Sprocket Rocket

An 8/10 Website Launched on a 3/10 Budget.

Learn More at www.SprocketRocket.co

Strategy Kit

There are 7 discovery / research steps to planning a new website.

The 7 Steps:

- ★ Business Model Canvas
- ★ Jobs To Be Done Framework
- ★ Customer Personas
- ★ Value Proposition Map
- ★ Before & After States
- ★ Buyer Journey
- ★ Website Architecture (Build Plan & Budget)

Website Strategy Workshop

1. *Business Model*
2. *Customer Personas*
3. *Value Proposition Map*
4. *Buyer Journey*
5. *Website Architecture*

Meeting #1

Business Model Canvas

The purpose of the business model canvas (adapted from the Lean Canvas by Ash Maurya) is to document the business model from a customer-centric perspective.

By focusing on the customer's problem rather than your solution, you gain insights that allow you to start marketing where the customer is. The goal is not to lead with your solution, but to lead them to your solution.

The following document is discussed and completed as part of our live strategy workshop.

CORE PROBLEMS

KEY PROBLEMS

Document the problems that would cause a customer to want to hire you.

What would they tell you they want help with?

Use their words.

WHY HAVEN'T THEY SOLVED THIS PROBLEM?

What has kept them from solving this problem to date?

TRIGGER EVENTS

What happened in the life of your target customer that caused them to want to solve their problem NOW?

They have likely been dealing with this for some time, so asking 'why *now'* is critical.

LIKELY SEARCHES

If a customer searched for a solution to this problem, what would they likely type into Google?

EXISTING ALTERNATIVES

COMPETITORS:
List direct competitors in order of market share.

MAKESHIFT SOLUTIONS:
How are customers solving this problem with bandaids and duct tape?

OTHER CATEGORIES:
Can other solutions (such as more labor hours, or other paths) solve this problem?

GAPS IN THE MARKET

What do existing alternatives fail to offer?

What does our brand stand against?
- If you're brand doesn't stand against a flawed way of doing things, a great injustice, or some other motivating message that people can rally behind, content will fall flat.

VALUE STATEMENTS

WHAT WE DO:
[PRODUCT NAME] ENABLES [CUSTOMER] TO EXPERIENCE [DESCRIBE THEIR IDEAL "AFTER"]

UNFAIR ADVANTAGE:
How does your company outperform all competitors?

NOT AN ADVANTAGE:
- Customer Service/Support
- Value @ Price Point
- On Staff Experts

UNIQUE VALUE PROPOSITION

Your UVP can be structured any way you like. If not sure, we like the "Understand > Vulnerable > Promise" approach.

I understand you ___
We may not... (vulnerable) ___,
But we (promise) ___.

FIRST VALUE EXPERIENCE

What of significant value to the customer can you deliver well advance of the sale?
It should be valuable enough to make competitors seem like a second tier solution.

THE ONE THING

What is the **One Thing** that if a customer believes, they'll feel they have to buy from you, and to do so with enthusiasm?

TARGET MARKET

What types of companies (or individuals) have the core problems you solve?

Where does this market hang out? How would you find them if you had to?

IDEAL CUSTOMER

What attributes make a customer a perfect fit?
A specific need?
Size, industry or background?
Piece of software?
Desire or goal?

RISKY ASSUMPTIONS

Document the assumptions that need validated in order to minimize the risk of failure.

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CORE PROBLEMS	LIKELY SEARCHES	GAPS IN THE MARKET	UNIQUE VALUE PROPOSITION	TARGET MARKET
KEY PROBLEMS		ALTERNATIVES FAIL B/C:		
		WHAT DOES OUR BRAND STAND AGAINST?		
WHY HAVEN'T THEY SOLVED THIS PROBLEM?			FIRST VALUE EXPERIENCE	IDEAL CUSTOMER
	EXISTING ALTERNATIVES	VALUE STATEMENTS		
	COMPETITORS:	WHAT WE DO:		
TRIGGER EVENTS		UNFAIR ADVANTAGE:		
	MAKESHIFT SOLUTIONS:			
			THE ONE THING	RISKY ASSUMPTIONS
	OTHER CATEGORIES:			
		NOT AN ADVANTAGE: - Customer Service/Support - Value @ Price Point - On Staff Experts		

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Meeting #1

Jobs to be Done

The purpose of the the Jobs to be Done (JTBD) framework is to understand exactly what your customer would hire your product or service to do for them.

People hire products and solutions to fulfill 3 job types:
 - Physical Jobs (the task at hand)
 - Emotional Jobs (a desired feeling)
 - Social Jobs (how they'll be viewed by others)

Great marketers understand that most purchases are emotional, and impacted greatly (if not driven) by the emotional and social impacts of the decision.

The following template is a homework exercise to document the jobs to be done for each core solution you offer.

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Jobs to Be Done: EXAMPLE
"My website sucks."

Situation	Motivation	Outcome	Emotional Job	Social Job
When... **Website Sucks**	I want to... **Redesign Site**	So I can... **Look Better & Convert More Leads**	Making me feel... **Proud of my brand and confident**	Others see I'm... **Driving the company forward**
What is the situation which triggers a need (a job) to be done?	*What does the customer want to do?*	*Why do they want this? What's the desired outcome (functional job)?*	*What will the emotional state of the customer when this job is complete?*	*How will the customer look to others when they solve the situation?*

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Jobs to Be Done: _customer solves problem_

Situation	Motivation	Outcome	Emotional Job	Social Job
When…	I want to…	So I can…	Making me feel…	Others see I'm…
What is the situation which triggers a need (a job) to be done?	What does the customer want to do?	Why do they want this? What's the desired outcome (functional job)?	What will the emotional state of the customer when this job is complete?	How will the customer look to others when they solve the situation?

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Meeting #2

Buyer Personas

Buyer personas are a way to gain and maintain an empathetic view of the customer's world. It documents key elements about them, like their struggles, goals, as well as likely questions or blockers when considering your solution.

There are many buyer [persona templates](#) you can download.

We favor our **one-page buyer persona template**. It's easy to scan and reference when creating content for a persona. Personas that get referenced are much better than personas that sit in a file or drawer. That's why we believe a high-impact single-page persona is the best way to go.

