



[www.tacticalexecution.com](http://www.tacticalexecution.com)

## STRATEGIC CONSULTING SERVICES

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### Prepared by

[Patrick Schwerdtfeger](#)

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*your source for implementation solutions*

Tactical Execution provides the most efficient and cost effective way for you to obtain expert guidance and detailed implementation solutions tailored for your specific circumstances. This document outlines exactly how Tactical Execution can contribute to your marketing objectives. The central component of our contribution comes in the form of a report containing a detailed implementation strategy designed specifically for a corporate user.

The report offers a step-by-step implementation guide for your stated marketing objectives. The document is organized by module, each addressing one particular objective and containing a series of tasks. This allows a critical path to be identified as well as a schedule of deliverables. Each module can be implemented separately, allowing your management team to determine the timing for project completion.

Modules are handled like subscriptions. Tactical Execution regularly updates each module to incorporate new technologies and strategies, and you will automatically get updates for the modules you have purchased in the past. By enlisting Tactical Execution once, you receive perpetual access to the latest techniques for each of your marketing objectives.

The primary report is designed for the Project Manager and includes the following:

1. Project overview and critical path analysis
2. Module identification and background discussion
3. Module prerequisite and reliant relationships
4. Schedule of deliverables by module & task
5. Coordination and implementation guidance

The report also comes with a series of appendices, one for each module. Each appendix is designed to be given directly to the employees responsible for that module, providing a physical document to guide the employee through his or her particular contribution. Tasks are presented sequentially to maximize efficiencies during implementation. Each appendix includes the following:

1. Description of the module and its role within the project
2. Background discussion to educate the employee about their contribution
3. Identification of prerequisite and reliant module relationships
4. Itemized checklist of tasks including estimated time requirements
5. Description of the final deliverables

The objective behind this approach is to deliver a report that encompasses the entire project in a single document and provide a complete implementation tool the company can use without requiring ongoing consulting services, saving time and money. Of course, consulting services are always available but the decision to use those services should remain discretionary.



Tactical Execution was founded by Patrick Schwerdtfeger in 2007 after years of sharing expertise about innovative marketing and strategic positioning. Patrick's podcasts have been downloaded over 17,000 times in 27 countries and he has authored two books. You can find his articles on literally thousands of websites. Just do a Google search for "Patrick Schwerdtfeger" to see for yourself.

Tactical Execution has accumulated an extensive inventory of implementation solutions for a wide array of marketing objectives.

These solutions fall into one of three categories: online marketing, offline marketing and strategic positioning. Solutions are organized into a series of modules, each of which can be incorporated into a particular project.

Each module addresses a specific marketing objective and is designed to be a free-standing unit, allowing independent implementation. This structure allows you to select only those modules that fit within your current marketing strategy. It also allows us to offer maximum value to our clients. Our basic package includes five modules and clients generally request additional modules as their businesses evolve.

Tactical Execution believes in a value-first marketing approach. Over-marketing has resulted in suspicion and skepticism in the consumer mindset and a dedication to provide value first and sell products or services second is the fastest way to build trust in today's consumer marketplace. All of our modules are based on this philosophy and we implement it by seeking opportunities to demonstrate expertise directly to the target market.

Consumers are desensitized to clever marketing slogans and no longer believe empty product claims. Instead, they want proof. They want to sample the product before they buy. They want to feel the value before they commit real dollars. But if you give them that opportunity – if you give them the value first, allowing them to see what you bring to the table – they'll exhibit even more customer loyalty than their gullible predecessors. Win them over once and keep them for life.

There are three basic strategies in marketing:

1. Education – demonstrate expertise & provide tools they can use
2. Entertainment – amaze them, shock them or make them laugh
3. Repetition – hit the same audience with the same message repeatedly

Most marketing campaigns involve some combination of those three. Tactical Execution clearly champions to the first approach but the other two are used as well. A number of our modules rely on entertainment and/or repetition to drive the message home. We just feel the first offers the greatest long-term results in terms of customer loyalty, that's all.

Each category of modules will be discussed separately. Although not all modules are required for every project, a complete list is included for your consideration.

