Vol 1

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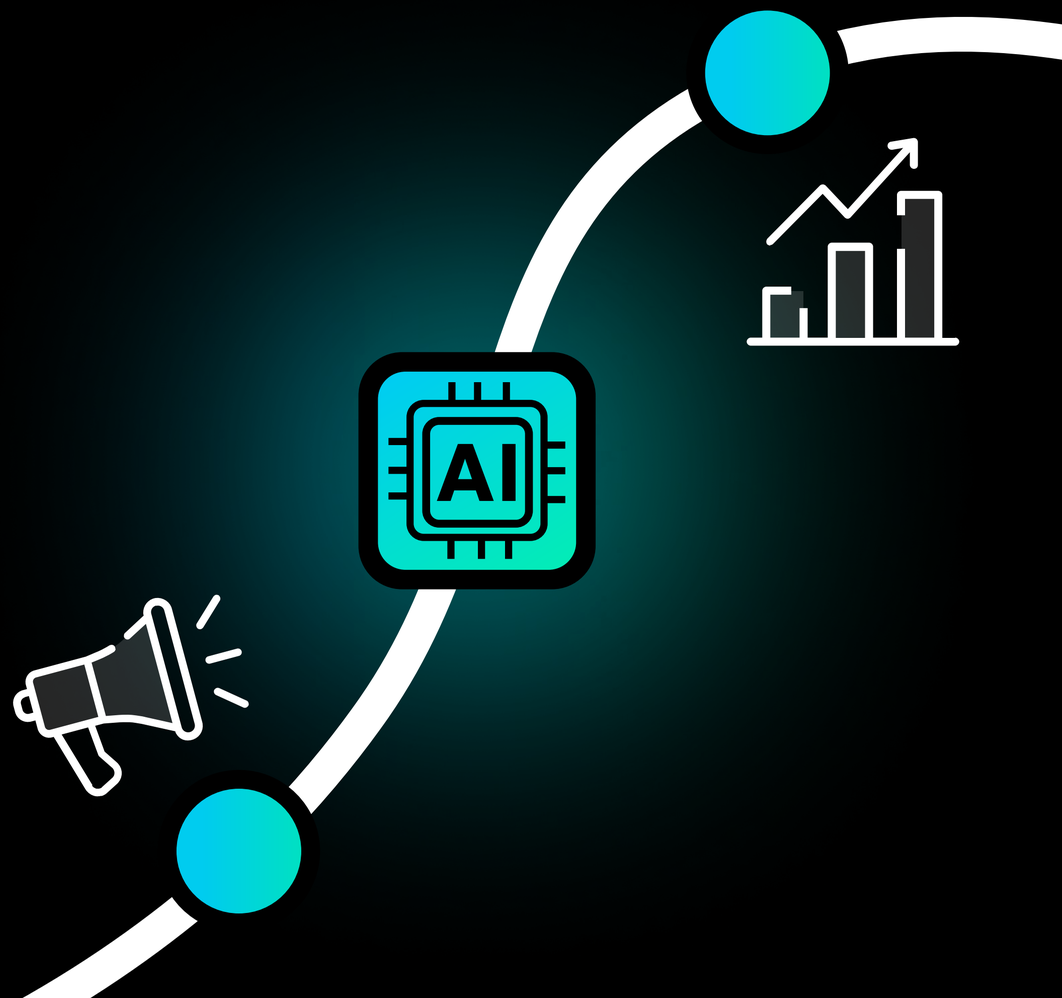
AI-Era Marketing Strategy.

Built for teams that need results, not more tools



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Why This Template Matters?

This template gives companies an easy, step-by-step solution for creating a complete digital marketing strategy, designed for **better AI discoverability and overall performance.**

Most companies struggle to build a clear and actionable strategy. This template fixes that by offering you a simple plan you can execute.

Our AI-assisted approach to complete this template ensures that even those without extensive marketing expertise can make better decisions, leading to a more focused, cost-effective strategy.

Co-create Using AI, and Build for AI Discoverability

This PDF is optimised for AI readability, making it easy to drag, drop, and collaborate with compatible AI language models.

We recommend addressing each section separately for optimal results. For inspiration, consider these **example prompts** you can use to complete each section:

Buyer Persona Template - Complete the buyer persona template in this PDF, targeting [Provide your Buyer Persona details]. My business is [Provide a brief business description].

Core Marketing Funnel Template - Use the Buyer Persona you just generated to complete the Core Marketing Funnel section.

Content Production Template - Complete the content production template. My business is [B2B or B2C] and base it on the core marketing funnel you created.

Marketing Channel Strategy Template - Complete the marketing channel strategy based on the Buyer Persona and Core Marketing Funnel.

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To validate your plan. Book us for a free strategy session.

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Buyer Persona (Example)

An effective buyer persona reflects a real customer. The more detail you provide the better. Drop this template into your preferred LLM and ask it to complete the persona using your inputs.

