

# THE OPEN SOURCE MARKETING CORE SYSTEM

*Guide + Workbook*

 open source  
**marketing**



## Why Open Source Marketing?

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Nobody can keep up with all the developments in marketing, so to develop **a comprehensive guide to marketing** means we will need to **involve everybody**.

Good marketing is critical to businesses and organizations all over the world, and we believe everyone should have access to the best marketing intelligence, **regardless of ability to pay** (so we've made it totally free).

By making our models and methods transparent and available freely to everyone, we can all work together to **improve our models and methods continually over time**.

The position we've taken is that **all recorded information should be free**.

## Usage & Rights

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**Everyone is welcome** to pick up any of the OSM systems, and apply them for their own cause, or for clients, free-of-charge.

**You may use OSM for profit** (including in professional marketing for clients, or for training others) but you may not sell the information itself. Please refer to the [Creative Commons license](#) for more details.

# Table of Contents

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<b>Strategy</b>	4
The Circuit Questionnaire	7
Circuit Review	49
Short Circuit Test	54
<b>Campaign Design &amp; Delivery</b>	55
Outreach	58
Target	62
Capture	63
Nurture	68
Close	70
Continuity	73
<b>What's Next?</b>	73

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# STRATEGY

## **The Three Strategy Tools**

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**Circuit Interview**

**Circuit Review**

**Short Circuit Test**

Strategy is the most critical factor in the success (or failure) of any marketing campaign. Unfortunately, it is far too often overlooked as we obsess about implementation techniques.

Your strategy should be a complete picture of where your business or organization fits in the world, and in your prospects' and customers' minds.

Open Source Marketing uses the Circuit model, originally developed in 2014 by Ben Hunt for his Ultimate Web Design course (which has now become Open Source Marketing).

### **The Circuit comprises five core elements:**

1. The Brand (who is making the offer)
2. Products & Services (i.e. what you actually deliver)
3. The Proposition (i.e. what you promise or sell)
4. The Problem you're promising to solve
5. And the Market you're selling to.

In our experience, when all these five core elements are clearly understood, present, strong, and in alignment, you have the basis of a marketing proposition to take to market.

Note: It is important to distinguish between known facts and assumptions, so that we can remember to plan to test assumptions as part of our Campaign Design.



## Circuit Interview

Any campaign strategy should start with the Circuit. If you're working with a client, this should take the form of an extensive interview. If you're working on your own project, you're essentially interviewing yourself.

The purpose of the Circuit Interview is to understand fully the situation or landscape. This is just as important if we're looking to start a new venture, to make strategic changes to an existing one, or even with a more modest goal like figuring out how best to market an existing product or service.

The phase after the Circuit Interview will be the Circuit Review, which requires that you have asked enough exploratory questions to have a full and accurate picture of "the situation as it is".

The Circuit consists of five fundamental elements...

1. You / the Brand
2. Products / Services
3. Proposition
4. Problem
5. Market

Together, these elements form one entire Circuit, which represents the relationship of a brand to its customers and the overall proposition.

Remember that one business will normally have multiple Circuits: one for each proposition or conversion event that prospects and customers will encounter. Think in terms of having a new Circuit for each commitment we'd ever want a prospect or customer to make.

The Circuit Questionnaire is an evolving set of questions and notes that we're constantly developing to provide the

ultimate comprehensive strategic framework for any marketing campaign or proposition. It has five sections, one for each of the logical elements.

## Notes on the Questionnaire

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A great Circuit interview is the foundation for a great marketing campaign. You should approach this critical first step with maximum clarity and energy, determined to discover the absolute truth about the present situation, and also to get a vision of what the world would look like if the business were to fulfill its maximum potential.

You do not need to follow the questionnaire in the order shown here. This is just the logical arrangement of the Circuit Elements. I often find I work through in the order: 1 (brand) > 2 (product/service) > 5 (market) > 4 (problem) > 3 (proposition), because the proposition is the keystone that connects us and what we do with the outside world (market).

In many cases, I'll suggest multiple possible ways of phrasing questions. Just use whatever feels right to you at the time.

No two Circuit Questionnaire interviews will every be the same. You will certainly need to ask additional questions, and there are probably several questions that are either irrelevant or that don't need to be asked. What's most important is that you ask the questions that make sense to you and to your client, so that you're confident that you have understood the strength and alignment of each of the five main Circuit elements.

# THE CIRCUIT QUESTIONNAIRE

## 1) You / Brand

This represents the brand or identity behind the offers. WHO is making the offer?

Ideally, we really want to work with brands that ARE unique... Not that just claim to have a Unique Selling Proposition, but genuinely one-of-a-kind, category-of-one businesses that stand out as unlike anything else on the market.

### **1.1 Why do you do what you do?**

- This line is inspired by Simon Sinek's book "Start With Why", which argues that people don't buy what you do, they buy why you do it. When your WHY aligns with your target tribe's WHY, they'll be irrationally motivated. Apple devotees are a great example. Apple IS "Think Different" and so are its tribal followers.
- You may ask, "**Beyond making a profit, for what purpose does this business exist?**"
- You may ask: **What are the peaks of clarity, purpose, and vision in your journey so far? What do they have in common?**

1.2 You may, at this point, begin to explore what it would look like if we took the business's mission or identity to its ultimate level...

This is extremely important, because it's actually much easier to take a unique, magnificent, remarkable business

to market than it is to market an ordinary, average one. So it can pay huge dividends to dig deep in two directions here: the business's natural uniqueness; and then to push the boundaries on how you would like it to be — if you could choose exactly what you want to be to the world (which, of course, you can).

It is preferable to brand based on what we ARE, our identity, rather than anything comparative. For example, if our branding is based on being the fastest, and someone else comes along who's faster, our branding becomes redundant. Much better to be able to say, "The only ... that..."

People want things they can believe in and that they can follow (see Seth Godin's "Purple Cow", or Marty Neumeier's "ZAG").

### **What is utterly unique about your business?**

- **What can no competitor ever claim?**
- **How could we complete the statement, "We are the only... that...?"**
- **In what ways are you in a category of one?**
- **Is there a particular phrase (like a tagline or claim) that you could OWN?**

### **What would your business look like if you could magnify your brand/identity to the highest degree imaginable?**

**If you got \$10,000,000 of investment tomorrow, what would you do?**

**If all the barriers that hold you back from achieving your highest vision or mission were suddenly removed, what would happen?**

### 1.3 Brand

**What does your company/brand stand FOR?**

This does not describe what you want to do, but rather what you believe in, or what you think should happen. What is your belief, passion, or vision for the future?