Our second meeting will consist of completing your first buyer persona. Following the meeting, you will repeat the process for each primary customer type you engage with.

Harriet the HubSpot Customer

Head of Marketing, VP Marketing, CMO, etc.
Harriet is In charge of website, ads & marketing.

Split F/M   30-45 $75k-200k

"I need more results from our dated, ugly website."

"Can you help us redesign our website on HubSpot?"

PERSONA INSIGHTS

EXTERNAL STRUGGLES
Stagnant Sales / Growth
Website NOT Performing Well
Has Marketing Tools, but still lacking marketing system.

INTERNAL STRUGGLES
Not sure how to improve.
Budget limits options.
Inadequate team to run a true marketing system & drive growth.

3 LinkedIn Profiles:
1) John @ _____ (education co)
2) David @ _____(financial co)
3) Al @ _____ (Industrial co)
(removed actual customer info)

WATERING HOLES / OPENERS
HubSpot Blog, Marketo, Gary Vee, Inbound Conference / MozCon.
Happy to discuss current goals.

ACTION DRIVERS

PRIORITY INITIATIVES
#1 - Improve Website Results
#2 - Deliver Lead Pipeline to Sales
#3 - Install a manageable marketing system

WHY MIGHT THIS BE FUNDED?
- Ready to invest in growth.
Normally driven by desire to improve #'s or increase sales staff.

TRIGGERS:
The sunk cost of HubSpot software motivates Harriet to stay on the platform (that she knows works), just needs to get her brand's website & marketing in order.

1-THING BELIEF:
We need to reconsider our website as it does not deliver an engaging buyer journey. We need an agency partner with strategy, messaging, design & dev.

GOALS

BUSINESS OUTCOMES:
Common to want to 2X their current revenue and want the website to contribute 50% of growth goal.

STEPS TO SUCCESS:
Need to find a smart partner.
Need to understand costs/timeline.
Need to buy into the process & deliverables.

INCREASE IN STATUS:
From Dated website to Bling website
Credited for delivering leads to sales
Seen as taking action and driving growth

DECREASE IN STATUS:
Presenting an insane budget would make me look bad.
Long timeframes or bad feedback from boss / team would be bad.

DECISION PROCESS

HOW I THINK THROUGH THIS:
How much will this cost?
When will it be done?
How do I know it will work?
What are the exact deliverables?
How do I run this after launch?

HAS TO HAPPEN BEFORE I BUY:
I have to be bought into HubSpot.
I have to have the right entry cost.
I have to believe it's the right team.

MOTIVATION TO BUY NOW:
Need it yesterday.
Quarterly #'s falling short.

WHAT'S AT STAKE IF I DON'T?
More stagnant growth.
Loss of precious calendar time.
Having to start all over talking to new people.

BARRIERS

WHY WOULD I NOT BUY?
More interested in "launch it and leave it" than continuous improvement.

Not interested in focus on content & buyer journey, drawn to aesthetics only.

PERCEPTION PROBLEMS:
Last website was very cheap or migrated for free. Feels pricey.

SALE STOPPING OBJECTIONS:
Don't like timeframe.
Will it integrate with ___.

WHO ELSE IS INVOLVED?
CEO / owner normally needs to see a proposal to authorize funds.

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Patti the Persona

Patti's likely job titles
Patti is in charge of ___.

👤 60% F   🎯 23-43   💲 $50-90k

"Quote About What I Want or Need to Accomplish."

PERSONA INSIGHTS	ACTION DRIVERS	GOALS	DECISION PROCESS	BARRIERS
EXTERNAL STRUGGLES	PRIORITY INITIATIVES	BUSINESS OUTCOMES:	HOW I THINK THROUGH THIS:	WHY WOULD I NOT BUY?
INTERNAL STRUGGLES	WHY MIGHT THIS BE FUNDED?	STEPS TO SUCCESS:	HAS TO HAPPEN BEFORE I BUY:	PERCEPTION PROBLEMS:
3 LinkedIn Profiles: 1 2 3	TRIGGERS:	INCREASE IN STATUS:	ANXIETIES OF NEW SOLUTION:	SALE STOPPING OBJECTIONS:
WATERING HOLES / OPENERS	1-THING BELIEF:	DECREASE IN STATUS:	ALLEGIANCE TO CURRENT HABITS:	WHO ELSE IS INVOLVED?

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Meeting #3

Value Proposition Map

The Value Proposition Canvas blew our minds when we read [Value Proposition Design](), by Alex Osterwalder.

