Visible Expert Online Workshop: Putting Your Expert Strategy to Work

Implementing your marketing strategy can be challenging. You need the appropriate skills, resources, and processes in place to ensure you achieve your goals.

Part I: Marketing Skills

For the marketing skills, indicate where you stand with this particular skill. If you already have this capability in-house, check off 'existing skill.' If you are lacking in this skill, but plan to train current member(s) of your firm, check off 'train internally.' If you do not have this skill and would like to consider external resources to bring in to help in this area, check off 'hire externally.'

Marketing Skill	Existing Skill	Train Internally	Hire Externally
Research			
Keyword research			
Target audience research			
Competitive research			
Guest posting opportunities			
Speaking opportunities			
Partnership opportunities			
Strategy			
Positioning and messaging			
Content			
Promotion			
Offers			
Networking			
Partnerships			

Marketing Skill	Existing Skill	Train Internally	Hire Externally
Editorial Content			
Blog content and articles			
Newsletter			
Guides and white papers			
Ebooks and books			
Webinars and presentations			
Research reports			
Marketing Content			
Promotional email			
Offers			
Ads			
Website copy			
Pitches			
Proposals			
Promotion			
Networking and social media			
Partnerships			
Speaking opportunities			
Guest posts and articles			
Analytics			
Website traffic			
Social media traffic			
Email			
CRM			
Conversions			
A/B testing			
Implementation Support			
Scheduling			
Project management			
Website management			
CRM/Marketing automation management			
Content calendar management			
Graphic design and layout			
Presentation preparation			

Part II: Business Development Skills

Below is a table of all of the skills you need as a solo business developer, or if you have a team, the skills they need for success - both traditional and contemporary. Next to each skill, rank where you believe you or your business development team currently stands using a 4-point scale.

1 – Needs improvement

2 – Could be refined

3 – Good

4 – Excellent

In the column next to this rating, you will mark how you plan to improve upon this skill. Check off 'self-guided' if you believe the team members can build this skill independently. Check of 'train internally' if you plan to conduct training sessions with your team to refine the skill. Check of 'train externally' if you plan to bring outside resources to help train your team. If you are not using one of these tactics and do not plan to start, simply write 'N/A' in the rating column.

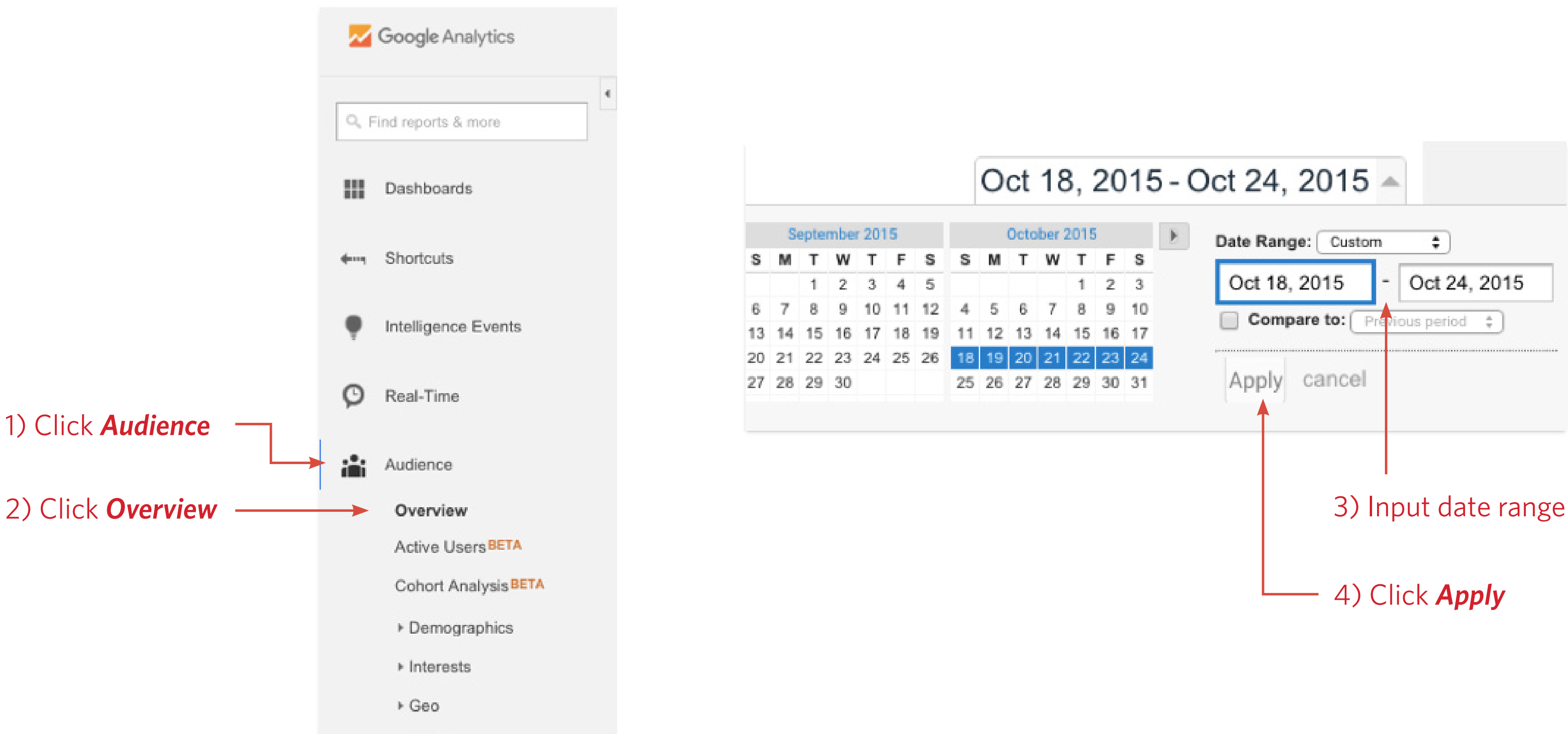
Business Development Skill	Rating	Improvement		
		Self-Guided	*Train Internally*	*Train Externally*
Cold call prospects				
Networking face to face				
Qualifying prospects				
Build relationships				
Persuade prospects with their presentation				
Negotiate with prospects				
Close the deal				
Make expertise visible				
Engage online				
Use content to educate and nurture				
Solve problems collaboratively with prospects				
Help influencers persuade their internal teams				

