Edward Eaton
MARKETING

COURSE

Marketing Strategy

How to choose where to compete, who to serve and how to stand apart, then turn those choices into a plan, a budget and a year of marketing that works

For business owners, marketers, agency staff and students. Beginner to advanced.

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Before you start

This course is educational. It is not legal, financial, medical or regulatory advice. Advertising platform rules and UK law change, so always check the current policies and guidance before you run ads. Links to the official sources are at the back.

Examples marked **illustrative** show a method with made up numbers so you can see the arithmetic. They are not promises of results. Results depend on your business, area, budget, offer and follow up.

Results I quote as real come from my own client work, with details removed.

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Welcome and how to use this course

Most marketing fails not because the tactics are poor, but because nobody decided what the marketing was for, who it was for and why anyone should choose you. Strategy is the set of choices that makes the tactics worth doing. This course teaches you how to make those choices, write them down and turn them into a plan.

WHAT YOU WILL BE ABLE TO DO

- Tell strategy from goals, plans and tactics, and spot a strategy that is really a wish list
- Diagnose your business, your market, your customers and your competitors with simple, repeatable methods
- Choose who you will serve, and who you will not, on purpose
- Build a position and an advantage that are hard to copy
- Set prices, offers and packages that reflect value and protect margin
- Choose a growth path and the channels that fit it
- Build a plan, a budget and a measurement system, and run a yearly review

Who this is for

Owners and managers who run their own marketing, marketers and agency staff who want a stronger foundation, and students of marketing. It works for any business, from a local clinic to a software firm. The examples lean towards service businesses, because that is where I work, but the thinking is general.

How the course is laid out

PART	WHAT IT COVERS
Chapters 1 to 4	Foundations: what strategy is, your business, your market and customers, your competitors
Chapters 5 to 8	Choices: advantage, positioning, value and pricing, growth
Chapters 9 to 11	Making it real: brand and memory, channels and the customer journey, planning and budgets
Chapters 12 to 14	Running it: measurement, execution and organisation, and strategy in action with illustrative cases
Chapter 15	A 90 day strategy sprint
Appendices	Templates, worksheets, a reading list, a glossary and a toolkit spreadsheet

Every chapter has the same shape: the idea, the method, a worked example with the arithmetic shown, common mistakes, an exercise and a summary. Examples marked illustrative are made up to show the method.

How to use it

- Keep a **strategy notebook**. Write your answers to every exercise in one place. By the end it becomes your strategy document.
- Do the exercises on your own business, not a hypothetical one.
- Be honest. Strategy built on flattering assumptions fails quietly and expensively.
- Share your draft with someone who will challenge you, such as a colleague, a mentor or a customer.

Where the ideas come from

The course draws on well established thinking, which I credit as I go: Richard Rumelt on good and bad strategy, Michael Porter on competitive advantage and trade offs, Al Ries and Jack Trout and April Dunford on positioning, Igor Ansoff on growth options, Byron Sharp and the Ehrenberg-Bass Institute on how brands grow, Clayton Christensen on the jobs customers hire products to do, Philip Kotler on segmentation and the marketing mix, and others. I explain each idea in my own words and show how to use it. The reading list at the back points you to the originals. Read them, because I can only give you the short version.

AN HONEST NOTE

Strategy is judgement under uncertainty. No framework gives the answer. Frameworks make your thinking visible so that you can test it, improve it and agree it with other people.

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CHAPTER 1

What strategy is, and what it is not

IN THIS CHAPTER

- The difference between strategy, goals, plans and tactics
- Rumelt's kernel of good strategy: diagnosis, guiding policy and coherent action
- Porter's point: strategy is about choices and trade offs
- The signs of bad strategy, and how to avoid them
- A one page strategy statement you will refine through the course

People use the word "strategy" for almost anything: a goal ("grow by 20 per cent"), a plan ("post three times a week") or a mission statement ("be the best"). Those are not strategies. Getting this right is the most useful thing you can do before you spend a penny on marketing.

Strategy, goals, plans and tactics

TERM	WHAT IT IS	EXAMPLE
Goal	A result you want	Win 20 more customers a year
Strategy	The choices about how you will win, given your situation	Serve busy homeowners in Blackpool who want a single point of contact, and be the firm with the clearest fixed price quote
Plan	What you will do, when, with what resources	Fixed price pages, a showroom open day each month, a quote in 48 hours
Tactic	A specific action	Run a Google Ads campaign for "kitchen fitters near me"

The strategy sits between the goal and the plan. It says **why** these actions, and not others, should get you to the goal.

The kernel of good strategy

Richard Rumelt, in *Good Strategy Bad Strategy*, argues that a good strategy has a kernel of three parts. In my words:

1. **Diagnosis.** A clear, honest explanation of what is going on and what the real challenge is. It simplifies a messy reality by naming the critical issue.
2. **Guiding policy.** An overall approach for dealing with that challenge. It rules some things in and many things out.
3. **Coherent actions.** Steps that fit together and support the guiding policy, rather than a list of unrelated initiatives.

