Virtual Emily

VIRTUALLEADGEN · WHITE PAPER 2026

Digital marketing

strategy in 9 steps: a plan you can run with a small, remote team.



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virtualceolife.com

VANTECH

INTRODUCTION

A plan beats a pile of tactics

Most small companies do marketing the way they do everything else when the owner is overloaded: one post here, an ad there, a newsletter when someone remembers. None of it compounds, because none of it is connected to a goal.

This guide turns the plan we use into nine steps you can work through in an afternoon. Each step ends with a short worksheet. Fill them in and you will have a one-page strategy your team, or your Emily, can execute every week.



Strategy first. Then content, ads and funnels, in that order.

01 · Define your business Model, audience, brand, offer.	**02 · Competition** Who else your buyer is considering.	**03 · Objectives** Business goals and marketing goals.
04 · Budget People, channels and money.	**05 · Situation** What has worked, and what has not.	**06 · Traffic sources** Where visitors come from.
07 · Content Give value before you ask.	**08 · Advertise** Paid reach, aimed precisely.	**09 · Sales funnel** From first click to signed client.



STEP 01

Define your business

Before you write a single post, answer four questions in one sentence each.

- **Business model:** how you make money, in plain words.
- **Audience:** who buys, by role, company size and industry.
- **Brand identity:** the personality you want people to feel, and the story you tell.
- **Offer:** the services or products you will actually promote.

> **HOW WE DO IT AT VANTECH**
>
> Business model: specialized consulting plus tailored outsourcing. Audience: owners and operators of US small businesses. Brand: the Virtual CEO, inspiring and practical, and Virtual Emily, friendly, efficient and smart. Offer: Virtual Emily remote executives, VirtualLeadGen and the MyVirtualBPO platform.

Your worksheet

Question	Your answer in one sentence
Business model	
Audience	
Brand identity	
Offer	



STEP 02

Analyze the competition

List the three to five companies your buyer compares you with, and look at them the way a buyer would.

Look at	What to write down
Location and pricing	Where they deliver from, and whether prices are public.
Website	Speed, mobile experience and how easy it is to contact them.
Search	Which keywords they show up for, and whether they run ads.
Social	Which networks they use, and how often they post.
Content and offers	Blog, videos, referral programs, free trials or downloads.

Then answer the only question that matters: what do you offer that they cannot? Write it in one sentence; it becomes the spine of every message.

Your worksheet

Competitor	Their strength	Your difference



STEP 03

Set your objectives

Separate what the business needs from what marketing must do to get it. Each objective gets an action plan.

Business objective	Marketing plan of action
Generate awareness of the brand	Email campaigns, social content and ads, earned press.
Position your service as the best experience	Client stories, video, a clear free first step.
Build the founder's personal brand	Video, webinars, events, a blog in the founder's voice.
Increase leads and sales	Search ads, lead forms, funnels that end in a meeting.

Marketing objective	Plan of action
Reach your buyers more precisely	Tighter targeting and segmentation by role and industry.
Make people identify with your story	Blog posts, email, webinars told by real people.
Rank for the searches that matter	Keywords per page, link building, consistent publishing.

Your worksheet

Objective	Action	KPI	Target date



STEP 04

Define your budget

The more you invest, the faster you move. But ingenuity and a good marketing assistant go a long way on a small budget.

- **Hours:** how many hours a week will your team spend on marketing?
- **Team:** who plans, who designs, who writes, who manages the community?
- **Channels:** which networks and ad platforms get money, and how much each?
- **Strategy vs. execution:** keep a small budget for planning and the larger share for distribution.

> **HOW WE DO IT AT VANTECH**
>
> A Marketing Emily can cover community management, content and campaign execution full time, so the budget goes to reach instead of to an in-house salary. Full time from $1,500/mo; up to ~70% vs. a comparable US in-house hire (varies by role).

Your worksheet

Line	Monthly budget	Notes
Strategy and planning		
Content production		
Social ads		
Search ads		
SEO and link building		
Total		



STEP 05

Analyze your situation

Look back before you plan forward. Compare this year with last year, channel by channel.

Question	Where to find the answer
What has been the strongest part of your marketing?	Email platform, landing page reports, blog analytics.
What are the weaknesses?	Leads that never fit your buyer, channels with traffic but no conversions.
How will you improve it?	Better segmentation, one funnel per offer, fewer channels done well.
Where does your brand stand in the market?	Website grade, search rank, social following vs. competitors.

Write what you will keep, what you will stop and what you will test. Three lines, not three pages.

Your worksheet

Keep	Stop	Test



STEP 06

Map your traffic sources

Know where your visitors come from, so you can feed what works.

Social networks

Facebook, Instagram, LinkedIn, X: organic posts and profiles.