## I Online Marketing Modules

Keyword Selection & Targeting	<input type="checkbox"/>
Website Positioning, Design & Calibration	<input type="checkbox"/>
RSS Techniques (Sites, Blogs & Podcasting)	<input type="checkbox"/>
Squeeze Pages & Sales Letters	<input type="checkbox"/>
Search Engine Optimization & PageRank	<input type="checkbox"/>
Generating Organic Website Traffic	<input type="checkbox"/>
Pay-Per-Click Advertising & Quality Scores	<input type="checkbox"/>
Viral Marketing (MySpace, eBooks & YouTube)	<input type="checkbox"/>
Building an Email List & Publishing Ezines	<input type="checkbox"/>
Joint Venture & Affiliate Programs	<input type="checkbox"/>

Internet marketing boils down to two basic steps:

1. Getting people to your website.
2. Impressing them once they arrive.

The process begins with step #2 and the first five modules need to be incorporated in that process. Although they also play a major role in driving traffic, their contribution to a winning website is critical. The second five deal solely with traffic generation and only one (pay-per-click) requires a significant budget. The rest just take time and direction. Tactical Execution can provide the direction but you have to be comfortable with an ongoing time commitment to see real results.

### a. Website Optimization

The cornerstones of an effective website are:

1. Focus – go “an inch wide and a mile deep” with a very specific topic
2. Depth – build an overwhelming online presence around that topic
3. Value – make your website “sticky” with value items and resource tools

But before you even get to those cornerstones, you have to solidify your strategic positioning. When a visitor first enters your website, you “own the frame”. You have complete control over the first impression they experience and you can present whatever reality you wish. The trick is to use that opportunity to present what you hope to become, not what you might currently be.

The objective is to greet first-time visitors with a much larger reality than they were expecting. You want to show them that you’re a much wider resource; a true industry leader and a place where they can always get what they need and even educate themselves along the way. That frame exists for all webmasters but few take advantage. Tactical Execution will help you define the larger vision of what’s possible and provide detailed implementation guidance.

b. Driving Website Traffic

The traffic generation modules focus on driving targeted traffic to your website. Truth be told, it's easy to drive meaningless traffic to a site. Anyone can subscribe to a traffic exchange and see hundreds or even thousands of unique "visitors" each day but none of those people will do *anything* while on your site. Bottom line; you want targeted high-quality traffic and that requires more effort.

Building organic website traffic is a simple process.

1. Maximize the number of entry points to your website.
2. Ensure the entry points are accessible to your target market.
3. Ensure the entry points offer a positive first impression.

The trick is to demonstrate expertise in places where your target market spends time. For almost any field, there are great online locations you can target and many of them are free. Forums and blogs are a good place to start but there are many more. Even Yahoo and Amazon provide facilities where you can provide real value directly to your ideal customers. The objective is to attract visitors who have a high probability of becoming customers.

## **II Offline Marketing Modules**

- Building Revenue with Workshops & Seminars
- Using Press Releases & the Media
- Leveraging Tradeshows & Festivals
- Direct Mail & Drip Marketing Campaigns
- Traditional Print Advertising
- Write & Self-Publish Your Own Book
- Publish a Book Through a Traditional Publisher

All of the offline modules revolve around strategic positioning. As mentioned earlier, some marketing techniques rely more on entertainment and/or repetition. We're all familiar with clever slogans or funny advertising campaigns that attempt to win us over with repetition or by making us laugh. While such techniques have proven track records for commodity-type consumer products, we believe they're less effective for B2B markets and other serious products.

The best market position is the premium label. The high-quality premium provider is the one who can maintain the highest profit margins with the least amount of groveling. Of course, quality is a critical requirement. But if that is assumed, the entire marketing effort needs to perpetuate the quality reputation and the premium image. Each module offline is designed to promote the premium market position by creating an opportunity to demonstrate superiority directly to the target market.

There are no realities in this world. There are only perceptions. The objective of effective marketing is to promote perceptions that deliver profitable business.

