Co-Active® Marketing Form  
for Exercises #4 and #5:   
Target Market Brainstorm

**Blank Forms for Exercises 4-6 (Chapter 2 and Webinar 2).**

**Instructions for Exercise #4: Use Column 1 of the Form below to list target markets as instructed in Exercise #4 of your Webinar Action Steps. Leave Columns 2 and 3 blank for now. The form will expand as you type into the column.**

**Instructions for Exercise #5: Use Columns 2 and 3 of the Form below to pull in your skills and interesting marketing approaches as instructed in Exercise #5. Then follow the directions for Step 3 in Exercise #5.**

|  |  |  |
| --- | --- | --- |
| **Target Markets** | **Skills / Experience** | **Marketing Approaches** |
|  |  |  |

Co-Active® Marketing Form  
for Exercise #6: Viability Test

**Instructions for Exercise #6: Use this Form to list target markets as instructed in Exercise #6 in your Webinar Action Steps. Guidelines for assessing each of your Target Market Ideas for the viability characteristics can be found immediately after the Exercise #6 instructions.**

Target Markets that earn 70–100 points are viable or have potential to be financially sustainable. Target Markets that earn less than 70 points are not likely to be viable. If none of your market ideas totals 70 or better, you have at least three options:

1. Get some support in the Accountability Pod to more fully engage your Captain and Crew to guide you, while quieting the Saboteur’s voice. Then re-rate.
2. Try new target market ideas.
3. Decide to target a non-viable market, understanding the tradeoffs discussed in Chapter 2.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Your Target Market Ideas** | **30 pts** | **30 pts** | **20 pts** | **10 pts** | **10 pts** | **TOTAL**  **POINTS** |
|  | **Easy to  Find** | **Easy to  Connect With** | **Eager to  Evolve** | **Willing to**  **Invest** | **Narrow  & Deep** |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Co-Active® Marketing Form  
for Exercise #7: Informational Interviews

**Instructions for Exercise #7: Cut and paste everything in this form into a new document. Fill in the blanks and make minor tweaks to gear the questions to your target market. Then copy the new document so that you have one for each person you’ll interview.**

**Blank Forms for Exercises 7-8 (Chapter 3 and Webinar 3).**

***Contact information***

Date of Informational Interview:

Interviewee’s Name:

Phone:

Email:

“Hello, my name is       . I’m a student in an entrepreneurial marketing class and I’d appreciate 15–20 minutes of your time to ask a few questions. I believe you’ll find these questions interesting and valuable. I’d be happy to share the results of my interviews with you at a later date.”

***Get to know you questions***

1. What do you love (or enjoy) most about       ? And what else? Anything else?
2. What are you most proud of accomplishing so far in       ? And what else?
3. If you had a vision for your       , paint me a picture of what that would look and feel like for you? (Ask probing questions to draw out the details as far as it can go.)
4. What would it do for you if you were living that vision now? What other ways might it benefit you, your family, your friends or community?
5. What are the costs (including hidden costs) of not having that vision be your reality?
6. What is your top goal right now? What strategies have you been using so far to get there? Tell me more.
7. What are the biggest obstacles in the way of achieving that goal? And what else? What is the single most critical thing you need to learn or know right now that would help you achieve your top goal?
8. What are your key strengths and skills? Anything else?       What do you think should be your biggest strengths or skills? Anything else?
9. What are the ways that you usually develop yourself personally and professionally? Anything else?
10. What are your favorite trade publications, blogs or journals?       Are there any associations or conferences you attend?       Are you using social networks to expand your connections?       How do you connect with other       ?
11. Do you have a confidante or go-to person who helps you implement your ideas, work through challenges and important decisions with you?
12. What else do you think I should know about       ?
13. Is there anyone else you would recommend I speak to?       Are there people in       who have influenced you?
14. Would you introduce me to them?

“I’m planning to create a short review of the information I’ve collected from these informational interviews. May I call you back in a few weeks to share that with you? I think it will be really interesting for you.”

Co-Active® Marketing Form  
for Exercise #8: Interview Gems

**Instructions for Exercise #8: Follow the directions for Exercise #8 in your Webinar Action Steps, and transfer data from your informational interview notes into this form as a summary. Be sure to capture the words and phrases you heard from individuals in your informational interviews, rather than “translating” them into your language.**

1. Similar or essential things they said they love or enjoy most:
2. Similar or essential things they said they are most proud of accomplishing so far:
3. Similar or essential details of their visions:
4. Similar or essential things they said about the benefits that would come to them if they could accomplish their vision:
5. Similar or essential things they said about the costs of not having their vision be their reality:
6. Similar or essential things they said about their top goals and the strategies they are using to reach those goals:
7. Similar or essential things they said about the obstacles in the way of achieving those goals. And about what they feel they need to know right now to achieve their top goals:
8. Similar or essential things they said about the key strengths and skills they have now. And about what they think should be their biggest strengths or skills:
9. Similar AND different ways they develop themselves personally and professionally:
10. List favorite trade publications, blogs or journals, associations, conferences, social networks they use to build connections:
11. List any details they mentioned about confidantes or a go-to person who helps them implement ideas, work through challenges and important decisions:
12. List anything else they thought was important to share with you that stands out from the things above:

Points 3–8 identify key issues or challenges, ultimate desired outcomes and perceived benefits of those outcomes. Your Targeted Core Message and Core Offers will incorporate some of these, when we cover that in Chapters and Webinars 4 & 5.

Points 9–11 will help you find ways to get in front of people in your target market. We’ll cover this in Chapter 6.

Other data points may also be useful in your marketing.

Co-Active® Marketing Form  
for Exercise #11: Targeted Core Offers

**Blank Form for Exercise 11 (Chapter 5 and Webinar 5).**

**Instructions for Exercise #11: Follow the directions for Exercise #11 in your Webinar Action Steps. Fill in the form below to create the concepts and titles for your freebie, introductory offer and initial fee-based offer. If you want extra credit, also create a concept and title for a follow-on or high ticket offer.**

1. My TCM is:
2. My freebie delivery method/format is:
3. My freebie title is:
4. My introductory offer concept is:
5. My introductory offer title is:
6. My initial fee-based offer concept is:
7. How many sessions do I deliver each month?
8. How long is each session?
9. What are my monthly fees for these services?
10. What is the length of term?
11. Is there an incentive price if paid in full up front?
12. If it’s a group program, are there any extras?
13. My title for my fee-based offer is:
14. My (optional) follow-on or high ticket offer concept is:
15. My follow-on or high ticket offer price is:
16. My follow-on or high ticket offer title is: