



VISION-DRIVEN MARKETING

FROM PERSONAL PURPOSE TO BRAND POWER

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A Strategic Framework for Building Marketing That Matters

"The Marketing Graveyard is Full of Companies That Never Knew Who They Were"

Before tactics, tools, or trends... you need FOUNDATION





Why 90% of Marketing Efforts Fail

90%

Inconsistent Messaging

75%

No Emotional Connection

80%

Competing on Price Only

65%

Leadership Misalignment

The Result: Marketing becomes reactive noise instead of strategic advantage





THE STRATEGIC HIERARCHY

PERSONAL VISION

COMPANY VISION

MISSION & VALUES

CRITICAL ADVANTAGE

MARKETING & BRANDING STRATEGY





LEVEL I: PERSONAL VISIONFOR BUSINESS OWNERS: YOUR NORTH STAR

- Material Lifestyle Goals: What income do you need?
- Desired Role: CEO, advisor, or hands-on operator?
- Health: What is you desired health? Which areas of Personal Growth do you seek
- Business Exit Strategy: What is you vision for exiting Your Business?

- Work-Life Balance: What does success look like personally?
- Legacy & Impact: What do you want to be remembered for?
- Family Involvement: Will family be part of the business?
- Personal Growth: Which areas of Personal Growth do you seek?

Key Insight: When your business serves your deeper goals, you'll have the passion to make it succeed





PERSONAL VISION SELF-ASSESSMENT RATE YOURSELF 1-10 IN THESE AREAS:

- Business Role Satisfaction
- Compensation Alignment
- Health & Wellness
- Relationships & Family Time
- Personal Growth & Learning
- Community Impact

For each low score, ask: "How could my business be structured to better support this area?" or "What does a 10 look (feel, sound,) like?





LEVEL 2: COMPANY VISIONESSENTIAL VISION COMPONENTS

- Business Purpose: Why do you exist beyond profit?
- Market Position: Where do you want to rank?
- Geographic Scope: Local, regional, national, global?

- Culture & Values: What principles guide decisions?
- Customer Focus: Who will you serve and how?
- Growth Trajectory: How big, how fast, how profitable?

"To be a leading provider of affordable, on-time, quality construction while employing a loyal workforce passionate about delivering benefits, operating with the belief that there is more to business than profits."





WHEN OWNERS HAVE DIFFERENT DREAMS COMMON CONFLICTS & SOLUTIONS

Common Conflicts:

- Expansion Speed: Conservative vs. aggressive
- Risk Tolerance: Bootstrap vs. leverage
- Exit Strategy: Family business vs. sale
- Role Distribution: Who does what as you grow

Resolution Process:

- Each owner writes personal vision separately
- Compare and identify misalignments
- Negotiate compromises or clarify roles
- Create unified vision statement
- Get leadership team input before finalizing





LEVEL 3: MISSION & VALUESVALUES THAT DRIVE DECISIONS

- Primary Function: What do you do?
- Target Market: For whom?
- Key Benefit: What value do you deliver?
- Approach: How do you deliver it uniquely?

- Customer Service Philosophy
- Employee Treatment Standards
- Quality Commitments
- Community Responsibility
- Ethical Guidelines

Marketing Connection: Mission and values become the foundation of every message you send





Level 4: Critical Advantage

Types of Critical Advantages

Operational Excellence

Lowest cost, fastest delivery, highest quality

Product Innovation

First to market, unique features, superior performance

Customer Intimacy

Deep relationships, customization, exceptional service

Strategic Position

Exclusive partnerships, prime location, regulatory advantages

Critical Advantage Audit: Call your top 5 customers and ask: "Why do you choose us over our competitors?"





