

# Just Enough Marketing for Freelancers

Frank Catalano, Intrinsic Strategy

Red Pencil in the Woods

24 September 2011

- Provide an overview of marketing – and what I’ve found does and doesn’t work
- I’m a consultant and writer – not an editor
- But like many of you, I have clients and am self-employed
- Say upfront: Like many professionals, success is about relationships, repeat business and referrals
  - So no magic bullets or quick hits



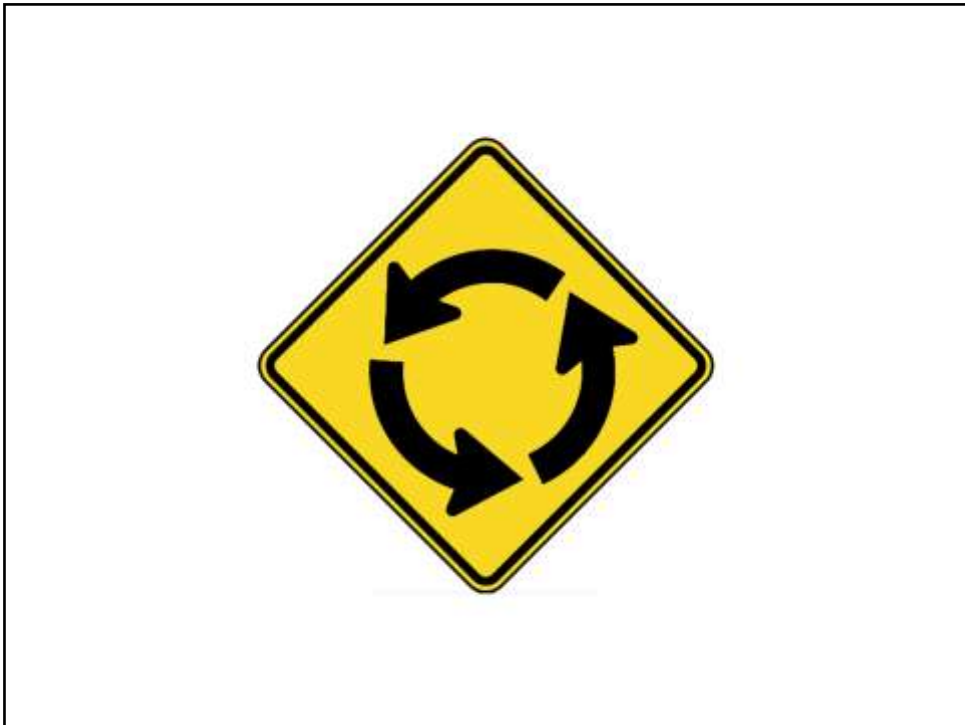
- Who I am
- Give you an idea of my perspective
- Intrinsic Strategy: marketing, branding and product strategy consultancy
- 20+ years consulting, 4 years as a corporate VP at Pearson
- Education, edtech and consumer/business tech
- Also a long-time freelance writer and columnist: GeekWire, PSBJ, Eastsideweek/Seattle Weekly, Seattle Times, Amazing Science Fiction, OMNI, AP Network News, RTNDA Communicator
- Co-author of two Dummies books



- So why market?
- Marketing is creating awareness and demand
- Build and maintain awareness that you're in business ... or still in business
- Provide a safe way to "get to know you" for clients before you approach them, or they approach you, one-on-one
- Establish a professional personality
  - Hiring a freelancer is as much about whether the client thinks you can do the job, as to whether you actually can do it – create a tone, and establish trust



- Why not to market
- To make yourself feel important or as though you're doing something
  - This is what I call "confusing any motion with forward motion"
- To avoid actual human contact and engaging a prospect
  - Such as publishing your fees or price list for everyone to see, out of context of a proposal
- To get lots and lots of unqualified leads, through promotions or direct marketing, that suck up valuable time
  - If you have to say "no" too often, that can hurt business in down times (referral network)



- Start with a marketing strategy
- Otherwise, as the sign shows, any direction will do if you don't care where you wind up
- A strategy is not a list of activities
  - It is an **approach**
  - You must have a strategy to know which tactics make sense, even as a sole proprietor
- Strategy also helps you develop your key message
  - Focus and communicate your core, not all in vague generalities – be specific
  - Yes, it's hard to do and requires discipline to not claim the ability to do everything that you can do

## Just Enough Strategy: **The Three Cs**

by Frank Catalano  
Catalano Consulting

The panic doesn't usually creep into their voices until we're nearly done with the coffee.

"I know strategy is important," the colleague will say to me as we wrap up. "But I can't spend a lot of time or effort on marketing strategy. I need to do stuff that will generate sales today."

I'll nod sagely. And hope he doesn't waste too much money on misdirected marketing tactics, confusing any motion with forward motion.

Strategy has gotten a bad rap as the tech economy has soured. In part, this is the fault of some direct marketing consultants, Web designers, PR firms, and ad agencies who charged inflated prices for meaningless "marketing strategies" during the boom times as a way to add margin to their basic services.