### III Strategic Positioning Modules

Company Values & Core Beliefs	<input type="checkbox"/>
Writing a Company Mission Statement	<input type="checkbox"/>
Macro-Economic Landscape	<input type="checkbox"/>
Global Geopolitical Monitor	<input type="checkbox"/>
Consumer Trend Advisor	<input type="checkbox"/>
The Future of P/E Ratios & Stock Valuations	<input type="checkbox"/>
The Future of Interest Rates & Housing Prices	<input type="checkbox"/>

The strategic positioning modules are all executive level topics. The first two form the backdrop for everything else. In fact, the ideal early-stage venture would begin with these two modules followed by the first online module about keyword selection and targeting. Those three modules implemented during the formative stage would yield a solid foundation from which to build a business. Indeed, these steps taken early on would save countless hours and dollars later on.

For established companies, the decision of whether or not to go through those steps is more subjective. Management may feel like these steps have been addressed and the strategic positioning is already in place. Tactical Execution believes these modules are among its most valuable and recommends them to all its clients. This is even more important when online adjustments are being made. The opportunity available through the internet accompanied by an effective implementation strategy can dramatically change the nature of an established business and a focused corporate identity always accelerates online results.

The remaining modules in the strategic positioning category involve high-level market analysis and Tactical Execution spends a lot of time monitoring this type of information. In fact, the extent of this type of advanced research is showcased by the [MEICAP model](#), a proprietary economic forecasting tool that calculates P/E ratios and interest rates based on a dynamic population platform combined with income and spending data from the US Census Bureau.

Tactical Execution provides sophisticated guidance for executive level strategic positioning discussions. We constantly stay on top of economic, geopolitical and consumer shifts, updating our modules accordingly. Keep in mind that we treat each module like a subscription. Once you've utilized the value once, you will continue to get updated versions as our research evolves.

For obvious reasons, these strategic positioning modules are less tactical. They provide fascinating executive-level information as well as broad recommendations but the decision of how to monetize this type of information has to be left to the client. Undoubtedly, all these evolving realities carry significant opportunities but it's the creativity and vision of specific companies that will transform these opportunities into realities.

Tactical Execution offers the Implementation 101 package is the most economical way to get started. The package includes any five modules from our selection. You can also request a new module and we will research the topic and develop the material specifically for your needs. Once project objectives are identified, Tactical Execution will compile the report and deliver it within one calendar month. If a new module is requested, we will need an additional three weeks to ensure it meets your requirements and our own internal standards.

Please keep in mind that our modules are treated as subscriptions. Tactical Execution regularly updates modules to incorporate new technologies and strategies, and you will automatically get updates for the modules you select.

Implementation 101 includes four hours of initial discussions to ensure all project objectives are properly identified and timelines addressed. These discussions are normally scheduled as conference calls. This will also allow us to get the industry background information we need to ensure our suggestions and recommendations are relevant to your current business environment.

We understand the delivery of such a document only represents the beginning of the project from your perspective and that many of the implementation challenges will remain unknown at that point. Implementation 101 also includes eight hours of post-delivery consulting services by Patrick Schwerdtfeger.

**Implementation 101 Package Cost: \$ 4000 USD**

Tactical Execution requires advance payment of half the Project Cost (\$2000 USD) before work can begin. Check should be sent to the following address:

**Tactical Execution**

Attn: Patrick Schwerdtfeger  
1473 Pico Court, Suite L  
Walnut Creek, CA 94597

Please make the check payable to **Beyond the Rate, Inc.**

Patrick Schwerdtfeger will also be available for additional consulting services at a rate of \$175 USD per hour. Such services can be scheduled as conference calls or onsite. If travel is necessary, reasonable travel expenses are charged to the client (see contract) and two weeks notice is requested.

Additional modules are available at any time. If they are ordered in conjunction with the Implementation 101 package, they can be added for \$500 per module. If they are ordered separately, they are \$600 per module and include two hours to identify objectives and timelines. Post-delivery consulting services are billed separately. Clients are welcome to order the Implementation 101 package as often as they like.

As a good faith demonstration of the strategies Tactical Execution uses, we have included a series of suggestions to build website traffic with little or no money. These tactics are generic in nature and could be used by virtually any webmaster.

### **Laying the Foundation**

- Specifically identify your target market including commonalities & grievances
- Research and develop a list of targeted keywords and keyword phrases
- Write a 15 to 25-word keyword-rich corporate positioning statement
- Include the positioning statement in your meta tags and on your homepage
- Add your positioning statement and a link to your standard email signature.

