

# MARKETING SHORTCUTS

for the

# SELF-EMPLOYED

Leverage Resources,  
Establish Online Credibility  
& Crush Your Competition

*Patrick Schwerdtfeger*

**Business Club Manual**

Version 1.2

## Why read this?

Join (or start) a Marketing Shortcuts Business Club! You will receive the following 4 benefits if you do:

1. Meet other self-employed professionals trying to leverage technology.
2. Hear real live success stories and case histories at every meeting.
3. Get guidance from people who have used the same strategies before.
4. Mastermind and collaborate with other like-minded professionals.

*"Marketing Shortcuts for the Self-Employed"* (2011, Wiley) is perfectly designed for self-employed professionals to work through the chapters in a collaborative setting. People have formed groups and meet on a regular basis to share experiences, compare notes and discuss ideas. In order to support that process, this manual offers a complete structure for you to create, build and/or participate in a thriving Marketing Shortcuts Business Club.

Are you a marketing consultant? Business coach? Web developer? Do you sell your products or services to other self-employed professionals? If so, organizing a Marketing Shortcuts Business Club will put you at the center of a mutually supportive community of ideal prospects. Even if you do not have any business-related objectives, being part of a club will help you put the book's strategies into practice for your own business.

It is important to understand that these clubs function 100% autonomously and are not part of any larger institutional structure, at least not yet. Whether clubs form in your area or not is entirely up to you. This manual attempts to provide a basic structure that all clubs can follow. That way, if members switch from one club to another or if these clubs are later organized into a larger structure, everyone will already be familiar with the same format.

This manual is designed for you, the reader. I (Patrick Schwerdtfeger), the author, collect no fees from clubs or club members. The objective is simply to encourage self-employed professionals to help and learn from each other. If there aren't any clubs near you, please consider starting one – reference Chapter 58 for more information. It might just change your career. It sure changed mine!



**Patrick Schwerdtfeger, Author**

## IMPORTANT

This is an evolving document. Developments, changes and additions are suggested by people like you and are then incorporated into a new version.

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Thank you for being part of this process.

### **Material changes and additions in this updated version of the manual:**

1. Version numbering system changed from 1.0.2 to 1.2 (simpler).
2. Basic formatting edits.

## Mission Statement

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The mission of a Marketing Shortcuts Business Club is to provide a mutually supportive environment where local self-employed professionals and small business owners can learn about and implement online marketing strategies that attract customers and grow revenue for their respective businesses.

## Program Overview

This program was inspired by Rotary International, Toastmasters and Business Networking International. As such, it incorporates many features that also exist in these other programs.

Clubs should meet on a weekly or bi-weekly basis. Meetings begin with 1-minute introductions (or “elevator pitches” – see Chapter 6) by individual members. Following the introductions, 3 members present the chapter they have just finished implementing. Each presentation should include an overview of the chapter’s suggestions and how they incorporated the strategy into their own business.

Presentations are followed immediately by evaluations from other members who have already completed the chapters in question. That means every single meeting offers attendees real life case histories as well as feedback from experienced colleagues. Meetings close with a mastermind session where all attendees make suggestions on additional tactics that could enhance results.

Members can go through the chapters at their own pace. And because everyone will be beginning at the same place, it will be common for multiple members to be working on the same chapter at the same time. Even though 2 different members might present the same chapter at one meeting, their experience with it and the implications for their respective businesses will be different.

Members, if they wish, can earn designations as they work through the chapters of the book (the Education Track). They can also earn designations as they achieve verifiable milestones in their own individual businesses (the Business Track). There are 4 designations in each track, as follows:

E1	Education One	B1	Business One
E2	Education Two	B2	Business Two
E3	Education Three	B3	Business Three
E4	Education Four	B4	Business Four

Creative, huh? If you have ideas for better names, please let me know.

When an individual member earns all 8 designations, they are awarded the Self-Employed Marketing Expert (SEME) award. Perhaps, over time, this award will become recognized on a wider context. For now, it serves as the ultimate milestone in the Marketing Shortcuts program. Every member should have an equal opportunity to achieve that final SEME milestone.

There is no central organizing body for these clubs and as such, there are no dues required outside of the individual club requirements. Clubs are welcome (and even encouraged) to charge fees to pay for location rentals and other expenses deemed necessary to run a successful club. Clubs should not exclusively strive to minimize membership fees. Instead, strive to maximize the potential benefits for members.

Free events tend to attract less established attendees. As benefits increase, so too will the caliber of the membership.

It is strongly discouraged to have the club organized and run by a single individual. Instead, each club should elect the following Club Officer roles for 12-month terms, starting on May 1<sup>st</sup> and ending on April 30<sup>th</sup> of the following year:

1. Club President
2. Vice President of Education
3. Vice President of Membership

**Club President.** The primary responsibility of the Club President is to lead the Club Officer team as well as the club itself. The Club President generally opens and closes each meeting and chairs monthly officer meetings.