FROM ADVANTAGE TO MARKETING MESSAGE THE TRANSLATION PROCESS

Internal Advantage



Customer Benefit



Marketing Message

- 20 years experience → Fewer mistakes, faster results → "Get it right the first time"
- **Family-owned business** \rightarrow Personal attention, long-term thinking \rightarrow "Your success is our legacy"
- **Proprietary technology** \rightarrow Unique capabilities, better outcomes \rightarrow "Solutions others can't deliver"





BUILDING YOUR BRAND ARCHITECTURE

PERSONAL/COMPANY VISION **BRAND PURPOSE (Why you exist) BRAND PROMISE (What you guarantee) BRAND PERSONALITY (How you communicate) BRAND POSITIONING (Where you compete) BRAND EXPERIENCE** (Every touchpoint)

MARKETING STRATEGY FRAMEWORK

I. Target Market Definition

- Primary customers (80% of effort)
- Secondary markets (20% of effort)
- Anti-customers (who to avoid)

2. Value Proposition

- Core promise to each segment
- Proof points and evidence
- Differentiation from competitors

3. Channel Strategy

- Where your customers are
- How they prefer to buy
- What influences their decisions

4. Message Architecture

- Core messages for each audience
- Proof points and stories
- Call-to-action strategy





MEASURING WHAT MATTERS

Leading Indicators

- ➤ Brand awareness
- ➤ Message recall
- ➤ Lead quality scores
- > Acquisition cost trends

Vision Alignment

- ➤ Employee understanding
- Customer perception
- > Touchpoint consistency
- ➤ Strategic progress

Lagging Indicators

- ➤ Revenue growth
- > Customer lifetime value
- ➤ Market share
- ➤ Satisfaction scores





YOUR 90-DAY IMPLEMENTATION ROADMAP

Days I-30

Foundation Setting

- Vision alignment session
- Assess current marketing
- > Identify foundation gaps
- Complete SWOT analysis

Days 31-60

Strategy Development

- Complete vision statements
- Survey top customers
- Audit message consistency
- > Evaluate advantages

Days 61-90

Tactical Execution

- Implement full framework
- > Train team on messaging
- Launch aligned campaigns
- > Establish measurement





COMMON PITFALLS TO AVOID

Foundation Pitfalls

- Skipping personal vision alignment
- > Generic vision statements
- > Lack of leadership

Strategy Pitfalls

- > Trying to serve everyone
- Competing on price only
- Following trends vs. customers

Execution Pitfalls

- Inconsistent messaging
- > Untrained team
- Measuring activities vs. outcomes





THE SWOT REALITY CHECK

Key Insight: Your vision tells you where you want to go, but SWOT tells you where you're starting from

Strengths

- Current advantages
- Customer praise points
- Internal capabilities
- Competitive wins

Opportunities

- Favorable market trends
- Unmet customer needs
- New capabilities to develop
- Strategic partnerships

Weaknesses

- Consistent struggles
- Customer complaints
- Missing capabilities
- Competitor advantages

Threats

- Business model disruption
- Competitor superiority
- Changing behaviors
- External forces





VISION COMMUNICATION STRATEGY

Internal Communication

- Leadership Alignment: Vision workshops, priority agreement
- Employee Engagement: All-hands presentations, department applications
- Reinforcement: Regular meetings, recognition programs
- Board/Investors: Growth strategy alignment, progress metrics

External Communication

- Customer Education: Website messaging, sales presentations
- Market Positioning: PR strategy, content marketing
- Partnerships: Aligned opportunities, community involvement
- Service Delivery: Every touchpoint embodies vision

Critical Truth: Your team can't deliver on a vision they don't understand or believe in.





COMPETITIVE ADVANTAGE DEEP DIVE

Resource-Based

- Proprietary technology
- Exclusive relationships
- Prime locations
- Specialized talent

Capability-Based

- Superior systems
- Faster innovation
- Better relationships
- Efficient structure

Position-Based

- First-mover advantage
- Category leadership
- Network effects
- Brand reputation

Strategic

- Regulatory protection
- Exclusive contracts
- Vertical integration
- Key partnerships

Sustainability Test...

- Valuable?
- Rare?
- Hard to imitate?
- Measurable?





YOUR NEXT STEPS

This WEEK

- Schedule vision alignment session
- > Assess current marketing vs framework
- Identify biggest foundation gaps
- Complete SWOT analysis worksheet

Next 30 DAYS

- Complete vision statements
- > Survey top customers
- Audit message consistency
- > Evaluate competitive advantages

Next 90 DAYS

- > Implement full framework
- > Train team on vision/values
- Launch aligned campaigns
- Establish measurement systems



Start Today! Even 30 minutes of personal vision work this week will begin the transformation process

THE MARKETING LEADER'S COMMITMENT

"I commit to building marketing that flows from clear vision, serves real purpose, and creates lasting value for customers, employees, and stakeholders."