Part III: Analytics Skills

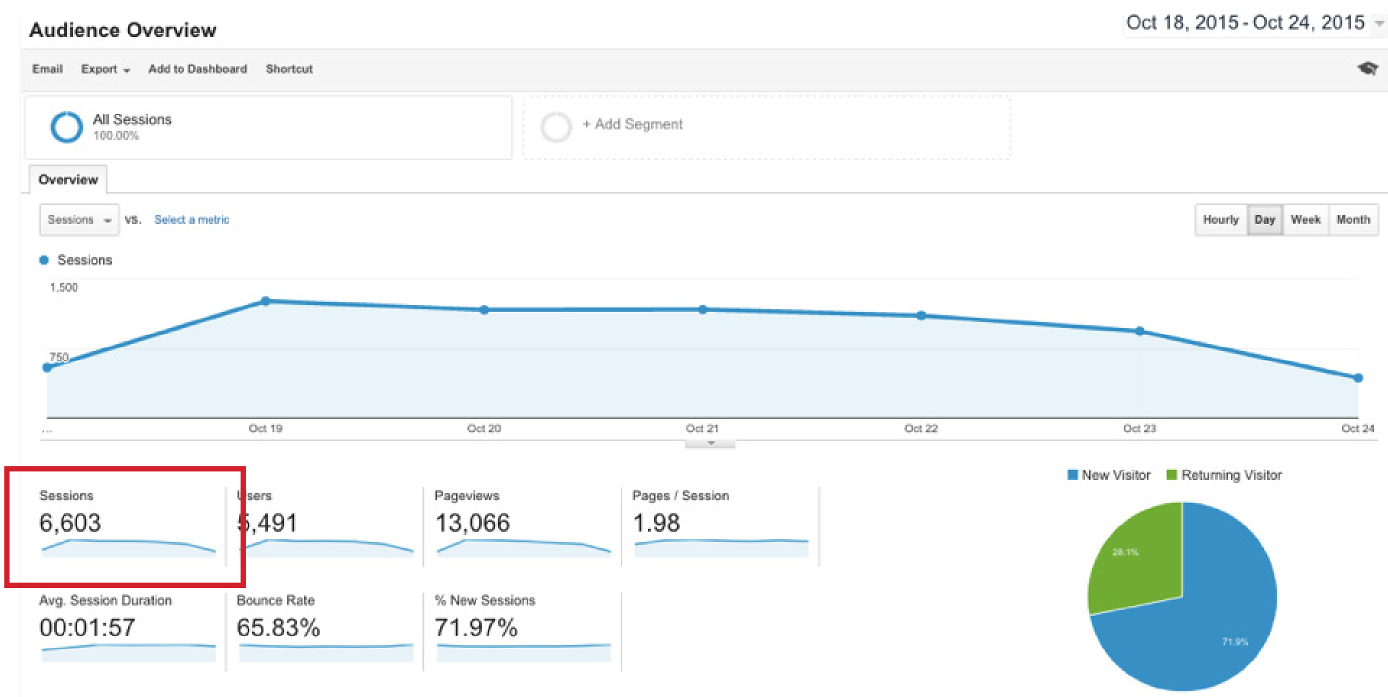
The vast amount of data in Google Analytics can be overwhelming to an inexperienced user. Here we break down step by step how to gather 4 crucial metrics that your firm needs to be tracking.

