# Blueprint Step-by-Step Procedure

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**Step #1**: Discovery Interview: This is essentially your Blueprint “Kick-off” meeting where you will gather the raw data you will need to do your research and create your buyer persona(s).

* Discovery Intake Form
* Buyer Persona Form (See Buyer Persona Canvas - Customize to your own vertical)

**Step #2:** Create Buyer Persona(s). Based on the interview with your client, you really want to do a good job here. It’s an opportunity to prove to your client that you really understand their business and their customers.

* Write persona(s)
* Create Custom Header Graphic (using PowerPoint & pull a Shutterstock photo)

**Step #3**: Trending Reports: [https://trends.google.com/trends/](https://trends.google.com/trends/?geo=US)

* Start with Top-Level Keywords. Try to get a representation of different topics to compare to each other.
* Start an “Image Worksheet” for the project in PowerPoint. This is essentially a “parking Lot” for the images that go onto the Blueprint.
* Paste screenshots onto PowerPoint slides
* Crop, combine, and format as necessary

**Step #4**: Competitive Analysis

* Tool: Silktide’s Prospect: <https://app.prospect.silktide.com/>
* Add the top 3 competitors
* Export just the competitive analysis
* Take a screenshot of the exported PDF and add to “Image Worksheet” (PowerPoint).
* Add the screenshot to the Blueprint in the appropriate place.

**DETAILED STEPS:**

* + - Client + 3 competitors
      * Put in the client website address
      * Select Analyze
      * Click All Reports
      * Add Competitor
        + Copy & paste URL from Intake Data form (verify website is accurate first)

Note: You may have to fill it in manually if the app doesn’t pull it up automatically

* + - * + Repeat for each of the competitors
      * Share report (send to self)
        + Only the “competitors” report
        + Send as downloadable PDF (not a link)
      * Download PDF from your inbox
        + Save to client folder
        + Take screenshot of image
        + Copy & Paste into PowerPoint 🡪 Then to the Blueprint

**Step #5:** Website Overview

* Tool: Silktide’s Insites: <https://app.insites.com/4529/home>
* Run test Include competitors, geo-location and up to 5 keywords
* Create Screenshot of Summary page. May have to drag browser in to format to the shape to fit properly on Word document. Crop the top & side.

**DETAILED STEPS:**

* + Click Add website
    - Enter client website address
    - Automatically re-test: \*\*Change to NEVER (so it doesn’t waste credits)
  + Optional settings:
    - Copy & paste competitor websites (1 per line)
    - Add keywords, separated by commas on one line (it will take 4 or 5 keyword phrases. (Use keywords from intake form or adapt to improve them).
    - Add search engine & location: Select Google, Select City.
    - Click Start testing
  + Let it run in the background while you move onto something else (it may take a short while or a couple hours if it’s a very large website)
    - Note: If there is an issue, Silktide may run it manually for you.

**Step #6**: Website Details

* Review Insites categories for highlights (Area’s for Improvement). Reuse verbiage from template and/or from the Insites descriptions.
  + Anything that scored low, highlight it and mention the #’s in the text in the Blueprint.
* Include the direct link to the interactive Insites report.

**Step #7**: Eye Tracking

* Tool: [www.feng-gui.com](http://www.feng-gui.com).
* Typically analyze by domain name, but you may want to analyze by image if the top part of the website is just a big image. In that case, you might want to scroll down beyond the image to where the visitor actually interacts with the website. May also want to analyze a different page aside from the Home page.
* Export as images 🡪 Unzip 🡪 (Delete zipped folder to save space). Drag images onto PowerPoint slides 🡪 Add shadows

**DETAILED STEPS:**

* + Upload
    - May upload image file (screenshot of web page) or use the web address
      * If large header, you might want to scroll down to where there is web content that a visitor might interact with and take Screenshot (at 100% so it reads site correctly)
      * Click Analyze
  + Click Download as Image Archive
    - Save to client file
    - Open zip file
    - Extract all
    - Click Extract [save to client folder]
    - Delete the zip folder to save space
    - Open the newly extracted file
  + Open PowerPoint
    - Name: image worksheet
    - Use a Blank Layout (Shortcut: Ctrl M will create additional slides for you)
    - Drag & drop the images you want to use onto separate PPT slides
    - Choose drop shadow (under Format tab) – 4th option – to give it effect
  + Add images to blueprint
    - See an existing Blueprint for order of slides (Because the test descriptions are already there).
    - You may want to add some observations under any of the images.

**Step #8**: Messaging & Flow

* Take screenshots as necessary to any relevant pages you want to make recommendations on.
  + Include screenshot of original website w/o any analysis
  + Make any notes/suggestions on improvements that could be made (i.e., size of logo, etc.)
* Add notes directly to screenshot using PowerPoint.
  + Add text box
  + Shape fill
    - Choose a color to Fill
  + Shape Outline
    - Use red as outline color
  + Create arrow to point to the item
    - Change line thickness, etc.
  + Can group text box & arrow to move it around as you desire
* To turn into an image, on your keyboard click Ctrl + A (all) 🡪 Ctrl + G (Group) 🡪 Ctrl +V (paste)/ Then click on the little clipboard icon on the lower right and click Image.
* Create an Introduction and if necessary, a conclusion.

**Step #9**: Strategy Section (mostly copy and paste)

* If you have created a master template of your suggested strategies, remove any strategies/tactics that don’t apply
* Tweak wording as you see fit for the client
* Data Aggregation & Directory Management:
  + Go to: <https://moz.com/local/search> (Create Screenshots)
    - Enter name of school & their zip code
    - Click Check My Listing
    - Choose the listing that matches current website
    - Print screen the image under each tab (complete, incomplete, inconsistent, duplicates)
      * Note: Adjust size of screen as needed to capture all data if it runs longer on screen, etc.
      * Copy & paste each image onto PPT slides
        + We will overlay this on the image
* Read through the Typical Scenario in the blueprint:
  + Change the name to the Persona Name
  + Adjust language accordingly to make sure the story fits the client
* PPC Budget Analysis (Use ReachLocal, or Google, or whomever your provider is)

**Step #10**: Facebook-Instagram Budget/Reach

* Log in to Facebook Business Manager and navigate “Ads Manager”
* You will need to create a new test campaign, and ad set. We typically name them “Test – Client Name”
* Within the ad set, you will need to enter the Daily Budget. We typically use $20/day as a benchmark.
* Next, we enter the Audience details, which include:
  + Location
  + Age
  + Demographics – Job title, income, interests, purchasing trends, etc.
* With all of this information entered, you should now have an “Audience Definition” which tells how specific or broad our audience is.
* You should see “Estimated Daily Results” which estimates your daily reach, and clicks based on the budget we have entered.

**Step #11**: Library

* Download all relevant reports (PDFs, Excel, etc.) and upload to server and get the URLs to hyperlink to. i.e. <http://kreativewebworks.com/blueprint/physician-life-care-planner/physicianlifecareplanner.com-Insites.pdf>
* Hyperlink the icons in the Library section of the Blueprint with the new branded links so the client can download them.