Your Personal Commitment

What is one specific action you will take within 48 hours to begin implementing this framework?

Write it down. Share it with someone. Make it real.





QUESTIONS AND WRAP

- Q & A
- Key Takeaways? Were expectations met? What are you going to do different tomorrow?
- Connect with me on LinkedIn and let's have Coffee...





Local Works Business Builders



THANK YOU

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QI: "HOW DO WE GET OUR TEAM ALIGNED WHEN THEY HAVE DIFFERENT IDEAS?"

- > **Answer:** This is one of the most common challenges, and it's actually a sign that you have engaged, thinking team members which is good! Here's my proven approach:
- > Step I: Separate the "What" from the "How"
 - The vision (what we're building) needs owner/leadership alignment first
 - Team input is valuable for HOW we achieve the vision, not whether we should pursue it
- > Step 2: Use the "Yes, And" Framework
 - When someone disagrees, say "Yes, I hear your concern about X,AND here's how our vision addresses that..."
 - This validates their input while keeping focus on the bigger picture
- > Step 3: Give Everyone a Role
 - Ask each team member: "Given our vision, how do you see your department contributing?"
 - This shifts from arguing about the vision to owning their piece of it
- > Key Insight: Alignment doesn't mean agreement on everything it means everyone rowing in the same direction.





Q2: "WHAT IF OUR CURRENT MARKETING CONTRADICTS OUR VISION?"

- > **Answer:** Don't panic this is more common than you think! Most businesses evolve their marketing organically without strategic foundation, so misalignment is normal. Here's how to fix it:
- > Immediate Actions (This Week):
 - Audit all current marketing materials against your vision
 - Stop anything that directly contradicts your vision (yes, even if it's expensive)
 - Prioritize the highest-impact touchpoints for immediate fixes
- > 30-Day Plan:
 - Website messaging Start here, it's your 24/7 salesperson
 - Sales presentations Make sure your team is telling the right story
 - Email signatures and templates Small changes, big impact
- > 90-Day Evolution:
 - Rebrand existing campaigns to align with vision
 - Create new content that reinforces your positioning
 - Train your team on the new messaging
- > Remember: Evolution beats revolution. Your customers need time to understand your new positioning too.





Q3: "HOW LONG DOES THIS PROCESS TYPICALLY TAKE TO SHOW RESULTS?"

- > **Answer:** Expectations matter! Here's the realistic timeline:
- > Internal Results (30-60 days):
 - Team clarity and confidence improves immediately
 - Decision-making becomes faster and more consistent
 - Internal alignment reduces friction and politics
- > Market Perception (3-6 months):
 - Customers start noticing more consistent messaging
 - Word-of-mouth improves as your team tells a clearer story
 - Lead quality begins to improve

- > Business Impact (6-12 months):
 - Revenue growth from better-qualified prospects
 - Pricing power increases as you move away from commodity positioning
 - Customer retention improves due to clearer value delivery
- > Long-term Transformation (12+ months):
 - Market position solidifies
 - Competitive advantages become harder to replicate
 - Business becomes more valuable and sustainable
- > **Key Insight:** The foundation work pays dividends forever, but like compound interest, the biggest returns come over time. Start measuring internal metrics first they're leading indicators of market success.





Q4: "WHAT IF WE DISCOVER OUR VISION NEEDS MAJOR CHANGES?"

- > **Answer:** Congratulations! Discovering this means you're doing the work seriously. Major vision changes aren't failures they're course corrections that prevent bigger problems later.
- > Common Reasons for Major Changes:
 - Market reality check: Your vision doesn't match market opportunity
 - Resource realization: You don't have the capabilities to achieve the vision
 - Personal evolution: Owner's life circumstances or priorities change
 - Competitive landscape: New information changes what's possible

How to Handle Major Changes:

- Step I: Understand the "Why"
 - Is this based on new information or just fear?
 - Are the changes in direction or just in timeline/scope?
 - What specifically isn't working about the current vision?