There is a great template [here](), and we have adapted Alex's Value Proposition Canvas into the **Value Proposition Map** you'll see on the following page.
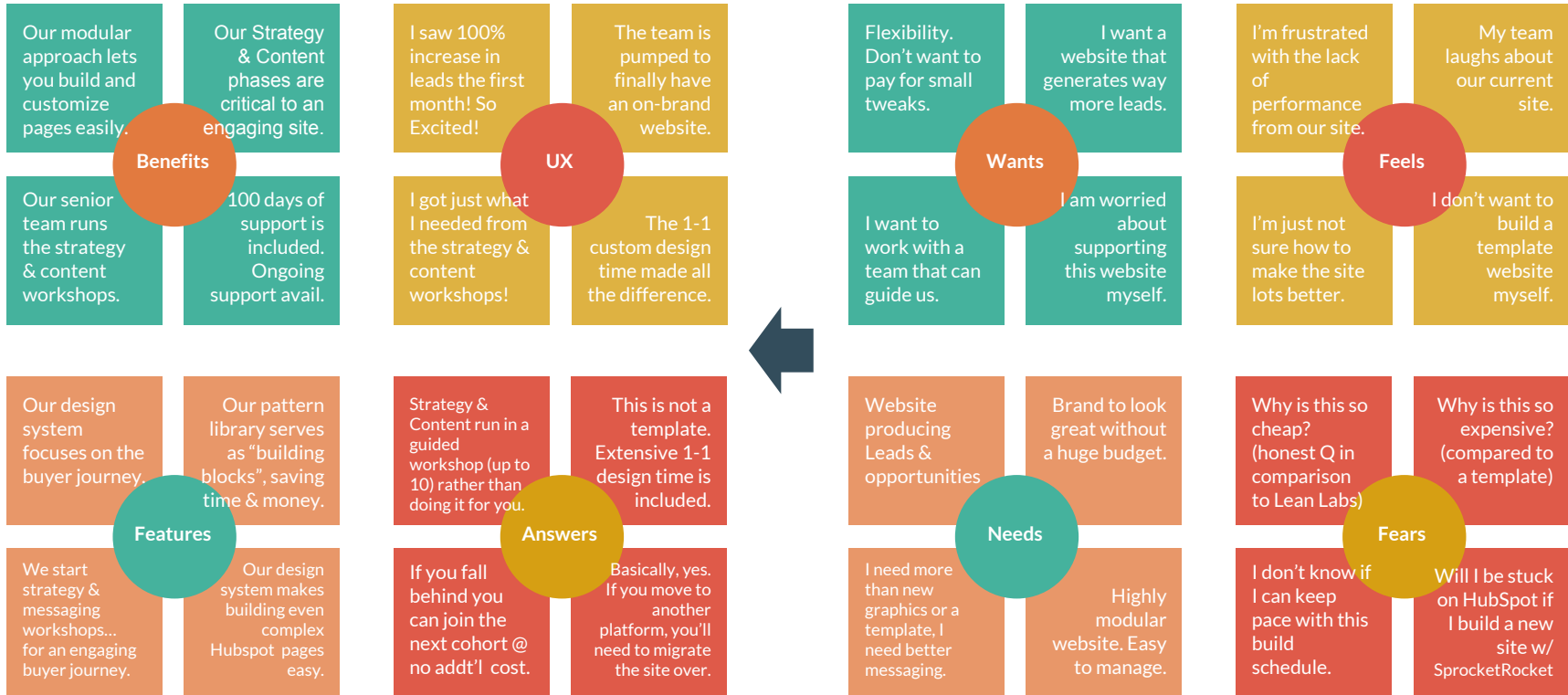
To overcome objections in a customer-centric way, your website message must not be about you. It must be about your customer.

Your message should begin with the customer's needs, wants, feelings, and fears. Only then, can you effectively position your features, benefits and user experiences in the best light.
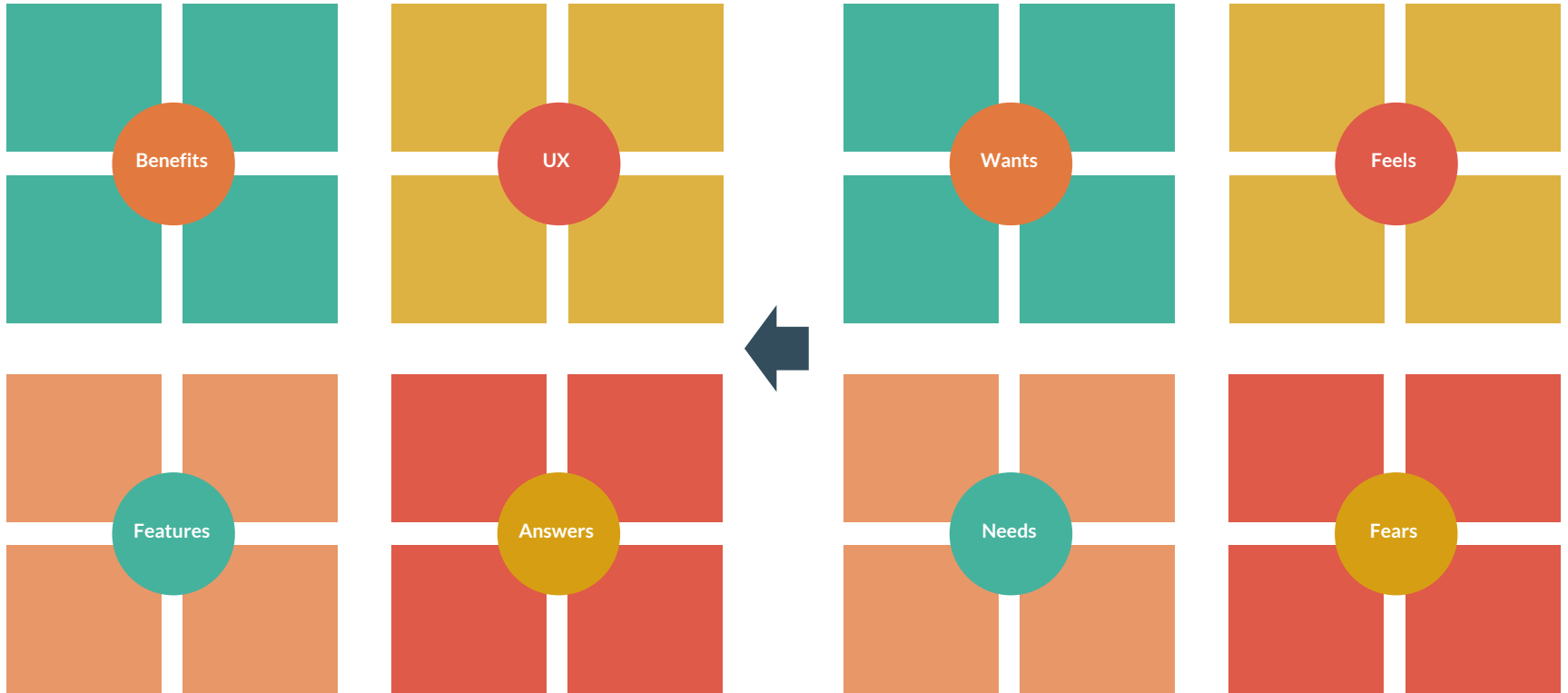
Remember to always complete the market side (right side) first. The needs of the market will determine the product offered and the messaging of how you address their needs.

VALUE PROPOSITION MAP

(example, based on Sprocket Rocket)

Benefits

Our modular approach lets you build and customize pages easily.

Our Strategy & Content phases are critical to an engaging site.