But marketing is needed to create demand that sales then fulfills. And a marketing strategy is nothing more than a disciplined approach that focuses demand creation efforts. Indeed, as I'd have liked to have told many colleagues over coffee, in a down economy you need focus more, not less, so every dollar spent is well spent.

So how to make marketing strategy fast and fashionable again? Start by demystifying it. A good way is to begin thinking of spelling the word "strategy" with three Cs:

### Customers

Who are your firm's target customers? Most companies think they know, but it's not enough to say "Fortune 1000 firms" (or, God forbid, "anyone with a computer"). What title do individuals you're targeting at these companies have? In many cases, the "customer" really is

- It can be simpler to develop a marketing strategy than you think
- Focus on the Five Cs
- Customers, Customers, Core Competency, Course
- A simplified way of thinking about it
  - More traditional for companies: Competitive analysis, target audience, key features/benefits and derive positioning
- The more specific in all of the Cs, the better the strategy
  - From the customer's perspective, not just yours
- Walk you through all the Cs, quickly



- Customers

- Do you know who your ideal customers are, title, motivations?
- Need to be specific, so you can target (important later)
  - In tech, “anyone with a computer”
  - Better: “38-year-old male who lives in parents’ basement”
- In editing, is it people who self-publish books? Companies who need outside help for financial reports or marketing? Market research firms who publish studies?
- These may not be all the people you now work with, but with whom are you an expert, your core customer base?
- If there are influencers in your segment, consider a way to reach them appropriately too



- Competition

- Who are your competitors – other freelance editors, in-house staff, entire marketing/editorial companies, or just bad writing?
- [Couch example from High-Tech Marketing Companion]
- Quicken: paper and pencil was their competition when they started
- Need to focus on what customers do NOW, and what THEY view as your competition – not just other companies that do what you do