**What does it stand AGAINST?**

Is there a Goliath to your David?



**In what ways could your brand be seen as contentious?**

**...Disruptive?**

Who should be afraid of what you're doing?

**... or otherwise remarkable?**

Why will people want to talk about you?

**What drives you CRAZY about other people or practices in your industry?**

Everyone has frustrations about the way their competitors are doing it wrong, or the way they treat customers. This can be a helpful tool for positioning yourself within your sector.

**1.4 Your Origin Story**

Human beings think and process in the realm of metaphor and



story. If we can communicate a compelling story it bypasses prospects' in-built BS filters and speaks straight to their emotional minds.

## **Why did the business need to exist?**

How did it come about? (i.e. What's your origin story?)

What events drove you to do what you've done?

### **1.5 What's your global proposition?**

**What is the core promise that your business makes to every prospect, customer, or follower?**

Your global proposition is your brand's promise that you make to everyone (clients, prospects, followers, tribe members). It should also be implicit in every commercial proposition you put out to the market.

My global proposition might be, "I discover and share online marketing methods to help entrepreneurs achieve massive success"... That proposition would apply to web designers and marketers who take one of my courses, as well as to small or medium business owners who want to get more bang for their buck from online marketing. It would apply to future books, courses, interviews, speaking engagements, or even to future investments in companies.

Or the global proposition for Partners in Pregnancy is "You Deserve Your Birth Your Way". That beautifully sums up the brand's beliefs, its stand, as well as its promise. The same global proposition could be perfectly expressed in real-world courses, or online products.



**1.6 What are we offering that people can follow? (A tribe, brand, movement..?)**

**1.7 What are your strengths?**

**1.8 What are your weaknesses (or perceived weaknesses)?**

**1.9 Compromise**

**List any ways in which you compromise or dilute your position, mission, or message today.**

## How would everything look without those compromises?

### 1.10 Authority

#### **What signs of brand authority can we point to?**

Books, publications, testimonials, speaking engagements, memberships, awards, talks, etc.?

#### **What trustmarks can we use?**

Any third-party validation that can be independently verified?  
e.g. Qualifications, degrees, first to..., creator of..., most ..., or  
“the ...-est”? Are there any memberships or affiliations that  
could help people to know they can trust you?

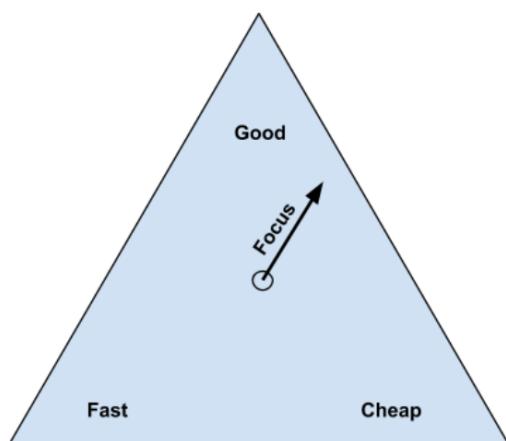
### 1.11 Relationships (partners or potential partners)

#### **What partnerships do you already have that we could use to further your cause? Who would be your natural allies?**



### 1.12 Value Triangle (for the brand)

This may not be applicable to every business. This is a way to visualize and to communicate the inherent compromise between speed, quality, and cost that every business faces. Economic forces say it is practically impossible to deliver the top quality at the lowest cost in the least time. (Customers' preferences will also have a leaning on the same three factors, so we should be looking for a natural fit between what customers want and what our propositions offer.)



*Example of a Value Triangle, (for a brand that offers a decent quality at affordable prices, but not quickly, which might be an example of a folk or artisan manufacturer.)*

### **What balance of speed, quality, and price does your brand offer?**

For example, the McDonald's brand promises fast, cheap food that is not high quality. Other burger restaurants offer the opposite: very high quality products at higher prices that you have to wait for. The market can support many variations. "Fast" may also be interchanged with "convenient" (i.e. saving the customer time).

### **1.13 What is your goal for this campaign?**

### **How will we know we have achieved it? What measure will we use?**

Is there a time limit? (Note: If you don't have a time limit, you have an excuse.)

### **1.14 What is your brand name?**

Does it tell people clearly what you offer? Will it give your prospects an appropriate expectation? Will the brand identity stretch so that it will still be true in several years' time?

### **1.15 What gives you your unique perspective?**

Why are you in a special position to see what's wrong out there, or how to fix it?

Being able to share the story of why your unique experiences or skills or background gives you a special insight into what your target market needs could help them to trust you and be drawn to you.



## **2) Products & Services**

i.e. what you deliver. A product or service may be packaged or bundled in multiple ways. For example, an hour of consulting may be called many things. So this section focuses on what you actually deliver, which is subtly different to what you sell.

### **2.1 Do you deliver products, services, or a combination of both?**

May be obvious. Very often, even if something seems like a product only, there is often a service element to the sale (e.g. helping the customer choose the right product, delivery features, or other services like training.)

### **2.2 What's the format of the product/service?**

e.g. Physical product, video, telephone service, ebook, in-home... Usually obvious, but may be worth checking.

### **2.3 Unique?**

#### **What makes your product / service unique?**

## **Who else is offering the same, or similar, to the same market?**

Find out more information. e.g. Are they selling online? How does their product/service compare to yours?

If product is totally new or unique, this may mean the market is effectively Step Zero? (At least, there is no Step Three or above.)

### **2.4 Story (origin story)**

#### **How did the product/service come about?**

What did you notice that showed there was a need for this? Tell me about how you developed it.

### **2.5 Do you LOVE making this product / providing this service?**

**Why?**



I use a model called the “Golden Triangle” which I find helpful. Imagine three overlapping circles, which represent “Stuff I love”, “Stuff I’m great at” and “Stuff there’s money in / there’s a demand for”. Your Golden Triangle is space that’s within ALL those 3 circles.

**2.6 Are you GREAT at making this product / providing this service? Why?**

2.7 Features

**What is it about this product / service that makes it special?**

**What will this give people that other products / services can’t?**

2.8 Price / Profitable

**How much does it cost you to make the product / provide the service?**



## How big are profit margins?

This is often obvious. For example, most digital information products practically have a zero cost of sale. But it's often worth asking.

**What other ways might there be of providing this product / service at different price points to suit different types of customers? Let's get creative!**

## 2.9 Is this a new offering in the market, or has it (or similar) been available before?

A brand new offering might be eligible for a product launch.

