



# farotech

## GAP ASSESSMENT

HOW TO DEVELOP A **3-5 YEAR ROAD MAP**  
TO **10X** YOUR COMPANY'S MARKETING

UNIQUE PROCESS

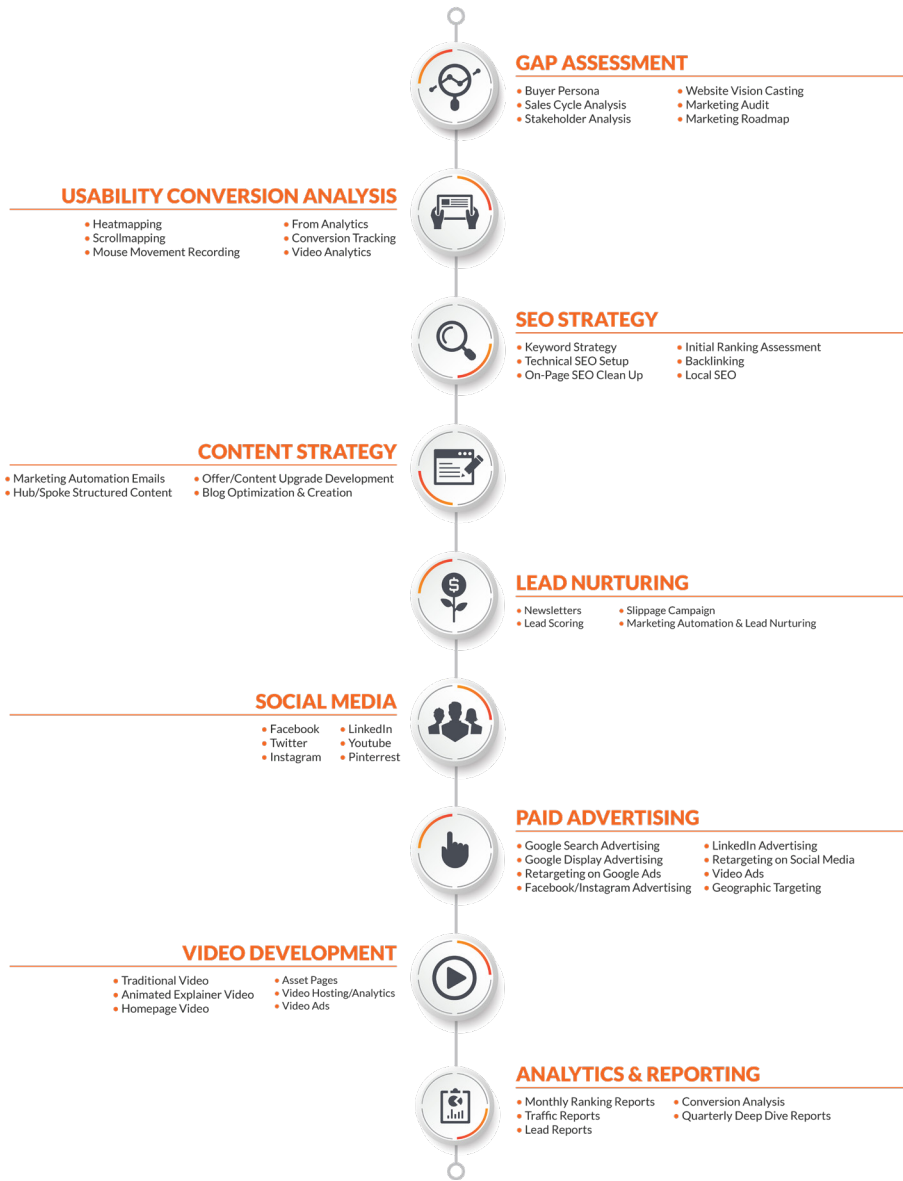


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# Gap Assessment



ABC Company  
**Gap Assessment**

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## 3 Year Road Map

- 10x Business Leads & Opportunities
- Identify **Critical Gaps** in your Market Approach
- Develop **Foundational Marketing Assets** to Scale Campaigns
- Create and maintain a **Marketing Score Card / KPIs**
- Identify your **quarterly priorities and goals**
- Review your **Competition**
- Identify the **LTV** of your current and prospective clients
- Establish an **ROI Model** that scales as the business grows.

**farotech** Gap Assessment

A Gap Assessment is a **10-week deep dive** into your company's goals, KPI's and growth opportunities. It's also a way to look at your **total marketing potential** in relation to the size of your industry and how much market share you need in order to reach your goals.

A Gap Assessment is an extremely thorough research process that happens at the beginning of a client's journey with us.

The data that is extracted from this process serves as the backbone of the system that we build for our clients.



## Gap Assessment

Building a system takes time, and there are a variety of elements that shape our long term process such as:

- SEO
- Building domain authority
- Brand establishment and messaging

These are just a few of the factors that are always being tweaked and improved along the way.

And while these are more so long term functions of a marketing plan, our system is also designed to generate quick wins and capitalize on low hanging fruit.

Ok, so let's walk through some of the highlights of what we cover in the Gap Assessment.

Obviously, the first place we are going to start is with your brand.