> Step 2: Communicate Transparently

- Explain to your team WHY the vision is changing
- Show how their work contributed to the learning
- Be clear about what's staying the same
- > Step 3: Rebuild Systematically
 - Don't throw everything away salvage what's working
 - Use the same framework to build the new vision
 - Involve key team members in the revision process
- > **Key Insight:** Changing your vision based on learning is strategic intelligence. Changing it every few months based on mood is strategic chaos. Make sure you're responding to real insights, not just temporary setbacks.





Q5: "HOW DO WE MAINTAIN VISION ALIGNMENT AS WE GROW?"

- > **Answer:** This is the ultimate test of a strong foundation! Growth naturally creates alignment challenges, but vision-driven companies handle it better. Here's the playbook:
- > Hiring for Vision Alignment:
 - Include vision questions in interviews: "Tell me about a time you worked for something bigger than a paycheck"
 - Hire for cultural fit first, skills second (you can teach skills, not values)
 - Use behavioral interviews to understand how candidates make decisions
- > Onboarding for Vision:
 - Week I: New hires learn company story and vision before their job description
 - 30-day check-in: "How do you see your role contributing to our vision?"
 - 90-day integration: New hire presents how their department advances the vision

- Ongoing Reinforcement Systems:
 - Monthly all-hands: Share stories of vision in action
 - Performance reviews: Rate performance against both results AND vision alignment
 - Recognition programs: Celebrate examples of vision-driven decisions
 - Decision frameworks: "Does this advance our vision?" becomes a standard question
- > Leadership Development:
 - Train managers to connect daily tasks to bigger purpose
 - Create vision ambassadors in each department
 - Regular leadership retreats to recalibrate on vision application
- Warning Signs of Drift:
 - Decisions being made without reference to vision
 - New hires not understanding or caring about company purpose
 - Departments working at cross-purposes
 - Leadership team disagreeing on priorities
- > **Key Insight:** Vision alignment doesn't happen automatically with growth it requires intentional systems and consistent reinforcement.





Q6: "WHAT IF OUR COMPETITIVE ADVANTAGES AREN'T SUSTAINABLE?"

Answer: The reality is that most competitive advantages erode over time – the key is building a portfolio of advantages and constantly developing new ones.

Types of Advantage Sustainability:

- > Temporary Advantages (6 months 2 years):
 - New product features
 - Pricing strategies
 - Marketing campaigns
 - Technology implementations
- > Durable Advantages (2-5 years):
 - Brand reputation
 - Customer relationships
 - Operational excellence
 - Geographic position
- Sustainable Advantages (5+ years):
 - Network effects
 - Regulatory protection
 - Proprietary technology
 - Cultural capabilities

> Strategic Responses:

- > I. Build Advantage Portfolios
 - Don't rely on a single advantage
 - Combine multiple sources of differentiation
 - Example: Southwest Airlines combines low cost + point-to-point routes + company culture
- > 2. Create Reinforcing Loops
 - Make advantages support each other
 - Example: Better service → higher prices → more investment in service → even better service
- > 3. Develop Dynamic Capabilities
 - Build your ability to create NEW advantages
 - Focus on learning, innovation, and adaptation as compounding advantages
- > 4. Shift from Product to System Advantages
 - Move from "what you sell" to "how you operate"
 - Example: Amazon's advantage isn't products, it's logistics and data systems
- Advantage Evolution Strategy:
 - Year I: Focus on operational advantages (service, quality, speed)
 - Year 2-3: Build relationship advantages (trust, loyalty, switching costs)
 - Year 4+: Develop strategic advantages (partnerships, positioning, capabilities)
- > **Key Insight:** The most sustainable advantage is your ability to continuously develop new advantages. Make innovation and adaptation part of your core vision, not just your strategy.





Q7: "WHAT DOES 'MESSAGE CONSISTENCY' MEAN IN PRACTICE? ACROSS WHAT CHANNELS OR ASSETS?"

- > **Answer:** Message consistency means your core value proposition, brand personality, and key promises are recognizable across every touchpoint where customers encounter your business. Here's what that looks like practically:
- > Core Message Elements to Keep Consistent:
 - Value proposition the main benefit you deliver
 - Brand personality how you "sound" (professional, friendly, authoritative, etc.)
 - **Key differentiators** what makes you unique
 - Customer language the words your ideal customers actually use
- > Channels and Assets That Must Align:
 - Digital: Website, social media, email signatures, online ads, review responses
 - Sales Materials: Presentations, proposals, case studies, testimonials
 - Physical: Business cards, office signage, vehicle wraps, uniforms
 - Communication: Phone greetings, meeting language, follow-up messages
 - Content: Blog posts, videos, podcasts, speaking engagements
- > **Practical Audit:** Print out content from 5 different touchpoints. If a stranger read them separately, would they think they came from the same company with the same values and positioning? If not, you have consistency work to do.





