish to integrate into your marketing plan for this Market Segment.

- Facebook
- Twitter
- MySpace
- Other
- Other
- Other

List marketing material(s) needed to accomplish this strategy:

Complete your Social Network Marketing Strategy on Worksheet 9.

 Media Advertising

Determine whether media advertising, such as placing display advertising in newspapers or magazines, will be effective and cost-efficient for promoting this Market Segment. List ads you intend to place, media where they will be placed, and dates they will appear.

List marketing material(s)* needed to accomplish this strategy:

***Client Acquisition Promotion Materials Possibilities:** Marketing Cards / Mini-Brochures / Booklets
High-Concept Marketing Mailers or Handouts / Gift Certificates / Gift Card Promotions / Websites, Blogs & eNewsletters

7C. Client Education

The purpose of Client Education is to add value to your product and service and to facilitate all aspects of the studio-client relationship, including session, sales and workflow efficiency.

Client Information Presentation

Do you plan to present clients with a collection of client education information about your business prior to the portrait session or event? **yes** **no**

If yes, when/how will you get this information into clients' hands (such as at planning session or through the mail)?

If yes, indicate how information will be organized (such as in a Client Information Folder):

If yes, list client information items to be provided:

Price List(s):

Portrait Needs Checklist:

Appointment Reminder

Pick-up Appointment Materials

List any client education information that will be presented at pick-up appointment or when delivering portraits.

List client education material(s)* needed to accomplish this strategy:

List any client education content you wish to post on your Website or Blog or to include in a client eNewsletter.

•Client Education Materials Possibilities: Client Information Folders / Folder Insert Sheets / Promotional Cards / Brochures / Mini-Brochures / Booklets / Client Education Brochures / Educational DVDs / Appointment Information Reminders / Price Lists / Value Enhancement Products / Websites, Blogs & eNewsletters

7D. Image-Enhancing Packaging

The purpose of Image-Enhancing Packaging is to add value to your product and create buzz among your clients and prospects.

Shopping Bag

Bag Tag(s)

Portrait Folder(s)

Portrait Box(es)

Belly Band(s)

Tissue Paper

Document Holder

Studio Identity Sticker for frame backing

Other:

Other:

Other:

List packaging material(s) needed to accomplish this strategy:*

****Image-Enhancing Packaging Possibilities:*** *Shopping Bags / Bag Tags / Portrait Folders / Portrait Boxes / Belly Bands / Stickers or Belly Band closures / Tissue Paper / Document Holders / Studio Identity Stickers*

Worksheet 8: Relationship Marketing by Market Segment

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|------------------------------|---------------------|
| <i>Name of Person/Studio</i> | <i>Date of Plan</i> |
|------------------------------|---------------------|

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|---|
| <i>Market Segment (Product Line or Product Line Category)</i> |
|---|

8A. Plan Hospitality Branding Strategies

List courtesies, hospitality, and ways that you can surprise and delight your clients in order to make their contacts with your business more memorable or emotionally satisfying in all of the following encounters:

Initial Phone Contact

Consultation

Session/Event

Sales Session

Product Delivery

Post-Delivery Contact

List material(s) needed to accomplish this strategy:

8B. Plan Relationship Marketing Strategies

Develop strategies for building client relationships in the following areas:

Client Rewards

Frequent Buyers

Referral Program

Marketing Back

Creating Client Buzz

List material(s) needed to accomplish this strategy:

9B. Plan Your Blog Strategy

Complete for each Website required for your business:

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|---|
| <p><i>Studio or Market Segment:</i></p> <p><i>URL:</i></p> <p><i>Type of Blog:</i></p> <p><i>Intended Audience:</i></p> <p><i>Drive Traffic By:</i></p> <p><i>Possible Blog Topics / Content:</i></p> |
|---|

9C. Social Network Media Strategy

Determine how you wish to integrate the following social networks into your Internet marketing strategy:

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| <p><input checked="" type="checkbox"/> Facebook <i>How to integrate:</i></p> <p><input checked="" type="checkbox"/> Twitter <i>How to integrate:</i></p> <p><input type="checkbox"/> MySpace <i>How to integrate:</i></p> <p><i>Other:</i> <i>How to integrate:</i></p> <p><i>Other:</i> <i>How to integrate:</i></p> <p><i>Other:</i> <i>How to integrate:</i></p> |
|--|

