

Marketing Strategy Template for Trades & Service Businesses

A Comprehensive Guide by Steven Rouget, ActionCOACH Business Coach

Introduction

This template is specifically designed for trades and service businesses in Australia. It provides a step-by-step framework to create a marketing strategy that generates consistent leads, builds your reputation, and grows your business profitably.

After 23 years of coaching trades businesses, I've identified the marketing strategies that work best for this industry. This template will help you implement them systematically.

Section 1: Business Foundation

Your Business Overview

Business Name: _____

Primary Trade/Service: _____

Years in Business: _____

Service Area (Suburbs/Regions): _____

Team Size: _____

Target Market Analysis

Primary Customer Type: ☐ Residential homeowners ☐ Commercial businesses ☐ Industrial clients ☐ Property managers ☐ Other: _____

Ideal Customer Profile: - **Age Range:** _____ - **Income Level:** _____ - **Property Type:** _____ - **Location:** _____ - **Pain Points:** _____

Customer Journey Mapping: 1. **Awareness Stage:** How do customers first learn about your service? 2. **Consideration Stage:** What factors do they consider when choosing a provider? 3. **Decision Stage:** What finally convinces them to hire you? 4. **Post-Service:** How do you maintain the relationship?

Section 2: Competitive Analysis

Direct Competitors

Competitor 1: - **Name:** _____ - **Strengths:** _____ - **Weaknesses:** _____ - **Pricing:** _____ - **Marketing Methods:** _____

Competitor 2: - **Name:** _____ - **Strengths:** _____ - **Weaknesses:** _____ - **Pricing:** _____ - **Marketing Methods:** _____

Competitor 3: - **Name:** _____ - **Strengths:** _____ - **Weaknesses:** _____ - **Pricing:** _____ - **Marketing Methods:** _____

Your Competitive Advantages

What makes you different/better? ☐ Superior quality workmanship ☐ Faster response times ☐ Better customer service ☐ More experience/expertise ☐ Better pricing ☐ Stronger guarantees/warranties ☐ More convenient scheduling ☐ Other: _____

Section 3: Marketing Goals & Objectives

Annual Goals

Revenue Target: \$_____

Number of New Customers Needed: _____

Average Job Value: \$_____

Monthly Lead Target: _____

Conversion Rate Goal: _____%

SMART Marketing Objectives

Objective 1: - Specific: _____ - Measurable: _____ - Achievable: _____ - Relevant: _____ - Time-bound: _____

Objective 2: - Specific: _____ - Measurable: _____ - Achievable: _____ - Relevant: _____ - Time-bound: _____

Section 4: Marketing Mix Strategy

1. Referral Marketing (Most Important for Trades)

Current Referral Rate: _____%

Referral System Implementation:

☐ **Ask Every Customer for Referrals** - When: At job completion and follow-up calls - How: "Who else do you know who could benefit from our services?" - Script: _____

☐ **Referral Incentive Program** - Customer reward: _____ - *Referee reward:* _____ - Tracking method: _____

☐ **Professional Referral Network** - Target partners: _____ - *Mutual referral agreements:* _____ - Regular communication plan: _____

2. Digital Marketing

Website Optimization:

- ☐ **Mobile-Friendly Design** - Responsive layout for phones/tablets - Fast loading times (under 3 seconds) - Easy-to-find contact information
- ☐ **Local SEO** - Google My Business optimization - Local keyword targeting - Customer reviews management - Local directory listings
- ☐ **Content Strategy** - Blog topics: _____ - **Video content ideas:** _____ - Before/after photo galleries - Customer testimonials

Social Media Strategy:

- ☐ **Platform Selection** - Facebook: ☐ Yes ☐ No - Instagram: ☐ Yes ☐ No - LinkedIn: ☐ Yes ☐ No - YouTube: ☐ Yes ☐ No
- ☐ **Content Calendar** - Posting frequency: _____ - **Content types:** _____ - Engagement strategy: _____

Online Advertising:

- ☐ **Google Ads** - Budget: \$_____/month - **Target keywords:** _____ - Geographic targeting: _____
- ☐ **Facebook/Instagram Ads** - Budget: \$_____/month - **Target audience:** _____ - Ad objectives: _____

3. Traditional Marketing

Print Advertising:

- ☐ **Local Newspapers** - Publications: _____ - **Budget:** \$_____ - Frequency: _____
- ☐ **Trade Magazines** - Publications: _____ - **Budget:** \$_____ - Frequency: _____

Direct Mail:

- ☐ **Targeted Neighborhoods** - Areas: _____ - **Frequency:** _____ - Offer/Message: _____
- ☐ **Door Hangers** - Target areas: _____ - **Timing:** _____ - Call-to-action: _____

Vehicle Signage:

☐ **Truck/Van Wraps** - Design elements: _____ - **Contact information:** _____ - Professional appearance: ☐ Yes ☐ No

4. Networking & Community Involvement

Industry Associations:

☐ **Trade Organizations** - Organizations to join: _____ - **Networking events to attend:** _____ - Speaking opportunities: _____

Local Business Networks:

☐ **Chamber of Commerce** - Membership: ☐ Yes ☐ No - Event participation: _____

☐ **Business Networking Groups** - Groups to join: _____ - **Meeting frequency:** _____

Community Involvement:

☐ **Local Sponsorships** - Sports teams: _____ - **Community events:** _____ - Charity organizations: _____

Section 5: Customer Retention & Loyalty

Follow-Up Strategy

Post-Job Follow-Up:

☐ **Immediate Follow-Up (24-48 hours)** - Method: ☐ Phone ☐ Email ☐ Text - Purpose: Ensure satisfaction, address concerns

☐ **30-Day Follow-Up** - Method: ☐ Phone ☐ Email ☐ Text - Purpose: Check on work quality, ask for referrals

☐ **Annual Follow-Up** - Method: ☐ Phone ☐ Email ☐ Direct mail - Purpose: Maintenance reminders, repeat business

Loyalty Programs

☐ **Repeat Customer Discounts** - Discount percentage: _____% - *Qualifying criteria:* _____

☐ **Maintenance Programs** - Service offerings: _____ - *Pricing structure:* _____ - Communication schedule: _____

☐ **VIP Customer Benefits** - Priority scheduling - Extended warranties - Exclusive offers

Section 6: Budget Allocation

Monthly Marketing Budget

Total Monthly Budget: \$_____

Budget Breakdown: - Digital Marketing: \$_____ (%) - *Traditional Advertising:* \$_____ (%) - Networking/Events: \$_____ (%) - *Referral Incentives:* \$_____ (%) - Marketing Materials: \$_____ (%) - *Other:* \$_____ (%)

ROI Tracking

Cost Per Lead by Channel: - Referrals: \$_____ - **Google Ads:** \$_____ - *Facebook Ads:* \$_____ - **Print Advertising:** \$_____ - Direct Mail: \$_____ - **Networking:** \$_____

Customer Lifetime Value: \$_____

Target Cost Per Acquisition: \$_____

Section 7: Implementation Timeline

Month 1: Foundation

☐ Complete competitive analysis ☐ Optimize Google My Business listing ☐ Set up referral tracking system ☐ Create basic marketing materials

Month 2: Digital Presence

☐ Launch/improve website ☐ Set up social media profiles ☐ Begin content creation ☐
Start Google Ads campaign

Month 3: Networking & Relationships

☐ Join trade associations ☐ Attend networking events ☐ Establish referral partnerships ☐ Launch customer follow-up system

Month 4-6: Optimization

☐ Analyze performance data ☐ Adjust strategies based on results ☐ Expand successful channels ☐ Eliminate underperforming tactics

Month 7-12: Growth & Scale

☐ Increase budget for successful channels ☐ Explore new marketing opportunities ☐
Develop advanced strategies ☐ Plan for next year's growth

Section 8: Measurement & Analytics

Key Performance Indicators (KPIs)

Lead Generation: - Total leads per month: _____ - **Leads by source:** _____ - **Cost per lead:** _____ - **Lead quality score:** _____

Conversion Metrics: - Lead to quote conversion: _____% - **Quote to job conversion:** _____% - Overall conversion rate: _____%

Customer Metrics: - Customer satisfaction score: _____ - **Repeat customer rate:** _____% - **Referral rate:** _____% - **Customer lifetime value:** _____

Financial Metrics: - Revenue per customer: _____ - **Marketing ROI:** _____% - Cost of customer acquisition: _____