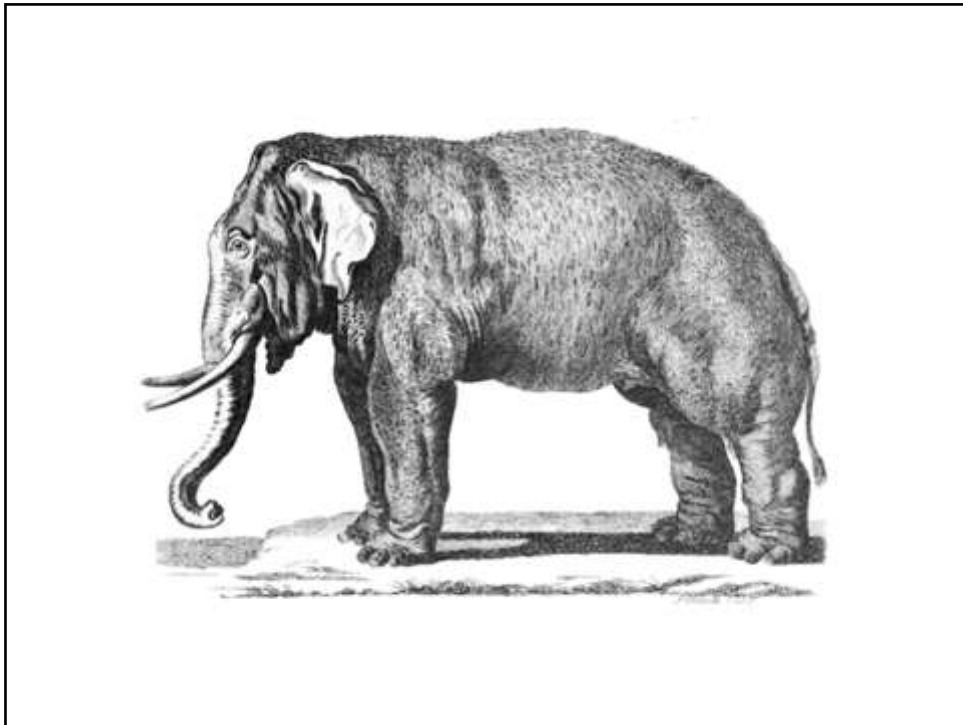


- Core Competency

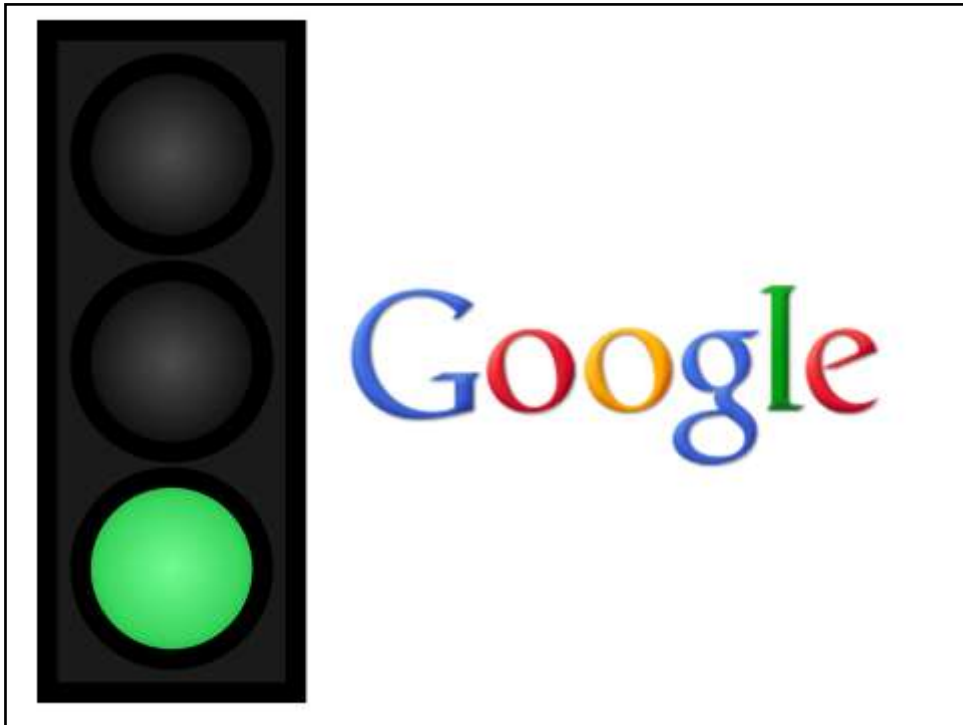
- What are you really good at – do uniquely well? Is it a particular set of editing or related skills, industry expertise, or something else?
- How do you stand out – in brief?
- [KING-FM Example]



- Course
- Now what are you going to do, keeping the customers, competitors and core competency in mind?
- When all are done right, the tactics are more obvious, as is messaging (uniquely describing) yourself
- Major caveat: Must be good at what you do, first
  - Harry Wilker, Broderbund: “Nothing will kill a bad product faster than good marketing.” (word of mouth)
  - Corollary: Nothing will kill a good freelancer or consultant faster than poor work (reputation)
- Second major caveat: There must be a market for it, and people willing to pay



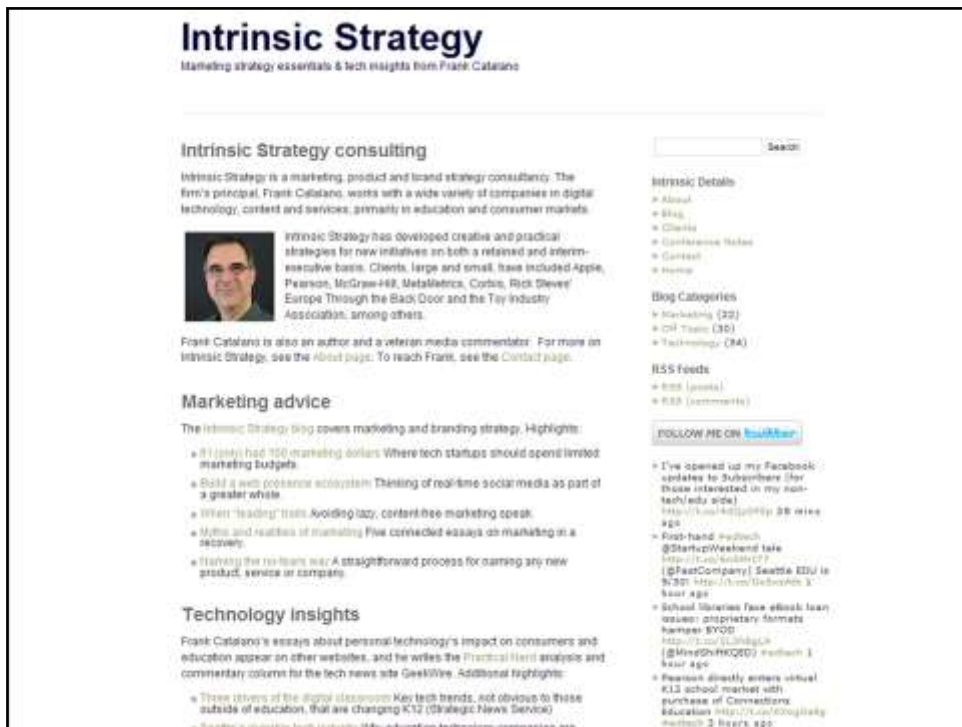
- Tactics
- Tactics come next – in 9 areas
- Only some really apply to freelancers
  - We're only wired to remember seven items, long term
  - PR/social media, direct marketing, website, distribution, events, advertising, promotion, collateral, packaging (& pricing)
- Some are bright shiny objects, some tradition-filled money pits, some absolute musts
- Focus on cheap musts – none of us have cash to spare
- Let's now pretend you ARE a product or service



- MUSTS

- Website

- Your front door
- SEO is critical as Google is your real home page
- Make it look professional, not flashy – and simple is best
- Size of site doesn't matter
- Landing place for all your marketing, business card, Twitter, Facebook efforts
- Spend a few minutes describing what I do, much of which may be applicable to you



- Website element musts
  - Own a domain
    - Even if you get email to Gmail or use GoDaddy for the domain and forward webmail
  - Use WordPress or a similar easy to create and maintain website tool
    - Should not require a designer for content changes
- Home page
- Succinct, specific description of what you do, who you do it for, and how to reach you
- Any high-profile resources, accomplishments or publications
- Photo strongly urged: They are hiring you
- Links to online presence elsewhere (Twitter, LinkedIn profile – not Facebook)
- Current speaking/writing/conference attendance, if applicable

# Intrinsic Strategy

Marketing strategy essentials & tech insights from Frank Catalano

## Client Results

"Frank was instrumental in helping us launch a strategically critical new business and assessment solution for K12 education. His industry knowledge, extensive background in educational technology, and his strategic marketing expertise were very helpful as we formed a new business. He brought sound, understandable, and practical processes, methods, and tools to help us define business and product positioning as well as guide us in the creation and execution of our strategic marketing function."