Content

Blog posts, videos, images and downloadable guides.

Paid search and ads

Google Ads, retargeting, promoted posts.

Email

Newsletters, campaigns and nurture sequences.

Referrals

Clients, partners and associations who send people to you.

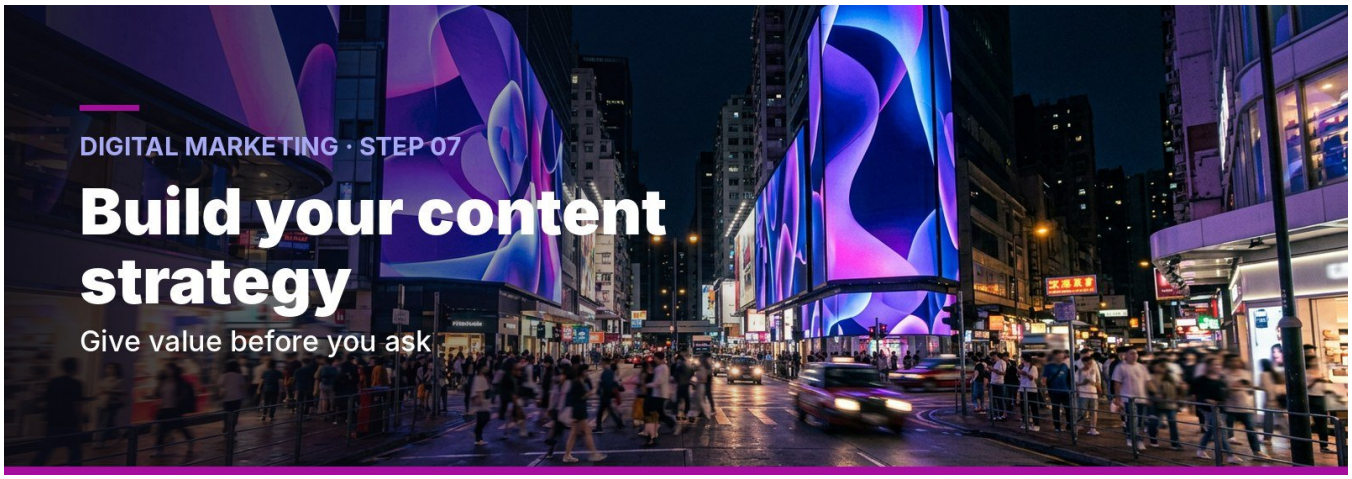
Direct and organic search

People who type your name or find you on Google.

Track five numbers per source every month: visits, new vs. returning visitors, devices, leads and conversions. A simple dashboard on your phone beats a long report nobody opens.

Your worksheet

Source	Visits / month	Leads / month	Keep, grow or cut



STEP 07

Build your content strategy

Content marketing goes from a whirlwind of ideas to a designed experience for your customer.

- **Analyze the data.** Find which posts, emails and pages already bring visits, and do more of that.
- **Create value.** Teach what you know: how-to videos, webinars, guides and checklists your buyer can use today.
- **Tell the story.** Let real people tell it: the founder, the team, the clients. A casual “day in the life” video often beats a polished ad.
- **Promote it.** Every piece gets a distribution plan: organic posts, email, and a small paid boost for the best ones.

> **HOW WE DO IT AT VANTECH**
>
> Our blog, Virtual CEO Life, publishes how-to posts and founder stories; every post ends with a free guide and a clear next step. Videos and quotes from the posts are cut into short social pieces.

Your worksheet

Format	Topic	Channel	Frequency
Blog post			
Short video			
Webinar or live			
Free download			