Q8: "HOW OFTEN SHOULD I DO MY SWOT? ISTHIS A ONE-TIMETHING OR A REGULAR CHECK-IN?"

Answer: SWOT analysis should be a regular strategic rhythm, not a one-time exercise. Here's my recommended schedule:

Annual Deep SWOT (Comprehensive Review):

- Full team involvement with outside perspective
 - Compare to previous year's SWOT to track progress
 - Use for strategic planning and vision refinement
 - Timeline: Usually during annual planning retreats

Quarterly Quick SWOT (Market Check-ins):

- Focus on opportunities and threats (external factors change faster)
- 30-minute leadership team discussion
- Ask: "What's changed in our market since last quarter?"
- Adjust tactics and messaging as needed

Triggered SWOT (When Significant Changes Occur):

- New competitor enters market
- Economic shifts affecting your industry
- Technology disruptions
- Major customer wins/losses
- Internal capability changes

What to Track Over Time:

- Strengths: Are we building on these? Are they still relevant?
- Weaknesses: Are we addressing these systematically?
- **Opportunities:** Which ones are we pursuing? What new ones emerged?
- Threats: Which became reality? What new ones appeared?

Key Insight: Your SWOT should evolve as your business and market evolve. The goal isn't a perfect analysis—it's actionable intelligence that guides decision





Q9: "CANYOU GIVE AN EXAMPLE OF HOW A 'THREAT' MIGHT SHAPE MESSAGING OR POSITIONING?"

Answer: Absolutely! Threats often create the most powerful positioning opportunities when you address them head-on. Here are real examples:

Threat: Low-cost online competitors

- Reactive Response: Lower prices, compete on cost
- Strategic Response: Position on value you can't get online
- Example Messaging: "When your financial future is on the line, you need more than software—you need a trusted advisor who knows your story."

Threat: Economic downturn affecting client budgets

- Reactive Response: Discount services, chase any business
- Strategic Response: Position as essential investment, not optional expense
- Example Messaging: "Uncertain times require certain strategies. Our planning helps you thrive while others just survive."

Threat: Larger competitors with more resources

- Reactive Response: Try to match their capabilities
- Strategic Response: Position on agility and personal attention
- Example Messaging: "While big firms put you in a system, we put the system around you."

Threat: Industry perception that "anyone can do this"

- Reactive Response: List more credentials and certifications
- Strategic Response: Position on outcomes and transformation
- Example Messaging: "Results speak louder than resumes. Our clients don't just get advice—they get transformation."

The Pattern: The best positioning often comes from acknowledging threats directly and positioning your unique value as the solution. Don't run from threats—use them to clarify why you're different.





Q:10 "IS SPECIALIZED TALENT ENOUGH OF AN ADVANTAGE IF COMPETITORS CAN HIRE SIMILAR PEOPLE?"

Answer: Specialized talent alone is rarely a sustainable advantage, but it can be part of a defensible competitive position when combined with other factors:

When Talent IS Sustainable:

- Proprietary Knowledge: Your team knows your unique processes/systems
- Cultural Fit: Your people thrive in your specific environment
- Development Systems: You consistently develop talent better than competitors
- Network Effects: Your team's combined relationships create value
- Geographic Constraints: Limited talent pool in your market

When Talent ISN'T Sustainable:

- Industry Standard Skills: Anyone can hire similar capabilities
- No Retention Strategy: High turnover makes investment meaningless
- Isolated Individuals: Single "star" employees create vulnerability
- No Knowledge Systems: When people leave, knowledge walks out the door

Making Talent More Defensible:

- I. Build Systems Around Talent:
 - Document processes so excellence isn't person-dependent
 - Create team-based capabilities, not individual dependencies
 - Develop internal training that's unique to your approach
- 2. Create Cultural Advantages:
 - Build an environment where top talent wants to stay
 - Develop leadership that attracts and retains the best people
 - Establish values and culture that competitors can't replicate quickly
- 3. Focus on Talent Development:
 - Your advantage isn't just having good people—it's making people better
 - Create career paths that keep talent growing with you
 - Build reputation as the place where professionals develop best

Better Strategy: Combine specialized talent with other advantages like proprietary processes, strong culture, customer relationships, or strategic positioning. The goal is making your talent more valuable at your company than anywhere else.