## 2.10 Do products or lines change frequently?

This can inform campaign design decisions later. For example, a butcher's shop, a comic book retailer, or a fashion outlet may have products that are only briefly available, which might mean that email broadcasts or Facebook pages would make sense.



## **2.11 Are products / services always available, or does availability change over time?** (Similar to the previous question.)

A hair salon, for example, may have a cancellation and might then put an offer on a Facebook page, e.g. "First to call gets a consultation with Diane at 2.30pm this afternoon - 50% OFF!" Or a restaurant may use social media or email to warn that "Bookings for the Valentine's banquet are nearly full, so book today to avoid disappointment."

## **2.12 Do you sell one-off products / services or can you sell lots of the same thing?**

For example, an artist may sell an original painting, or a limited run of 200 prints. That will have a significant impact on how the product should be sold.

Most services are one-offs, in the sense that an hour with a stylist is unique. However, there are sometimes opportunities to be found. For example, if you sell a day's training, that training could also be packaged as a digital product and sold as an alternative to the service.

(If a service) Is there any way we could make this service into a product to sell to more people?





## **2.13 What trustmarks can we use?**

For example, you may pick up on something your client takes for granted, e.g. "The only widget that's rated AAA for reliability."



## **2.14 Does your business naturally have quiet times of the week / year?**

If so, consider group buying deals, with constraints that require people to redeem during your quiet periods, helping to maintain turnover.



## **2.15 What DON'T you do?**

Are there things that people might expect you to provide, which it's important they understand you don't offer?



2.16 Frequency or pattern of use

**Will your product or service be used once, daily, weekly, monthly, ad hoc?**

### **3) Proposition**

i.e. what you sell. This is not the same as what you deliver. For example, your service may be, “Consulting by the hour” but that could be sold in many ways, such as “I’ll show you where your website is leaking money,” or “Branding and messaging review offer”.

**3.1 Is your proposition offering to fix a problem, prevent a problem, or is it an opportunity to gain?**

3.2 Unique?

**How is this offering radically different to the rest of the market? Is there clear, blue water between this and anything else out there? How?**



Tip: If the product or service itself does not have features or pricing that make it unique, you might consider the additional services (such as the way a product is sold, or the customer support) as a differentiator.

### 3.3 Promise

**How can this uniquely solve the customer's problem?**

**What is the promised outcome?**

**Consider what the outcome would look like, if you showed it to someone (perhaps on video)?** List all the reasons why the customer WILL get the promised outcome?



## **Does the offer automate, simplify, or scale?**

This is a handy way of drilling down to the ultimate benefit of a product. Does it make something happen with less work (automate), make something easier (simplify), or get more output for no more effort (scale)?

## **Does the name or title of the offering communicate its unique promise?**

It's a bonus if we can name (or otherwise brand) the offering so that it "does exactly what it says on the tin."

### 3.4 Benefits

**List all the benefits to the customer that this delivers.**

**Tip: If too vague, drill down to ultimate benefits using "which means that..." method, e.g. "It saves you time" >> "Which means that..?" >> "You have more time to..." (and so on, until you get to the really core benefits to someone in their life.)**

**How can the benefits be demonstrated, or otherwise proven?** e.g. Is it visual (which suggests video), verbal (maybe audio), or lots of information (book or report)?

Showing exactly how something delivers is so much more powerful than simply claiming that it delivers, or even having third-party evidence that say it delivers.

The Yes/No matrix can be a helpful tool to identify useful messaging, or to list points that might easily be overlooked:

**What are the Benefits of saying “Yes” (to the offer)?** (We’ve probably already covered these above. Include emotional benefits, such as getting security, reducing worry, etc.)

**What are the Costs of saying “Yes”?** (We’ll want to minimize these. Typically include actual monetary cost, and often time cost, but also consider other personal or emotional risks. Switching from one product/service to a new one can also bring its own real or perceived risks/costs.)

**What are the Benefits of saying “No”?** (We’ll want to minimize these often perceived benefits. Saving money and saving time are common perceived benefits of inaction.)

**What are the Costs of saying “No”?** (We’ll want to emphasize these. Is a modest investment today going to turn into greater savings in the future?)

**What will buying the proposition mean to the prospect?**

Specifically, what kind of person does it make them, or indicate that they are? (e.g. A shrewd investor, a good husband/wife, a free-thinker, someone who shows how much they care, etc.)

**Can buying this entitle the customer to some identity or group?**

We are highly motivated by being, specifically being part of something. Our self-image is a very powerful force. So if I believe that buying a product will give me permission to perceive myself as special or powerful, that may be a compelling benefit.



### 3.5 Proposition's Value Triangle?

**Do the benefits of this offer emphasize cost, speed, or quality, or more than one?**

### 3.6 What hard evidence is there that we can show to prove it works, or that we can be trusted?

- Case studies?
- Reports?
- Statistics?
- Group tests?

### 3.7 What other soft evidence can we present?

- Testimonials?
- Anecdotal evidence?
- Celebrity endorsements?
- Reviews?
- Are lots of people using this right now?
- What are they saying about it?

### 3.8 Scarcity?

**Is the availability of this offer limited in any way (such as stock numbers, or time window)?**

### 3.9 Urgency?

**What reasons are there for the prospect to act NOW?**

**3.10 What's the general posture of the proposition relative to competition? e.g. Leader? Niche? Challenger? Follower? Cheaper alternative?**

### **3.11 Will communications make a single offer, or multiple offers?**

### **3.12 How much scope for conversation is there with the target market around offers?**

e.g. Responding to what customers want, gathering feature suggestions, feedback, Q&A.

A high capacity for conversation would make a strong case for using social media (especially Facebook).

For example, I had a client who offered a wide range of courses to their local community. Because of the relatively high speed and low investment needed to add courses, they could generate high engagement on Facebook by opening up dialogue about what courses people wanted next, and of course get cheap market research.

### **3.13 How many questions is a prospect likely to have to get answered before making a decision?**

Some purchases take little thought, others take much more. If a prospect is likely to have many questions in the way of their making a decision, we will need to plan for giving them the right channel (email, social media, forum, live chat, etc.)

### **3.14 Are propositions suitable for gifts, celebrations, or other events?**

We're often more flexible on price when buying something for a gift, when we're really buying peace-of-mind. Positioning something as an ideal gift can help tap into great price elasticity.