### **Optimize Your Website**

- Optimize each page of your website with targeted keywords and phrases.
- Offer your target market a value item or a resource tool on your website.
- Use an autoresponder to accumulate email addresses and then stay in touch.
- Start an email newsletter to offer value and point back to your website.
- Give your visitors more and more reasons to come back to see new things.

### **Build an Online Presence**

- Manually submit your website to all the major search engines.
- Submit your website to any industry niche directories on the internet.
- Start a free lens on Squidoo.com and direct visitors to your website.
- Create a myspace page, add friends and link to your regular blog or website.

### **Publish articles online**

- Write brief outlines for articles you can write to demonstrate expertise.
- Publish 500 to 700-word keyword-rich articles at least twice each week.
- Post to the top article directories and distribute through [iSnare.com](http://iSnare.com) (\$1 ea.).
- Put your link on targeted keyword phrases to increase Google pagerank.

### **Post regularly on popular blogs & forums**

- Identify popular blogs and forums in your area of business or expertise.
- Never over-promote your website. Add value and include a link, that's it.
- Contribute value to existing forum threads and build your number of posts.
- Make sure you keep your own threads at the top by posting to them yourself.

### **Answer questions at <http://answers.yahoo.com>**

- Create an account including a link back to your website.
- Search for the industry-specific questions you have answers for.
- Provide value with little nuggets of useful information for each question.

### **Start your own blog on WordPress or Blogger**

- Post regularly and use keyword-rich titles (they're included in the URL).
- Register with blog directories and join syndication networks like BlogRush.
- Participate in the blogger community (add friends & cross link posts).

### **Start a podcast and register on iTunes**

- Demonstrate expertise by recording podcasts about your area of expertise.
- Register your podcast with iTunes and the top online podcast directories.
- Contact other industry experts and offer to interview them on your podcast.
- Cross reference value items on your website to encourage listeners to visit.

### **Take advantage of high-traffic bulletin boards**

- Post regularly on high-traffic bulletin boards like Craig's List.
- Find reasons to post classified ads (top sites at [TacticalExecution.com](http://TacticalExecution.com)).
- Place free classified ads on websites like eBay, Yahoo and MySpace.
- Run inexpensive targeted ads on AdBrite.com or Text-Link-ads.com.

### **Offer Testimonials**

- Create an Amazon profile and submit reviews for books you've read.
- Offer a testimonial for a product you've used in exchange for a link.
- Send a free product to popular website owners in exchange for a review.

### **Generate Publicity**

- Do something controversial and publicize it on the internet.
- Conduct a survey, publish the results on your site and announce it online.
- Write a press release and distribute it on a news wire service.

### **Encourage Viral Marketing**

- Record and post an entertaining and/or educational video to YouTube.
- Add an RSS feed to your website so visitors can subscribe to your content.
- Add "bookmark this page" and "tell a friend" links on all of your webpages.
- Create & sell an ebook that includes links to your site along with resale rights
- Get an ISBN number (required) and then sell your ebook on Amazon.com
- Create a free ebook and post it on the many free ebook directories.
- Start an affiliate program, encouraging your existing visitors to invite friends.

### **Cater to social bookmarking services**

- Give your visitors a reason to come back (like updating information).
- Make sure you're providing real value on the target page.
- Ask for the sale! Encourage your visitors to bookmark the page.
- Make it easy! Add social bookmarking buttons to the bottom of your pages.

### **Other Suggestions**

- Create a custom 404 error page to redirect visitors to your homepage.
- Exchange reciprocal links with other websites in your area of business.
- Use traffic exchange services (generally low quality but traffic nonetheless)



Return by fax to 925-476-0799

*Yes! We are interested in working with Tactical Execution.***Company Information**

Company Name
Type of Business
Street Address
City, ST ZIP

**Contact Information**

Primary Contact	Phone
Email Address	Fax
Secondary Contact	Phone
Email Address	Fax

**Basic Information**

Year Established	2006 Revenue	2007 Projected
What is the industry's greatest challenge today?		
What is the industry's greatest opportunity today?		