NAME:	Peter Lacey
GENDER:	Male
AGE:	40
INCOME:	$110,000 AUD
INDUSTRY:	Finance and Insurance
LOCATION:	Gold Coast, Queensland, Australia
EDUCATION:	Bachelor's degree in Finance
POSITION:	Asset Finance Broker, Owner of Aim Financial.

Buyer bio:

Peter Lacey is an Asset Finance Broker at Aim Financials, he has an extensive background in finance since 2009. His career has spanned roles in banking and asset finance brokerage. Peter's expertise lies in delivering excellent service, securing fast approvals and settlements. He is a Brisbane native and a resident of Gold Coast since age 12.

Their challenges:

- Staying ahead in a competitive finance industry.
- Keeping up with changing regulations.
- Expanding his business while maintaining a high level of personal service and quality.

Their goals:

- To provide excellent service to his customers by leveraging his experience.
- To secure fast loan approvals and settlements, enhancing customer satisfaction.
- To continuously grow his network and business through effective partnerships.

Their pain points:

- Time constraints in dealing with various lenders and securing the best loan terms.
- Attracting premium clients.
- The stress involved in ensuring fast and efficient loan processing for clients.

Their influencers:

- Graham Stephan (YouTuber).
- Codie Sanchez (Influencer).
- Humphrey Yang (Influencer).

Their go-to platforms and media channels:

- LinkedIn for networking and industry updates.
- YouTube for learning and watching his influencers.
- Industry-specific websites for finance professionals.

Top 3 questions they might ask about your service or product:

- How can your service streamline my business operations and loan processing?
- How can your service help me find premium clients?
- How can your service help me save time and reduce stress in managing client loans?

Their top 3 desires from your service or product:

- Efficiency and time-saving features that allow for faster loan processing.
- A competitive edge through unique service offerings or technology.
- Support for business growth without compromising on personal service quality.

3 lead magnet ideas they will download:

- Faster loan processing using AI.
- How to stand out as a financial services provider
- How to scale your financial services without compromising on service quality.

Core Marketing Funnel (Example)

Each level of your marketing funnel is designed to guide your buyer persona toward your core offer. To complete this template, start at the top and work your way down. Define your Business Content first, then decide what offer you will present at each stage until you reach your core offer.

Business Content (BC) refers to the material you share across articles, social media, podcasts and other channels. It should demonstrate your expertise and show how you solve your buyer persona's challenges and pain points. This content also helps AI systems understand your offer and who you should be recommended to.

Top of Funnel

1

Business Content (BC)

Secondary topic: Navigating regulatory changes in the finance industry.

Secondary topic: Expanding your finance brokerage business.

Primary topic: Streamlining loan processing for finance brokers.

Secondary topic: Work-life balance for finance professionals.

Secondary topic: Latest trends in the automotive and finance industries.

2

Lead Magnets offer actionable resources like templates, guides, and tools. This gives you an opportunity to collect their contact details.

Your Lead Magnet (LM):
"The Ultimate Guide to Loan Processing for Finance Brokers."

3

Deep Dive Content offers in-depth education on solving specific pain points through compelling stories, case studies, or webinars.

Deep Dive Content (DDC):
Success stories from our brokers.

4

Foot-in-the-Door Offers provide a direct engagement opportunity with your warmer leads through free consultations, demos, or trials.

Foot-in-the-Door (FITD) offer:
A free webinar offering a deep dive into effective strategies for loan brokers.

5

Core Offers represent the primary products or services you offer, aiming to be the ultimate step in your Buyer Persona's journey towards their desired outcome.

Core Offer (CO):
Software for Finance Brokers.

Bottom of Funnel

Use an email sequence to funnel leads through each of your offers

Email Marketing Sequence

Email 1 (DDC)
Offer more value and social proof to build trust (i.e. case study)

Email Subject: Incredible Client Result After 2 Years - Free Case Study

Email 2 (FITD)
Try to engage directly (i.e. consultation, demo, product samples)

Email Subject: Exclusive Invitation for Brokers: Join Our Free Webinar

Email 3 (CO)
Cover your core offer benefits and value proposition.

Email Subject: Transform Your Finance Brokerage with Our AI Powered Software.

Upon completion of the sequence, add the lead to your email list for further nurturing.

Content Production Plan [Example]

Quick Guide

Your weekly content plan:
This is your output each week, how many posts, videos, and articles you create. Start with 1 core idea (e.g. a client result or trend) and adapt it into multiple formats.
Example: 1 idea = LinkedIn post, short video, blog.

