



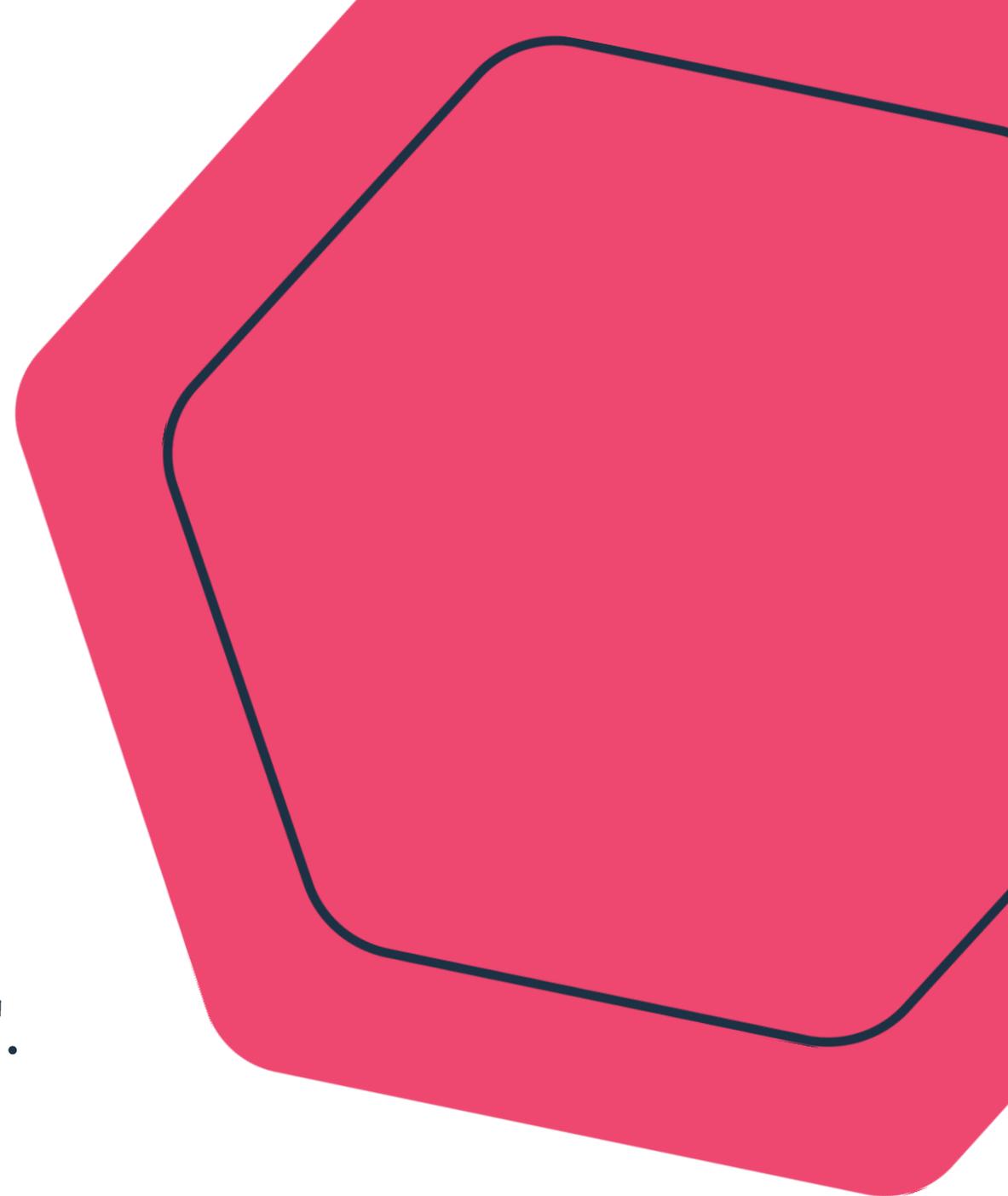
ENGAGEMENT MADE SIMPLE.

THE CLEVER WAY TO STAY VISIBLE

WHAT IS ENGAGEMENT?

- Staying visible with people who already know your business
- Building genuine connection
- Making others feel seen, valued and remembered

IT'S MARKETING, BUT DIFFERENT.



WHY DOES IT MATTER?

Engagement is one of the most impactful – and most overlooked – ways to grow your business.



KEEPS YOU TOP OF MIND

Staying engaged keeps you top-of-mind with the people most likely to hire or refer you.

INCREASES WARM LEADS

Warm relationships convert faster and feel easier than starting from scratch.

BUILDS LOYALTY

Small touches create long-term trust and repeat business over time.

CREATES CONNECTION

People naturally refer the businesses they feel genuinely connected to.

IT'S LOW COST & HIGH IMPACT

Engagement is the most affordable, overlooked form of marketing you can do.

THE FOUR CLEVER CATEGORIES

These are the core ways you can stay connected, build trust and stay visible with the people who already know your business.

Every touchpoint you create will pull from one of these categories - and you'll mix and match based on your style, time, and goals.

DIRECT COMMUNICATION

- **Email Campaign** – Monthly or quarterly updates, promos or helpful content sent to inboxes
- **Text Campaign** – Quick messages for invites, reminders or check-ins
- **Personal Call or Meeting** – One-on-One connection like a check in or coffee chat

PERSONALIZED GIFTING

- **Gift** – Small thank-you, birthday surprise or milestone celebration
- **Card** – Handwritten or printed note for holidays, thank-yous or just because
- **Promo Item** – Branded item used for drop offs, events or thank-you packages

COMMUNITY + EXPERIENCE

- **Event** – Hosting or inviting clients to something special, virtual or in person
- **Group** – Book club, mastermind or networking meetup that builds community
- **Programming** – Hosting a group activity like a class, club or workshop that adds value

BRAND PRESENCE

- **Marketing Piece** – Brochure, postcard or flyer designed to highlight your brand or offer
- **Social Media** – Staying visible and consistent on your preferred platform(s)
- **General Awareness** – Keeping your business findable via Google, SEO or website updates

ENGAGEMENT MADE SIMPLE WORKSHEET

We are going to walk through 4 quick steps to create meaningful touchpoints that fit your time and budget. As we go, fill in one row for each category that comes to mind. Then we'll create a system that works for you.



STEP 1 – WHO?

Who do you want to stay visible with?
Think: past clients, current clients, referral partners, collaborators, mentors, supporters



STEP 2 – WHAT?

Using the different clever categories, what touchpoint feels easy and natural and fits the who?
Think: Email, Text, Personal Call/Meeting, Gift, Card, Promo Item, Event, Group, Programming, Marketing Piece or Social Media