Our senior team runs the strategy & content workshops.

100 days of support is included. Ongoing support avail.

UX

I saw 100% increase in leads the first month! So Excited!

The team is pumped to finally have an on-brand website.

I got just what I needed from the strategy & content workshops!

The 1-1 custom design time made all the difference.

Wants

Flexibility. Don't want to pay for small tweaks.

I want a website that generates way more leads.

I want to work with a team that can guide us.

I am worried about supporting this website myself.

Feels

I'm frustrated with the lack of performance from our site.

My team laughs about our current site.

I'm just not sure how to make the site lots better.

I don't want to build a template website myself.

Features

Our design system focuses on the buyer journey.

Our pattern library serves as "building blocks", saving time & money.

We start strategy & messaging workshops… for an engaging buyer journey.

Our design system makes building even complex Hubspot pages easy.

Answers

Strategy & Content run in a guided workshop (up to 10) rather than doing it for you.

This is not a template. Extensive 1-1 design time is included.

If you fall behind you can join the next cohort @ no addt'l cost.

Basically, yes. If you move to another platform, you'll need to migrate the site over.

Needs

Website producing Leads & opportunities

Brand to look great without a huge budget.

I need more than new graphics or a template, I need better messaging.

Highly modular website. Easy to manage.

Fears

Why is this so cheap? (honest Q in comparison to Lean Labs)

Why is this so expensive? (compared to a template)

I don't know if I can keep pace with this build schedule.

Will I be stuck on HubSpot if I build a new site w/ SprocketRocket

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VALUE PROPOSITION MAP

Benefits

UX

Wants

Feels

Features

Answers

Needs

Fears

Meeting #3

Before/After State

Your website message must help customers understand how their life will change after buying your product. They won't just have a new invoice to pay, they'll see a major impact in their lives.

Use the before/after state to document the changes in:
 - What they have
 - What they feel
 - Their average day
 - Their status within their organization

This exercise is given as homework at the end of the third meeting.

WHO WE HELP
HOW WE HELP

PERSONA 1

PERSONA 2

Before State

Have:

Feel:

Avg Day:

Status:

After State

Have:

Feel:

Avg Day:

Status:

Before State

Have:

Feel:

Avg Day:

Status:

After State

Have:

Feel:

Avg Day:

Status:

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Meeting #4

Q & Review

The fourth meeting in the strategy workshop is an open opportunity to ask questions, and to give feedback and review the strategy documents to this point.

You can schedule one-on-one sessions of 15 or 30-minutes during the weeks of the strategy workshop to address questions. You can also attend the office hours sessions as well.

We also encourage clients to complete the optional competitive analysis document found on the following page.

Who are you Stealing From?

	Competitor 1	Competitor 2	Competitor 3	Competitor 4
Job to be Done				
Struggling Moment				
The Outcome				
The Switch				
The 1 Thing				
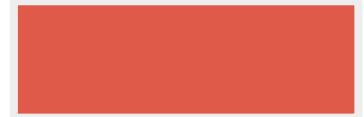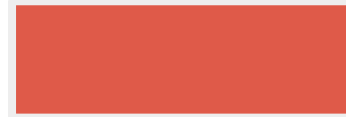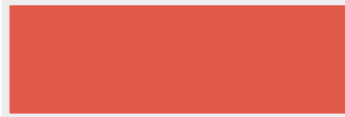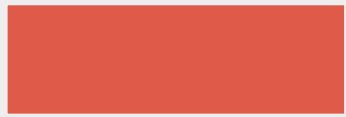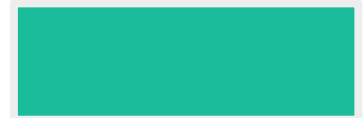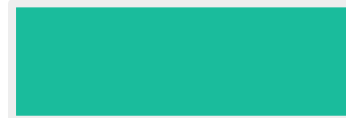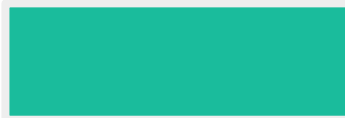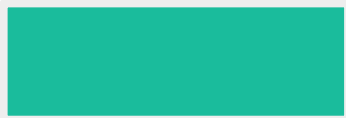
Meeting #5

Buyer Journey

Now that we've documented the business from the customer's perspective, it's time to synthesize all of your thoughts and ideas into the buyer journey of your new website.

First, we explore the bait/hook/reel metaphor, then use that to construct the buyer journey. After that, we will brainstorm lead magnets and persuasive marketing messages to help you nurture leads through the buyer journey.

Finally, we'll document the website pages and landing pages that should be built to support the buyer journey.

This meeting is kind of technical and can get complicated quickly, but feedback and support is available if you get stuck. You schedule one-on-one sessions of 15 or 30-minutes during the weeks of the strategy workshop to address any questions. You can attend the office hours sessions while we work on the buyer journey as well.

BUYER JOURNEY

AWARENESS	INTEREST	DESIRE	CONSIDERATION	DECISION
What content will attract our target customer to our site for the first time?	*What would our target customer find irresistibly interesting or helpful?*	*What is the right email "soap opera" sequence to attract them to us?*	*What is the best way to help customers understand the value of what you offer?*	*What "calls to action" will entice our target customer to come to the table?*
?	?	?	?	?

THE BUYER JOURNEY

AWARENESS	INTEREST	DESIRE	CONSIDERATION	DECISION
BAIT	**HOOK**	**REEL**	**BOAT**	**TABLE**
What key questions are being asked?

What is the right inbound content to answer each question? | What can you offer that would be irresistible to your target customer?

What would not only be excited to download, but value and remember your brand for making available? | We want to pull them in by continuing to deliver value, attracting them as a volunteer, and gently lead them to our solution.

What content will scratch their itch so well that they want to learn more about us? | How do we transition from delivering value and building trust to using that trust to help the customer understand what we have to offer?

What's the best way for them to grasp the value of our solution? | What signals can we use to know when a customer is thinking about buying?

What can we do to lower obstacles and barriers to purchase?

