

Small business marketing strategy evaluation

The situation:

Jeff has his own small business, Digital Splash Media, developing and maintaining websites. He has several long-term clients who provide steady work, and has gained new ones through word-of-mouth referrals. He is happy with his business, but recognizes that he needs to keep developing new clients, and would like to increase his total income and diversify his client list to reduce dependence on just a few. He has decided he needs to pursue some self-marketing/promotion activities and has come up with eight ideas. He doesn't have time to pursue all eight, and asked me to help him narrow his choices, so that he can focus his efforts on those most likely to be productive.

The process:

We met three times spread out over nine days. In our first meeting, we discussed Jeff's goals, the options he was considering, and what he hoped to achieve. We defined the project scope and expected results. After the meeting, I developed a methodology to propose and documented the first meeting.

In our second meeting I described the proposed methodology to Jeff. He agreed, and we proceeded to follow it, digging deeper into his thinking about each option, and into his evaluation criteria. At this point, several options were dropped from further consideration. I subsequently summarized where we stood at this point and listed the pros and cons of each option for Jeff's review and reference.

When we met for the third time, we reviewed the project scope and expected results, and the data gathered and decisions made so far. Through discussion, we explored and clarified Jeff's evaluation criteria, then ranked them using a prioritizing grid, and quantified them using visual and numerical means. Several more options were eliminated at this stage. I added this information to the ongoing written summary and emailed it to Jeff.

After reading the summary and considering his three remaining options against his four evaluation criteria, Jeff felt his decision was clear. One option clearly stood out above the rest. He will develop his own plans for implementing the decision later.

Reflection:

In the end, Jeff felt that following a structured approach for evaluating his many options against his varied evaluation criteria allowed him to reach a decision that felt right and met his objectives. Aspects of the process contributing to this success were thorough consideration of each option (including its pros and cons, implementation difficulty, and how well it met other evaluation criteria), having a written summary, using the prioritizing grid, visually comparing different evaluation criteria, and having incubation time to "sit with" the options and criteria, ensuring the decision was not rushed and all relevant factors were considered.