### **3.15 How easy or quick will it be for somebody to understand what you offer?**

This is very important, as it informs the amount of information we'll need to convey in order to get someone to being ready to buy. For some purchases, a single sales page may be able to convey all the information. For others, an email or video series may be needed. When still more education needs to take place, maybe they'll need a whitepaper, physical DVD, or even a book. All mechanisms are open to us. We just need to choose the most appropriate one(s) that will give the best conversion.

### **3.16 What is the longevity of the promotion? Short-term, long-term?**

For example, if a promotion is short-term, then SEO may not be viable, but social media promotions and pay-per-click are likely to be better. Short-term launches may also work.

However, if you will be selling the same thing over a longer period, SEO becomes more viable, and it also makes sense to invest in a launch sequence that can be repeated many times.

### **3.17 Who else will benefit from this?**

Consider any other beneficiaries of the proposition. Explore any family or work relationships, and consider how the prospect may enjoy other indirect benefits.

### **3.18 Is there a constraint, cost, or difficulty that is traditionally associated with the thing you offer (side-effects), which you can promise to remove? e.g. "Now you can get {benefit} without {traditionally associated cost}!"**

### **3.19 In your proposition, are you inviting your prospects to try something totally new, or an alternative to something they use now?**

If you're asking them to switch products or services, what is the primary benefit of switching?

## **4) Problem**

i.e. what your proposition solves.

4.1 Nature of the problem:

**Is this a problem that occurs at a specific point in time? Which may necessitate an urgent solution — a painkiller.**

**Or is it something that it is worth preventing before it happens? i.e. We're selling a preventative, like a vitamin, or insurance.**

**Is it preventable?** If so... Is it worth investing to prevent?

**Is this a problem that the proposition prevents before it happens, or solves after it happens?**

**Is the problem frequent?**

**Is the problem persistent?**

**4.2 Does the problem cause pain (physically, psychologically, or emotionally)?** (If so, describe it as accurately as you can.)

#### **4.3 Is there urgency?**

Pain obviously generates urgency!

#### **4.4 List ALL other costs of problem.**

- Short-term and long-term.
- Consider there may also be hidden costs, e.g. emotional distress; potentially missing out on future opportunities, etc.
- Are there knock-on costs to other people in the prospect's life?

#### **4.5 What are the long-term prospects or consequences if the problem is not addressed?**

#### **4.6 If not a problem, is there an attractive opportunity?**

The prospect of missing out on an opportunity can be like a problem.

**4.7 List ALL possible alternative solutions to the problem.**

- Commercial competition.
- Home-grown/DIY solutions.
- Doing nothing.

**4.8 Will this be a one-time, occasional, or regular purchase?**

**4.9 List ALL distinct markets that the product/service or proposition could address.**

If there is more than one totally distinct market, we would usually have one campaign for each. This does not mean you should target all these groups, but it is worth considering.

#### **4.10 Is the problem sensitive or embarrassing?**

If so, that may influence the methods, channels, and styles used to communicate with prospects. For example, teleseminars are more private than webinars or online videos.

#### **4.11 Is this a problem the prospect knows they have?**

If not, they're at Step Zero on the Awareness Ladder (see more in section 5 below).

#### **4.12 Is there evidence to say people are prepared to take action to address the problem?**

Is there evidence that people will pay to solve the problem?  
If so, how much?

#### **4.13 What other (competing) ways exist to solve the problem?**

Which of these are known to our target prospects?



#### **4.14 What assumptions are we making about the problem?**

How could we test those assumptions quickly and cheaply?

#### **4.15 What are the causes of the problem?**

What causes are there that the prospect does not yet realize? (These can be great appeals for content/ads.) Ideally, we're looking for a root cause that your solution addresses in a way that your competition does not.

#### **4.16 Should we reframe the problem?**

Sometimes it is worth switching the focus onto a specific more immediate and motivating problem, particularly when the product/service can address a broad range of issues.

For example, a client sells a range of pain-relieving tinctures. Very few people are actually looking for this specific solution, because it is generic. However, a LOT of people are searching for "back pain" and variations, so the proposed strategy is to



focus exclusively on that problem.

#### **4.17 Is the problem or issue emotive?**

Certain strategies may be suitable (or easier) when the problem or opportunity is something that people can get passionate about.

### **5) Markets**

i.e. the group or groups that have the problem.

#### **5.1 What is the target market's level of awareness about the problem and your proposition?**

Note: While each person can be at only one step, you will usually find people at more than one step. We should be clear about the earliest step where there is a significant number of prospects.

- Step Zero: Has no conscious awareness of the problem.
- Step One: Is aware of the problem, and may be open to solutions, but is not aware that any solutions exist.
- Step Two: Aware of the existence of solutions, but not ours.
- Step Three: Aware of our solution, but not convinced of its particular benefits.



- Step Four: Convinced of the benefits of our solution, but not that they must buy.
- Step Five: Ready to buy.

## **5.2 What scale of shift in thinking will be required to get them to subsequent awareness steps?**

How much information will need to be communicated in order to effect that shift?

How long might that take? (e.g. one sitting/message, or multiple communications over time)

Note: We'll often find that one gap between awareness steps is bigger than others. It will then require more communication to bridge that gap.

For example, in the case of Sharon Small's "Clean Language Institute", our primary target market is practicing therapists in the United States. They primarily congregated at Step Zero, because they do not really perceive any problem or opportunity related to the way they work. Sure, they don't always get the results they want, but assume that's just the way things go. So, in the face of years of expensive training, highly invested prospects, it was going to take a lot of communication to convince them of a problem, which is why we chose to publish the book, "The End of Therapy".

In other cases, we might face more of a challenge getting people to think that their problem is truly solvable, i.e. a big Step 1 > 2 gap.

Alternatively, we may have a big challenge getting them to appreciate the relative benefits of our solution, i.e. a big Step 3 > 4 gap (and so on).

### 5.3 What do we know for sure about these people?

- Gender
- Localized or global?
- Age ranges?
- Common interests? These are particularly helpful for Facebook profile targeting.
- Job, problem, dreams, hopes, frustrations?
- Religion, ethnicity, language?
- Education, experience, habits, life story?

### 5.4 What can we safely predict about their attitudes and preferences?

- Attitude to Risk versus Security?
- ... Quality vs. Value?
- ... Novelty vs. Proven record?
- Do we know where they sit on the technology adoption curve?
- ... Individual vs. Mass-market?
- ... Design vs. Functionality?

## 5.5 What is the size of the market?

Some campaigns address mass markets (e.g. communications, energy, TV subscriptions), while others are much more niche.