What are our decision phase offers & CTA's? |
| *What content will attract our target customer to our site for the first time?* | *What would our target customer find irresistibly interesting or helpful?* | *What is the right email "soap opera" sequence to attract them to us?* | *What is the best way to help customers understand the value of what you offer?* | *What "calls to action" will entice our target customer to come to the table?* |

Buyer Journey: EXAMPLE

5. LEAD MAGNETS
Become familiar and liked.
reciprocity-unexpected bonus.

4. BELIEF BRIDGE
Indoctrination / engagement series
Suffering, Struggle, Victory
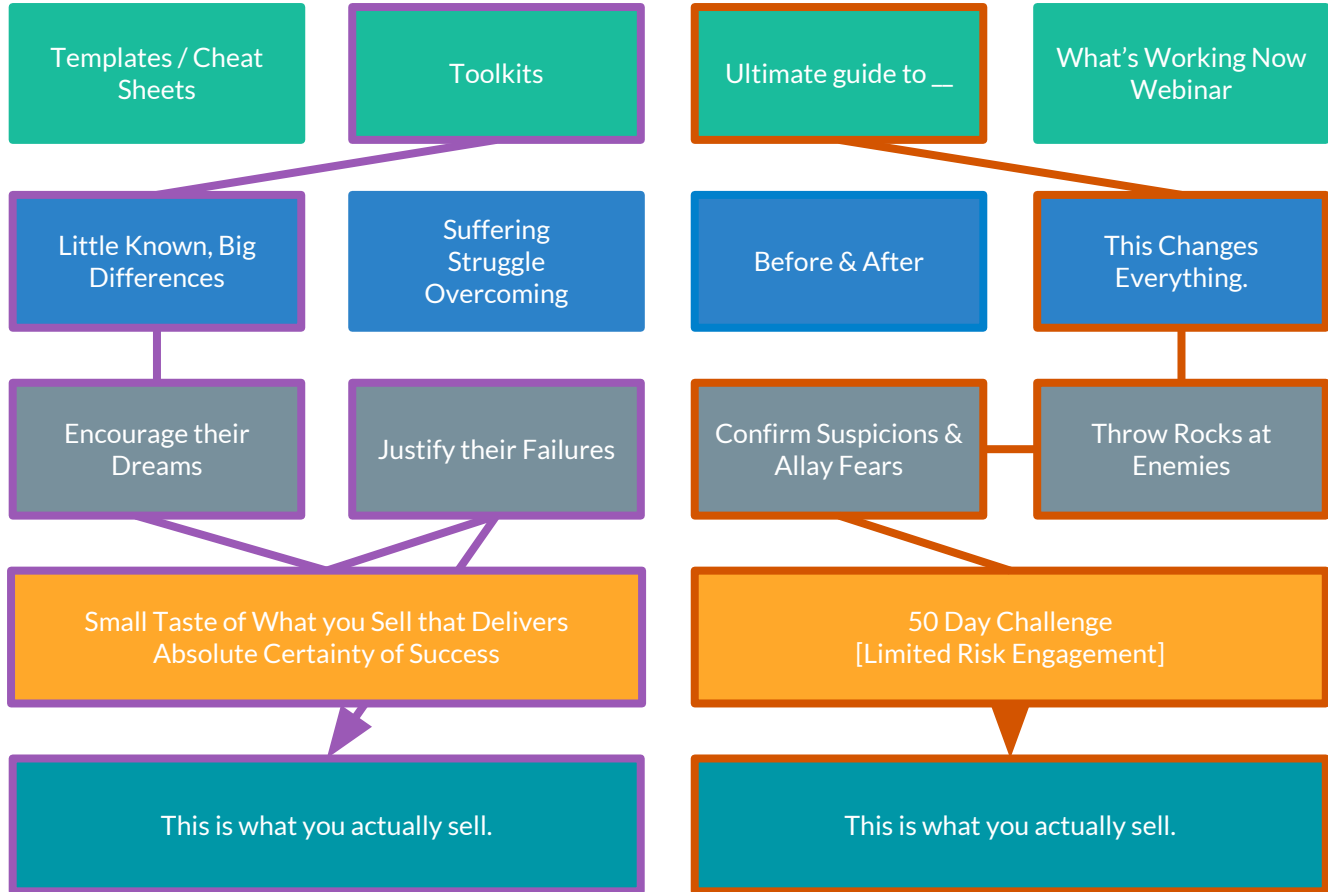(liking, reciprocity, authority)

3. TRUST TRIGGERS
Earn Trust, Overcome Objections,
(liking, reciprocity, authority, proof)

2. SPLINTER OFFER
Reduce Risk, Step vs Leap
(consistency, scarcity, unity)

1. CORE OFFER
Outcome Guaranteed, Bought In, Deserved

Templates / Cheat Sheets	Toolkits	Ultimate guide to __	What's Working Now Webinar
Little Known, Big Differences	Suffering Struggle Overcoming	Before & After	This Changes Everything.
Encourage their Dreams	Justify their Failures	Confirm Suspicions & Allay Fears	Throw Rocks at Enemies
Small Taste of What you Sell that Delivers Absolute Certainty of Success		50 Day Challenge [Limited Risk Engagement]	
This is what you actually sell.		This is what you actually sell.	

Buyer Journey

5. LEAD MAGNETS

Become familiar and liked.
reciprocity-unexpected bonus.