**VP of Education.** The VP of Education is responsible for the existing members and their progression through the program, encouraging them as necessary. He/she also assigns mentors to new members when they join.

**VP of Membership.** The VP of Membership is responsible for collecting club dues (if applicable) and attracting new members to the club. Various promotional options can be used to build exposure for the club and many of those strategies are described in the book itself.

**Officer Meetings.** The Club Officers should meet once each month to discuss the operation of the club and how to develop it further. This monthly meeting should be called by the Club President, who should also provide an agenda. Club Officer meetings can be scheduled before or after regular meetings to make them convenient for those attending.

Club Officers are encouraged to respect a two-term limit to any particular officer role. However, Club Officers are welcome to rotate through the 3 positions if no other candidates are available or willing to step in.

Clubs can meet in any location deemed appropriate by the Club Officers, including the conference room of a club member, a local community center, restaurant or a church hall. Clubs are encouraged to operate on a non-profit basis but the final decision is up to the Club Officers. Clubs are individually responsible for the tax implications of their profit or non-profit status.

In the early stages, very few clubs will exist. It is my hope that that will change over time. If you check the website and don't see any clubs in your area, please consider starting one. If you do, you will become part of a true grassroots movement. The success of this program rests with the people who take action and build it for themselves.

The rest of this document outlines the various elements of a successful club.

## Outstanding Club Program (OCP)

Similar to the designations available to club members, the entire club can earn designations as well, based on a variety of factors as laid out in the Outstanding Club Program (OCP). The objective is to recognize successful clubs, allowing new prospective members to distinguish between unproductive clubs and thriving ones.

Marketing Shortcuts Business Clubs operate on a 12-month term beginning on May 1<sup>st</sup> of every calendar year. Officers should be elected during late March or early April and should take office beginning on May 1<sup>st</sup>. During every 12-month term, clubs can earn a maximum of 6 OCP points, as follows:

1. Have at least 15 active members.
2. Achieve 2 Education designations.
3. Achieve 2 additional Education designations (for a total of 4).
4. Achieve 1 Business designation.
5. Achieve 1 additional Business designation (for a total of 2).

At the end of each term, clubs will be recognized for the OCP points they achieved during the year. Club designations include the following:

- 3 OCP points = Established Club
- 4 OCP points = Distinguished Club
- 5 OCP points = Elite Club

The Outstanding Club Program (OCP) is designed to help clubs become more successful. The very process of achieving these individual milestones guarantees a successful club and an active membership. Club officers are encouraged to use the Outstanding Club Program to guide their club development and leadership.

At the beginning of May each year, clubs are encouraged to submit the OCP Achievement Form via email to:

[clubs@80shortcuts.com](mailto:clubs@80shortcuts.com)

Clubs that earn the Established, Distinguished or Elite status will have their links updated with that information. In time, as more clubs are formed, prospective members will have a variety of local clubs to choose from. The OCP designations will obviously become more important at that time.

## Club Infrastructure

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Clubs have complete flexibility in how they organize and communicate with their membership, but an online location of some kind is recommended. Meetup.com is an excellent online platform for organizing offline events (precisely what we're trying to do in this case) so it is definitely a good option. The other advantage with Meetup is that new members will find the club without any assistance from you.

Of course, you can also organize groups on Yahoo, Google, Facebook and LinkedIn among many others but these are rarely location-based. As a result, they may attract non-local members, complicating the club's operation. You may wish to make such groups private, allowing the VP of Membership to either approve or disapprove new members based on their location.

Another option would be to host the club on Meetup (open to the public) but then create a private email group on Yahoo or Google, reserved for paid members. That way, people who find the group on Meetup would feel welcome to attend as guests but would then be encouraged to become actual members. Until their membership dues are paid, they would not be allowed to participate in any of the meeting roles.

Regardless where you organize your club, please provide me with the URL so I can add a link to the website. People who are interested in joining a club near them check the website first, making these links instrumental in attracting people who are already familiar with the Marketing Shortcuts model. Once you have an online facility set up, email me at:

[clubs@80shortcuts.com](mailto:clubs@80shortcuts.com)

As clubs evolve (see "Outstanding Club Program" above), their OCP status will be listed on the website, allowing prospective members to distinguish between unproductive clubs and thriving ones.

Club Officers may wish to restrict membership to one person from each industry. This is up to each club to decide individually. Such rules may reduce competitive pressures on members, allowing them to be more open about their respective marketing objectives, obstacles and opportunities.