- Kevin Broeggeman, CEO, Assessment for Learning, Pearson

"Frank Catalano helped bring focus to our marketing vision by showing us how to leverage our existing resources in new ways. We promote our company successfully without spending a pile of money on promotion. His insider's advice on the technology boom (and bust) helped us avoid wasting resources on unproductive technology development initiatives."

- Brooke Burdick, Communications Manager, Rick Steves' Europe Through the Back Door

"Frank has been a tremendous asset and resource to Metablinks. Not only did he design and create our strategic marketing plan, he also was instrumental in implementing it. He was a great member of our team. His thoughtfulness, creativity, and dedication to us played a significant role throughout our entire organization. He has been and continues to be a very trusted advisor to me!"

- Maiber Smith, Co-Founder & President, Metablinks

"Frank brought immense value in his engagements with our firm. He was able to target our activities, deliver impactful results, and move on to the next activity with speed and effectiveness. His role was instrumental in our achieving the #1 500 list of fastest growing companies two years in a row."

- Cliff Morse, President, Apex Computer

"Frank's marketing launch plan for Corbis Publishing's first CD-ROM title -- A Passion for Art: Renoir, Cezanne, Matisse and Dr. Barnes -- was invaluable in helping Corbis Publishing get off the ground with a bang. His marketing insights and insights on how to use the CD-ROM to reach other businesses and beyond are invaluable."

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- Marketing (22)
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- First-hand feedback @MarketingDeskandIdea <http://t.co/6V5M177> (@FastCompany) @twittr EDU is #1! <http://t.co/6V5M177> 2 hours ago
- School libraries face eBook loan issues: proprietary formats barrier. BYOD <http://t.co/6V5M177> (@MindShiftEDU) #edtech 2 hours ago
- Pearson directly acquires virtual K12 school market with purchase of Connections Education <http://t.co/6V5M177>

- Sample clients, type of work (link to it, if public) and testimonials if you have them

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## Irresistible startups, immovable education

September 29, 2011 by Frank Catalano

**Geek  
Wire**

There is a lot of tech startup activity in education technology and digital learning — the most I can recall in a decade. There are new incubators, new newsletters and new events.

The latest, just in time for back-to-school (ah, that charming agoratic-K-12 calendar), is Startup Weekend Seattle EDU. As the second education-focused Startup Weekend — and the first in Seattle — it gave me a lens through which to view the current education startup emphasis. It's taking place at all levels of education, including higher education, continuing education and lifelong learning.

But to me, the most interesting is in the also-included, and difficult-to-address, K-12 market. As the Cooney Center's Corily Shuler recently blogged in her post about education in culture: Imagine K-12. "Education is often the last to benefit from innovation because it is so hard to sell to."

Read my resulting Practical Field column at GeekWire, "Irresistible startups, immovable education."

Posted in Technology (7) & Comments (4)

## The hidden price of "free"

August 27th, 2011 by Frank Catalano

**Geek  
Wire**

When something is free, there's frequently a catch. Sometimes it's a requirement for your personal information, sometimes it's a constant pitch for a paid version, sometimes it's exposure to ads. But I have a serious problem with faux "free" when the real price isn't clearly disclosed.

That's the issue I take up in my latest Practical Field column for GeekWire, "The hidden price of 'free,'" and free products — the Spotify music service and the AnchoFree HotspotShield personal VPN service — that have hidden or buried their true costs. An [article](#) [discusses](#) [several](#) [examples](#) [of](#) [this](#) [type](#) [of](#) [pricing](#) [if](#) [you](#) [are](#) [interested](#) [in](#) [this](#) [topic](#).

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- First-hand insights @StartupWeekend fall [http://www.facebook.com/frank.catalano](#) (@FrankCatalano) Seattle EDU is K-12! [http://www.facebook.com/frank.catalano](#) 2 hours ago
- School spirals face eBook loan between proprietary formats hamper #P200 [http://www.facebook.com/frank.catalano](#) (@FrankCatalano) #edtech 2 hours ago
- Pearson directly enters virtual K-12 school market with purchase of CoreKnowledge Education [http://www.facebook.com/frank.catalano](#)

- Blog if it's something that makes sense and you can update at least 2x month
- Use my blog for not just original content, but what I'm doing or have done elsewhere – clearinghouse approach, makes it easier to keep fresh

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## Conference Notes

Technology and education have their share of industry conferences. And, in the normal course of business, I attend several a year — sometimes to speak, sometimes to moderate/panels, but always to learn.