Your content pillars:
These are your themes what each piece of content is about. Choose a pillar based on your goal:
- Want authority → share insights or opinions
- Want proof → show results or case studies
- Want leads → explain a framework or solution

Recommended channels:
LLMs like ChatGPT are trained to pull data from platforms with strong authority and real conversations. Most trusted platforms include:
- LinkedIn
- Reddit
- YouTube
- Google Blogs (SEO content)
- X (Twitter)
- Medium
- Facebook

For B2B Business

AI platforms prioritise depth, credibility, and structured expertise. Long-form content, consistent LinkedIn authority, and case-driven insights help you become a trusted source that AI tools cite and recommend.

Weekly Content Plan

2x LinkedIn posts (insights, opinions, case studies)
1x Blog article (SEO + authority)
1x Short-form video (LinkedIn / YouTube Shorts)
1x Deep content / case study (bi-weekly)

Content Pillars

Authority → insights, trends, opinions

Proof → case studies, results

Education → how-to, frameworks

Personal brand → founder Point of View (POV)

For B2C Business

AI amplifies high-engagement, high-volume content that signals popularity and relevance. Short-form video, strong hooks, and consistent social activity help your brand surface in discovery-driven AI answers.

Weekly Content Plan

Content Pillars

Marketing Channel Strategy (Example)

Begin by selecting the marketing channels and offers you want to promote. Each channel should be used with intention, based on your audience and its effectiveness in building your authority with search engines and LLMs.

Your Business Content and Lead Magnets should be distributed on high-trust, high-volume platforms such as LinkedIn, YouTube, blogs, and Reddit. These channels help build authority and generate engagement.

As your audience becomes more familiar with your business, use channels such as email marketing, retargeting ads, and direct-response platforms to guide them to deeper content and offers.

Offer Abbreviations

- BC - Business Content
- LM - Lead Magnet
- DDC - Deep-Dive-Content
- FITD - Foot In The Door
- CO - Core Offer

~~Google Ads~~

Warm audience:

BC, ~~LM~~, ~~DDC~~, ~~FITD~~, CO

Cold audience:

BC, ~~LM~~, DDC, FITD, CO

Facebook Ads

Warm audience:

BC, LM, DDC, FITD, CO

Cold audience:

BC, LM, DDC, FITD, CO

Instagram Ads

Warm audience:

BC, LM, DDC, FITD, CO

Cold audience:

BC, LM, DDC, FITD, CO

~~LinkedIn Ads~~

Warm audience:

BC, LM, ~~DDC~~, ~~FITD~~, ~~CO~~

Cold audience:

~~BC~~, ~~LM~~, DDC, FITD, CO

Twitter (X) Ads

Warm audience:

BC, LM, DDC, FITD, CO

Cold audience:

BC, LM, DDC, FITD, CO

TikTok Ads

Warm audience:

BC, LM, DDC, FITD, CO

Cold audience:

BC, LM, DDC, FITD, CO

~~YouTube Ads~~

Warm audience:

BC, LM, ~~DDC~~, ~~FITD~~, CO

Cold audience:

~~BC~~, ~~LM~~, DDC, FITD, CO

~~Email Marketing~~

Warm audience:

BC, ~~LM~~, ~~DDC~~, ~~FITD~~, ~~CO~~

Cold audience:

BC, LM, DDC, FITD, CO

~~Website (SEO)~~

Warm audience:

BC, ~~LM~~, ~~DDC~~, FITD, CO

Cold audience:

~~BC~~, LM, DDC, FITD, CO

Buyer Persona [Template]

Let's create an effective buyer persona using generative AI to help you make a start. An effective buyer persona mirrors the characteristics of a genuine potential customer. The more information you have, the better.

#ChatGPT Prompt Directions: Copy and paste all the information you have about your ideal buyer persona and ask ChatGPT to complete this section. Simply drop the file in ChatGPT4 or copy and paste the text from this PDF.

ADD PHOTO

NAME:

GENDER:

AGE:

INCOME:

INDUSTRY:

LOCATION:

EDUCATION:

POSITION:

Buyer bio:

Their challenges:

-
-
-

Their goals:

-
-
-

Their pain points:

-
-
-

Their influencers:

-
-
-

Their go-to platforms and media channels:

-
-
-

Top 3 questions they might ask about your service or product:

-
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Their top 3 desires from your service or product:

-
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3 lead magnet ideas they will download:

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Top of Funnel

1

Business Content (BC)

Secondary topic:

Secondary topic:

Primary topic:

Secondary topic:

Secondary topic:

2

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Foot-in-the-Door (FITD) offer:

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Core Offer (CO):

Bottom of Funnel

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Email Subject:

Email 2 (FITD)

Try to engage directly (i.e. consultation, product samples).

Email Subject:

Email 3 (CO)

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Email Subject:

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Weekly Content Plan

Content Pillars

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Weekly Content Plan

Content Pillars

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Cold audience:

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Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO

LinkedIn Ads

Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO

Twitter (X) Ads

Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO

TikTok Ads

Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO

YouTube Ads

Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO

Email Marketing

Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO

Website (SEO)

Warm audience:

BC LM DDC FITD CO

Cold audience:

BC LM DDC FITD CO