

Combined Strategy Overview

HomeRun Strategy Lab - Complete Strategy Summary

Client: Sarah Chen, Chen Marketing Solutions

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Completed Modules: 0-4 (All Modules)

Executive Summary

This document synthesizes insights from all five modules of the HomeRun Strategy Lab, providing a comprehensive overview of Sarah Chen's business strategy, positioning, and 90-day action plan. Sarah runs a marketing consultancy specializing in local service businesses and is positioned for sustainable growth through operational clarity, team building, and process systematization.

Key Strategic Insights:

- **Current Reality:** Strong client results and consistent demand, but capacity constraints and operational gaps limit growth
 - **Ideal Customer:** Growth-oriented owner-operators of local service businesses (5-15 employees) ready for systematic marketing
 - **Core Offer:** Proven local SEO and Google Ads systems that generate 30-50% more qualified leads
 - **Delivery:** Well-structured 5-stage process that needs documentation and client communication improvements
 - **90-Day Goal:** Hire first employee, delegate 25-30 hours/week, and document core processes to enable scaling
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Module 0: Current Reality (At Bat)

Business Overview

Sarah operates "Chen Marketing Solutions," a one-person consultancy helping local service businesses (plumbing, electrical, HVAC) improve their digital marketing. She offers website development, SEO optimization, Google Ads management, and social media strategy to owner-operators with 2-10 employees.

Key Strengths

- Strong client results (30-50% lead increases)
- Established, repeatable processes
- Growing demand (waitlist of potential clients)
- Financial stability (\$15K-20K monthly revenue)
- Deep expertise in local SEO and Google Ads

Key Risks

- Scalability constraints (solo operator, 8-10 client capacity)
- Client dependency (3 clients = 60% of revenue)
- Lack of documented systems
- Unclear positioning (broad vs. specialized focus)
- No systematic sales process

Key Opportunities

- Pricing optimization (premium pricing for results)
- Productized services (SEO audit as standalone offering)
- Strategic partnerships (business associations, trade groups)
- Team building (virtual assistant or junior consultant)

90-Day Home Run Goals

1. Clarify ideal client profile and positioning

2. Document core processes (website, SEO, Google Ads)
 3. Build waitlist system with qualification criteria
 4. Hire first employee (virtual assistant or junior consultant)
 5. Establish 2-3 strategic partnerships
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Module 1: 1st Base - Define Who You're Really For

Ideal Customer Profile

Who They Are:

- Owner-operators of local service businesses (plumbing, electrical, HVAC, landscaping)
- Company size: 5-15 employees (established, not startup or enterprise)
- 10+ years in business, established local reputation
- Often second-generation business owners or entrepreneurs

What They Want:

- Transition from reactive (word-of-mouth) to proactive (systematic lead generation)
- Consistent, qualified leads that convert to profitable jobs
- Professional online presence
- Marketing they don't have to manage
- Measurable ROI

What Frustrates Them:

- Unpredictable revenue (feast or famine)
- Competing against larger companies
- Previous bad experiences with marketing agencies
- Marketing overwhelm (too many options, unclear what works)
- Time constraints (busy running business)

What They Value:

- Expertise and guidance (trusted advisor)
- Transparency and communication
- Measurable results (not vanity metrics)
- Partnership approach (collaborative)
- Efficiency (streamlined process)

Key Patterns from Best-Fit Customers

1. Owner involvement in decision-making
2. Growth mindset (ready to invest in systematic marketing)
3. Established operations (proven business model, good teams)
4. Local market presence (established reputation)
5. Responsive communication (treats marketing as priority)

Red Flags / "No-Go" Traits

1. Unrealistic expectations
 2. Price shopping only (not value-focused)
 3. Lack of commitment (can't provide info/resources/time)
 4. Poor communication (unresponsive, inconsistent)
 5. Wrong stage (too new or in crisis mode)
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Module 2: 2nd Base - Design What They Actually Want

Customer Pains and Desires

Core Pains:

- Unpredictable revenue and feast-or-famine cycles
- Losing to competitors with bigger marketing budgets
- Missing opportunities (customers looking but not finding them)
- Marketing overwhelm (confused by options)
- Time constraints (can't become marketing experts)

Core Desires:

- Predictable, consistent leads
- Professional online presence
- Marketing that works without constant attention
- Measurable results
- Expert guidance

Concrete Outcomes

1. 30-50% increase in qualified leads
2. Consistent monthly lead flow
3. Higher quality leads (ready to hire, understand pricing)
4. Improved online visibility (local search results)
5. Professional website (builds trust, converts)
6. Established Google Ads system (scalable campaigns)
7. SEO foundation (long-term visibility)
8. Clear value proposition (effective messaging)
9. Lead generation process (capture, follow up, convert)
10. Marketing confidence (peace of mind)

Core Offer Statement

"We help growth-oriented owner-operators of local service businesses establish proven local SEO and Google Ads systems, so they can generate 30-50% more qualified leads and stop worrying about where their next customer will come from, without wasting time on marketing that doesn't work."

Breakdown:

- **We help [WHO]:** Growth-oriented owner-operators of local service businesses
- **do [WHAT]:** Establish proven local SEO and Google Ads systems
- **so they can [OUTCOME]:** Generate 30-50% more qualified leads and stop worrying about where their next customer will come from

- **without [FEAR]:** Wasting time on marketing that doesn't work
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Module 3: 3rd Base - Map How You'll Deliver It

Delivery Process (5 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

Essential Assets (Prioritized)

Must Have:

1. Discovery call script/template
2. Website content templates
3. SEO audit framework
4. Google Ads campaign structure templates
5. Client onboarding checklist

Nice to Have (Future): 6. Strategy presentation template 7. Monthly reporting template 8. Client training materials 9. Keyword research database 10. Competitor analysis template

Key Improvements Needed

- Document processes and create templates
- Improve client communication (timelines, expectations)
- Streamline discovery calls (60 minutes vs. 90+)
- Create content collection process with deadlines
- Establish clear communication schedule

Module 4: The HomeRun - Build Your 90-Day Game Plan

90-Day North Star Outcome

"In 90 days, it will be a win if I've hired my first employee, delegated 25-30 hours of work per week, and documented my core processes, and this matters to my

customer because it enables me to serve more clients effectively while maintaining the quality and responsiveness they value."

Strategic Projects (4 Projects)

Project 1: Clarify Ideal Client Profile and Positioning

- **Timeline:** Weeks 1-6
- **Deliverables:** Ideal client profile document, positioning statement, qualification criteria, 3 case studies
- **Status:** Foundation for other projects

Project 2: Document Core Processes

- **Timeline:** Weeks 2-8
- **Deliverables:** Three core service playbooks (website launch, SEO audit, Google Ads setup), onboarding checklist, templates
- **Status:** Needed for Project 3 (hiring/training)

Project 3: Hire First Employee

- **Timeline:** Weeks 4-10
- **Deliverables:** Job description, candidate selection, hiring, onboarding, 25-30 hours/week delegated
- **Status:** Depends on Project 2 (process documentation for training)

Project 4: Establish Strategic Partnerships

- **Timeline:** Weeks 8-12 (or extended)
- **Deliverables:** 2-3 partnerships, referral process, first referrals
- **Status:** Lower priority, can be extended if needed

Weekly Review Rhythm

- **Frequency:** Weekly 30-minute review (Friday afternoons)
- **Focus:** Progress on projects, blockers, next week priorities
- **Enhancement:** Use review template/checklist, consider monthly deeper review

Risk Mitigation

- **Hiring delays:** Start early, consider contractor as interim
 - **Documentation overwhelm:** Focus on one process at a time
 - **New hire challenges:** Thorough interview, trial period, clear expectations
 - **Client work impact:** Plan during slower period, communicate changes
 - **Partnership timeline:** Lower priority, can extend if needed
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Strategic Connections and Integration

How Modules Connect

Module 0 → Module 1: Current reality (capacity constraints, unclear positioning) leads to need for ideal client clarity

Module 1 → Module 2: Ideal customer profile informs what customers want and core offer development

Module 2 → Module 3: Core offer (local SEO and Google Ads systems) defines delivery process and assets needed

Module 3 → Module 4: Delivery process documentation (Module 3) enables team building and delegation (Module 4)

Module 4 → Module 0: 90-day plan addresses current reality challenges (capacity, systems, positioning)

Key Strategic Themes

1. **Operational Clarity:** Documenting processes, clarifying positioning, defining ideal customers
2. **Team Building:** Hiring first employee to create capacity and enable scaling
3. **Customer Focus:** Understanding ideal customers, their needs, and delivering value

4. **Sustainable Growth:** Building systems and capacity to grow without sacrificing quality
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Recommended Next Steps

Immediate (Week 1-2)

1. Finalize 90-day plan with specific timelines
2. Begin Project 1 (Client Profile) - analyze past clients
3. Set up weekly review schedule and template

Short-Term (Weeks 3-6)

1. Complete Project 1 (Client Profile and Positioning)
2. Begin Project 2 (Process Documentation) - start with website launch playbook
3. Begin Project 3 (Hiring) - create job description and post

Mid-Term (Weeks 7-10)

1. Complete Project 2 (Process Documentation)
2. Continue Project 3 (Hiring) - interviews and selection
3. Begin Project 4 (Partnerships) - identify and reach out to partners

Long-Term (Weeks 11-12 and Beyond)

1. Complete Project 3 (Hiring) - onboard new employee
 2. Continue Project 4 (Partnerships) - establish partnerships
 3. Evaluate progress and adjust plan as needed
 4. Plan next 90-day cycle
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Conclusion

Sarah's strategy is clear: focus on ideal customers, document processes, build a team, and deliver consistent value. The 90-day plan addresses current constraints (capacity,

systems, positioning) while setting the foundation for sustainable growth. Success depends on prioritization, execution, and maintaining focus on high-impact activities.

The path forward is well-defined: clarify who you serve, document how you deliver, build your team, and scale with confidence.

This combined overview integrates insights from all five modules. Use this document as your strategic reference guide and share it with your team to align everyone around the plan.