4. BELIEF BRIDGE

Indoctrination / engagement series
Suffering, Struggle, Victory
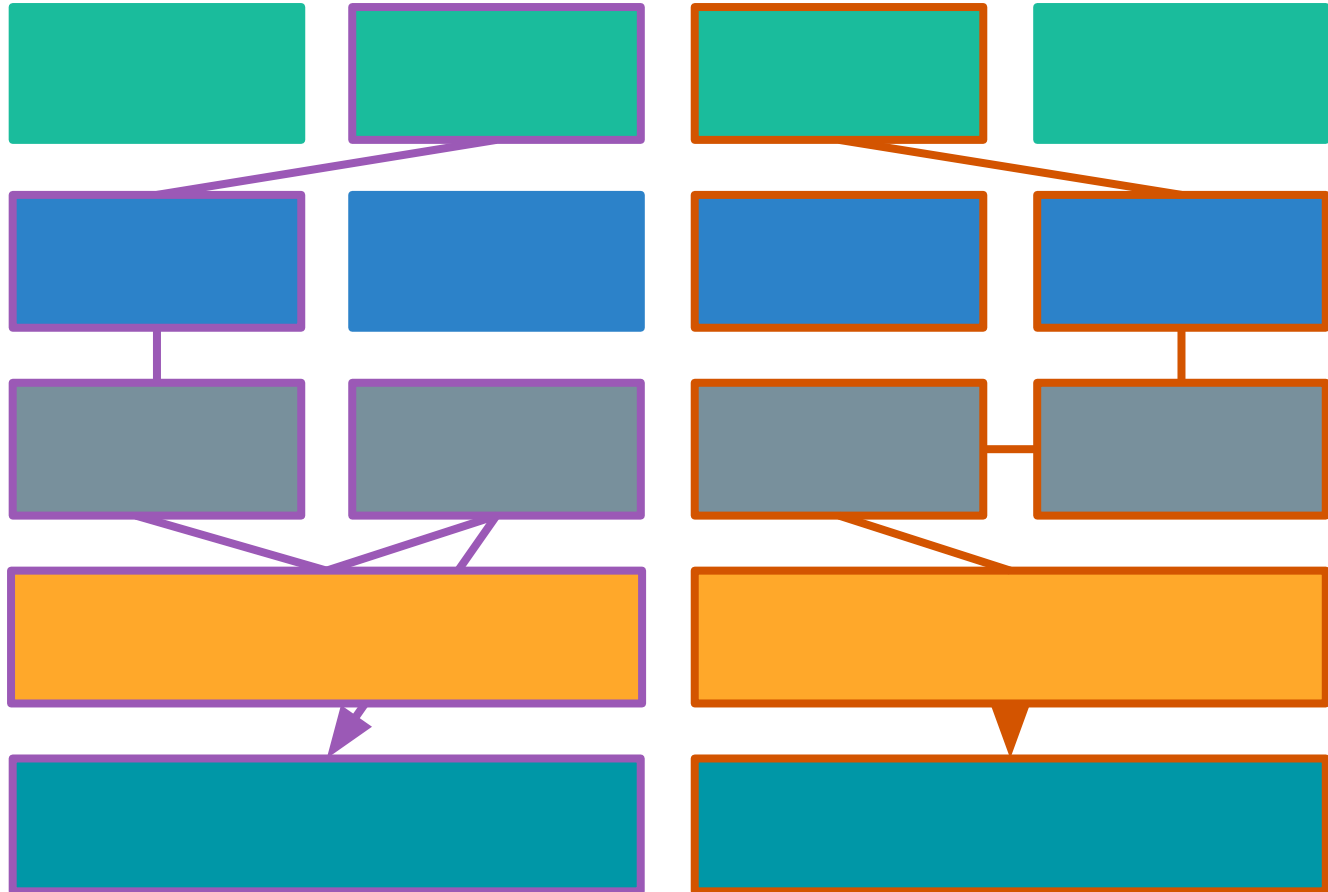(liking, reciprocity, authority)

3. TRUST TRIGGERS

Earn Trust, Overcome Objections,
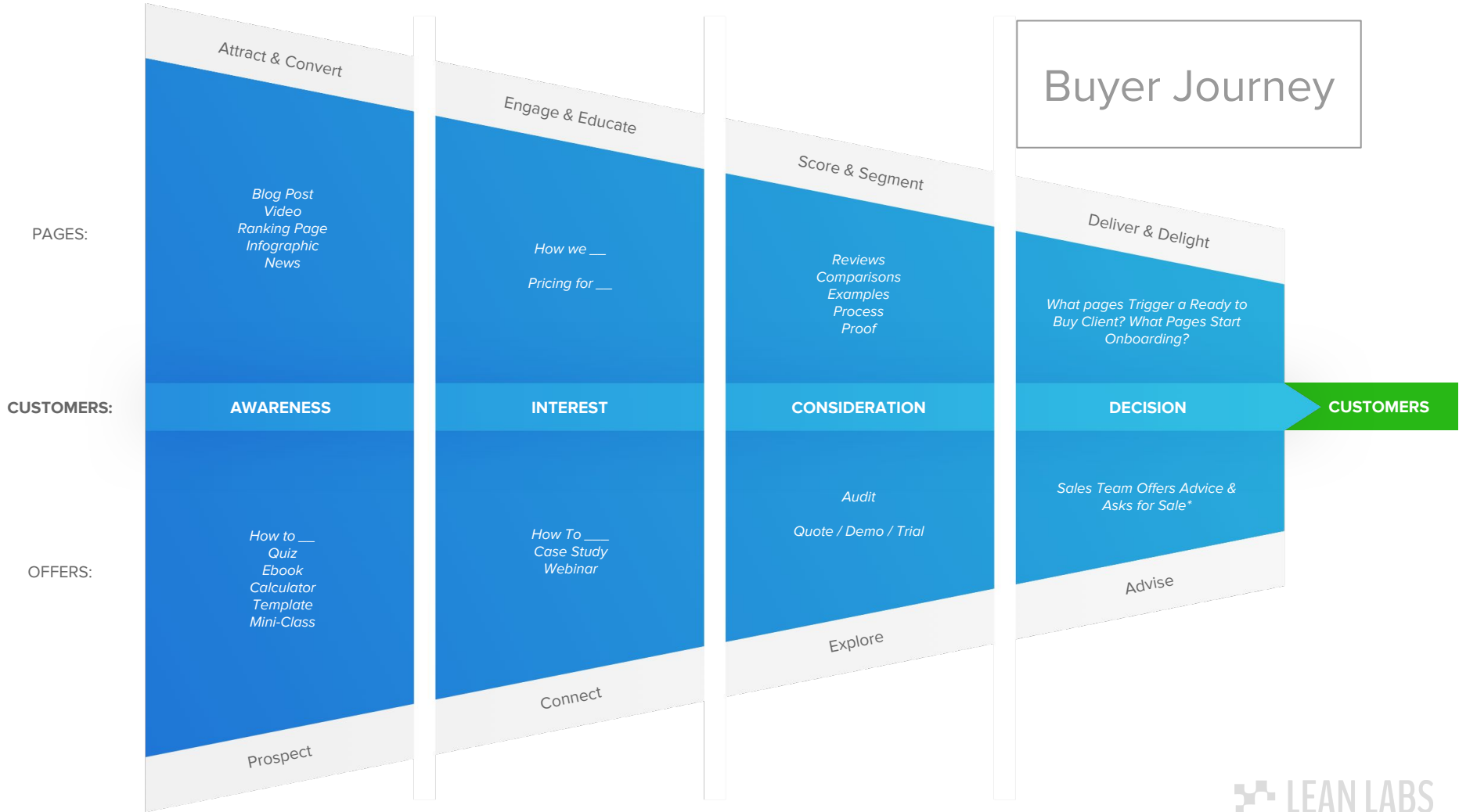(liking, reciprocity, authority, proof)