It is important to target our true potential audience as closely as possible. So broadcast media channels may be particularly cost-effective for mass markets, but might be wasteful when we have a narrow niche market. Whereas hiring skilled direct telesales people may be great for a niche market but unaffordable for the mass market.

This is not always a quantifiable question. There are online tools, such as the Google Ads Research Tool, which will tell you approximately how many people are typing a specific phrase into search engines each month, but that is not exact.

## 5.6 How many conversions do we need in order to succeed?

Can we put specific numbers on conversions? For example, the client on the CLE case study said he needed to know he would have a \$1M turnover business within two years. That meant we needed  $1M / 12$  or \$84,000 monthly turnover within 24 months. That would require a minimum growth of \$3500 per month over 24 months. At a typical \$6000/month subscription value, and allowing for some fall-off, that gives a target of one

new happy customer per month. If we could beat that in the first few months, the client could be confident in making his target.

Or percentages? This would suit the type of situation where we know the average revenue per sale and can predict the typical cost of sale, for example. That could then give us a break-even conversion percentage.

## 5.7 What's the target prospect's ability to pay?

What kind of investment will this represent to them?

## 5.8 Where do they congregate?

- Do they gather together, online or offline?
- Are there Facebook groups? Type “Groups named [your keywords]” (without quotes or square brackets) into the Facebook search field to browse groups and membership numbers.
- LinkedIn groups? Select “Groups” from the drop-down before the search field and enter keywords into search field. You will need to click into each group to get member numbers.
- Do they attend the same events?
- Read the same publications?

**5.9 List ALL the possible objections we can think of that people might offer to taking up our proposition.**

Speaking to front-line salespeople, or online/phone chat operators can be a great way to gather these.

**5.10 What's the prospect's deepest motivation? Does their WHY match yours?**

**5.11 What view of the world does the prospect hold true?**

We aren't going to change this, but it may be helpful to ask how our marketing message could help to resonate with the prospect's worldview. (See Seth Godin's book "All Marketers Are Liars" for more on this, summarized here.)

## 5.12 What are they most concerned about?

Price / Speed / Quality? (i.e. Value Triangle factors.)

## 5.13 What do we know about the people who are going to buy?

Not our target market, but the people who'll end up buying.  
Use a kind of reverse logic. What must have been true about them in order that they came through the funnel?  
This can help us to filter or target our messaging.

## 5.14 How can we spot the people we don't want to be talking to?

What can we say with confidence about these people?

**5.15 Who MUST take advantage of this offer, and why?**

**5.16 Who should NOT take advantage of this offer? Who would it be WRONG for?**

**5.17 Who does our target prospect look up to? Brands, job types, individuals?**

**5.18 What kind of test or language could we use that will quickly differentiate the right targets from the wrong ones?**

What Perry Marshall calls, “Racking the shotgun” in 80/20 Sales and Marketing.

### **5.19 What prior knowledge, experience, or education does someone require in order to qualify or benefit from the offering, if any?**

"Do you qualify?" can actually be a powerfully attractive message.

### **5.20 Is it a Business (B2B) or Consumer (B2C) market?**

### **5.21 What do these people need in order to become passionate advocates?**

### **5.22 What assumptions are we making about the prospect or market? How could we test those assumptions quickly and cheaply?**

## **5.23 Does the prospect want a solution they can implement themselves, or help to solve it, or do they want it solved for them?**

Different levels on the “do-it-yourself” to “done-with-me” to “done-for-me” range will have different needs.

You may be able to offer solutions for people at more than one layer in that range (i.e. stacking your offers). But remember that different groups may require the solution to be packaged differently for them.



## **5.24 Could other people influence the buying decision?**

e.g. Spouse, line manager, other stakeholders, financial controller, etc.

What might those people need in order to be convinced? We should consider including material in our campaign that helps the prospect to answer the question of third parties, or a story that it may be helpful to relate.



## **5.25 Do you care about this target market?**

If you don't genuinely care about the people you serve, how will you serve them with all your energy and commitment?



## **5.26 Can we refine the possible market to an ideal target customer?**

Who are likely to be your most responsive, most engaged, keenest customers? Who will exhibit less resistance? Who will make the best referrals or champions? Consider focusing on only this group.

## **5.27 Are customers likely to have direct contacts (friends, colleagues, or their own suppliers or customers) who are also in the target market?**

If so, it would make sense to build in a mechanism to encourage them to provide referrals, testimonials, etc., perhaps in return for discounts or even affiliate earnings.



# CIRCUIT REVIEW

The Circuit Review is a critical step where we evaluate the information gathered in the Circuit Interview, and establish what changes could be made (now, when it is easiest and most cost-effective) prior to planning or rolling out a campaign.

The purpose of the Circuit Review is to establish whether there is a powerful marketing proposition to take to market, and - if so - how fit for purpose it is or if there are refinements that can be made before we proceed to the next step (Campaign Design).

One of the great things about this process is that you can do a quick Circuit Questionnaire and Review (in minutes) or you can spend days on it. There is value to be gained every time. It's also a great tool to use as a touchstone when you're planning and executing a Campaign.

(In the context of running this as a project for a client, the deliverable from this step would be the summary of those findings, together with any actions that we recommend.)

## 1) Overall

### 1.1 Do we feel the five elements in the Circuit are:

- Present?
- Clear?
- Distinctive?
- Strong?

### 1.2 Do all the elements align with each other?

- If not, what is out of line, and what could be changed to bring that element into alignment?

## **2) Is the Brand good?**

### **2.1 Is it clear what the brand stands for, its mission or purpose?**

- Does it have a compelling story to tell that resonates with that?
- Is the mission story (and reason why) credible?
- Are you fully engaged with this as a mission?

### **2.2 Are we 100% clear...**

- WHO or WHAT you ARE
- WHAT you DO
- HOW you do it uniquely
- WHAT your global proposition (promise) is
- and WHY you do it at all?

### **2.3 Have we really MAXED what they can be to the world?**

- Are there any areas of compromise or friction?
- What would it take to remove any compromise, and to be the best that we can be?

## **3) Products & Services**

### **3.1 Is the product or service offering in alignment with the Brand?**

### **3.2 Do you love to deliver this?**

### **3.3 Do you do it well?**

### **3.4 Is there a clear demand (or unexpressed need) for this?**

### **3.5 Is it unique, or at least distinctive, in the marketplace?**

- If not, what can we focus on, or develop, to make something that is unique? ("We are the only... that ...")