STEP 08

Advertise your brand

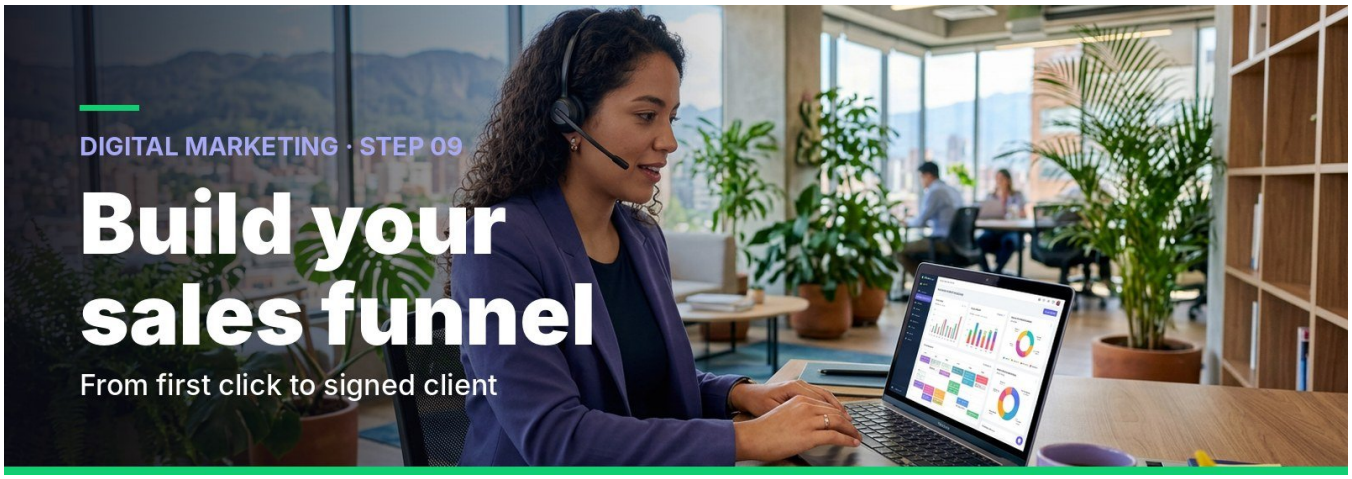
Write down every advertising channel you will use, what each ad does and where it sends people.

Channel	Ad types	Sends people to
Facebook and Instagram	Lead forms, boosted posts, clicks to website, video ads	A landing page or a free download
LinkedIn	Lead forms, sponsored content, sponsored messages	A guide, a webinar or a meeting
Google Ads	Search ads on your keywords, retargeting	The page that answers the search
Email	Weekly sends, promotions, invitations	Blog posts, events, offers
Blog	Boosted posts, organic shares, newsletter	The next step on each post

Start with one or two channels where your buyer already spends time, measure cost per lead for a month, then move budget to the winner.

Your worksheet

Channel	Ad	Landing page	Budget



STEP 09

Build your sales funnel

A funnel is the path from the first click to a signed client. Map every step and who owns it.

1 **Attract**

An ad, post or search result brings the right person to a landing page.

2 **Capture**

They leave their details for something useful: a guide, a webinar, a free consultation.

3 **Nurture**

Email and a personal call explain how you work and answer their questions.

4 **Convert**

A meeting, a proposal and a clear first step. For us: interview three candidates, free.

5 **Onboard**

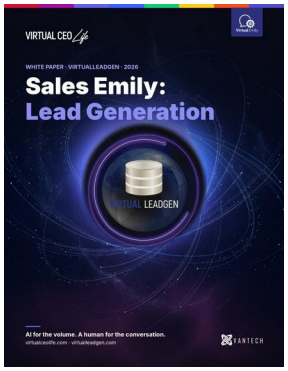
Contract, kickoff and the first results they can see.

Who runs it? A Sales or Marketing Emily can run the lead forms, follow-up emails and calls while you take the meetings. **See the LeadGen guide**

KEEP READING

The playbook, in writing

Free PDFs and tools from Joe that pick up where this guide ends.



LEADGEN 2026

Sales Emily: Virtual LeadGen

Get it free →



VCEO XPERIENCE

How to become a Virtual CEO

Get it free →



CASE STUDY

Startup VCEO: the case study

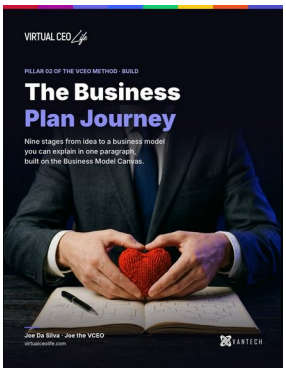
Get it free →



WHITE PAPER 2026

Go Virtual: the Remote Assistant Experience

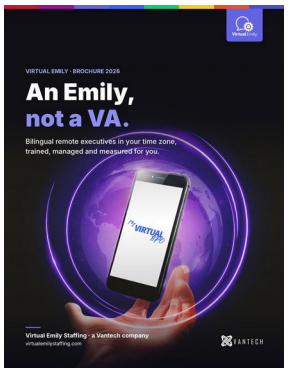
Get it free →



WORKBOOK · PILLAR 02

The Business Plan Journey

Get it free →



BROCHURE

Virtual Emily brochure 2026

Get it free →

Ready to hire a Marketing or Sales Emily? Get the Job Order Form

YOUR NEXT STEP

Meet Joe, the Virtual CEO.

Meet Joe, the Virtual CEO

Book the free 60-minute EMOP Diagnostic and get a second pair of eyes on your marketing plan.

joethevceo.com →

Not sure where to start? Book the free 60-minute EMOP Diagnostic with Joe at **joethevceo.com**.

Free guides and calculators: **virtualceolife.com/resources.html**

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