

Module 3: 3rd Base - Map How You'll Deliver It - Audit Review

Executive Summary

Sarah's delivery process is well-structured but needs documentation and streamlining. Her process flows through five clear stages: Discovery & Assessment, Strategy Development, Implementation, Launch & Optimization, and Ongoing Management. The process works well when clients are engaged, but she's identified gaps in communication, asset documentation, and client education that create confusion and inefficiency. Essential assets include website content templates, SEO audit frameworks, and Google Ads campaign structures that can be reused and improved over time.

Delivery Process Summary

Sarah's delivery process breaks down into five distinct stages:

Stage 1: Discovery & Assessment (Week 1)

- Initial consultation and needs assessment
- Business and competitor research
- Current marketing audit
- Goal setting and KPI definition

Stage 2: Strategy Development (Week 2)

- Marketing strategy development
- Keyword research and targeting
- Campaign structure design
- Content and messaging framework

Stage 3: Implementation (Week 3-4)

- Website updates/optimization
- SEO foundation setup
- Google Ads account setup
- Initial campaign creation

Stage 4: Launch & Optimization (Week 5-6)

- Campaign launch
- Initial performance monitoring
- Optimization and adjustments
- Client training and handoff

Stage 5: Ongoing Management (Ongoing)

- Monthly performance reviews
- Campaign optimization
- Content updates
- Reporting and communication

What's Working Well and What Could Be Improved

Stage 1: Discovery & Assessment

- **✓ Working Well:** Sarah has a thorough discovery process that helps her understand clients' businesses deeply
- **✓ Working Well:** Her business and competitor research provides valuable insights
- **⚠ Needs Improvement:** Discovery calls sometimes run too long (90+ minutes). Could be streamlined to 60 minutes with better preparation
- **⚠ Needs Improvement:** Needs a standardized assessment template/document to capture findings consistently

Stage 2: Strategy Development

- ✓ **Working Well:** Strategy development is Sarah's strength - she creates comprehensive, tailored strategies
- ✓ **Working Well:** Her keyword research and targeting approach is effective
- ⚠ **Needs Improvement:** Strategy documents are sometimes too detailed, overwhelming clients. Could use simpler visual formats
- ⚠ **Needs Improvement:** Client feedback loop isn't structured - could use a formal review and approval process

Stage 3: Implementation

- ✓ **Working Well:** Implementation phase is efficient when clients are responsive
- ⚠ **Needs Improvement:** Delays occur when waiting for client content/assets. Need clearer deadlines and expectations
- ⚠ **Needs Improvement:** Website updates require client input but process isn't clearly defined. Clients often don't know what's needed or when
- ⚠ **Needs Improvement:** Google Ads setup is repetitive - could benefit from templates/checklists

Stage 4: Launch & Optimization

- ✓ **Working Well:** Launch process is smooth and clients are typically excited
- ✓ **Working Well:** Sarah's optimization approach delivers results quickly
- ⚠ **Needs Improvement:** Client training/handoff isn't structured - clients don't always understand what to expect or how to provide feedback
- ⚠ **Needs Improvement:** Initial performance expectations aren't clearly communicated - clients sometimes expect immediate results

Stage 5: Ongoing Management

- ✓ **Working Well:** Monthly reviews keep clients engaged and informed
- ✓ **Working Well:** Reporting structure is clear and clients appreciate transparency
- ⚠ **Needs Improvement:** Client communication between reviews is inconsistent - some clients want more updates, others want less
- ⚠ **Needs Improvement:** Optimization activities aren't clearly communicated - clients don't always know what's happening between reports

Essential Assets (Prioritized)

Must Have (Move the Needle First):

1. **Discovery Call Script/Template:** Standardized approach to discovery calls with key questions and assessment criteria
2. **Website Content Templates:** Templates for service pages, about pages, and landing pages that can be customized quickly
3. **SEO Audit Framework:** Structured checklist for conducting SEO audits that ensures nothing is missed
4. **Google Ads Campaign Structure Templates:** Reusable campaign structures for common service business types
5. **Client Onboarding Checklist:** Step-by-step checklist for new clients covering all necessary setup steps

Nice to Have (Future): 6. **Strategy Presentation Template:** Visual template for presenting marketing strategies to clients 7. **Monthly Reporting Template:** Standardized reporting format with customizable sections 8. **Client Training Materials:** Guide or video series explaining what clients need to know about their marketing 9. **Keyword Research Database:** Organized database of keywords by industry/service type 10. **Competitor Analysis Template:** Standardized approach to competitor research and analysis

Confusion Points and Solutions

Confusion Point 1: Client Content Requirements

- **Issue:** Clients don't understand what content/assets are needed for website updates, causing delays
- **Solution:** Create a clear "Content Checklist" that lists exactly what's needed (photos, service descriptions, business information, etc.) with examples and deadlines
- **Implementation:** Send checklist during Stage 3 with specific due dates and explain why each item is needed