## **4) Proposition**

**4.1 Does it perfectly express why the product/service/package is the ideal solution to the Problem?**

**4.2 Is the proposition distinctive and remarkable?**

**4.3 Does it make a big, bold promise?**

**4.4 Could we MAX the promise?**

- Is there a level of promise that would make your palms start to sweat, which would really call you to play your biggest game to the best of your ability?

**4.5 Make sure you have a note of any assumptions you're making.**

## **5) Problem-Proposition Gap**

**5.1 When people are conscious about the problem (Steps 1 or 2), how big a gap is there to make them aware of our offering and its benefits (Steps 3 and 4)?**

**5.2 What is the scale and nature of communication that will be required to bridge the gap?**

- Will it take minutes, hours, days, or weeks to communicate fully everything that needs to be communicated?
- What volume of information? A page, a chapter, or a whole book?
- Will any media types be a natural fit? For example, a guided meditation would be great in audio, but not in text. A physical product could be demonstrated in photos, drawings, or videos. A complex logical argument might work most effectively as a book. An emotive sales message could be great as a live-action video presentation.

## **6) Problem**

### **6.1 Is the problem well defined?**

- If not, can we focus it more?

### **6.2 Is it sufficiently poignant and motivating to get people to take action?**

### **6.3 If not, can we further refine the problem, or consider alternative problems that are likely to be more motivating?**

## **7) Problem-Market Gap**

### **7.1 How big a consciousness gap is there between the market and the problem?**

- i.e. Are people already aware of the problem (Step 1 or later), or do we need to put measures in place in our campaign to create a bridge (Step 0)?

### **7.2 What is the scale and nature of communication that will be required to bridge the gap? (See notes for Problem-Proposition gap above.)**

## **8) Market**

### **8.1 Do we know exactly who we want to reach?**

### **8.2 Is it possible to focus on a subset of this group, to identify those who are not just in the target market, but the ideal model customers, who'll be the most profitable and faithful?**

### **8.3 Are we confident that we can reach them where they congregate? Consider e.g.**

- AdWords search numbers?
- Facebook groups?

- Forums?
- Dedicated websites?

#### **8.4 Do we truly know what they really care about?**

- “Don’t think like a fisherman, think like a fish.” ~ Gary Bencivenga

# SHORT CIRCUIT TEST

If you're ever evaluating a Circuit questionnaire, a business plan, a pay-per-click ad, or even an email, try this super-quick test.

In just seven questions, you can know with confidence that you have a campaign ready to take to market.

If you can answer a question succinctly and with clarity, you have a green light.

All green lights — you're good to go to market! If you don't have all green lights, stop and fix it before you proceed.

## The Short Circuit Questions

### **Brand**

- Why will people feel part of this brand?
- What is the brand's promise?

### **Product / Service**

- What uniquely makes this product/service the perfect solution for your target customer?

### **Proposition**

- What do you promise to do for customers that no competitor can?
- Why will people choose this solution?

### **Problem**

- Why will people be motivated to take action to address this problem?

### **Market**

- Do we know exactly who our ideal customer is, and where we can find them?

# CAMPAIGN DESIGN & DELIVERY

One of the most common mistakes marketers and business owners make is to dive into executing marketing activity without having a comprehensive campaign plan in place.

Campaign design is the second critical phase of the Open-Source Marketing system. Its goal is to have a complete campaign that provides a thorough process for creating happy customers.

We do this through a series of six Campaign Steps.

## The Six Campaign Steps

**Outreach:** Generally raising awareness of the brand and its offers.

**Targeting:** Directly identifying our target prospects and getting our message to them.

**Capture:** Where possible, obtain the prospect's contact details, so that we can continue to market to them directly.

**Nurture:** Fully communicate the benefits of our proposition, and try to resolve any objections, until the prospect is ready to buy.

**Close:** Make the "sale" (which is not always a financial transaction).

**Continuity:** Once we have a new customer, what else can we do to keep them happy?

You are advised to work through the Six Campaign Steps in turn, and follow the advice so that you craft your complete marketing campaign design.



## Techniques

There is a bewildering array of techniques (by which we mean **channels, tools, platforms, and methods**) available to today's marketer.

While marketing “gurus” and specialists in particular techniques will happily sing the praises of their current favorite tool, please never forget this rule.

**No technique is right for every campaign! It always depends on your context.**

And, unfortunately, there is little information available to help you decide which of these are right for your scenario and goals.

So Open-Source Marketing aims to help guide your options by providing free advice from our large team of marketing experts.

## Campaign Delivery

Having a sensible and true strategy in place, together with a comprehensive campaign design will make your campaign delivery far easier.

Knowing your strategy means you are clear about where your brand and offerings sit in the market, and why your target market should care. You will have uncovered the compelling benefits of your offer, and have a good idea that you will be able to reach an audience that has a tangible problem that you can solve.

In carefully crafting your campaign design, you will have ensured you have put measures in place to reach, engage, nurture, and close your target prospects, selected the most appropriate channels and tools, and you will also have

considered how to create the maximum value for each new customer.

Now you know what you want to achieve, and what you're going to do to get there, you are ready to go to market!

In the Campaign Delivery section, the Open-Source Marketing expert team provides you with our best advice on how to use each of the techniques (tools, channels, platforms, methods etc.) in the marketer's toolkit.

# OUTREACH

Outreach is reaching out to people in an indirect way (i.e. where you don't know to whom you're talking), compared to direct reach (which we call Targeting).

With Outreach, you cannot expect direct cause-and-effect. In fact, you should accept that the path that connects your Outreach activity to the creation of a new customer is likely to be so complex that you may not even understand it, never mind be able to measure it.

But, despite the fact that it isn't measurable, we do Outreach anyway, because we know it's the right thing to do.

So Outreach is an important discipline for most businesses and organizations, because it allows **new** people to discover your message. The only exception is really if you are running a short-term campaign, where longer-term or fuzzy promotional activity may not have time to bear fruit.

## General Tips

Always ask, "Who does my market already follow? Who has their attention? Who are my natural allies?"

Outreach is about building relationships, not direct sales. So take an attitude of, "How can I help you?" rather than, "How can I benefit from this?" because that's the way to build a following or tribe that will stay with you long-term. (If you urgently need short-term revenues, you should be using a short-funnel Targeting method, such as pay-per-click.)

## Two Main Types of Outreach

Any Outreach channel you use will either be **your own**, or it will **belong to someone else**. Both types have their benefits.