QII: "OUR BRAND HAS A GOOD REPUTATION LOCALLY— HOW DO WE LEVERAGE THAT IN OUR MARKETING MORE EFFECTIVELY?"

Answer: Local reputation is actually one of the most valuable and defensible advantages you can have! Here's how to leverage it systematically:

Document Your Reputation:

- Collect Testimonials: Get specific stories from local clients
- Case Studies: Detail local success stories with measurable outcomes
- Community Involvement: Document your local partnerships and contributions
- Referral Patterns: Track how often you get word-of-mouth referrals

Marketing Strategies to Amplify Local Reputation:

I. Social Proof Strategy:

- Website: Prominent local client testimonials and case studies
- Social Media: Regular features of local client successes
- Networking: Speak at local business events and chambers
- Referral Program: Formalize the word-of-mouth that's already happening

2. Community Leadership Positioning:

- Thought Leadership: Write in local business publications
- Event Hosting: Hold educational workshops for local business community
- Partnership Visibility: Co-sponsor local events with complementary businesses
- Media Relations: Position yourself as local expert for business media

3. Geographic SEO and Content:

- **Local SEO:** Optimize for "[your service] + [your city]" searches
- Local Content: Blog about local business trends and challenges
- Google My Business: Actively manage reviews and local search presence
- Local Directories: Ensure consistent presence across local business listings

4. Referral Amplification:

- **Systematic Follow-up:** Ask satisfied clients specifically for referrals
- **Referral Rewards:** Create incentives for clients who refer others
- Thank You Strategy: Publicly thank clients who refer (with permission)
- Introduction Facilitation: Help clients network with each other

Expansion Strategy Using Local Reputation:

- Adjacent Markets: Use local reputation to expand to nearby cities
- Vertical Expansion: Leverage reputation in one industry to enter related industries
- Service Expansion: Use trust from current services to introduce new offerings
- Digital Expansion: Use local testimonials and case studies to attract similar businesses in other markets

Key Insight: Local reputation is like compound interest—it builds on itself. The more systematically you leverage it, the stronger it becomes and the harder it is for competitors to replicate.





Q12: "WHAT IF WE DON'T THINK WE HAVE ANY CLEAR ADVANTAGES—WHERE DO WE START?"

Answer: This is more common than you think, and often it's a perception problem rather than a reality problem. Here's a systematic approach to discover and develop advantages:

Step I:Advantages Discovery Process

- Customer Interview Approach:
 - Call your top 5 customers and ask: "Why did you choose us over competitors?"
 - Follow up with: "What would you miss most if we disappeared tomorrow?"
 - Ask: "What do your friends say when you recommend us?"
 - Listen for patterns in their language—that's your hidden advantage
- Internal Audit Questions:
 - What do we do that competitors struggle with?
 - What do customers consistently compliment us on?
 - What processes do we have that others don't?
 - What relationships give us an edge?
 - What do we know that others don't?
- Competitor Analysis:
 - Where do competitors' customers complain about them?
 - What don't they offer that customers want?
 - Where are they consistently weak?
 - What would be expensive/difficult for them to copy?

Step 2:Advantage Development Strategy

- If You Truly Have No Advantages: Build Operational Excellence:
 - Become exceptional at the basics (response time, followthrough, quality)
 - Develop systems that create consistent, superior customer experience
 - Focus on one area where you can become measurably better
- Create Positioning Advantages:
 - Choose a specific niche where you can become #I
 - Develop unique methodology or process
 - Build strategic partnerships that others can't access
- Develop Knowledge Advantages:
 - Become the expert in specific customer problems
 - Create proprietary research or insights
 - Develop unique perspective on industry trends

Remember: Every business that seems to have "natural" advantages developed them systematically over time. The key is starting somewhere and building consistently.