9D. Plan Your eNewsletter Strategy

Complete for each eNewsletter required by your business:

Studio or Market Segment:

Name of eNewsletter:

Intended Audience:

How to collect email addresses:

Activities with marketing partners:

Worksheet 10: Selling Plan by Market Segment

| | |
|-----------------------|---------------------|
| <i>Name of Studio</i> | <i>Date of Plan</i> |
|-----------------------|---------------------|

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|---|
| <i>Market Segment (Product Line or Product Line Category)</i> |
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| | |
|---|---|
| <i>Last Year's Total Sessions for this Market Segment</i> | <i>Projected Total Sessions for this Market Segment</i> |
|---|---|

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| <i>Last Year's Total Sales for this Market Segment</i> | <i>Projected Total Sales for this Market Segment</i> |
|--|--|

| | |
|---|---|
| <i>Last Year's Average Sale for this Market Segment</i> | <i>Projected Average Sale for this Market Segment</i> |
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| <i>Who is responsible for establishing the sales plan and price list of this Market Segment?</i> |
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10A. The Telephone Inquiry

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| <i>Who will handle telephone inquiries for this Market Segment?</i> |
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| <i>List key questions to ask of prospective client:</i> |
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| <i>List important information to impart to prospective client:</i> |
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| <i>List desired outcome (next step, such as "schedule a Consultation appointment") for this step in the selling plan:</i> |
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| <i>List any necessary follow-up steps:</i> |
| |

10B. The Consultation

If a Consultation is required, for this Market Segment, who will handle it?

Where and/or how will the Consultation take place?

List sales aides needed to support the Consultation, including price lists and sell sheets:

List key questions to ask of prospective client:

List important information to impart to prospective client:

List key products, from this Market Segment, that should be introduced during the Consultation:

List courtesies you can extend to make the Consultation memorable or emotionally satisfying:

List desired outcome (next step, such as "schedule Portrait Session") for this step in the selling plan:

Follow-up steps required prior to the Portrait Session or Event:

10C. Preparation and Execution of Session or Event

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|--|---|
| <i>Who will do Session or Event preparation?</i> | <i>Do you have a session or event checklist ?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No |
|--|---|

If you do not have a Session or Event checklist, list steps required to conduct the Session or Event:

List courtesies you can extend to make the Session or Event memorable or emotionally satisfying:

10D. Sales Session Preparation

| | |
|--|--|
| <i>Who will prepare the images for presentation?</i> | <i>Who will determine Expectation of Sale?</i> |
|--|--|

List preparation steps required for conducting the Sales Session:

10E. Sales Session

Where (such as in the studio or at client's home) and/or how (such as projection or paper proofs) will the Sales Session take place?

List sales aides needed to support the Sales Session, including price lists and sell sheets:

List courtesies you can extend to make the Sales Session memorable or emotionally satisfying:

Describe each step in the Sales Session, including a sales checklist:

10F. The Product Delivery

List steps required to prepare for the pick-up or delivery of finished order:

List rewards you can provide to make the client's completed transaction with you memorable or emotionally satisfying:

List any post-delivery follow-up actions:

List any re-marketing opportunities that would apply to the client, along with the steps needed to make this happen:

10G. Refining Your Selling Plan

List the step in which you encountered problems or objections:

Telephone inquiry Consultation Session or Event Sales Session Other:

List problem(s) encountered or objection(s) stated:

Determine appropriate response or action for problem(s) encountered or objection(s) stated:

List the step in which you encountered problems or objections:

Telephone inquiry Consultation Session or Event Sales Session Other:

List problem(s) encountered or objection(s) stated:

Determine appropriate response or action for problem(s) encountered or objection(s) stated:

List the step in which you encountered problems or objections:

Telephone inquiry Consultation Session or Event Sales Session Other:

List problem(s) encountered or objection(s) stated:

Determine appropriate response or action for problem(s) encountered or objection(s) stated:

List the step in which you encountered problems or objections:

Telephone inquiry Consultation Session or Event Sales Session Other:

List problem(s) encountered or objection(s) stated:

Determine appropriate response or action for problem(s) encountered or objection(s) stated:

List the step in which you encountered problems or objections:

Telephone inquiry Consultation Session or Event Sales Session Other:

List problem(s) encountered or objection(s) stated:

Determine appropriate response or action for problem(s) encountered or objection(s) stated: