

101 Winning Marketing Actions is a workshop in book form for all Small Businesses, particularly the Very Small, Woman-Owned, Minority-Owned, Veteran-Owned and Disadvantaged. The Actions help business owners sell their products and services and simplify painful activities such as planning, preparation, follow-up and networking. It is based on the questions, concerns and obstacles the author has heard and seen during her eight years of working with Small Businesses and their would-be customers and clients.

## **101 Winning Marketing Actions for Small Businesses**

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What people are saying about  
101 Winning Marketing Actions for  
Small Businesses

“I like the way the book is well organized using the ACTIONS and then writing about them. I like the use of the web-links and examples as well. I think the writing is clear, simple and concise. It is well written and provides practical and logical suggestions on how to address each ACTION. It is clear to the reader that Janet is very knowledgeable on these subjects and business owners can trust her suggestions.”

Director of a Business Development program funded by a major manufacturer

“Wow you’ve done it again – finally a handbook in plain and simple language that explains the maze of government contracts and connections. The heavy lifting you have done makes it easier for me to chart my course for business success regardless of industry or company size.”

Deb Sofield, Executive Speech & Presentations Coaching Co.

“We are believers in having a mentor to help you through business. Janet’s book is like having that mentor with you at all times. Reminders, encouragement and instructions are a must for any business. Forget the bookshelf, keep this book on your desk.”

Susan Linsley, Head Creative Thinker at Endless Ideas, LLC

“I have read the book cover to cover and learned a lot. Janet has done a nice job detailing some complicated processes – I’m certain the book will provide valuable guidance for many small businesses.”

June Wilcox, President ADEC Group

## 101 Winning Marketing Actions for Small Businesses

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“In her book, 101 Winning Marketing Actions for Small Businesses, Janet Christy provides a comprehensive, action-based approach for small business owners. Effective marketing is a cornerstone for any business. This book gives 101 specific action steps to take toward successful marketing and includes plenty of room for planning, jotting notes and keeping track of progress. As the co-owner of a small, woman-owned marketing business, I believe the information in 101 Winning Marketing Actions will be helpful to those just starting out as well as veterans who’ve been in their respective fields for years. As a marketing professional, I found numerous informational gems that will be useful to me!

Jill Pertler

Co-owner, Marketing by Design; Syndicated columnist, “Slices of Life”

Author of “The Do-It-Yourselfer’s Guide to Self-Syndication”

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# 101 Winning Marketing Actions for Small Businesses

A Workshop in a Book for  
Small, Woman-Owned, Minority-Owned  
and Disadvantaged Businesses

Janet W. Christy

BookLocker  
Bangor, Maine

## 101 Winning Marketing Actions for Small Businesses

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## INTRODUCTION

Have you ever said or thought any of the following:

- Could I get that coffee straight into my vein, please?
- I need to lose five pounds by this weekend.
- Call me back right away!
- That hostess thinks I'm gonna wait 20 minutes for a table, are you kidding?
- If you are going to drive the speed limit then get in the right lane!

Today it seems that we not only want instant results, but we often feel it is our right to expect and receive things immediately. We always have what we think are good reasons to justify this need for immediacy. Some of those reasons appear in the rationalization Small Business Owners use to explain why they haphazardly market their business and why they do little, if any, Marketing Planning and Research.

Have you ever used any of the following justifications?

- Why make a Marketing Plan, the marketplace drives my Customers.
- I'm too busy servicing my Customers to market my business.
- I don't have time to do research.
- I'd like to get some government business, but I don't know how (or it's too complicated).
- I have a Marketing Plan – call on 30 people every week.

In your hands you now have a “workshop in a book” that provides you 101 Actions that yield immediate results and collectively produce a marketing action plan.

When I was in telecommunications marketing/sales we Account Managers were required to develop and use Marketing Action Plans – MAPs. In developing these MAPs (plans) we listed Actions, established time frames for them and identified roles and responsibilities for carrying out the Actions. Some of the marketing research was done for us because we had assigned geographic territories and customer types such as: Professional Services, Medical, Government, Manufacturing, etc. When I first worked in telecommunications we operated as a utility so we were to market/sell to everyone in our assigned area and business type. However, after we really had competition, management realized we needed to operate more like a business than a utility and Account Managers were instructed to incorporate qualification of prospects into our MAPs (plans).

Most businesses, whether large or small, that are successful have some type of Marketing Plan that includes activities with time-frames. So if you are operating without a Marketing Plan or have one but it needs updating or is not helping, you can increase your success by following the Actions in this book.

The book provides 101 Marketing Actions that, when used, provide you understanding, activities, templates, methods and challenges. These Actions will simplify your marketing and sales efforts and make them more efficient and productive. If you use the Actions and set time-frames for them you will have a Marketing Action Plan – MAP. Many of the Actions utilize forms and examples to help you understand and get started. There are even some Actions that give you immediate payback.

All the Actions may not apply to your business or they may not be feasible now. In the last Chapter of the book (Chapter 9) is a list of all the Actions with a place for you to make notes or set dates for future use or consideration.

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Some concepts that you will see throughout the Actions are:

- Subcontracting – an approach that increases your opportunities by allowing you to participate in the big projects.
- Outsourcing – being the recipient of outsourced projects, processes and functions
- Partnering – another method for increasing your opportunities.
- Focused – meaning alert, targeted and homed-in; all things that will make your Marketing Actions simpler and more productive.
- Doing – the book uses Actions instead of Tips because Actions will move you forward and get results for your business.

Some of the Actions are dependent on or intertwined with others, but most of them do not have to be done in a specific order. The Actions are divided into 8 sections to help you choose the ones that apply to your specific situation at a specific time. A chapter is devoted to each section:

- Chapter 1 – BEGINNING
- Chapter 2 – PHILOSOPHY
- Chapter 3 – PREPARATION
- Chapter 4 – PROSPECTING
- Chapter 5 – GETTING THE WORD OUT / GETTING NOTICED
- Chapter 6 – TRADE FAIRS & NETWORKING
- Chapter 7 – FOLLOW UP / FOLLOW THROUGH
- Chapter 8 -- SCHEDULE



*Sample Actions from the book*

Action #4

Know and respect your competition.

If you do not know your competition or you ignore them you are living dangerously!

This book includes many Actions that lead you to meetings, conferences, websites, situations and activities that your competition may already be utilizing. These things offer you excellent opportunities to observe and learn about your competition. Pair this observation with a little research on their website and you will see what they do and how they do it. You can discover how they market their products/services and what advantages or weaknesses they have. This knowledge will prepare you to more effectively compete and win.

The knowledge will also help you find partners in businesses that you would normally have seen only as a competitor. When you understand what they do/offer and what they don't do/offer you may find that they actually compliment your business in some situations. That's called co-opetition. Just be sure you establish a written agreement (see page 74 for guidance).

## Sample Actions from the book

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### Action #8

Determine the NIGP Codes that apply to and identify your business products and services to local government agencies.

NIGP is the National Institute of Governmental Purchasing [www.nigp.org](http://www.nigp.org). This organization provides support and training for governmental purchasers/buyers. The organization has developed a list of codes to assist government purchasers/buyers in automating purchasing. Cities, counties, school districts and some state government agencies are the most likely users of these codes.

These codes are required by many government entities of any business that wants to be placed on their vendor/bidder list. Many government entities list the codes on their websites or in their purchasing information. It is important to spend time looking through the very long list and choosing the ones that best apply to your business, because this is what will be used to identify you as a possible vendor or bidder. If a government agency uses an automated vendor database and they search by NIGP Code for vendors that supply a specific product or service you need to be registered in their database with that Code. Getting it wrong will result in missed opportunities. Keep a record of the codes you choose, so you do not have to look them up every time you need them. If you have already determined your codes, take a look at the list to be sure you don't need to add or delete some. You should do this editing whenever you add or eliminate products/services, but at least once a year.

Note: NIGP uses the term "Commodity" instead of product or service.

You can subscribe to online access to the current codes and all updates from the NIGP or you can look at the purchasing website for a city, county or school district near you. You should revisit the list at least once a year to be sure you are claiming all the NIGP Codes that apply to you.

List your NIGP Codes here so that you have them handy.

NIGP Code	Description

Action #15

Recognize that being a Small Business, Woman/Minority/Veteran Owned or a Disadvantaged Business is a Marketing Angle and not the foundation of your business or the basis of your marketing plan.

Your Small Business classification or Ownership status can open doors, give you a competitive advantage and help you gain access to opportunities or resources, but it will not get you business. Your best approach is usually “My business can provide you quality (your product or service here). We can also help you meet your goals for the use of Small, Woman /Minority/Veteran Owned or Disadvantaged Business.” If you lead with your Small or Ownership status instead of your product/service then it may appear that you expect to make the sale or get the contract solely based on that status or that you feel entitled to it. Although being a

### Sample Actions from the book

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Small, Woman/Minority/Veteran Owned or Disadvantaged Business often increases your opportunities and your odds, it is not the most important factor to a Prospect. You still must meet their need.

It is important to understand all your possible marketing angles. List the assets and unique qualities of your business here so that you can begin looking for those other angles.

Here are some examples to help you get started:

- Delivery Services
- In-Home/In-Office Service
- Bonded
- 25 Years of Experience
- Multiple Locations
- Professional License or Certification
- Guarantee
- Recognized Expert (author, speaker, board/committee member, etc.)

Your top ten business assets and unique qualities:

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Action #16

Know who your Customers/Clients are.

In doing research for organizations and centers that deal with small business development I always talk with local bankers about the obstacles for Small, Minority/Woman Owned and Disadvantaged Businesses. Almost every one of them tells me that the biggest obstacle for obtaining loans and to being successful is that the business owners do not know who their Customer/Client are (or will be). They further share that when most loan seekers are asked who their customers are, they start their answer with “all” or “any” and follow with a very general category. Here are some examples:

- ❖ All women
- ❖ Any teenager
- ❖ Any business owners
- ❖ All dog owners

According to the bankers it is very common for the response to this critical question to be “Anybody” or “Everybody.” How simple marketing would be if this was true.

It is vital to know who your Customer/Client are so that you do not waste your time and money targeting people who are not your Customer/Client and so that you can convince lenders that you will be profitable.

In order to know if someone is actually a likely Customer/Client you must understand their buying criteria. This involves things like: needs, desires, willingness to pay, likelihood to act, obstacles to purchasing/using. It takes research to learn these things. But research beats wasted time, money and opportunities every time.

**Sample Actions from the book**

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If you want to be sure you know who your Customer/Client are give yourself a test. Fill in the following form and share it with a lender, a small business counselor or a marketing professional. If you struggle to fill out the form or the person you share it with doesn't buy your explanation you need to do some research and clarification. A simple example entry is provided

PRODUCT or SERVICE AND CUSTOMER or CLIENT (Use a business type, not individual customer or client)	??	YOUR ANSWER	??	YOUR ANSWER
Example: Community Relations Services to the State Departments of Transportation	What problem does your Customer/ Client have that you can solve?	When work on roads and bridges causes detours and bad traffic situations DOTs need to inform and explain to the community and possibly hold community Q&A sessions	Why would they purchase this product/s ervice from your business	DOTs need someone with local knowledge and contacts to ensure that information is shared in the most positive manner and that no one is left out.

A blank form for the reader's use is provided in the book.

Action #19

Appreciate that the User of your product or service is your real target.

Many times in a purchasing or bidding situation you will be forced to deal with a Purchaser, Procurer or Buyer. That person (or department) is not the User of your product/services. They are in most cases the person enforcing the rules of purchasing/procurement. They are carrying out the wishes of the User to obtain a product or service and making sure that it is in keeping with the laws or internal guidelines. They may also be used to insulate the User from those “pushy” vendors. But the User is the one who establishes the criteria for the product or service. That means that your target for education, relationship, awareness, etc. is the User.

The User comes in many forms:

- Plant Manager
- School Principal
- Department Head
- Facilities Manager
- General Contractor
- Agency Director
- Etc., Etc.

Understanding of the Users world, needs, problems, obstacles, etc. will enable you to appropriately market to them. .

Users determine the specifics of a bid or RFP (Request for Proposal) or RFQ (Request for Quote or Request for Qualifications). They sometimes keep a “short list” of vendors/suppliers that they want to be sure gets an opportunity to respond to a bid, RFP or RFQ. The User normally makes the final purchasing decision or is involved in the evaluation process; they may even set the evaluation criteria.

**Sample Actions from the book**

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Use the following form to examine a few past successful and unsuccessful sales/marketing situations and see if you can identify the actual User.

Profitable Clients/Customers:

Brief Description of Situation/Opportunity	User	Did you interact with the User?



Action #23

Recognize that Subcontracting to government Prime Contractors could provide you excellent opportunities.

If you are in either of the following groups you should consider Subcontracting:

- My company is too small to compete successfully for government business.
- I would like to sell to the government, but I don't have time to deal with all the "red tape" – too many requirements, too complicated.
- I want to sell my products and services to large corporations.

Prime Contractors to government entities need Woman/Minority Owned Businesses and other Small and Disadvantaged businesses to meet contract and project requirements. When you act as a Subcontractor to the corporations that are Prime Contractors to government and education entities you help them satisfy their requirements and you benefit because:

- You do not have to prepare the whole bid or proposal
- You do not have to meet all the requirements of the request for bid or proposal
- You do not have to compete with larger businesses
- You can participate in large projects, thus increasing the number of opportunities
- You can develop a mutually beneficial partnership with a large corporation that could result in future opportunities

The current trend is for government entities to charge their Prime Contractors with involving Small, Woman/Minority/Veteran Owned and Disadvantaged Businesses in projects. This increases the need for Subcontractors.

Information on the SBA (Small Business Administration) goals is included in on page 53.

## Sample Actions from the book

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Make it a normal practice to automatically look for Subcontracting possibilities whenever you are searching for opportunities. Use SubNet – see page 82.

Action #31

### Develop a one-pager on your company.

Because Prospects and Customers are interested in what you can do for them, not what you do or sell, you need to have an appropriate document that will tell them. They may be impressed by your brochures, but they will be persuaded by your one-pager. Here are some reasons they like one-pagers:

- It's easier to keep in a file or notebook
- It provides facts instead of art
- It can be emailed – to them and by them
- It is short and to-the-point
- It can be used for future reference when they are looking for vendors

You may have multiple one-pagers that have the same basic information, but also include specifics for the customer or type of customer. Here are some things that can be included:

- Short paragraph about the products and services you offer stated in a way that shows how it applies to the intended reader
- List of some recent projects and the need/problem they addressed (with contact names if you have permission)
- Certifications, Licenses (including Woman/Minority/Veteran Owned or Disadvantaged)
- Your contact information
- Your logo, your colors, but nothing flashy

Think of the one-pager as your company's resume.

If you can't get it on one page, print it front and back, but try hard to do it on one page. It may be psychological, but Prospects and Customer/Clients are more likely to take time to read something that is one page than even look closely at something that is longer. You may want to attempt to do the one-pager as the inside of a brochure. Also be sure that you have an electronic version because many people would rather have it in that form so that they can keep it in a database and pass it on to others.

Consider developing a basic one-pager that you can modify to suit specific Prospects. For instance, if you want to sell your products/services to schools then you may want to have two versions – one for K-12 schools and one for colleges/universities.

Note: Be sure to have some people outside the company read it to check for understanding and errors.

The book provides a guide and blank forms for developing a one-pager..

Action #37

Develop and use a Customer/Client Contract that includes a Scope of Work.

A contract serves many purposes. Here are some of the common ones:

- Protect your business
- Establish expectations
- Avoid misunderstandings

## Sample Actions from the book

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- Assign responsibilities
- Clarify consequences
- Provide for recourse

A contract may be a multi-page document drawn up by an attorney, a fill in the blank form from a legal services website or a statement on a store receipt. The form and language depends on the specifics of your business. But no matter what the form, it is important to “put it in writing.”

A Scope of Work is normally used for services and outlines what your business will do/provide, when, sometimes how and the cost. This document helps your Client/Customer understand what to expect from you and avoids them assuming or attempting to add tasks that were not in the original negotiation. Sometimes it is advisable to include in the Scope of Work the expectations or responsibilities of the Customer/Client. This can be important because your tasks may be dependent on them completing or providing something. Here is an illustration: You are conducting research and have committed to interview a group of people. You cannot interview those people until your Client provides you a list of names and contact information. Your Scope of Work should show that your task is dependent on the Client completing their task.

A Scope of Work example is provided in the book.

Action #49

Develop, categorize and maintain an email Distribution List.

In order to get announcements, promotions or any marketing message out to the right people in a timely manner you need a well-maintained email Distribution List. Do not risk irritating people by sending them information they do not care about. In order to send information to the appropriate people it is important to categorize your list; this will also make distribution of information more efficient.

Here are some tips to help with this tedious, but vital Action:

- Dedicate a specific amount of time each month (or week or quarter) to be spent on developing and maintaining a Distribution List
- Determine classifications to use in distributing information.  
Example classifications:
  - Current Clients/Customers
  - Past Clients/Customers
  - Qualified Prospects
  - Professional Organizations
  - Media
- Determine a format for the Distribution List (i.e. Customer Management Software, Excel Spread Sheet, Table in Word document, Access, etc.).
- Develop a standard phrase to be added to any email that states why they are receiving it and that if they would like to opt out how they should do it. This is a legal requirement to combat Spam. Here is an example of one:  
You are receiving this email because you previously signed up for our Distribution List. If you would like to discontinue receiving emails, please respond to this email with Unsubscribe in the Subject line.

### Sample Actions from the book

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- Always update the list when bounce back and undeliverable emails are received.
- Whenever you encounter a person (request for information phone call, meeting, conference, etc.) ask if they would like to be added to your Distribution List.
- Develop a schedule for maintaining your Distribution List.

#### Action #73

Choose five of the most likely business/corporate Prospects for your products and services in your profitable geographic area and register in their database.

Almost all businesses/corporations use an online vendor registration. Also, most of them follow a similar protocol/process in considering Small Businesses of any type as potential vendors. Registering in the online database is normally the first step in the process to be considered as a potential vendor. So, do not jeopardize your opportunities by not following the normal protocol – complete the online vendor registration before making any contact with the business/corporation.

If you meet a purchaser or Supplier Diversity coordinator at some type of event and they say to send them some information, then do so after you complete the online registration. Chances are extremely high that they will direct you to complete that online registration at some point. They may suggest, when they first meet you at an event that you do the online registration and then contact them. Either way do the online registration first; you will impress them if you do because it shows both that you took the time to find out how they like to do business and that you care enough to follow their protocol.

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The information requested in the online registration varies somewhat from one business to another because what they need to know when considering you as a vendor varies depending on their needs and business practices. However, the information on other vendor registrations provided in this chapter are good guides for getting started in compiling the information. Remember that the information requested is important to your Prospect, even if you do not understand why they ask for it.

Use the table on the following page to establish a time line for registering with these first five business/corporate Prospects.

Business/ Corporation	Date to Visit Website & Print form/directions	Date to finish compiling info for registration	Date to complete online registration

## Sample Actions from the book

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### Action #87

#### Be sure that you spend your Networking time with Prospects, Clients and Customers

It is so enticing to believe the promises and claims made by organizations, people and websites that invite you to join and participate. When you are promised exposure to large numbers of people, direct access to hundreds of buyers, speed-dating type contact with purchasers and almost certain sales it seems you would be foolish not to join, attend or participate.

Networking organizations (including Chambers of Commerce) and social networking websites both offer chances to reach people. You will need to evaluate any and all of these organizations in light of your business Marketing Plan.

A short test is provided in the book to be sure readers are getting the appropriate access to real prospects.



Action #94

Develop a procedure for follow up.

Follow up is essential to marketing and is desired and expected by Prospects, Customers and Clients. Yet, it is something that many people either do not do effectively or do not do at all. If you do not have a procedure for follow up, you will likely not do it or at least not do it consistently. Developing the procedure is making a promise to yourself and your business to increase opportunities. It will also set you apart from almost everyone else because so few people do appropriate follow up.

In doing marketing research for clients I often talk with purchasers or Supplier Diversity coordinators to find out what common mistakes vendors and suppliers make. One of the most common answers is that they do not follow up. The purchasers and coordinators tell me that would-be suppliers/vendors miss the following chances to shine:

- Sending information when requested
- Reminding a purchaser that they are still out there ready to supply
- Giving a quote when they promise to do so
- Bidding or providing a “No-Bid” response when given an opportunity

An example of a follow-up procedure is provided in the book.

## Sample Actions from the book

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Action #101

### Schedule a regular and recurring time for Research.

One of the most important things you can learn from this book, is that it is essential that you do RESEARCH. Many of the Actions suggest research that will save time, improve your chances of success, set you apart from your competition or provide some other important benefit. However, most people do not like to do research or do it when they “have time”. To insure that you do appropriate research, schedule time to do it on a regular basis. You will have to decide when you can do it and how much time you can spend based on your personality, the fluidity of your business and the amount of help you have. Here are some suggestions that have worked for other people:

- Dedicate one lunch-at-your desk session per week
- Come in one hour early twice a month
- Schedule one afternoon per month
- Do an intensive research session for two days each summer and the week between December 25<sup>th</sup> and 31<sup>st</sup> (These are both times when it’s hard to get things done, so go exploring instead)

The most important thing is that you schedule it. Plug it into the Marketing Action Plan schedule, put it on your calendar and treat it as you would an appointment with a client – it does not get canceled or even changed except for honest-to-goodness emergencies!

## ABOUT THE AUTHOR

Janet W. Christy has spent the majority of her professional career in marketing, sales and public relations positions.

In 2003 Janet formed Leverage & Development, LLC, a consulting firm focused on helping Small, Disadvantaged and Woman/Minority Owned businesses and the agencies and organizations that work with them.

Janet currently works with businesses to develop plans that will help them maximize their Small, Disadvantaged or Ownership status. She prepares a customized manual for her clients that includes: Market Assessment, Key Prospects, Prospecting Strategy, and a Step-by-Step Marketing Plan.

Janet also conducts seminars on marketing and certification for Small, Disadvantaged and Woman/Minority Owned Businesses. She conducts the seminars for Chamber of Commerce memberships, private businesses, education institutions and municipal/county governments. These workshops provide attendees with practical instruction, resources and experience-based advice.

In 2006 Janet's first book Capitalizing On Being Woman Owned was released. This book is still available through bookstores and online booksellers such as Amazon.com and Barnes&Noble.com. Janet has also written articles for several magazines and blogs including "Home Business Magazine." She has made more than 30 radio appearances to discuss the advantages and opportunities for Small Businesses. Janet was selected as part of the "Brain Trust" for the Small Business Advocate ([www.smallbusinessadvocate.com](http://www.smallbusinessadvocate.com)). She was named as "Communicator of the Year" by the Greenville SC Chapter of the Association for Women in Communications. She continues to speak and conduct workshops related to Small, Women and Minority Owned Businesses.

Janet has worked on both sides of the procurement process. Her experience includes both preparing RFPs (Request for Proposal) and RFIs (Request for Information) and responding to them. She currently works as a consultant for Small and Woman/Minority Owned Businesses to aid them in marketing to government and education entities. She also assists government and education entities in the development of RFPs and the evaluation of responses. Janet's firm, Leverage & Development, LLC offers a workshop to help businesses understand the culture behind government purchasing.

Because of Janet's experience and unique grass roots research methods she is often called on by both businesses, government entities and non-profit organizations to conduct feasibility, needs assessments and other complex studies. Reports from Leverage & Development, LLC provide detailed information and practical applications that are easily adapted for business plans, operational guidelines, and grant applications.

Before becoming a Consultant and Author, Janet spent more than 25 years in the telecommunications industry. In late 1999, Janet, along with several partners, formulated, raised angel and bank financing, and implemented the business plan for a telecommunications company specializing in back-office and consulting services for Internet Service Providers (ISPs), Virtual ISPs and Competitive Local Exchange Carriers (CLECs). The group launched the telecommunications company and within less than a year sold the ISP portion to a publicly traded company. Janet served as Executive Vice President for Sales, Marketing and Customer Service.

At the website of her firm Leverage & Development, LLC [www.leverageanddevelopment.com](http://www.leverageanddevelopment.com), you can find more information about Janet along with helpful articles and guides she has written. She can be contacted at [janet@leverageanddevelopment.com](mailto:janet@leverageanddevelopment.com). Janet is also the host of two other websites [www.janetchristy.com](http://www.janetchristy.com) and [www.businesshospitalforwomen.com](http://www.businesshospitalforwomen.com).

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