Starting in 2009 I began to live-tweet conference sessions I attended (you can follow me as @FrankCatalano by visiting [www.twitter.com/FrankCatalano](http://www.twitter.com/FrankCatalano)). And for those conferences that had a bit more heft, I re-started a practice dating back to my initial consulting days: taking highlight notes, but now based on my tweets as well as additional observations.

You'll find those notes here, as Adobe PDF files. Do feel free to share, quote and excerpt, but if you do please do the (copy)right thing and provide credit as due. And, I hope, learn something from the notes.

### International Society for Technology in Education

ISTE 2011

June 25-29, 2011, Philadelphia, PA

Association of Educational Publishers

Content in Context Conference

June 8-9, 2011, Washington, D.C.

While not strictly a set of conference notes, this in-depth essay for the *Strategic News Service* newsletter uses developments from ISTE 2011 and the AEP 2011 Content in Context Conference (along with examples from SIA's 2011 Ed Tech Industry Summit) to illustrate key trends in digital education and education technology, and describe their current state. [Download the essay.](#)

### Software and Information Industry Association

Ed Tech Industry Summit

May 22-24, 2011, San Francisco, CA

With strong underpinnings of the promise of personalized learning and the threat of Open Educational Resources, the Software and Information Industry Association's 2011

Ed Tech Industry Summit at the Palace Hotel in San Francisco attracted a record 400 education and technology company executives over his days. The theme for



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• First-hand author of *StartupWeekend tale* <http://t.co/6w3kC7T> (@FastCompany) Seattle EDU is 3/30. <http://t.co/0d8u0ev0> 2 hours ago

• School libraries face eBook loan issues; proprietary formats hamper E-OD <http://t.co/1L38g2k> (@MAGNREG) Podcast 2 hours ago

• Pearson directly enters virtual K-12 school market with purchase of Connected Education. <http://t.co/1L38g2k>

- If you can't blog, consider creating or coalescing (through links elsewhere) resources
- I use conference notes
- Consider editing checklists, etc.

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## Contact

Frank Catalano and Intrinsic Strategy are best, and most rapidly, initially contacted through this public email address.

We US Postal Service

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Or call [+1 206 429 1228](tel:+12064291228) (Pacific time zone)

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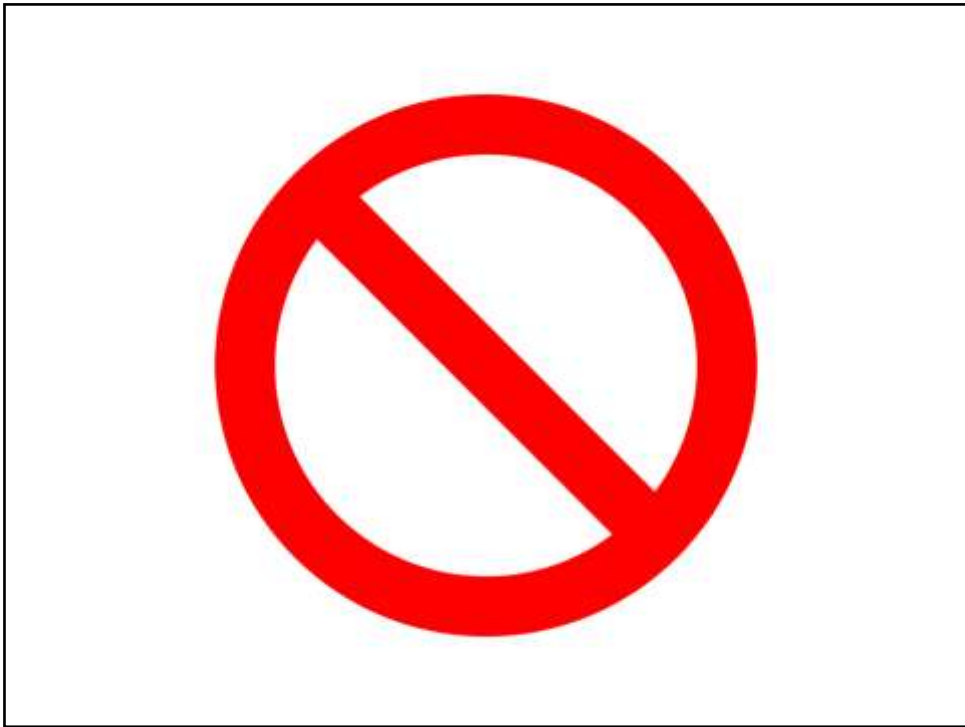
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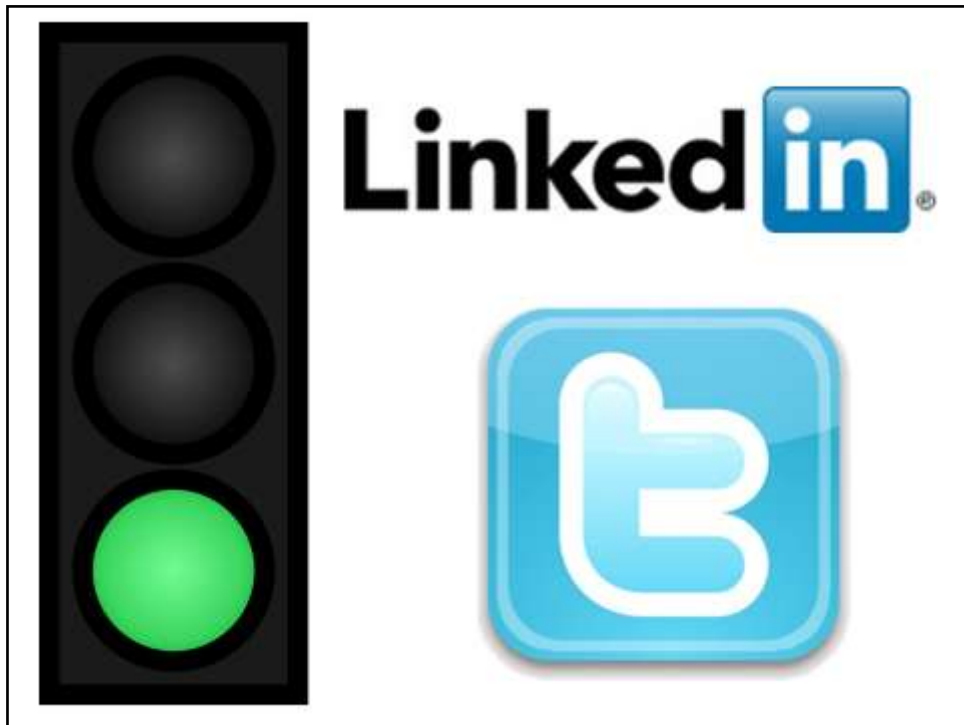
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- I've opened up my Facebook updates to Subscribers (for those interested in my non-tech/edu side) <http://fb.com/403409911> 1 hour ago
- Fast-track @work! @StartupWeekendIsle <http://fb.com/64991071> (@FastCompany) Seattle 6:00 is 8:30! <http://fb.com/10436001> 2 hours ago
- School libraries face attack from vendors; proprietary formats hamper BYOD <http://fb.com/21444914> (@MindShiftQED) Feedback 2 hours ago
- Pearson directly enters virtual K-12 school market with purchase of Connections Education <http://fb.com/10436001>