Monthly Review Process

- ☐ **Analyze Performance Data** - Review all KPIs - Identify trends and patterns - Compare to goals and benchmarks
 - ☐ **Assess Marketing Channels** - Which channels are performing best? - Which need improvement or elimination? - Where should you invest more resources?
 - ☐ **Customer Feedback Review** - Analyze customer reviews and testimonials - Identify common themes and concerns - Use feedback to improve services and marketing
 - ☐ **Competitive Monitoring** - Track competitor activities - Identify new threats or opportunities - Adjust strategy accordingly
-

Section 9: Marketing Materials Checklist

Essential Marketing Materials

- ☐ **Business Cards** - Professional design - Clear contact information - QR code for easy contact saving
- ☐ **Brochures/Flyers** - Service descriptions - Before/after photos - Customer testimonials - Clear call-to-action
- ☐ **Vehicle Signage** - Company name and logo - Phone number (large, readable) - Website URL - Professional appearance
- ☐ **Uniforms/Branded Clothing** - Company logo - Professional appearance - Contact information
- ☐ **Digital Assets** - Logo files (various formats) - Professional photos - Video testimonials - Social media graphics

Sales Materials

- ☐ **Quote Templates** - Professional formatting - Clear pricing breakdown - Terms and conditions - Contact information

☐ **Presentation Folder** - Company information - Service descriptions - Testimonials and references - Certificates and licenses

☐ **Portfolio/Photo Gallery** - Before/after photos - Completed projects - Quality workmanship examples - Organized by service type

Section 10: Crisis Management & Reputation Protection

Online Reputation Management

☐ **Review Monitoring** - Google Reviews - Facebook Reviews - Industry-specific platforms - Local directories

☐ **Response Strategy** - Positive review responses - Negative review handling - Professional tone guidelines - Escalation procedures

☐ **Proactive Reputation Building** - Encourage satisfied customers to leave reviews - Share positive testimonials - Address issues before they become public - Maintain professional online presence

Crisis Communication Plan

☐ **Identify Potential Issues** - Service quality problems - Safety incidents - Customer complaints - Negative publicity

☐ **Response Protocols** - Internal communication procedures - Customer communication templates - Media response guidelines - Legal consultation triggers

Section 11: Seasonal Marketing Strategies

Seasonal Opportunities

Spring (September-November): - Services in demand: _____ - **Marketing focus:** _____ - Special offers: _____

Summer (December-February): - Services in demand: _____ - **Marketing focus:** _____ - Special offers: _____

Autumn (March-May): - Services in demand: _____ - **Marketing focus:** _____ - Special offers: _____

Winter (June-August): - Services in demand: _____ - **Marketing focus:** _____ - Special offers: _____

Holiday Marketing

☐ **Christmas/New Year** - Gift certificate promotions - Year-end maintenance reminders - Holiday scheduling considerations

☐ **Easter** - Spring cleaning services - Home improvement projects - Family gathering preparations

☐ **Other Holidays** - Australia Day - ANZAC Day - Melbourne Cup - Local events and festivals

Section 12: Action Plan Summary

Immediate Actions (Next 30 Days)

1. ☐ _____

2. ☐ _____

3. ☐ _____

4. ☐ _____

5. ☐ _____

Short-term Goals (Next 90 Days)

1. ☐ _____

2. ☐ _____

3. ☐ _____

4. ☐ _____

5. ☐ _____

Long-term Objectives (Next 12 Months)

1. ☐ _____

2. ☐ _____

3. ☐ _____

4. ☐ _____

5. ☐ _____

Conclusion

This marketing strategy template provides a comprehensive framework for growing your trades or service business. Remember, consistency is key—implement strategies systematically and measure results regularly.

The most successful trades businesses combine excellent workmanship with smart marketing. Use this template to create a marketing system that generates consistent leads and builds long-term customer relationships.

Need Help Implementing Your Marketing Strategy?

Join Project BETA for ongoing support and accountability, or book a free consultation to discuss your specific marketing challenges.

Contact Steven Rouget: - Email: steven@actioncoach.com - Phone: [Your Phone Number] - Website: www.stevenrouget.com.au

ActionCOACH Business Coaching - 23 years of experience - Specializing in trades and service businesses - Victoria, Australia

This template is part of the ActionCOACH methodology for business growth. For more resources and support, visit our website or join Project BETA.

© 2025 Steven Rouget ActionCOACH. All rights reserved.