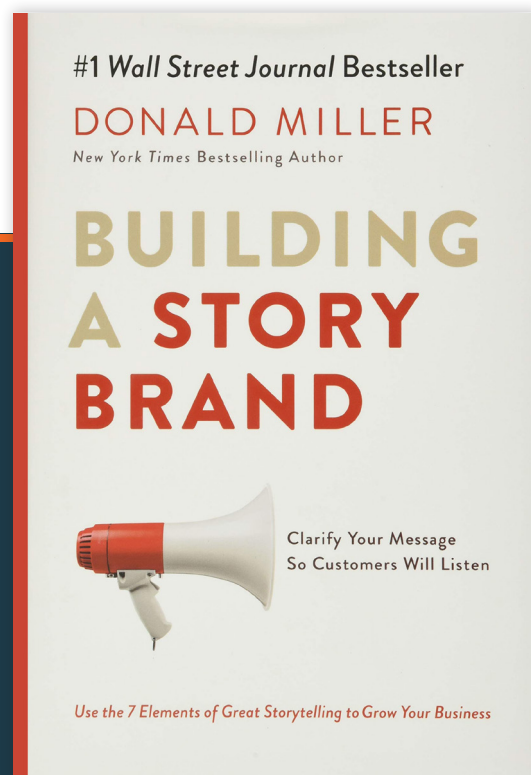


When we talk about your brand, we don't mean just your logo, font and color scheme.

While all of that is important, we are referring to how you establish and refine your message to target a variety of different audiences and buyer personas.

We utilize a scientific process to accomplish this.

And to help us with that, we lean on a proven outline from the book, **Building a Story Brand**.



In this book, Donald Miller outlines a turnkey approach to help your company clarify your message to maximize engagement.

We have taken his approach one step further with our Story Guide exercise that allows us to apply your newly refined messaging to our comprehensive marketing approach.

## Persona Name

### Background:

- Basic details about persona's role
- Key information about the persona's company
- Relevant background info, like education or hobbies

### Demographics:

- Gender
- Age Range
- HH Income (Consider a spouse's income, if relevant)
- Urbanacity (Is your persona urban, suburban or rural?)

### Identifiers:

- Buzzwords
- Mannerisms



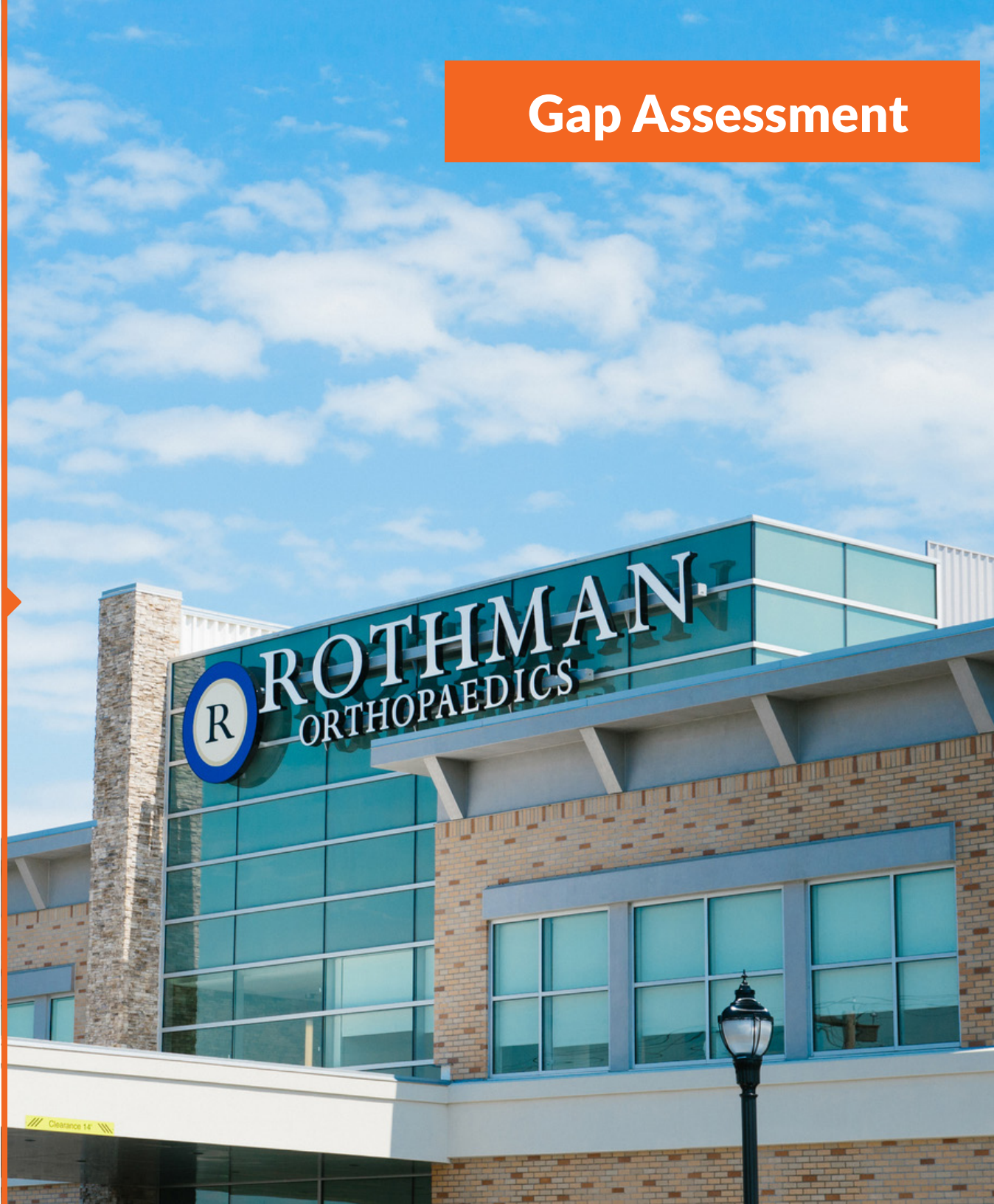
The next step of our process is to **identify all of your ideal buyer personas** (as well as influencers) who might engage with your marketing.



# Gap Assessment

As an example, let's take a look at the approach we used for one of our most recognized clients: **The Rothman Orthopedics Institute.**

According to US News & World Report, Rothman Orthopedics is one of the most accomplished orthopedics practices in the United States. We helped lead their Digital Optimization Strategy for **nearly a decade.**



# Gap Assessment



At Rothman, we worked with their creative team on a very successful marketing campaign called ***"Rothman First."***

We piggybacked on that campaign to create a **wide net approach.**

The wide net approach allowed us to create generalized messaging that would apply to anyone who had pain in their hips, knees, spine etc...

***"If you have pain, think of Rothman First."***

But that was just the beginning....







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FAROTECH  
**BUYER PERSONA REPORT**

### Middle Age Cyclist

#### Background:

- Basic details about persona's role
- Key information about the persona's company
- Relevant background info, like education or hobbies

#### Demographics:

- Gender
- Age Range
- HH Income (Consider a spouse's income, if relevant)
- Urbanacity (Is your persona urban, suburban or rural?)

#### Identifiers:

- Buzzwords
- Mannerisms



## Gap Assessment

In this case, the hobby that caught our attention was cycling.

In Philadelphia, cycling is HUGE.

It turns out, orthopedic practices like cyclists a lot because...

Well, they tend to hurt themselves frequently. And they're often plagued by chronic pain.

We knew that if we established Rothman as sports and activities that eventually lead to joint pain and deterioration. We knew that if we established Rothman as a **thought leader in those communities** and if we found ways to **service influential people** in those groups, it would just be a matter of time before the large majority of cyclists in the region would think of Rothman first whenever they had joint pain.

By investing in the **entire cycling community** and creating inroads with cyclists, we positioned Rothman as the "Go-To Provider" in their circle.

We decided to take it one step farther.

Rather than trying to sell orthopedic services one client at a time, it was our vision to sell orthopedics to one **COMMUNITY** at a time.

And here's the logic behind it.

If we're trying to target individuals with back pain, it's going to be pretty difficult to do that because nobody advertises to the world that they have back pain.

But they **will** advertise things about their life, such as their hobbies.



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FAROTECH  
**BUYER PERSONA REPORT**



## Influencer: Spouse

### Background:

- Basic details about persona's role
- Key information about the persona's company
- Relevant background info, like education or hobbies

### Demographics:

- Gender
- Age Range
- HH Income (Consider a spouse's income, if relevant)
- Urbancity (Is your persona urban, suburban, or rural?)

### Identifiers:

- Buzzwords
- Mannerisms



Not only were we marketing to the cyclists, but also to influencers.

Because everyone knows... for every cyclist that has a bad back, there's a spouse who is tired of hearing about it.

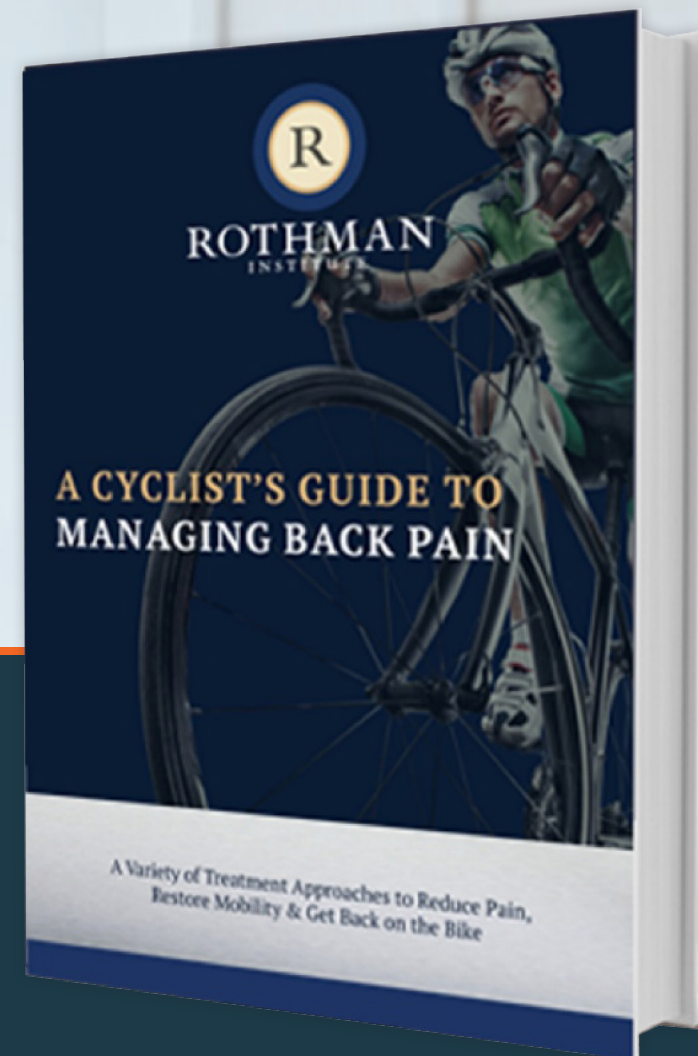


# Gap Assessment



So once we established that cyclists were the community we want to go after, then we began to target that group by designing specific marketing materials **for cyclists** in the form of ebooks, white papers, videos, etc...

As opposed to a wide net approach, this campaign reaches a very specific buyer persona, this process has worked very effectively and has been adopted for most of the clients that we partner with.





So, how do we do buyer persona exercises?

Well, this is one of the most critical parts of marketing, but it's also one of the things that many companies don't do. Why? To put it bluntly: **because it is hard.**

In order to effectively create buyer personas, we conduct something we call **"war room sessions"** with the subject matter experts from your team.

In those sessions, we ask a series of really important questions about your products and services. And then analyze how the answers to these questions **vary from one buyer persona to another.**

BP #1 BP #2 BP #3

Verticals	High School Soccer Player	Active 40 year Old Male	Senior Citizen (Female)
<b>Job &amp; Demographic Information</b>			
Demographics: gender, age, income, education level, urbanicity, family?	15-18 Years Old M/F Student - no income High School Lives on Main Line (Suburbs) Lives with parents/siblings	40 Years Old Male \$5,000 College Educated Lives in Suburbia, Commutes to work in Philly Married, with children	
What is their role?	Student Athlete	Middle- Upper Management	
What is their idea of success?	Having a winning season Getting chosen for college scholarship	Weekend Warrior- living for activities on the weekend	
<b>What Are Their Challenges &amp; Pain Points? (And How Can The Client Address These)</b>			
What are their biggest challenges at work? In general?	Balancing school and sports Knee injuries	Long hours during make it difficult to work out during the week More prone to injuries on the weekend	
What makes their job more difficult?	Injuries that set back their ability to play	Relatively sedentary at work Work/ life balance Injuries that inhibit ability to be active on the weekend	
How urgent is this challenge?	They want to get back on the field ASAP Worried about missing a whole season	Moderately- but intervention will prevent greater problems later	
How can you solve the Persona's challenges?	Help with prevention and early treatment to minimize amount of playing time that is missed	Prevention Non-surgical treatment for injuries	
<b>Who Refers This Persona To You?</b>			
Who are your biggest referral sources?	Coaches		

**farotech** BUYER PERSONA REPORT

**Senior Citizen (Female)**

**Background:**

- Basic details about persona's role
- Key information about the persona's company
- Relevant background info, like education or hobbies

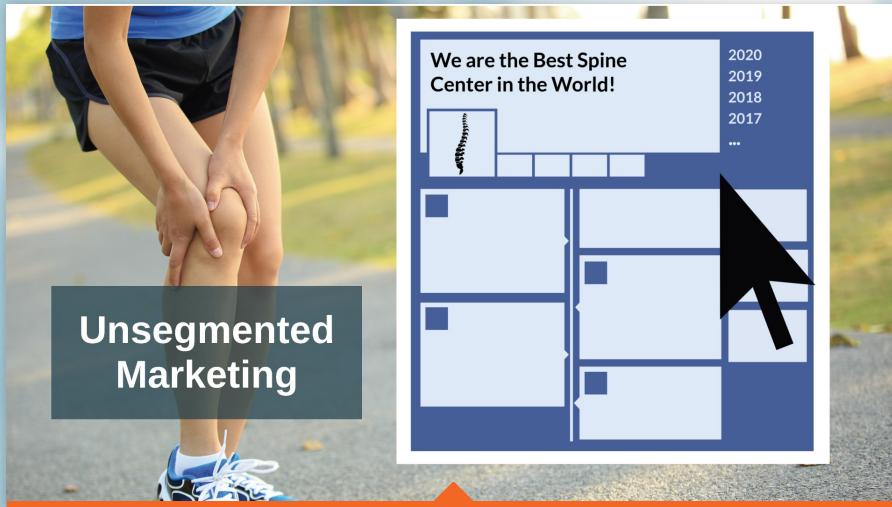
**Demographics:**

- Gender
- Age Range
- HH Income (Consider a spouse's income, if relevant)
- Urbanicity (Is your persona urban, suburban or rural?)

**Identifiers:**

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## Get the Right Message to the Right Potential Client at the Right Time

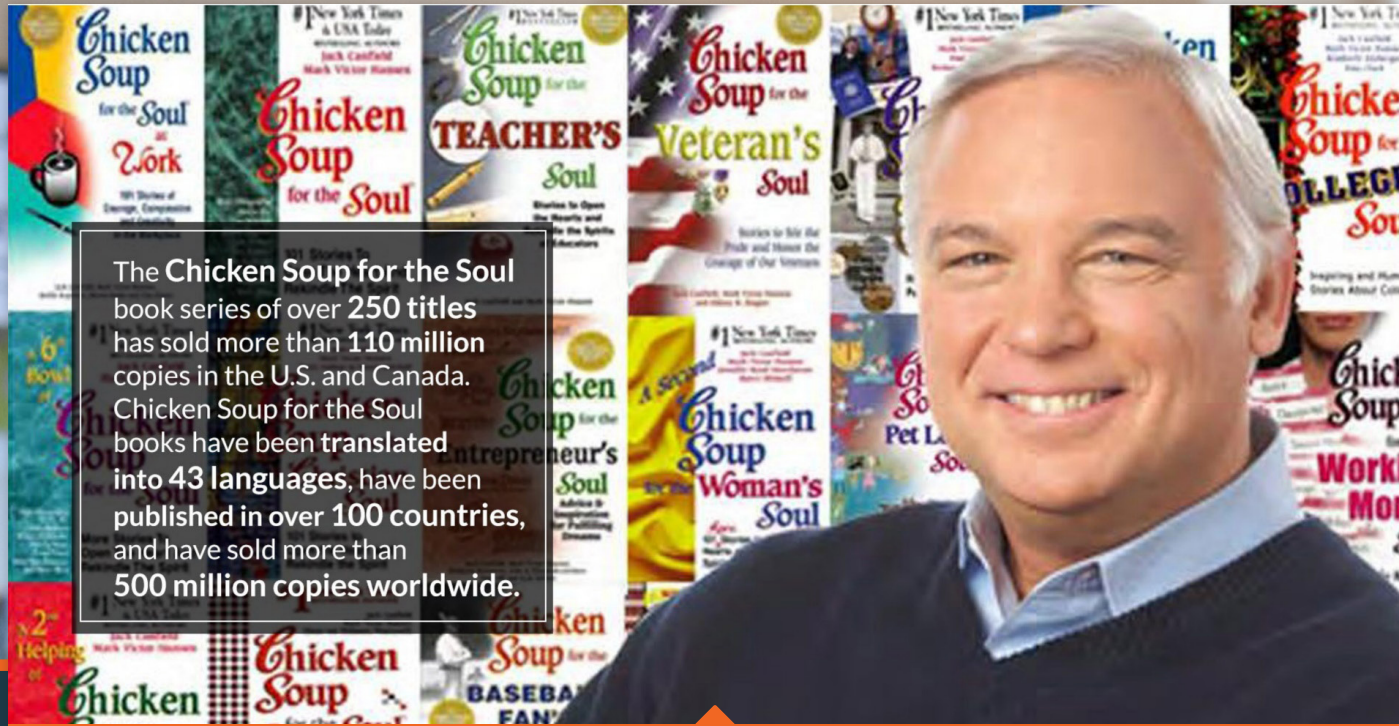
Because what we **don't** want to do is market to all the same potential targets with just one message.

Imagine you are an athlete with torn ACL, if you are placed on an orthopedic practice's opt-in list and then you start getting newsletters about their spine center, you are very likely not to open those emails.

But if the same orthopedics practice did **proper segmentation** of their list and sent you messaging about **knee pain**, well then there's a really good chance you would open it!

So, the goal of the buyer persona exercises is to get the right message to the right potential client at the right time.





The **Chicken Soup for the Soul** book series of over **250 titles** has sold more than **110 million** copies in the U.S. and Canada. Chicken Soup for the Soul books have been translated into **43 languages**, have been published in over **100 countries**, and have sold more than **500 million** copies worldwide.

## Introducing Jack Canfield, The Godfather of Buyer Personas

His best-selling Chicken Soup for the Soul series made him a household name.

Now, writing a bestselling book is not why Jack is considered a genius. Jack's brilliance was in his realization of the power of creating highly-tailored messaging for a specific target audience.

Question for you? Would you read Chicken Soup for the Firefighter's Soul if you were a teacher? It is very **unlikely**.

But if there were an addition that was written as heartwarming stories for Teachers, there is a **very high likelihood** that you would read it.

That is the power of crafting highly personalized messaging for different buyer personas.





## **SALES** and **MARKETING** Integration



In our Gap Assessment, we take time upfront to look at how your sales and marketing are integrated.

We believe that when sales and marketing are working together with their messaging, automation, analytics, and CRM...great things happen.

Now let's walk through how buyer persona specific marketing can impact sales.

Let's stick with our example from the orthopedics industry.

Here is how we market to orthopedics practices' CMOs and physicians.





## Sales Cycle Analysis

A sales cycle analysis is one of the **first** approaches we conduct in our Gap Assessment.

What is the benefit of the analysis?

In sales, you can always recall those times when everything is going well, you've had a couple of good meetings, the client is responding to your message, and then...

All of a sudden your potential client simply vanishes or becomes a ghost! They don't answer your emails, calls, or texts. They essentially "slip off the hook."

We call that phenomenon "**dropoff**."

The goal of a well-designed sales cycle is to eliminate the possibility of customer dropoff by creating marketing materials that are **highly tailored** to the buyer persona. These materials should keep your potential sales target enthusiastic about your products or services and ideally prevent dropoff.

# Sales Cycle Analysis

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**BUYER PERSONA REPORT**

**Primary Care Physician**

Age Range: \_\_\_\_\_

Gender: \_\_\_\_\_

Urbancity: \_\_\_\_\_

Commute Length: \_\_\_\_\_

Degree: \_\_\_\_\_

Influencers: \_\_\_\_\_

Preferred Content Medium: \_\_\_\_\_

Major Concerns: \_\_\_\_\_

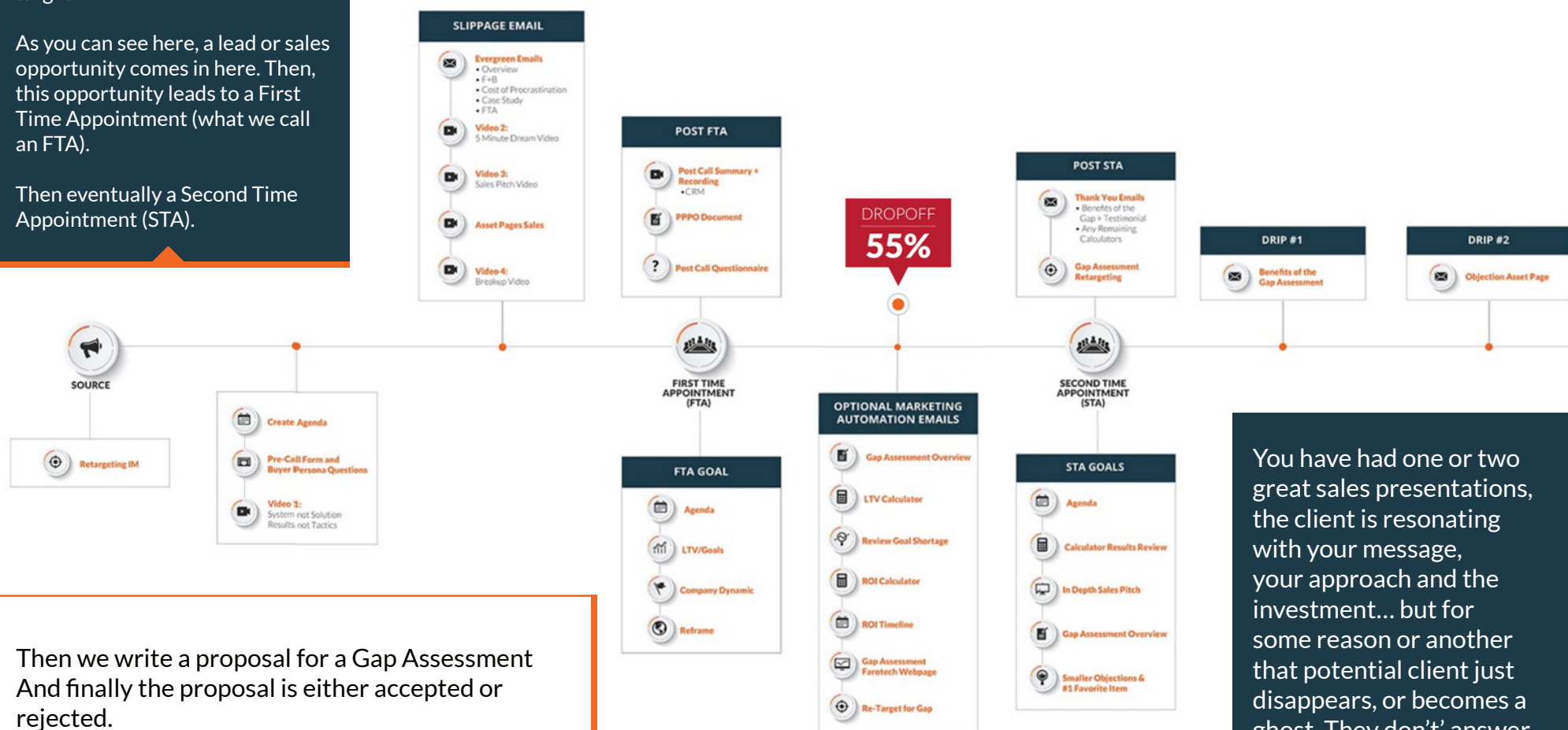


So the graphic you see here represents the actual Farotech Sales Cycle.

The circles represent every touch point that we have with a sales target.

As you can see here, a lead or sales opportunity comes in here. Then, this opportunity leads to a First Time Appointment (what we call an FTA).

Then eventually a Second Time Appointment (STA).



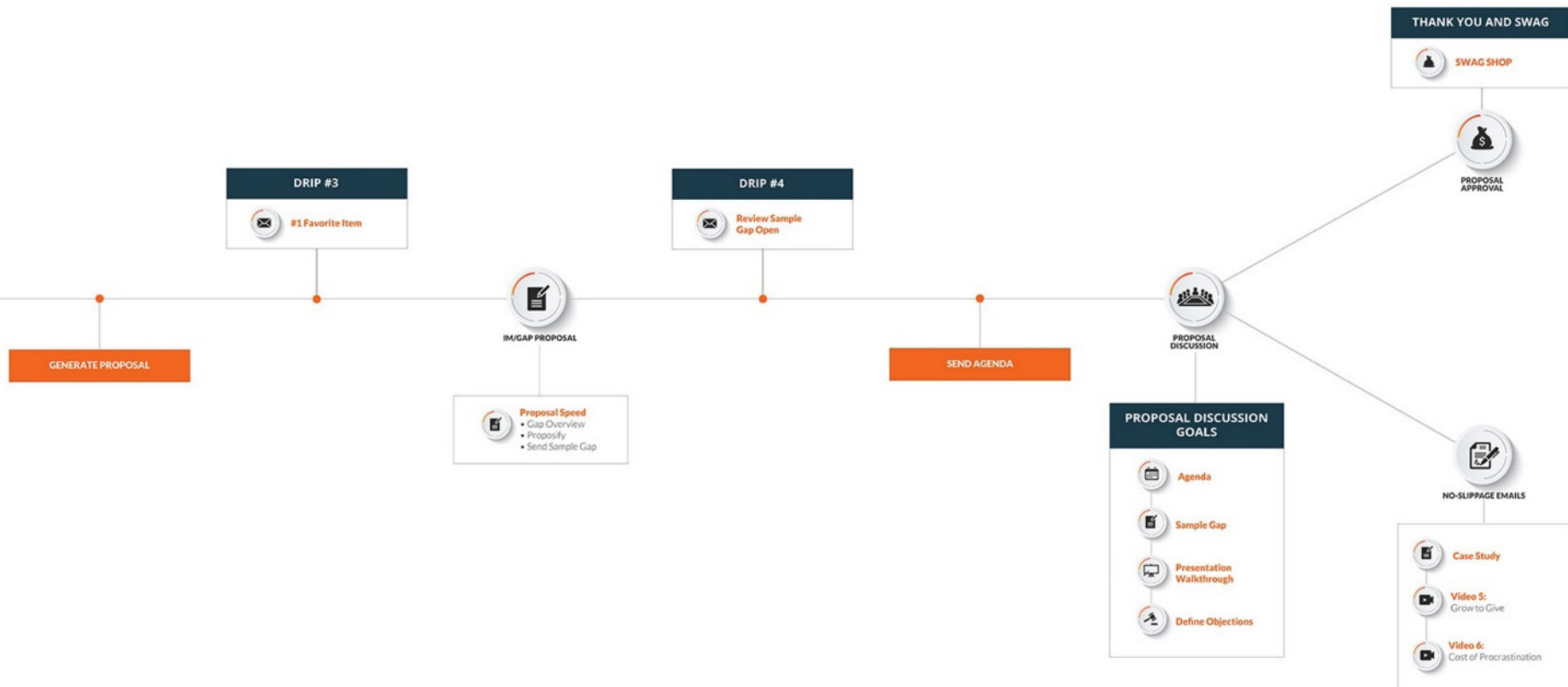
Then we write a proposal for a Gap Assessment And finally the proposal is either accepted or rejected.

The main reason why we are doing this ideal sales cycle is that there comes a time in any sales journey where everything is going really well.

You have had one or two great sales presentations, the client is resonating with your message, your approach and the investment... but for some reason or another that potential client just disappears, or becomes a ghost. They don't answer your emails, calls, or texts. They essentially "slip off the hook."

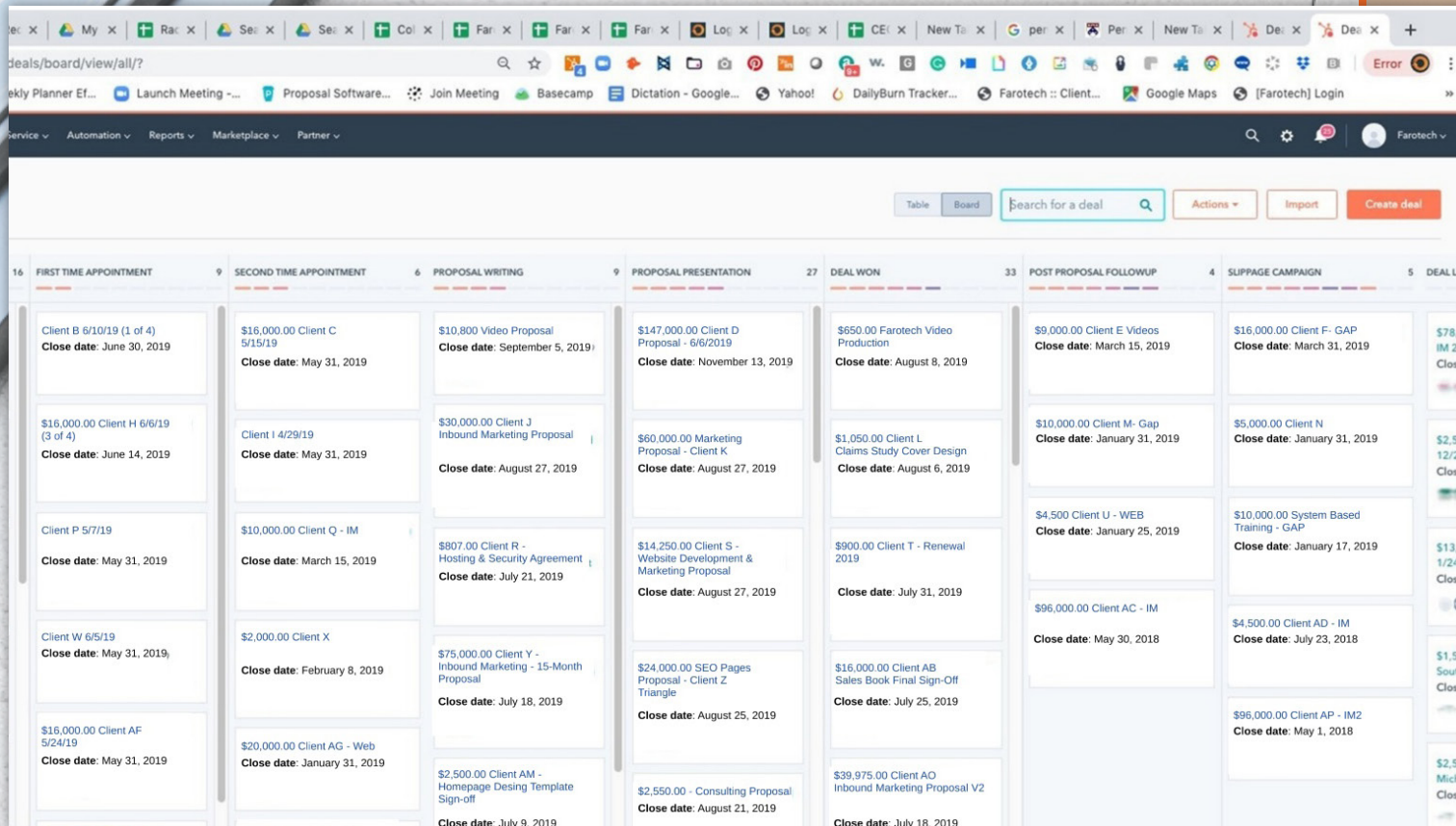
We call that phenomenon Dropoff.

# Sales Cycle Analysis (Cont.)





# Gap Assessment



The screenshot displays a CRM interface with a pipeline view. The pipeline stages are: FIRST TIME APPOINTMENT, SECOND TIME APPOINTMENT, PROPOSAL WRITING, PROPOSAL PRESENTATION, DEAL WON, POST PROPOSAL FOLLOWUP, SUPPLAGE CAMPAIGN, and DEAL LI. Each stage contains deal cards with details like client name, value, and close date.

16	9	6	9	27	33	4	5
FIRST TIME APPOINTMENT	SECOND TIME APPOINTMENT	PROPOSAL WRITING	PROPOSAL PRESENTATION	DEAL WON	POST PROPOSAL FOLLOWUP	SUPPLAGE CAMPAIGN	DEAL LI
Client B 6/10/19 (1 of 4) Close date: June 30, 2019	\$16,000.00 Client C 5/15/19 Close date: May 31, 2019	\$10,800 Video Proposal Close date: September 5, 2019	\$147,000.00 Client D Proposal - 6/6/2019 Close date: November 13, 2019	\$650.00 Farotech Video Production Close date: August 8, 2019	\$9,000.00 Client E Videos Close date: March 15, 2019	\$16,000.00 Client F- GAP Close date: March 31, 2019	\$78, IM 2 Clos
\$16,000.00 Client H 6/6/19 (3 of 4) Close date: June 14, 2019	Client I 4/29/19 Close date: May 31, 2019	\$30,000.00 Client J Inbound Marketing Proposal Close date: August 27, 2019	\$60,000.00 Marketing Proposal - Client K Close date: August 27, 2019	\$1,050.00 Client L Claims Study Cover Design Close date: August 6, 2019	\$10,000.00 Client M- Gap Close date: January 31, 2019	\$5,000.00 Client N Close date: January 31, 2019	\$2.5 12/2 Clos
Client P 5/7/19 Close date: May 31, 2019	\$10,000.00 Client Q - IM Close date: March 15, 2019	\$807.00 Client R - Hosting & Security Agreement Close date: July 21, 2019	\$14,250.00 Client S - Website Development & Marketing Proposal Close date: August 27, 2019	\$900.00 Client T - Renewal 2019 Close date: July 31, 2019	\$4,500 Client U - WEB Close date: January 25, 2019	\$10,000.00 System Based Training - GAP Close date: January 17, 2019	\$13, 1/24 Clos
Client W 6/5/19 Close date: May 31, 2019	\$2,000.00 Client X Close date: February 8, 2019	\$75,000.00 Client Y - Inbound Marketing - 15-Month Proposal Close date: July 18, 2019	\$24,000.00 SEO Pages Proposal - Client Z Triangle Close date: August 25, 2019	\$16,000.00 Client AB Sales Book Final Sign-Off Close date: July 25, 2019	\$96,000.00 Client AC - IM Close date: May 30, 2018	\$4,500.00 Client AD - IM Close date: July 23, 2018	\$1.5 Sout Clos
\$16,000.00 Client AF 5/24/19 Close date: May 31, 2019	\$20,000.00 Client AG - Web Close date: January 31, 2019	\$2,500.00 Client AM - Homepage Desing Template Sign-off Close date: July 9, 2019	\$2,550.00 - Consulting Proposal Close date: August 21, 2019	\$39,975.00 Client AO Inbound Marketing Proposal V2 Close date: July 18, 2019		\$96,000.00 Client AP - IM2 Close date: May 1, 2018	\$2.5 Mich Clos

Better yet, each part of the sales cycle works in **conjunction** with your CRM so that you can forecast the **monetization** of your pipeline.



ary 8, 2019	<p>\$75,000.00 Client Y - Inbound Marketing - 15-Month Proposal</p> <p><b>Close date:</b> July 18, 2019</p>	<p>\$24,000.00 SEO Pages Proposal - Client Z Triangle</p> <p><b>Close date:</b> August 25, 2019</p>	<p>\$16,000.00 Client AB Sales Book Final Sign-Off</p> <p><b>Close date:</b> July 25, 2019</p>	Close
AG - Web y 31, 2019	<p>\$2,500.00 Client AM - Homepage Desing Template Sign-off</p> <p><b>Close date:</b> July 9, 2019</p>	<p>\$2,550.00 - Consulting Proposal</p> <p><b>Close date:</b> August 21, 2019</p>	<p>\$39,975.00 Client AO Inbound Marketing Proposal V2</p> <p><b>Close date:</b> July 18, 2019</p>	
AL - IM 0, 2018	<p>\$14,050.00 - WEB</p> <p><b>Close date:</b> June 27, 2019</p>	<p>\$10,000.00 Gap Assessment Proposal - Client AN</p> <p><b>Close date:</b> August 21, 2019</p>	<p>\$8,000.00 Order Request</p> <p><b>Close date:</b> July 18, 2019</p>	
44,000	Total: \$136,607	Total: \$408,879.50	Total: \$460,558	



# Summary

The Gap Assessment is the #1 thing that makes Farotech so unique. Just like you wouldn't trust a primary care physician who automatically recommends heart surgery without doing a deep dive into the picture of your health, your marketing plan can't be rushed or incomplete either. That's why a **gap assessment is a critical first step** when you engage with a marketing agency.

The problem is that companies seeking a marketing agency will often go to multiple agencies and choose the lowest cost option. Why is this an issue? Well, the marketing agency you choose might send you a \$100,000 proposal, but has only put in 3 hours of work to justify that figure! This rushed, price-intensive way of choosing agencies can mean that huge flaws in your plan may not surface until it's **too late and your ROI is in jeopardy**. Therefore, the gap assessment is not a process you want to rush. It's always better to measure twice and cut once.

Our version of a Gap Assessment is a **10-week deep dive** into your company's **goals, KPI's, and growth opportunities**. This extremely thorough research process--and the details that are extracted from it--serves as the **backbone** of a robust, data-driven system that scales over time.

It's also a way to look at your total marketing potential in relation to the size of your industry and how much market share you need in order to reach your goals.

## The purpose of a gap assessment is to develop a 3-5 year road map to:

- 10x your business leads and opportunities
- Identify critical gaps in your marketing approach
- Develop foundational marketing assets to scale campaigns
- Create and maintain a marketing scorecard
- Identify your quarterly priorities and goals
- Review your competition
- Identify the lifetime value of their current and prospective clients
- Establish an ROI model that scales as their business grows

## Some important features in our gap assessment include:

- Branding beyond your logo
- Developing a compelling story
- Establishing short & long-term goals
- Identifying buyer personas
- Optimizing your sales cycle

The gap assessment should be the very first process undertaken at the beginning of your journey with an agency. Read more in this eBook about Gap Assessments and how our approach to designing a blueprint for your company's future is different from other agencies.

## Next Steps



Now that your road map is clearly defined and your goals are set, a usability conversion analysis is the next step to marketing success. This process addresses the challenge of keeping readers engaged with your site, your content, and your product. Want to learn how to keep eyeballs on your content at critical times? **Download the next eBook** where we cover **usability conversion analysis** or download the full Digital Marketing Process eBook.