Metric: Overall Website Traffic

Follow the 4 steps in the screenshot below:



You will then be brought to this screen:



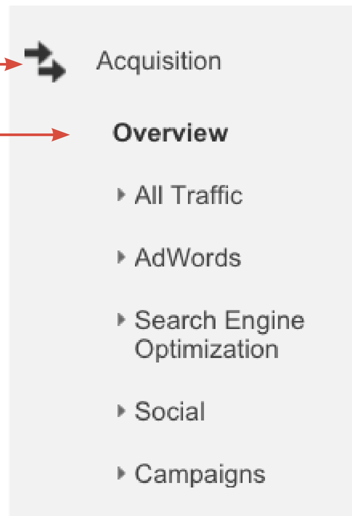
The number under sessions (boxed in red) is the total amount of traffic to your website in the given time frame that you inputted.

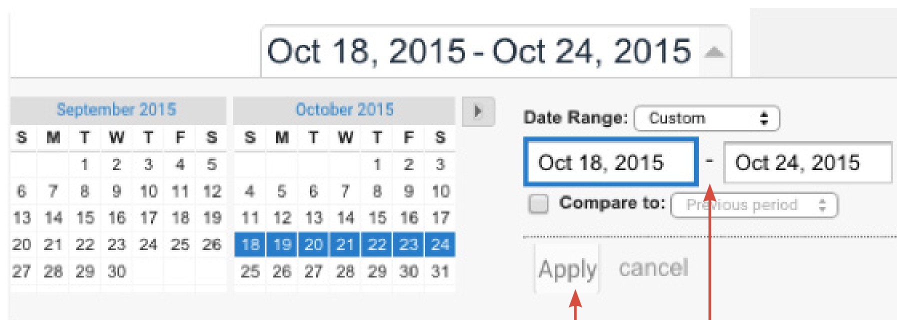
Metric: Traffic by Source

Follow the 4 steps in the screenshot below:

1) Click ***Acquisition***

2) Click ***Overview***





3) Input date range

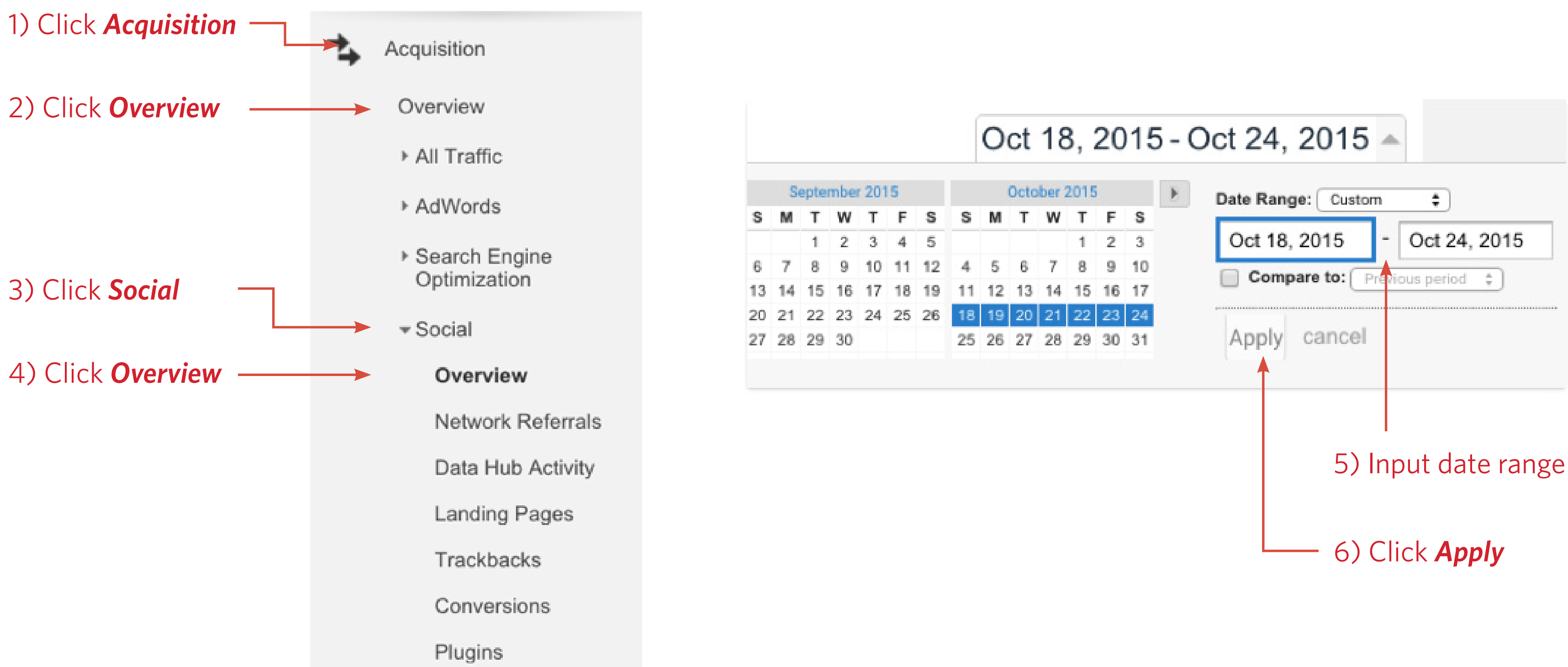
4) Click ***Apply***

You will then be brought to this screen, showing the breakdown of where your website visitors came from:

	Acquisition		
	Sessions	% New Sessions	
	31,128	72.09%	
1 Organic Search	15,507		Search engines
2 Direct	7,184		No referral source (i.e. typing in your URL or using a bookmark on their browser)
3 Social	3,819		Social networks
4 (Other)	2,322		Custom campaign tracking
5 Referral	2,207		Another website by clicking on a link to your site

Metric: Social Media Traffic

When you break down the source of your website traffic (on page 5), social media is one of the categories that Google Analytics automatically tracks. To dig deeper and find out the breakdown of the amount of traffic each social network is driving, follow the 6 steps in the screenshot below:



You will then be brought to this screen, as you see below:

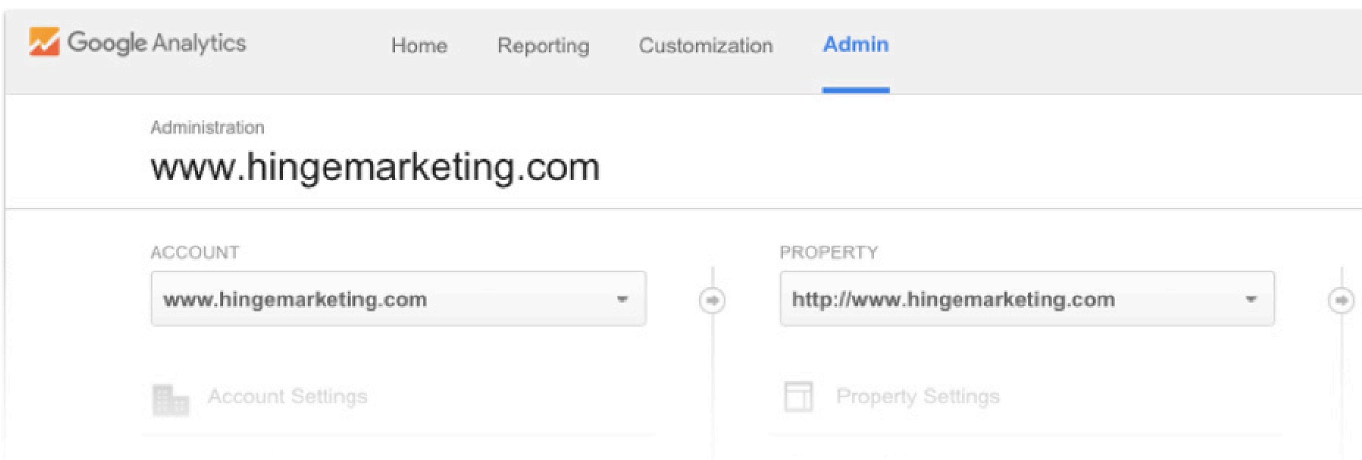
	Social Network	Sessions	% Sessions
1.	LinkedIn	3,043	79.70%
2.	Twitter	437	11.45%
3.	Facebook	193	5.06%
4.	Google+	77	2.02%
5.	paper.li	27	0.71%
6.	Pinterest	10	0.26%
7.	Glassdoor	6	0.16%
8.	SlideShare	5	0.13%
9.	goo.gl	4	0.10%
10.	reddit	3	0.08%