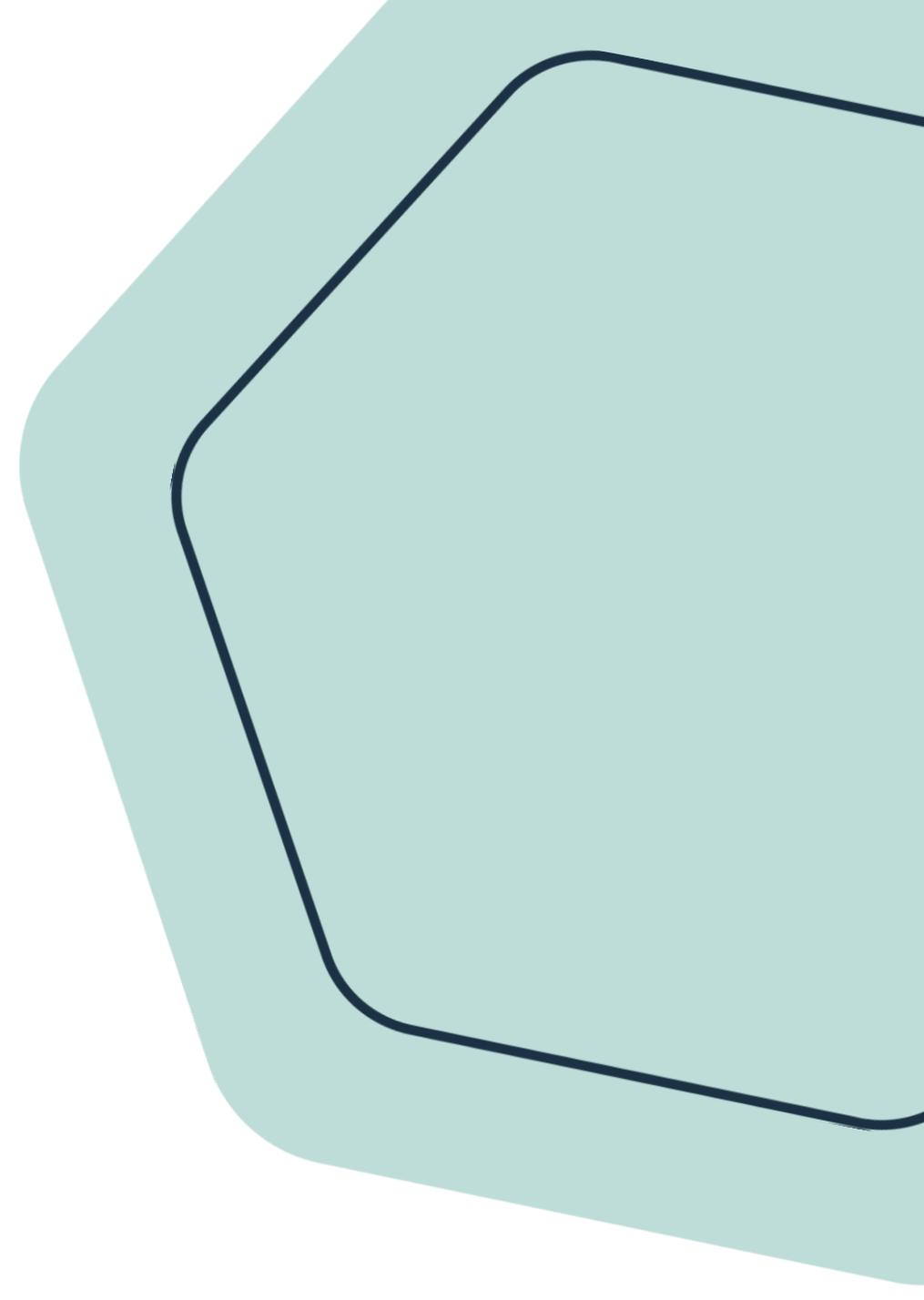
STEP 3 – WHY?

Why are you reaching out?
Think: Thank you, share a resource, congrats, checking in, celebrate a milestone, invite / opportunity, thought of you



STEP 4 – TOP 3

Pick the top 3 that you can start this month. Draw a star in the top box for the ones you want to prioritize this month. You'll use these in the next step to create your system.





TURNING IDEAS INTO SYSTEMS

Why systems matter:

- They remove decision fatigue
- They keep engagement consistent
- They make growth feel easier

What a system looks like:

- A home for your touchpoints
- A repeatable rhythm
- A tool you actually use
- A plan that matches your personality + time

MAKE IT A SYSTEM

Turning your ideas into a system is what makes engagement consistent and doable. This is where your touchpoints get a home, a rhythm, and a plan you'll actually stick to. Today, you'll turn your Top 3 touchpoints into a simple monthly rhythm using tools you already use — so your engagement happens automatically, not accidentally.

1

CHOOSE YOUR TOOL

What fits your brain best?

- Digital Calendar
- Planner
- Task Management Tool (like Monday.com)
- Phone Reminder
- Paper To-Do List
- Other: _____

2

CHOOSE YOUR RHYTHM

When will each touchpoint happen?

- Weekly
- Monthly
- Quarterly
- Tied to an event or milestone

3

MAKE IT HAPPEN

Add your Top 3 to your tool before you leave today.

Check them off once added, and let your system guide you.

QUESTIONS?

LET'S CONNECT!

MEREDITH DOWDY

MEREDITH@HEYCLEVERSTUDIO.COM

HEYCLEVERSTUDIO.COM

@HEYCLEVERSTUDIO

972.658.5430