If we're interested in marketing in the long term, of course we should aim to build assets that we own: often mailing lists, blog sites, or social media groups. However, you don't always want to be talking only to your own tribe.

Because the primary purpose of Outreach is to get your brand and message to new people, we should all be considering how to reach new blood, which is why we also aim to use other people's channels (lists, groups, blog, etc.)

A good principle is to offer a partner some real value, which will make them look good and be useful to their followers. Don't be mercenary and expect a short return. Instead, consider offering a "lead magnet" (or "pre-sell", page to follow) that requires the prospect to enter their email address, thereby growing your own list. (More details in "Capture" phase.)

## **Who Should Do Outreach?**

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Consider outreach as the on-going activity that your brand does naturally. That is not to say you shouldn't make time for it, rather that it's about **being who you are**. Outreach spreads your message, your overall promise ("global proposition"), your vision for the world, so that new people can discover your brand.

On the plus side, Outreach has many benefits. A good blog post can get a huge amount of valuable traffic. (For example, a blog post I wrote on "The Top 10 Skills for Web Designers" has been viewed 472 times by 366,000 different people since I published it in June 2010, and was still getting traffic at the time of writing. Consider how much you would have to pay to reach that many people using ads!)

On the down side, some marketers don't like Outreach because it is long-term and practically impossible to measure. However, I don't think that's a good enough reason to ignore it.

The only really good reason not to do Outreach as part of your



regular marketing activities is if you do not intend to build the business in the long-term, i.e. your offer is truly short-term.

Here's another story that should make you think twice. At the time of writing this, I'm running a small course with a group of about ten small business owners. When I asked the participants how they had first come across me, I got a range of responses. At least two of them had heard interviews I had done with other marketers (stuff that I do regularly for free, just to share ideas). And more than one had read one of my books (a great outreach tool). But the surprising thing I realized is that some of these people, whom I had only recently met for the first time, had been following me for years!

## **Top Tip**

The best advice we can offer for general Outreach is to know your own brand first. The Circuit Interview and Circuit Review (in Strategy phase) should encourage you to **be something that's worth talking about.**

If you know what you stand for, or stand against, what people can count on you for, and what you believe in, and you fully embody those things, you will find your outreach is naturally easier.

People will instinctively know what you mean to them, and should have either a positive or negative reaction (which is preferable to no reaction at all), and should find your brand and your activities remarkable (i.e. worth talking about).

On the other hand, if you are unclear about what you mean to the world, you will have an uphill battle trying to get people to notice you, or to talk about you.

## Outreach Techniques

Outreach includes the following techniques:

- Group buying offers
- Virtual summits
- SEO / Local SEO
- Content marketing
- Public Relations (PR)
- Speaking events
- Testimonials First
- Blogging
- Guest blogging
- YouTube
- Podcasting
- Social Media
- Display ads
- Books / Ebooks / E-magazine
- Affiliate partnerships (using partners)
- Wizards / Surveys
- Interviews (giving or hosting)
- “Sharegates”

# TARGET

Efficiently targeting your prospects is clearly an essential step in the success of any marketing campaign.

The stakes are getting raised with many more channels following a “pay-to-play” model, leading to direct costs per click or visit.

It is generally advisable to use both indirect reach (outreach) as well as direct targeting, although either may be very effective. We distinguish targeting as methods or channels that give you control over the people you speak to (such as through profiling, for example).

## **Targeting techniques include:**

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- Direct mail
- Pay-Per-Click (PPC)
- Google Ads
- Social Media PPC Ads
- Podcast / vodcast
- Email lists
- Meetup group
- Networking events
- Telephone
- Social Media Groups
- 3rd-party Forums

# CAPTURE

Most campaigns should endeavor to capture visitors' contact details. Having contact info (usually email, but could include phone or mailing address) means that you can then communicate direct to a prospect.

This is particularly vital if your sales funnel or lifecycle may take some time, extended over multiple contacts or touch points, and also if you have paid for visits.

## Why You Must Capture

The vast majority of transactions are not completed in just one visit. There is no agreement on what the average number of "touch points" is, and it's bound to vary by sector, but you can bet it's more than one!

If you capture your prospects' contact information, that means you **own a channel** for communicating directly to them, and therefore **continuing the conversation** under your control.

That means you can deliver a series of follow-up communications, which can help resolve objections or queries, deliver a full range of benefits (even for different segments of prospect), and give all the reasons why the prospect should act now.

Very often, it's simply a case of providing sufficient weight of positive reasons, enough to counter the negatives (cost, risk, etc.).

Additionally, you also get to keep the prospect's details for future offers.

The only circumstances in which you should NOT think about capturing your prospects' contact info are...

- If you already have them (i.e. you're using direct marketing channels).



- You are presenting a short-term impulse offer, in which case there may not be time to follow up on the offer, and to present a second call to action may negatively impact your primary CTA.
- If the context is sensitive, your prospect puts a high value on their privacy, and they know how to find you (very unlikely scenario).

## Important Points

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Capture is a “conversion event”, i.e. a Trade, because you are asking for a commitment from your prospect, which invariably involves some cost or some work on their part.

That means you need to **offer value that the prospects perceives as greater than the likely cost to them** (of handing over their information).

So you must first come up with a powerful offer or reason why the prospect should enter their details. Don’t just put, “Subscribe to our newsletter,” because nobody really wants any more email. There has to be the promise of clear value that exceeds the cost of having yet more email or phone calls or letters to deal with.

Do not skimp on your offer. Make it overwhelmingly more valuable to your prospect. And, wherever possible, focus it directly at your bullseye target customer, not just the whole “target market”, by using an offer that will only be relevant and appealing to your preferred prospect.

## Planning For Your Capture Objective

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The majority of online marketers employ the “ethical bribe” technique, where you’ll offer a free download, video, webinar, product, or even service, to anyone who enters their contact info. There are many variations on this technique.

Don't assume your "lead magnet" has to be a single product. It could be a series of tips emailed to you, or one video each day for a week that walk you through some process. This could help you build a more complex sales message, as well as keeping your brand present for the prospect.

CRM and email marketing systems are the standard platforms used to store contact info. (We will have in-depth reviews of all the popular platforms in due course.)

But you can also capture contact details from live events or face-to-face meetings using written surveys, or cards that delegates complete. You may also collect business cards.

Before the Internet, mail-in coupons were very common in print media, either cut out of a publication, or using an inserted card.

## **Competitions**

Competitions and contests are familiar and established ways of getting people to opt in to a list. They can use a variety of channels, including SMS/text message.