## Meeting Objectives

Meetings should be structured according to the following basic outline:

1.	Open Meeting & Announcements	1 minutes	Club President
2.	Read the Mission Statement	1 minutes	Master of Ceremonies
3.	Member Introductions	15 minutes	Club Members
4.	Implementation Presentation #1	7 minutes	Speaker #1
5.	Evaluation for Presentation #1	3 minutes	Evaluator #1
6.	Implementation Presentation #2	7 minutes	Speaker #2
7.	Evaluation for Presentation #2	3 minutes	Evaluator #2
8.	Implementation Presentation #3	7 minutes	Speaker #3
9.	Evaluation for Presentation #3	3 minutes	Evaluator #3
10.	Mastermind Discussion	10 minutes	Mastermind Leader
11.	Next Meeting Role Sign-up	3 minutes	VP of Education

Each meeting should have the following volunteer roles filled ahead of time:

1. Master of Ceremonies
2. Secretary (Note Taker)
3. Speaker #1
4. Evaluator #1
5. Speaker #2
6. Evaluator #2
7. Speaker #3
8. Evaluator #3
9. Mastermind Leader

The above outline implies that meetings will function best with at least 9 members in attendance. As a result, that is the initial goal of any club: accumulate enough members to ensure at least 9 attend each meeting. You will probably need about 15 members to achieve that objective since every member will not be able to attend every meeting. If your club is smaller than that, schedule 2 speakers (and 2 evaluators) instead of 3.

The VP of Education may wish to go through next week's roles at the end of each meeting. Otherwise, there are a variety of platforms (including wikis) that can allow for roles to be filled online. In either case, allow members to sign up for roles 4 or even 8 weeks in advance. That will give your members an opportunity to schedule their participation in advance.

It is important to note that each marketing presentation requires actual implementation of the chapter's recommendations as well as some preparation for the presentation itself. Provide your members with the time they will need to get the job done. The finished product will be better as a result and that benefits the entire membership.

## Education Designation Awards

The first Education Designation is the E1 award. Members have to complete and present the following 10 chapters to complete the award:

1. Chapter 4: Problems + PAIN = Profits
2. Chapter 5: Value Proposition
3. Chapter 6: Elevator Pitch
4. Chapter 7: Target Market
5. Chapter 8: List of Prospects
6. Chapter 12: Keyword Ideas
7. Chapter 13: Keyword Research
8. Chapter 14: Positioning Statement
9. Chapter 20: Expand the Frame
10. Chapter 21: Categorize Your Content

Members also have to evaluate 4 presentations (on chapters they have already completed themselves) made by other members. The goal of any active member should be to complete the E1 award within the first year. They could achieve that if they implemented and presented one new chapter each month, and evaluated other presentations at meetings where they are not presenting.

**NOTE:** If a particular club meets weekly (assume 50 meetings each year) and had 3 presentations at each meeting, a total of 150 presentations would be made per year. With 15 members, each member would be able to earn 1 Education Designation (requiring 10 presentations) each year.

The remaining Education Designations have similar requirements – 10 chapter presentations and 4 evaluations – but in these subsequent designations, members can select the chapters they wish to complete and present to the club. The chapters selected and the order in which they are completed is up to the member. There are, however, a number of chapters that do NOT qualify for any designation, listed below:

1. Chapter 1: Introduction
2. Chapter 2: Develop Expertise
3. Chapter 3: Belief Systems
4. Chapter 16: Website Cornerstone: Focus
5. Chapter 17: Website Cornerstone: Depth
6. Chapter 18: Website Cornerstone: Value
7. Chapter 34: Understand Analytics Data
8. Chapter 44: Conversations are Markets
9. Chapter 49: Understand the Process
10. Chapter 62: Social Media Mantras
11. Chapter 79: Wow Your Audience
12. Chapter 80: Consistency Wins

Once members have completed the requirements of an Education designation, the Education Award Submission Form (see below) needs to be completely, scanned and emailed to:

[clubs@80shortcuts.com](mailto:clubs@80shortcuts.com)

On the Education Award Submission Form, the chapter presentations are to be filled out by the evaluators who provide feedback. The evaluations are to be filled out by the member directly and then signed off by a Club Officer.

In order to complete all 4 Education designations, members would complete and present 40 of the book's 80 chapters to their fellow members. With 12 non-qualifying chapters, there are actually only 68 to choose from. The differential between designation requirements and total available chapters allows for differences in business models and target markets.

The chapters required for the E1 designation were chosen because they form the foundation of any business. The remaining chapters are more outbound-marketing related, making each chapter better suited for some businesses than others. Wherever possible, the VP of Education should try to schedule at least one non-E1 presentation at each meeting.

At the beginning of a club's development, most of its members might be working on their initial E1 designation. Club Officers, at their discretion, can designate certain members who might already have established businesses to skip directly to the non-E1 chapters. Not only will that encourage members to interact with later chapters but it will also make the meetings a lot more interesting.