WORKED EXAMPLE (ILLUSTRATIVE): A PRIVATE PHYSIOTHERAPY CLINIC

PART	STATEMENT
Diagnosis	The clinic has capacity but its diary has gaps midweek. Most new patients come from Google search for pain, where it competes on price with larger chains. Its reviews and local reputation are strong, but it does not use them. The real challenge is that it looks the same as every other physio in search results.
Guiding policy	Become the first choice for active adults who want to keep exercising, by specialising in sports and rehab, and win through speed of access and trust, not price.
Coherent actions	Create sports and rehab pages and ads. Offer midweek assessment slots. Build partnerships with three local clubs. Collect and show reviews. Stop discount promotions. Track bookings by source monthly.

Strategy is about choices and trade offs

Michael Porter has argued that strategy means choosing a distinctive set of activities and, importantly, deciding what not to do. If you try to be everything to everyone, you end up with no clear position. A real strategy makes some customers, some channels and some offers off limits. If nothing is off limits, you probably do not have a strategy yet.

A STRATEGY SAYS	A WISH LIST SAYS
"We serve these customers, not those."	"We serve everyone."
"We win on this, and we accept we are weaker on that."	"We are the best at everything."
"We will do these three things and stop those."	"We will do all of this."

The signs of bad strategy

- **Fluff:** grand words with no meaning, such as "world class customer centric solutions".
- **Failure to face the challenge:** no diagnosis, so no way to tell whether the actions fit.
- **Goals mistaken for strategy:** "increase sales by 30 per cent" with no explanation of how.
- **Bad objectives:** a long list of "priorities" that do not fit together or tackle the real obstacle.
- **No trade offs:** nothing is ruled out.

WORKED EXAMPLE (ILLUSTRATIVE): FROM WISH TO STRATEGY

Wish: "We want to be a leading provider of high quality home improvements and grow sales by 25 per cent."

Better: "We win kitchen and bathroom jobs worth £8,000 to £20,000 from homeowners aged 35 to 65 in the Fylde who dread the mess and uncertainty of a big project. We do it by offering design, one project manager and a fixed fitting date, and we say no to price only shoppers and small repair work. Growth of 25 per cent means about 30 more jobs a year, which needs about 250 qualified leads at a 12 per cent lead to sale rate."

Working: 30 / 0.12 = 250. The better version names the customer, the challenge, the approach and the numbers.

A one page strategy statement

You will refine this through the course. Start a draft now, even if parts are weak.

TEMPLATE

1. Where we are: a plain description of our situation and the main challenge (diagnosis).

2. Who we serve: the customers we focus on, and those we do not.

3. How we win: why they choose us over alternatives (our advantage and position).

4. What we offer and charge: our offers, packages and pricing logic.

5. How we grow: our growth path and channels.

6. What we will not do: the trade offs.

7. How we will know: the few numbers that tell us it is working.

COMMON MISTAKES

- Confusing a goal with a strategy.
- Making a strategy so broad that nothing is ruled out.
- Skipping the diagnosis and jumping to tactics.
- Writing strategy once a year and then ignoring it.
- Copying a competitor's strategy rather than choosing your own.

DO THIS NOW

In your notebook, write your current "strategy" in two sentences. Then test it: does it name a challenge, an approach and things you will not do? Rewrite it using the kernel, and start the one page statement with a rough answer for each of the seven parts.

CHAPTER SUMMARY

- Strategy is the set of choices that explains how you will win. It is not a goal, a plan or a slogan.
- A good strategy has a diagnosis, a guiding policy and coherent actions.
- Strategy means trade offs. Decide what you will not do.
- Bad strategy is vague, avoids the real challenge and ignores trade offs.

FREE SAMPLE

Want the full course?

This is the free sample of **Marketing Strategy**: the welcome chapter and Chapter 1. The full course has 25 sections:

- Chapter 2: Diagnose your business
- Chapter 3: Your market and your customers
- Chapter 4: Your competitors and your competitive landscape
- Chapter 5: Building a competitive advantage
- Chapter 6: Positioning
- Chapter 7: Value, offers and pricing
- Chapter 8: Choosing how to grow
- Chapter 9: Brand, memory and being easy to choose
- Chapter 10: Channels and the customer journey
- Chapter 11: Objectives, plans and budgets
- Chapter 12: Measurement that guides decisions
- Chapter 13: Execution, focus and organisation
- Chapter 14: Strategy in action: three illustrative cases
- Chapter 15: Your 90 day strategy sprint
- Appendix A: The strategy document template
- Appendix B: Diagnosis worksheets
- Appendix C: Customer research kit
- Appendix D: Positioning workshop
- Appendix E: Pricing and offers toolkit
- Appendix F: Planning and measurement formulas
- Appendix G: Review meetings, dashboards and decision logs
- Appendix H: Glossary
- Appendix I: Reading list and official sources

Get the full course at **edwardeatonmarketing.com/courses/marketing-strategy-course**.

Put it into practice

Work through one chapter at a time and keep a simple log of what you change and what happens.

Want a hand setting it up, or a second pair of eyes on your account? edwardeatonmarketing.com/contact

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