The number of sessions next to each social network is the amount of traffic that was driven to your website from that network. So using the example above, this firm received 3,043 of their 3,819 total social visits from LinkedIn.

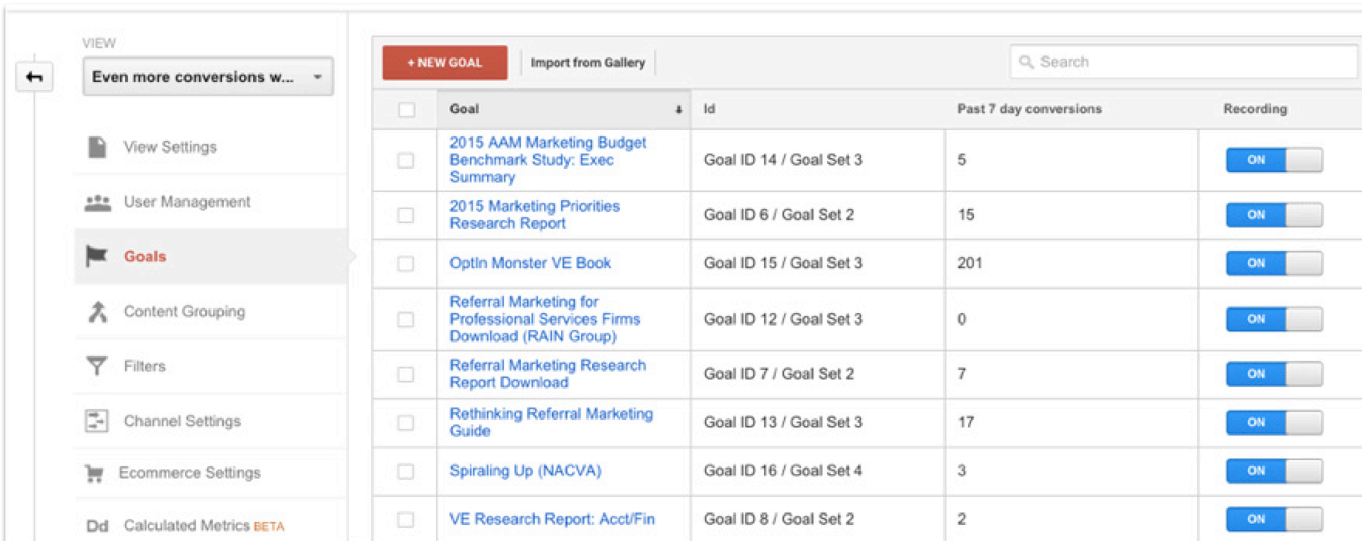
Metric: Conversions

This is one of the most important metrics to understand how to set up and track. If you only know how many visitors are coming to your website and have nothing set up to track their behavior on your website, you are missing a lot of crucial information. In order to do this, you have to set up what Google Analytics calls a "goal." This allows you to easily determine how many websites visitors are doing what you want them to do – i.e. downloading a piece of premium content, filling out the contact us form, newsletter sign-ups, etc. For each conversion you want to track, you have to set up a different goal. Follow these steps to create a goal:

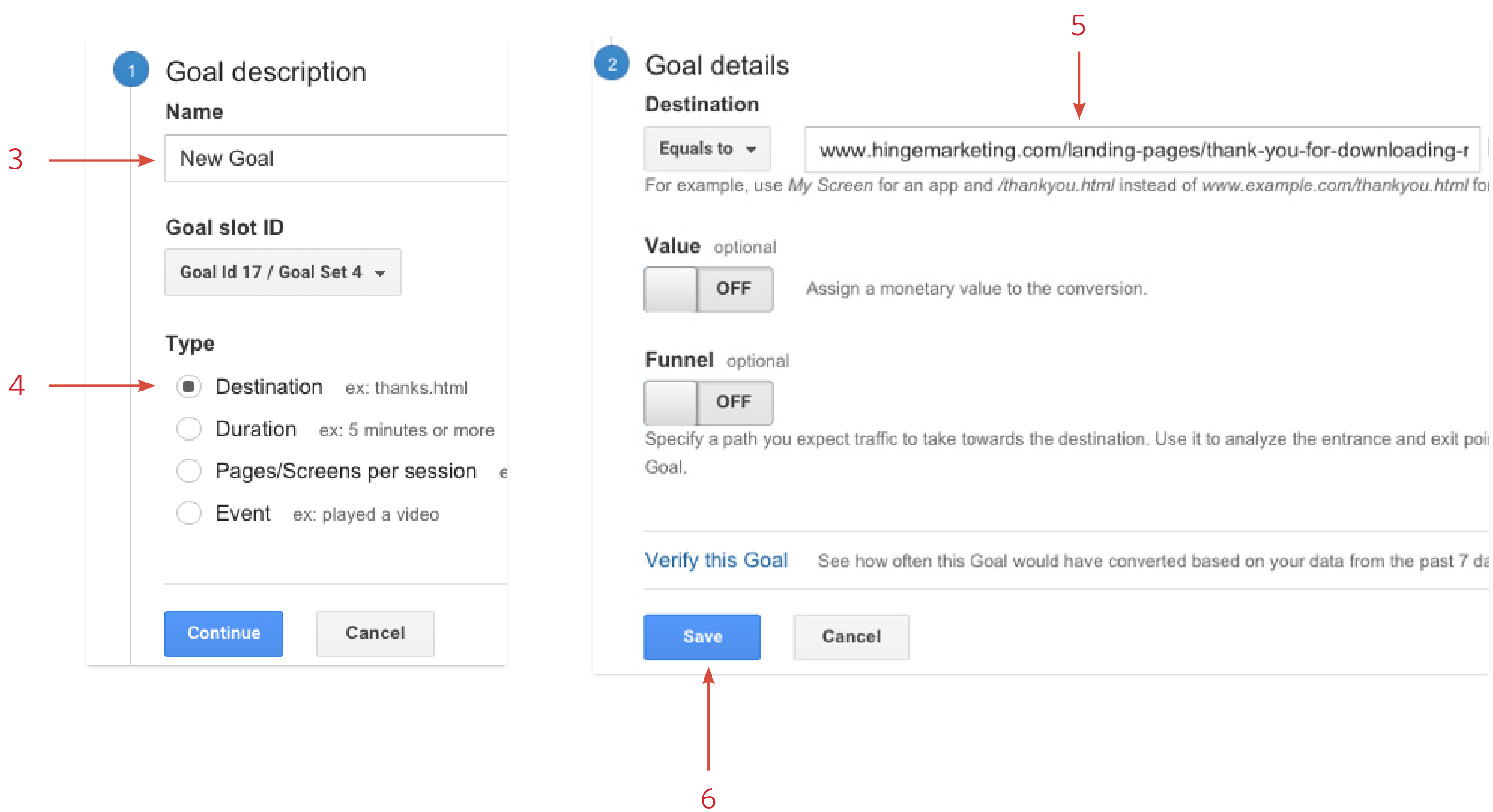
1. Click ***Admin*** in the navigation on the top of your screen.



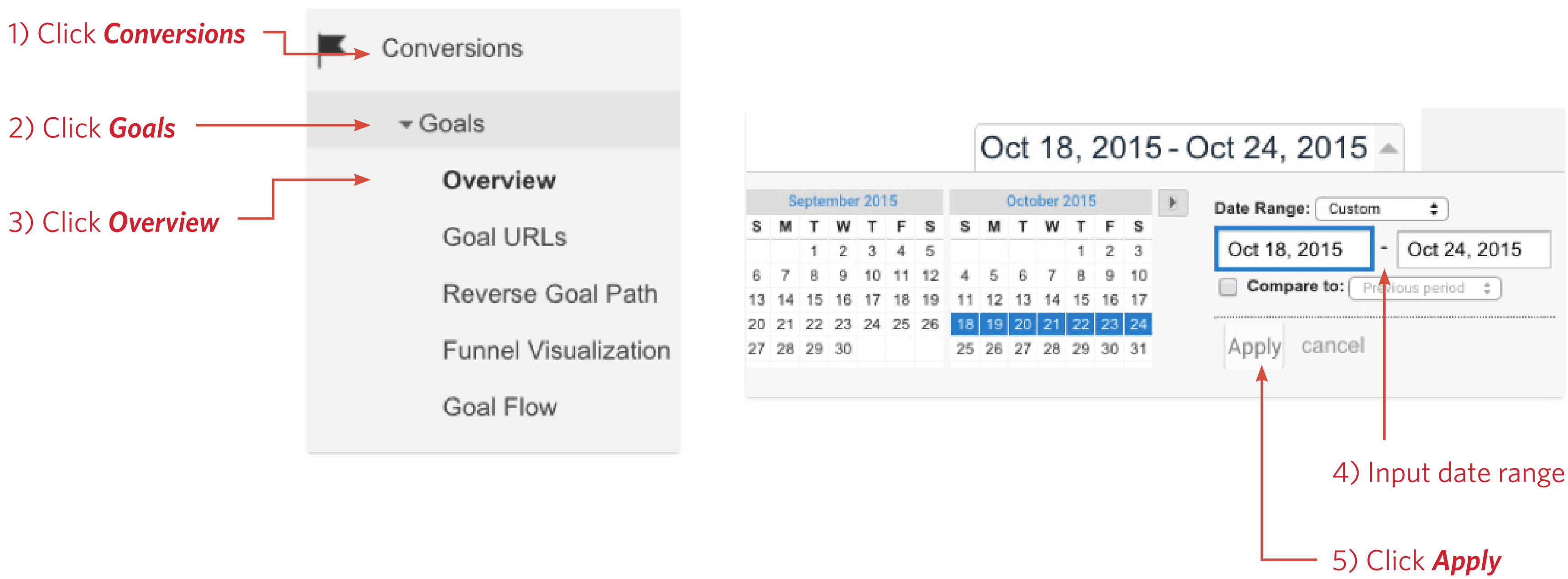
2. Click ***Goals*** on the left hand side then click the red ***+New Goal*** button



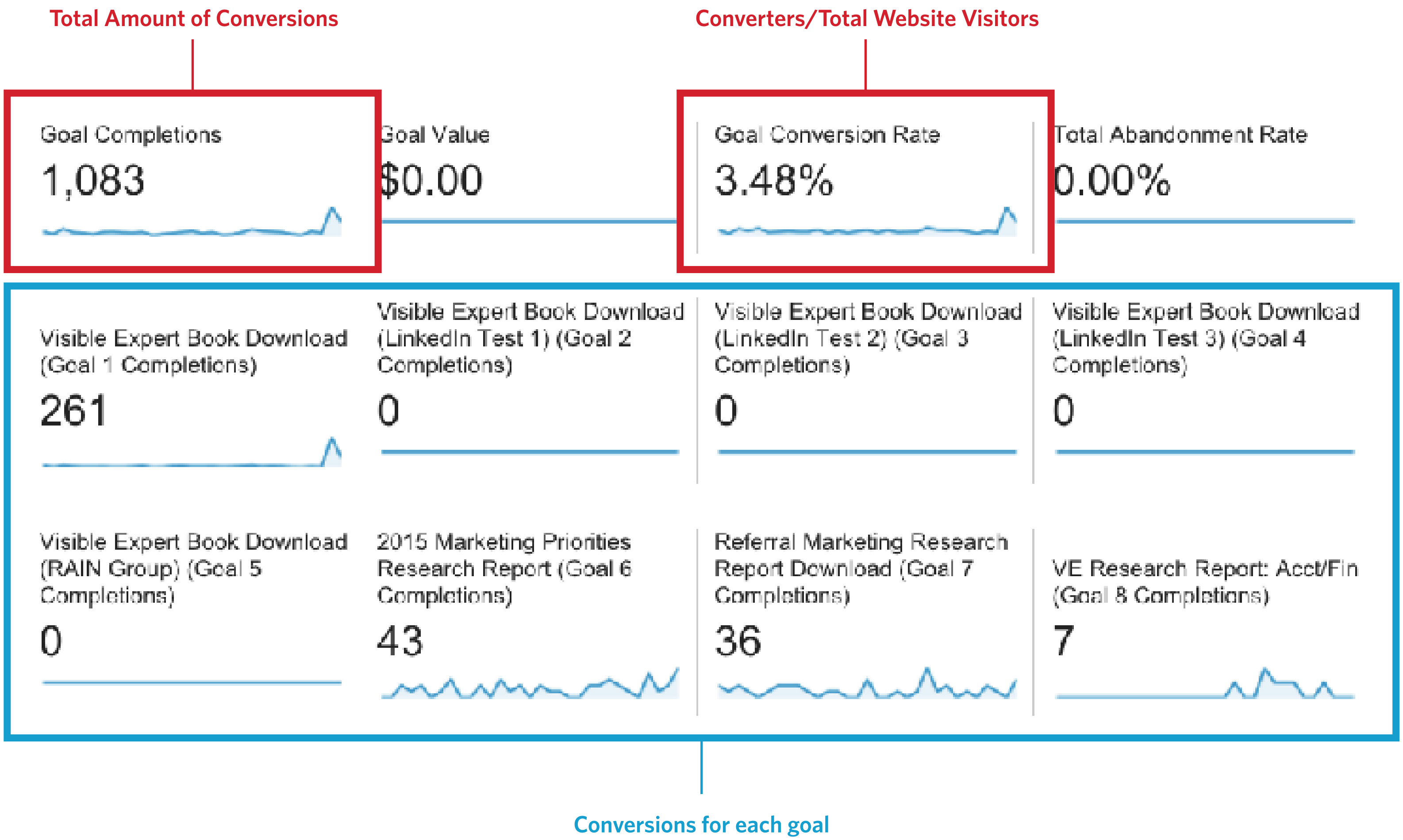
3. Enter the name of your goal. (i.e. the title of the content, ‘contact us form’ etc.)
4. Select the type. For most goals, you’ll select destination.
5. In the destination box, copy and paste the link to the page that indicates the visitors has done what you want them to do (if it’s a content download, then insert the link to the thank you page)
6. Press ***Save***



To view your conversions, follow the 5 steps in the screenshot below:



You will then be brought to this screen shown below:



We would recommend tracking the number of conversions you get per month or per week in a separate Excel spreadsheet so you can easily see the change over time.

Determining Which Metrics You'll Track

In this workshop, we'll go over 20 metrics that your firm can monitor to help you optimize your marketing results. Follow along with this worksheet and in the 'Tracking" column, check off the metrics you are already tracking or plan on tracking. For those you check off, write in how frequently you'll be tracking the metric (i.e. weekly, monthly, quarterly). There are also 3 blank rows for each domain in case you are tracking metrics that we don't cover in the workshop.

Metric	Domain	Tracking	Frequency
Website Traffic	Visibility		
Website Traffic by Source	Visibility		
Social Media Traffic	Visibility		
Social Media Followers	Visibility		
Email List Size	Visibility		
	Visibility		
	Visibility		
	Visibility		
Premium Content Downloads	Expertise		
Premium Content Download Rate	Expertise		
Blog Traffic	Expertise		
Guest Posts/Articles Published	Expertise		
Social Shares	Expertise		
Inbound Links	Expertise		

Metric	Domain	Tracking	Frequency
Speaking Engagements	Expertise		
	Expertise		
	Expertise		
	Expertise		
Number of Leads	Impact		
Number of Proposals	Impact		
Cumulative Proposal Value ($)	Impact		
Proposals to New Clients	Impact		
Proposals to Existing Clients	Impact		
Cumulative Value of Wins ($)			
Firm Growth	Impact		
Firm Profitability	Impact		
	Impact		
	Impact		
	Impact		

Summary

Start using analytics to optimize your marketing results and improve your strategy. Refer back to your worksheet when compiling your data to ensure you are tracking your firm's visibility, expertise and impact metrics.

About the Visible Expert℠ Program

Designed to deliver more referrals, higher profits, and faster growth, the Visible Expert Program will build a powerful marketing platform to engage your audiences and increase your visibility. Based on the most extensive research into high-growth experts ever conducted, the Visible Expert Program will ground your marketing in science and leverage your expertise to draw in the right audiences.