## Education Award Submission Form

Member Name	Club Name
Email Address	Designation

(to be completed by respective evaluators)					
	#	Chapter Title	Date	Evaluator Name	Signature
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

(to be completed by the designation applicant)					
	#	Chapter Title	Date	Presenter	Officer Signature
1					
2					
3					
4					

## Business Designation Awards

The Business Designations are designed to reward members who are building sustainable business models. In this context, a “sustainable business model” is one that is generating enough revenue and profit to pay all business expenses while simultaneously funding reasonable living expenses for the business owner. As simple as that sounds, that is the most important initial goal of any self-employed professional or small business owner, and your club should celebrate that achievement as individual members get there.

Each Business Designation also includes requirements that benefit the club. This is designed to encourage successful club members to give back to their club and help the community grow. Self-employed professionals and small business owners need examples for guidance and inspiration. Encourage your successful club members to get more involved in the club by earning their Business Designations.

B1	Website / Blog Development	& Mentor a Member
B2	Complete Sales Funnel	& be a Club Officer
B3	Driving Website Traffic	& Start a New Club
B4	Profitable Conversion Tracking	& Social Media Marketing

Here is a description of the requirements for each of the 4 Business Designations:

### **B1 Website / Blog Development**

In order to complete this designation, the member must build (or hire someone to build) a website and blog platform including an online contact form, RSS feed and navigation menu. The platform should have a professional appearance that is consistent with the underlying business being offered.

The member must make a presentation to the club, providing a visual tour of their website and blog platform and how it was built. The member must also explain how the platform was designed according to the 3 questions laid out in Chapter 15. The Club Officers will need to ‘approve’ the platform in order for the member to get credit.

In addition to building a website and blog platform, the member must mentor a club member from joining the club to earning his/her E1 Education Designation. The member must gain that mentee’s written approval before submission. If the member is a Club Officer at the time of submission, he/she is permitted to ‘approve’ his/her own website and blog platform but must also get the approval of the other two Club Officers.

### **B2 Complete Sales Funnel**

In order to complete this designation, the member must demonstrate a complete online sales funnel, including beginner, intermediate and advanced content. Each category of content must contain a call-to-action, inviting prospects to the next

level. The final 'advanced content' category must have a wide menu of product or service options, demonstrating the 'expand the frame' concepts in Chapter 20.

The member must make a presentation to the club, explaining the elements of the sales funnel and where they are located online. The member must show how the elements fit into the beginner – intermediate – advanced framework and how the 'expand the frame' concept influenced the purchase options at the end. The Club Officers will need to 'approve' the sales funnel in order for the member to get credit.

In addition to the complete sales funnel, the member must also hold one of the 3 Club Officer positions for a full 12-month term. If the member is a Club Officer at the time of submission, he/she is permitted to 'approve' his/her own sales funnel but must also get the approval of the other two Club Officers.

### **B3 Driving Website Traffic**

In order to complete this designation, the member must demonstrate the successful application of at least 5 different traffic generating strategies described in the book, verified by Google Analytics. In order to qualify, the traffic generated by these strategies must materially increase the traffic prior to implementation.

The member must make a presentation to the club, showing their Google Analytics account (either live or via screen captures) and the referring traffic statistics to verify the 5 strategies chosen. The presentation should also include documentation of the traffic sources, be they article directories, forums, prominent industry bloggers or social media platforms.

In addition to driving website traffic, the member must sponsor the development of a new club for a period of time not less than 6 months. In order to sponsor a club successfully, the member should support the initial development process, help attract new members and encourage the leadership structure to take shape. The member will need written approval from the new club's 3 Club Officers before submission.

### **B4 Profitable Conversion Tracking**

In order to complete this designation, the member must demonstrate conversion tracking from total website visitors to those engaging with the business (for either intermediate or advanced content) as well as an increase in that conversion ratio over a 2-month period, based on principles described in the book.

The member must make a presentation to the club, walking attendees through the initial conversion calculation, the steps taken to improve conversion and then the results at the end of the project. The member should also ask for suggestions from attendees on additional ideas that might increase conversion further.

In addition to profitable conversion tracking, the member must initiate a social media marketing campaign (using Twitter, Facebook, LinkedIn and/or YouTube) to promote their business for a minimum of 60 days. The member must make a presentation to the club detailing the original strategy and objectives, the initial

results, any adjustments made during the campaign and the final results at the 60-day mark. The member should include lessons learned and how he/she would adjust the campaign to optimize engagement and conversion.

## B1 Business Designation Submission Form

Member Name	Club Name
Email Address	Designation

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<http://www.80shortcuts.com/clubs>

Thank you.

## B2 Business Designation Submission Form

Member Name	Club Name
Email Address	Designation

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Thank you.

## B3 Business Designation Submission Form

Member Name	Club Name
Email Address	Designation

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Thank you.

## B4 Business Designation Submission Form

Member Name	Club Name
Email Address	Designation

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Thank you.