2. SPLINTER OFFER

Reduce Risk, Step vs Leap
(consistency, scarcity, unity)

1. CORE OFFER

Outcome Guaranteed, Bought In, Deserved

Buyer Journey

PAGES:

Attract & Convert
Blog Post
Video
Ranking Page
Infographic
News

Engage & Educate
How we ___

Pricing for ___

Score & Segment
Reviews
Comparisons
Examples
Process
Proof

Deliver & Delight
What pages Trigger a Ready to Buy Client? What Pages Start Onboarding?

CUSTOMERS:

AWARENESS	INTEREST	CONSIDERATION	DECISION	CUSTOMERS

OFFERS:

How to ___
Quiz
Ebook
Calculator
Template
Mini-Class

How To ___
Case Study
Webinar

Audit

Quote / Demo / Trial

Sales Team Offers Advice & Asks for Sale*

Prospect

Connect

Explore

Advise

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Optional

Journey Mapping Exercise

Within the UX & GDD methodologies, some appreciate the creation of a journey map for their users.

We're not a fan of this activity, as it seems redundant to the buyer journey slide above. We do not include this exercise in our workshops, but if you want to explore it on your own, you can download the template, as well as training on the activity.

- [Template](#)
- Training is in Section 2.5 of the [Growth Driven Design Certification](#).

Meeting #6

Sitemap

With the Buyer Journey in place, our sixth meeting constructs the information architecture of your new website, starting with the sitemap.

Rather than overwhelming your team with ideas, you should focus on the most important, 3-5 pages. This ensures you are building pages that will make the most impact first so you can launch your website quickly, and learn how it works. You can push second and third-tier ideas and pages into future launch phases.
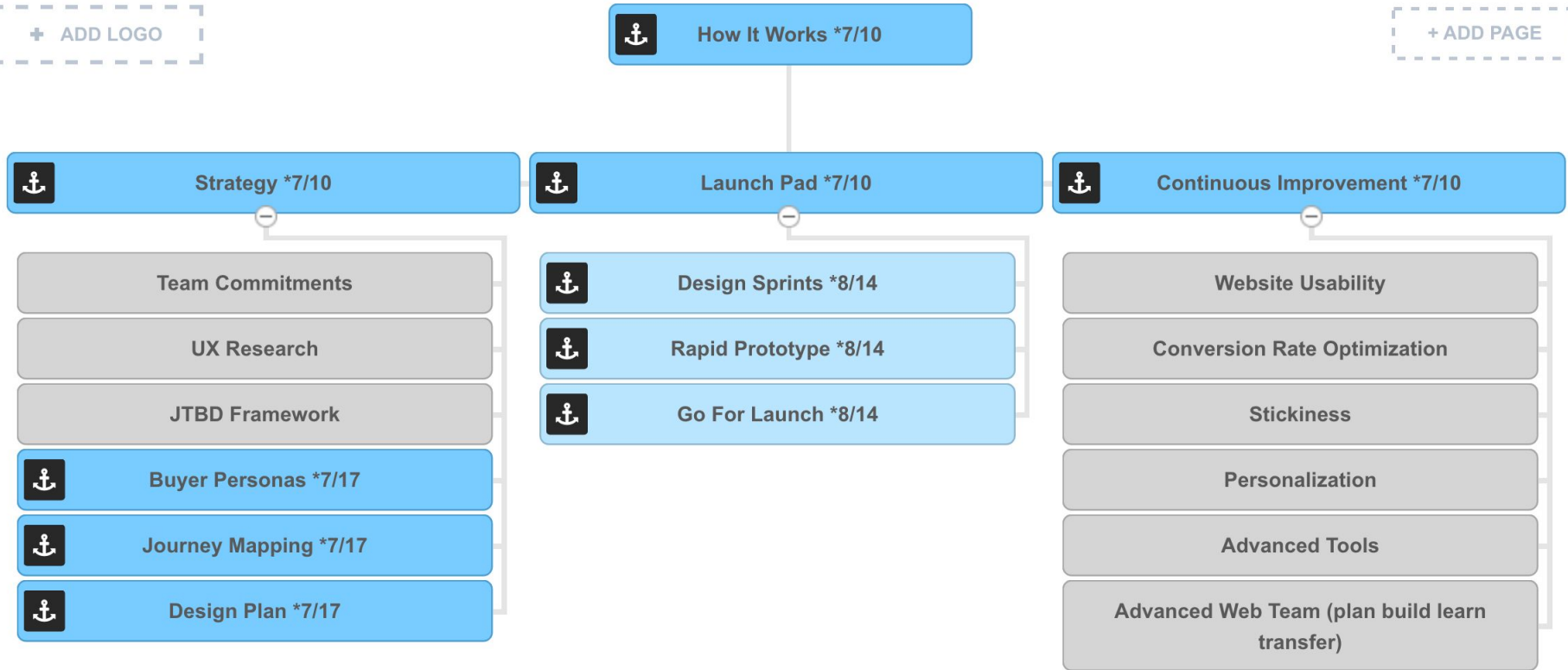
We're happy to review and discuss sitemaps, the foundational structure of your website, navigation, and ultimately, the Buyer Journey.