Confusion Point 2: Timeline Expectations

- **Issue:** Clients aren't sure when things will happen or how long each stage takes
- **Solution:** Create a visual timeline/project plan showing key milestones and deadlines
- **Implementation:** Share timeline at end of Discovery stage and update as needed

Confusion Point 3: Performance Expectations

- **Issue:** Clients expect immediate results after launch and don't understand ramp-up period
- **Solution:** Set clear expectations about performance timeline (e.g., "first 30 days are learning phase, results typically improve in weeks 4-8")
- **Implementation:** Discuss expectations in Strategy stage and reinforce during Launch

Confusion Point 4: Ongoing Optimization Activities

- **Issue:** Clients don't know what happens between monthly reports
- **Solution:** Create a simple "What We Do Between Reports" document explaining ongoing optimization activities
- **Implementation:** Share during client handoff and reference in monthly reports

Improvements to Feel More Organized and Less Rushed

1. **Client Onboarding System:** Create a structured onboarding process with clear phases, deadlines, and responsibilities. This prevents last-minute scrambling and ensures nothing is missed.
2. **Content Collection Process:** Establish a formal content collection process with deadlines, templates, and examples. This reduces delays and back-and-forth communication.
3. **Project Management System:** Use a simple project management tool (like Trello or Asana) to track client projects, deadlines, and tasks. This creates visibility and reduces mental load.

4. **Templates and Checklists:** Develop reusable templates and checklists for common tasks (discovery calls, audits, campaign setup, reporting). This reduces time spent on repetitive work.
5. **Client Communication Schedule:** Create a clear communication schedule (weekly updates during setup, monthly reports during management) so clients know when to expect communication.

Better Communication of Delivery Path to Customers

Current Approach: Sarah explains the process verbally during discovery calls, but clients often forget or misunderstand.

Improved Approach: Create a visual "Client Journey Map" that shows:

- Each stage of the process
- What happens in each stage
- What's expected from the client
- Timeline and milestones
- Key deliverables

Implementation:

1. Create a simple visual diagram or infographic showing the 5-stage process
2. Include it in proposal/pitch materials
3. Reference it during onboarding ("Here's where we are in the process")
4. Use it to set expectations and answer questions

Additional Communication Tools:

- **Welcome Packet:** Document explaining the process, what to expect, and how to prepare
- **Stage Transition Emails:** Emails that mark the transition between stages ("Great work on Strategy - now we're moving into Implementation")
- **Progress Updates:** Brief weekly updates during setup phase so clients know what's happening

- **Deliverable Explanations:** Brief explanations of what each deliverable means and why it matters
-

For Your Team

Executive Summary / Key Takeaways

Sarah's delivery process is well-structured but needs documentation and client communication improvements. The 5-stage process (Discovery, Strategy, Implementation, Launch, Ongoing) works well but could benefit from templates, clearer timelines, and better client education. Essential assets should be prioritized (discovery scripts, content templates, SEO frameworks) before developing nice-to-have materials.

Key Insight: Many delays and confusion points stem from unclear client expectations and communication gaps, not process problems. Improving communication and documentation will have the biggest impact.

Action Items and Next Steps

1. **This Week:** Document the 5-stage delivery process with clear timelines and expectations
2. **Next 2 Weeks:** Create essential assets (discovery script, content templates, SEO audit framework)
3. **Week 3-4:** Develop client onboarding checklist and communication schedule
4. **Month 2:** Create visual client journey map and welcome packet
5. **Month 3:** Test improved process with new clients and gather feedback

Team Communication Templates / Talking Points

For Client Onboarding: "Here's how our process works: We start with Discovery to understand your business, then develop a Strategy tailored to your goals. Next, we move into Implementation where we set everything up. After Launch, we optimize and monitor performance. Finally, we move into Ongoing Management with monthly reviews and optimization. Each stage has clear milestones and deliverables. Does that timeline work for you?"

Email Template for Stage Transitions: "Great news - we've completed the Strategy Development phase and have your marketing strategy ready for review. Next, we'll move into Implementation where we'll set up your website, SEO, and Google Ads. This phase typically takes 2-3 weeks. Here's what to expect: [list key activities and client responsibilities]. Questions? Just reply to this email."

Decision Frameworks

Asset Prioritization:

1. **High Impact + High Frequency:** Develop first (e.g., discovery script, content templates)
2. **High Impact + Low Frequency:** Develop second (e.g., strategy templates, reporting templates)
3. **Low Impact + High Frequency:** Develop third (e.g., email templates, checklists)
4. **Low Impact + Low Frequency:** Develop last (e.g., training materials, databases)

Client Communication Timing:

- **During Setup (Stages 1-4):** Weekly updates (brief, focused on progress and next steps)
- **During Management (Stage 5):** Monthly reports (comprehensive, includes performance and optimization)
- **As Needed:** Quick responses to questions (within 24 hours)
- **Proactively:** Share wins, insights, and recommendations (not just reporting)

Remember to click the 'Next Module' button below to submit your review and continue to the next module.