- Prominent, easy contact info (time zone, too)



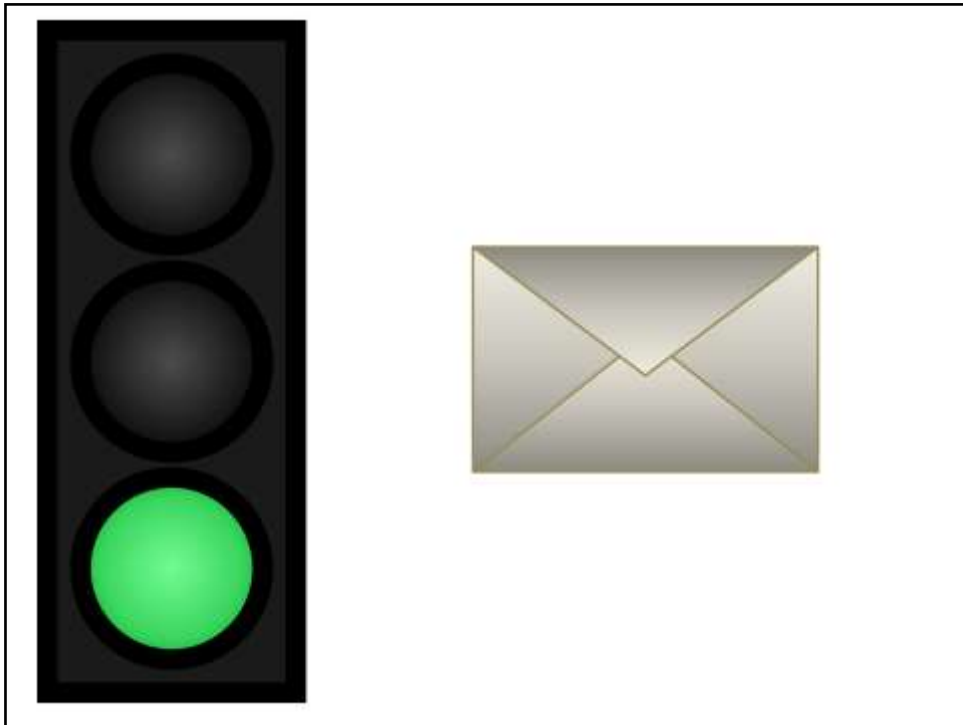
- Website element must nots
- List of fees – no context – but you can explain how you work with clients and the process
- Obviously dated references – review your site every three months and read it carefully
- Cute/counters/too personal (humanizing info vs. TMI)



- MUSTS

- Social media (aka PR)

- Most bang for the buck, long-term – word of mouth, via press organization or individual
- Establish reputation, area(s) of expertise, market knowledge, top-of-mind awareness
- Long fuse, not a quick fix
- In the case of freelancers, not suggesting “traditional” PR with news releases, awards, reviews
- Social media for marketing is more like PR than any other discipline
  - Facebook fan page (800 mil), LinkedIn profile (120 mil), Twitter for broadcasting with hashtags, tight website integration for all
  - LinkedIn is good for a digital CV, but full view can be limited to members and/or those close to you
- Think web ecosystem: website center, email direct touches, social media broadcasting



- MUSTS

- Direct mail & email marketing

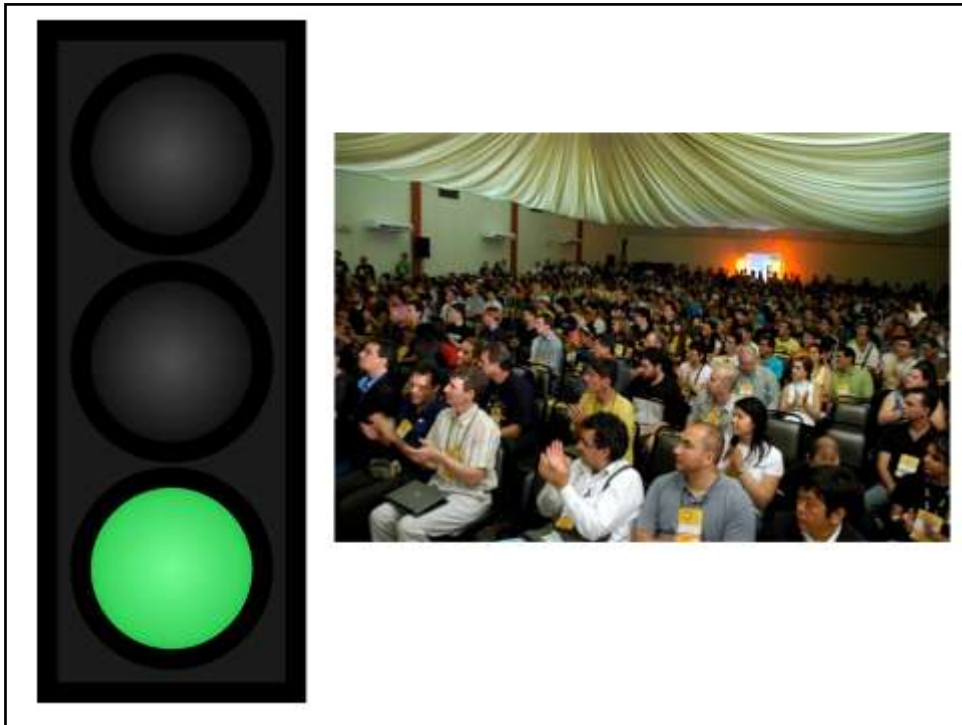
- Unless you're supporting a staff, I don't recommend doing any mass mail or email

- Problem of too much unqualified response

- More useful: A brief, personal follow-up after meeting someone at an event (and getting his/her business card), pointing to a resource of yours or an appropriate one of someone else's (makes you the "expert")

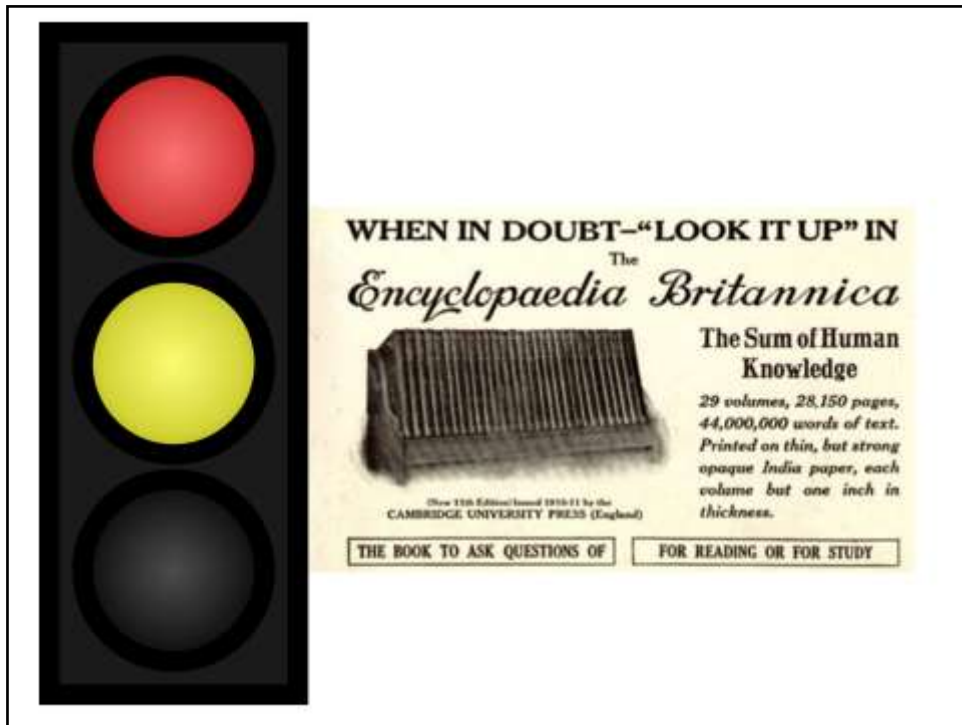
- Is direct mail dead? Not now.

- Handwritten notes still good.



- MUSTS

- Events: Public speaking at chambers, Rotary, trade associations
  - Lessons learned and successes, as a thought leader (on good writing as the core for all communications)
  - Participation in online and in-person professional discussions (LinkedIn, others, industry specific)
- Networking events, conferences
  - Be very selective – aside from dollar cost, there is time and opportunity cost
  - But try and do them regularly – even if you hate them
  - Builds awareness, allows for follow-up, and you may learn something

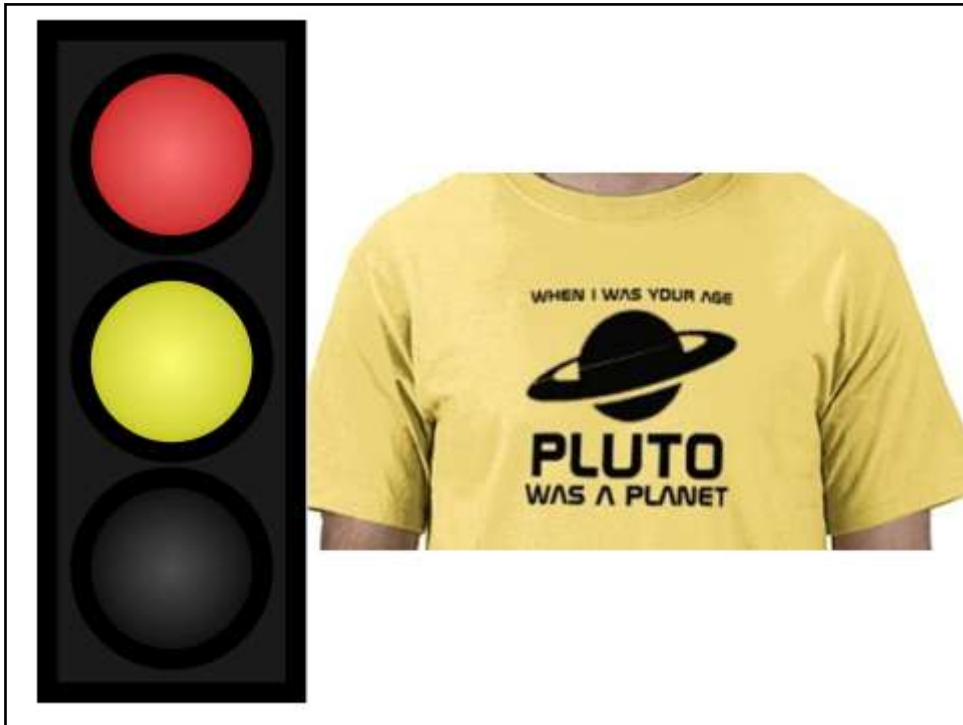


- MAYBE, NEVER OR IT DEPENDS

- Advertising (display)

- Branding and awareness, again, but very expensive, relative to PR or direct marketing
- It should be very, very targeted and drive to your website ... if at all
- Strong call to action

- Listings in industry directories perhaps better – the key is, you want to be FOUND



- MAYBE, NEVER OR IT DEPENDS
- Promotional items (tchotchkes)
  - Make sure they reinforce your message
- Never ignore what works if it's cheap and effective, even if boring
  - Pink Pet erasers with URL?
- Consider checklists, notes or other documents you generate as a "promotional item"



- MAYBE, NEVER OR IT DEPENDS
- Collateral materials (printed)
- Business card exception
- Steer to website – not even a simple flyer
  - Again, your created resources can be considered “collateral”



- How might this all come together? One example ... from me
- Recently wrote a long essay (4400 words) on trends driving digital education for a tech industry newsletter
- As part of the agreement, I was able to rapidly post it on my website blog
- I also created a PDF version for easy downloading and put it on the “Conference Notes” section
- I tweeted the article was available with a compressed bit.ly link
- I sent individual emails to my current clients, previous clients and prospects indicating they may find it useful
- I posted a LinkedIn update about the essay’s availability and encouraged it to be shared in discussions
- I let a couple of industry newsletters know they might find it of interest -- and some shared that
- Result? Hundreds of views in one day alone, many downloads (not tracked) and sustained interest over time
- Every view saw my embedded bio and contact info

- 1. Marketing = Awareness + Demand Creation**
- 2. Strategic 5 Cs: Customers, Competition, Core Competency, then Course**
- 3. Tactical Musts: Website, social media (PR), personal mail/email, event speaking/networking**
- 4. Tactical Money Pits: Ads, promo items (except expert resources), printed collateral (except business cards)**
- 5. YMMV (Your Marketing May Vary)**

- Recap
- Think of marketing as a way to stay top-of-mind
- Think about who your customers are, what your competition is, what you're best at, then what to say about yourself and how to get that word out
- Think cheap and effective and visible



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Q&A