We use www.SlickPlan.com for our sitemaps.

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Example Sitemap

How It Works *7/10

Strategy *7/10
- Team Commitments
- UX Research
- JTBD Framework
- **Buyer Personas *7/17**
- **Journey Mapping *7/17**
- **Design Plan *7/17**

Launch Pad *7/10
- **Design Sprints *8/14**
- **Rapid Prototype *8/14**
- **Go For Launch *8/14**

Continuous Improvement *7/10
- Website Usability
- Conversion Rate Optimization
- Stickiness
- Personalization
- Advanced Tools
- Advanced Web Team (plan build learn transfer)

+ ADD LOGO

+ ADD PAGE

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Meeting #7

Build Plan & Budget

The final step in strategy is to arrive at a build plan, budget and timeframe that is agreeable to all stakeholders and supports the goals of the project.

How you estimate your projects is largely dependent upon your process. We provide our clients with a budget worksheet and the ability to allocate content & design budget where it will have the most impact.

Once the Build Plan is in place, you're ready to start prototyping your new website.

We have a smooth process for quickly creating design-ready pages in HubSpot, which is covered in our Prototype Kit.

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How to Budget for a Custom Website

If interested in what it would cost for Lean Labs to build a top shelf web presence for your brand, browse our [Project Playbook](#).
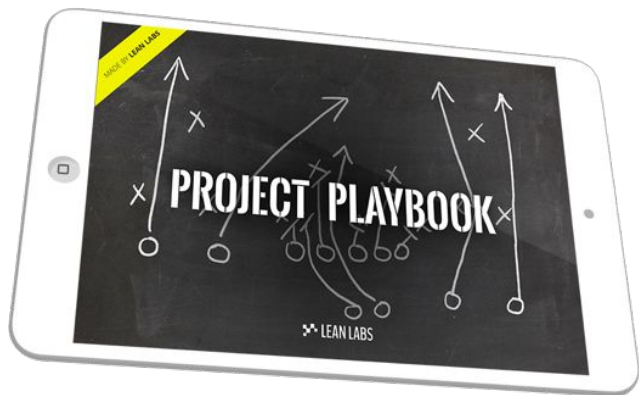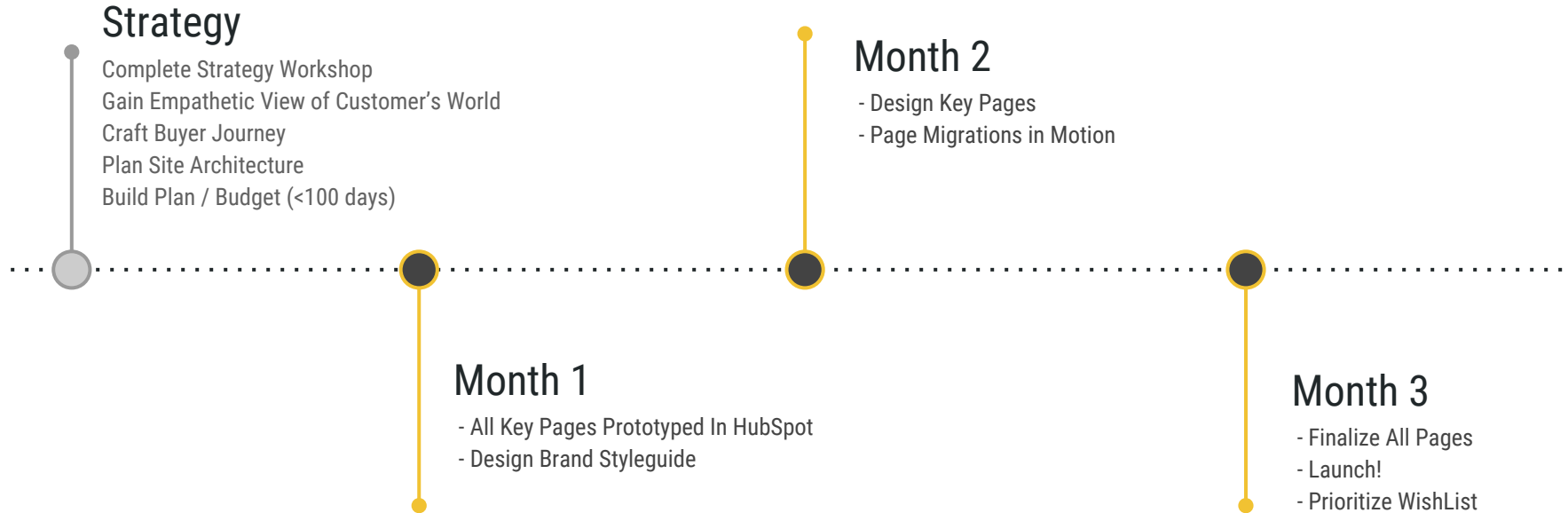

Budgets for Bootstrapping Brands

We took all of the efficiencies we've gained in developing HubSpot COS websites for over four years and created a new design system called [Sprocket Rocket](#).

This design system enables brands and agencies to build an 8/10 website with a 3/10 budget, without cutting out critical components like strategy, content creation, and custom design.

[Check Out Sprocket Rocket](#)

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Target Milestones

Strategy
Complete Strategy Workshop
Gain Empathetic View of Customer's World
Craft Buyer Journey
Plan Site Architecture
Build Plan / Budget (<100 days)

Month 2
- Design Key Pages
- Page Migrations in Motion

Month 1
- All Key Pages Prototyped In HubSpot
- Design Brand Styleguide

Month 3
- Finalize All Pages
- Launch!
- Prioritize WishList

This Strategy Kit is just one piece of the puzzle.

Download the full **Growth Kit** from Sprocket Rocket to radically streamline your website design process.

We have **live workshops & video training** to walk our clients through the entire process, including:

- Website Strategy
- Rapid Prototyping
- Website Launch
- Optimization Sprints

To discuss our workshops, schedule a chat.

Introducing...

Sprocket Rocket

An 8/10 Website Launched on a 3/10 Budget.
Learn More at www.SprocketRocket.co

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