## **Ensure You Get Permission**

There are pretty clear laws that apply to direct marketing these days. If you are going to collect someone's contact info, it's safe to assume you must ensure they know what you're going to do with it.

With most email systems, double opt-in is now standard best practice. That's where you get an email with link that you have to click in order to confirm you want to go onto the mailing list.

## **Proceed With Confidence**

Do not worry that asking people to opt in will lose you potential customers.

## Here's why...

- You're targeting a distinct group of people who share a particular problem (or opportunity).
- You believe you have some knowledge or product that can help them overcome their problem and get to where they really want to be.
- You can offer them something at no cost, which promises to inform them about the reasons why the challenge is there, and what they need to do.
- So why wouldn't they want to say yes?
- If they aren't interested enough to accept your initial trade (contact info for free product), then they probably either aren't in your target market, or would never accept your ultimate trade anyway.

## Capture Techniques

### **Opt-in mechanisms**

- Email opt-in mechanisms
- "Pre-Sell" (Also known as ethical bribes or lead magnets)
- Squeeze pages
- Teleseminars
- Webinars
- Virtual summits

### **Social platforms** (tenuous?)

- Facebook (connect or opt in to group)
- LinkedIn (connect or opt in to group)
- Twitter (follow)
- YouTube (follow)
- Instagram (follow)
- TikTok (follow)
- etc.

## Capture Tools/Platforms

- Any marketing automation or email platform (like ActiveCampaign, AWeber, MailChimp, etc.)
- LeadPages
- ClickFunnels, FG Funnels, and other funnel software
- GoToWebinar, WebinarJam, and other webinar platforms

# NURTURE

Many selling processes or funnels are unlikely to be completed in one visit. So we need to nurture prospects, taking them from the point where we meet them along the path to the point where they are ready to make a decision whether to accept our offer - or not.

Nurturing may involve the following **Major Objectives**:

- Emphasize the problem and its cost
- Visualize the outcome in their life
- Present or acknowledge other existing solutions
- Gather objections
- Discredit alternatives
- Set up criteria for best solution
- Introduce better solution
- Communicate who the offer is for (and not for)
- Reinforce the positives / benefits
- Evidence of why your proposition is ideal
- Resolve the negatives / Handle objections
- Prove value (value proposition, make sure the benefit clearly outweighs the cost)
- Risk reversal
- Establish scarcity & urgency (where appropriate)

Just working through the list above will give you a significant advantage.

For any of the Objectives in the list above that are appropriate for your campaign, you should build mechanisms for delivering them into your campaign design.

Delivering on these objectives is generally done through content, which is why copywriting is so critical. But ensuring you cover all these steps will give you a content structure that is likely to be effective, even without expertly-written copy!

## Some Common Techniques

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- Webinars
- Video follow-up sequences
- Email follow-up sequences
- Product launches

# CLOSE

Every campaign should specifically plan for closing sales (or whatever the conversion event may be).

It is important not to try to close too early (before the prospect is ready), but it is also a mistake to postpone asking for the sale.

So, when you're designing a campaign, decide when the most appropriate point is to "pop the question". Remember...

**If you don't ask, how can anyone say "yes"!?**

It can also be very helpful to **ask for the sale more than once**. Sometimes we're not ready to click "Buy" but not because the offer is no good! Maybe there are unanswered questions or concerns, which you may be able to resolve. We'll look at techniques for continuing the sales conversation

## Techniques Include

- Paid or Free Membership sites
- E-commerce sites
- Sales pages
- PayPal links
- Donations

## Understanding "the Trade"

The best book about selling that I've ever read is "*The Secret of Selling Anything*" by Harry Browne. In the book, Browne sets out a super-simple model that helps explain buying and selling.

Harry Browne explains that a "trade" is a simple transaction in which two parties exchange stuff, often cash on one side and some commodity or goods on the other side.

Now, a trade can only take place when a simple situation



arises. That is when **both parties value what they're getting from the trade more than what they're giving up.**

If you were to buy a car, a computer, or a bottle of beer, that thing is worth more to you than the cash you pay for it. But the seller also wants your cash more than the car, computer, or beer. (That's usually because they're making a profit on the sale.)

But when you stop to think that the same goes for any transaction, this fundamental model can transform the way you view sales and marketing.

- Selling a course? Don't just tell your prospects what's in the course! Tell them how those things (features) are going to make a real difference in their lives. Do they care about making money, about prestige, about being healthy, or about being attractive to potential dates? It's those benefits that really attract buyers, and they must be worth more to your prospects than the money you're asking them to hand over... otherwise there's no trade!
- Are you asking for a charitable donation? What's in it for the donor? What really matters to them? How can you give them good feelings that are worth more to them than the money they're handing over?
- Do you want people to sign up for your mailing list? Do you realize that handing over my contact info has a cost? There's a risk of getting unwanted emails, or of having my info passed to other marketers. So you need to offer me benefits that clearly outweigh that risk.
- Even if you're giving something away, there's a cost involved. This course is free, but you still need to invest your time. Unless it's worth your time, you won't invest.

## **Integrity in Sales**

Do I need to add that you should **never lie in order to make**

**a sale?** It may be common practice, but it isn't best practice in the long-run.

- **The best advert for your business is a happy customer.**
- **The worst advert for your business is an unhappy customer.**

Knowing that a trade is only possible when the benefits of what you're selling outweigh the cost of what you're selling, you logically only have a few simple options...

- Offer something that really delivers great benefits. (That's the first step to building a great business!)
- If you don't have a great offering, you'll need to reduce the price to the point where it's good value (not recommended).
- Do a great job of communicating all the benefits of your offering.
- And remember to ask for the trade, at the right time(s).
-

# CONTINUITY

A marketing campaign shouldn't end when you get a customer. There are several important things you still need to do, including:

- **Reassure** them about their commitment (which may be a purchase), to prevent chargebacks or disappointed customers.
- Offer **new levels** of interaction, such as up-sells, cross-sells, memberships or referral/affiliate programs.
- **Engage** the customer or follower as part of your tribe, getting them to help spread the word. (Happy customers are the best marketing collateral you can get!)
- And generally **keep in touch**, keeping your brand present until the next time.

## WHAT'S NEXT?

### Visit our Toolbox

We maintain a directory of marketing tools to help you deliver your marketing campaigns.

[Click here to visit the Toolbox >](#)

### Join the Open Source Marketing Community on Facebook

Ask questions & share tips with other marketers & business owners in our Facebook group.

[Click here to join >](#)