**Competitive Information**

Who is your biggest competitor?
What is their greatest strength?
What is their greatest weakness?

## Customer Information

Who is your biggest customer group today?
Who would you like to target in the future?
What is their greatest grievance today?

Please select the modules you are considering, pending further discussions.

### **I Online Marketing Modules**

- Keyword Selection & Targeting
- Website Positioning, Design & Calibration
- RSS Techniques (Sites, Blogs & Podcasting)
- Squeeze Pages & Sales Letters
- Search Engine Optimization & PageRank
- Generating Organic Website Traffic
- Pay-Per-Click Advertising & Quality Scores
- Viral Marketing (MySpace, eBooks & YouTube)
- Building an Email List & Publishing Ezines
- Joint Venture & Affiliate Programs

### **II Offline Marketing Modules**

- Building Revenue with Workshops & Seminars
- Using Press Releases & the Media
- Leveraging Tradeshows & Festivals
- Direct Mail & Drip Marketing Campaigns
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### **III Strategic Positioning Modules**

- Company Values & Core Beliefs
- Writing a Company Mission Statement
- Macro-Economic Landscape
- Global Geopolitical Monitor
- Consumer Trend Advisor
- The Future of P/E Ratios & Stock Valuations
- The Future of Interest Rates & Housing Prices

**Thank you for your interest! We'll contact you soon to begin a dialog.**

## Contract for Consulting Services Implementation 101 Package

### 1. Parties to the Contract

This agreement entered into on this \_\_\_\_\_ day of \_\_\_\_\_, 2007  
by and between

**Beyond the Rate Inc. dba Tactical Execution**  
(hereinafter referred to as "Consultant")

-- and --

\_\_\_\_\_  
(hereinafter referred to as "Client")

shall govern the rendering of professional consulting services between Consultant and Client, detailed below.

### 2. Terms of the Contract

The duties and obligations of Consultant and Client shall commence on the effective date of this contract and continue until the deliverables listed below have been received by Client, subject to further amendments.

### 3. Project Summary

Whereas Client is currently attempting to improve its marketing effectiveness and/or strategic positioning and whereas Client has limited time and resources to make said improvements, it is the desire of Client to engage the services of Consultant to provide detailed implementation guidance for said improvements. Specifically, Client desires to make the following improvements:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

The deliverables comprising the implementation guidance provided by Consultant and covered by this agreement include the following:

<u>Item Description</u>	<u>Cost</u>	<u>Total</u>
<b>Implementation 101 Package</b>	\$ 4000	\$ 4000
4 hours to identify objectives and timelines	incl.	
Module #1: _____	incl.	
Module #2: _____	incl.	
Module #3: _____	incl.	
Module #4: _____	incl.	
Module #5: _____	incl.	
8 hours of post-delivery consulting services	incl.	
 <b>Additional Modules Selected</b>		
Module #6: _____	\$ 500	
Module #7: _____	\$ 500	
Module #8: _____	\$ 500	
<b>Total Project Cost (½ due up front):</b>		<b>\$ _____</b>

Delivery of the above items will constitute satisfaction of the terms of this agreement, subject to further addendums.

Consultant retains copyright on all materials and modules, even if they were developed specifically for Client.

#### **4. Responsibilities of Consultant**

Consultant will provide professional services as requested by Client and as considered appropriate under the circumstances. Consultant is responsible for:

1. Gathering and collecting the necessary information and clarifying the specific objectives related to this project.
2. Organizing and compiling the necessary expertise to ensure the implementation guide will allow Client to achieve its objectives.
3. Communicating the progress of deliverables on a regular basis to Client's management and making appropriate presentations to Officers, Directors, and Managers regarding the administration of and issues related to deliverables covered under this agreement.
4. Making Consultant's resources and expertise available to all interested parties within Client's organization (at an agreed upon hourly less time already covered in this agreement) as deemed reasonable to ensure the project is successfully implemented.

## 5. Responsibilities of Client

In order to ensure the success of projects covered in this agreement, Client shall:

1. Provide access to project team members to allow Consultant to maximize congruence between the implementation guide and Client's existing systems, procedures and objectives.
2. Provide the necessary administrative facilities including photocopying, phones, faxes, internet access and other services while Consultant is onsite at Client's location.
3. Communicating all pertinent facts, issues, and other information to Consultant regarding project related work.

## 6. Compensation Provisions

The Project Cost for the deliverables outlined in the Project Summary is:

**Project Cost:     \$ 4000 USD**

Client agrees to remit payment for half the total Project Cost before Consultant is expected to begin work on the deliverables covered by this agreement. In exchange, Consultant agrees to spend a minimum of 10 hours on the project without any further charges incurred.

Checks should be made payable to Beyond the Rate, Inc., and sent to:

**Tactical Execution**

Attn: Patrick Schwerdtfeger  
1473 Pico Court, Suite L  
Walnut Creek, CA 94597

For services rendered beyond the deliverables outlined in the Project Summary, Consultant shall receive compensation at the following rates:

**Hourly rate:     \$ 175 USD**

In addition to the hourly rates for services rendered, Consultant shall receive reimbursement for all direct costs associated with the project covered by this agreement. Direct costs may include but are not limited to books, manuals, airfare, lodging and meals while traveling. Direct expenses shall be charged at actual cost. Air travel (if applicable) shall be limited to standard coach rates. Meals while traveling shall be limited to \$50 USD per day.

For services rendered beyond the deliverables outlined in the Project Summary, Consultant shall submit monthly invoices in support of all charges with appropriate descriptions of work performed. Client shall remit payment to Consultant within 30 days of the invoice date or submission date, whichever is later.

## **7. Retention Contract**

In the event Client requires extensive (more than 40 hours) follow-up work from Consultant, Consultant shall offer Client a retainer contract to manage subsequent work of projects covered under this agreement. The retainer contract shall offer hourly rates 25% below the rates quoted in this agreement.

## **8. Sub-Contracting**

Client retains the right to engage, employ, hire or secure the services of other providers to support the execution of specific recommendations outlined in the implementation guide as long as such arrangements are not designed to replace or subvert the deliverables outlined in the Project Summary.

Consultant retains the right to engage, employ, hire or secure the services of other providers to support the completion of deliverables covered by this agreement as long as such arrangements do not affect the Project Cost and other fees covered by this agreement. Should such arrangements affect said costs and fees, Consultant will secure Client agreement before proceeding and the associated costs will be chargeable to Client as agreed upon under separate provisions.

## **9. Limitations of Liability**

Client agrees to allocate risks so that, to the fullest extent permitted by law, Consultant's total aggregate liability to Client and all contractors and subcontractors (if any) is limited to the Project Cost or the total amount of Consultant's fees, whichever is greater, for any and all injuries, damages, claims, losses, expenses or claim expenses (including attorneys' fees) arising out of this agreement from any cause(s). Such cause(s) may include but are not limited to Consultant's negligence, errors, omissions, strict liability, breach of contract, or breach of warranty. Client further agrees to notify all contractors and sub-contractors (if any) of this limitation of Consultant's liability and require them to abide by this limitation of damages suffered by any contractor or subcontractor arising from Consultant's actions or inactions. Neither the Consultant nor any subcontractor assumes any liability for damages to others which may arise on account of Consultant's actions or inactions.

## **10. Termination Clause**

Client has the right to terminate this agreement at any time and for any reason with five (5) business days written notice to Consultant and will only be responsible for charges incurred up to the receipt of the notice or until the date specified in such notice, whichever is later.

Consultant has the right to terminate this agreement in the event that Client fails to remit payment for services rendered within thirty (30) days of the invoice date or submission date, whichever is later. Consultant also has the right to terminate this agreement if Client makes it unreasonably difficult for Consultant to satisfy the requirements outlined in the Project Summary.

## 11. Signatures to Contract

This agreement shall be binding on the parties hereto and shall be governed under the laws of the State of California in the United States of America.

### Client Signature:

Authorized Signature
Date of Signature
Print Full Name
Organization Name

The person named above hereby certifies that he/she is duly authorized by Client to embrace and encumber Client to the terms and conditions of this agreement.

### Consultant Signature:

Authorized Signature
Date of Signature
Print Full Name <i>Patrick Schwerdtfeger</i>
Organization Name <i>Beyond the Rate, Inc., dba Tactical Execution</i>