

Presented by
Christine Lockhart-Morse

16 Years Experience
800+ Positive Testimonials

BRAND STRATEGY

Helping You Reach Your Goals



A Client Example Will Be Used To Demonstrate Success In the Areas Below

01.	Purpose	Brand Strategy Development
02.	Positioning	Competitor & Market Research
03.	System(s)	Marketing Funnel Design
04.	Promise	Digital Marketing Strategy
05.	Personality	Audience Persona Development
06.	Goals	Campaign Planning & KPIs
07.	Automation	AI & Automation in Marketing
08.	Guide	Business Consulting Mindset
09.	Team	Strong Communication Skills

Oren came to us because he wanted to take his knowledge and experience from running his private therapy practice to a large scale, global business which can help an infinite number of people.



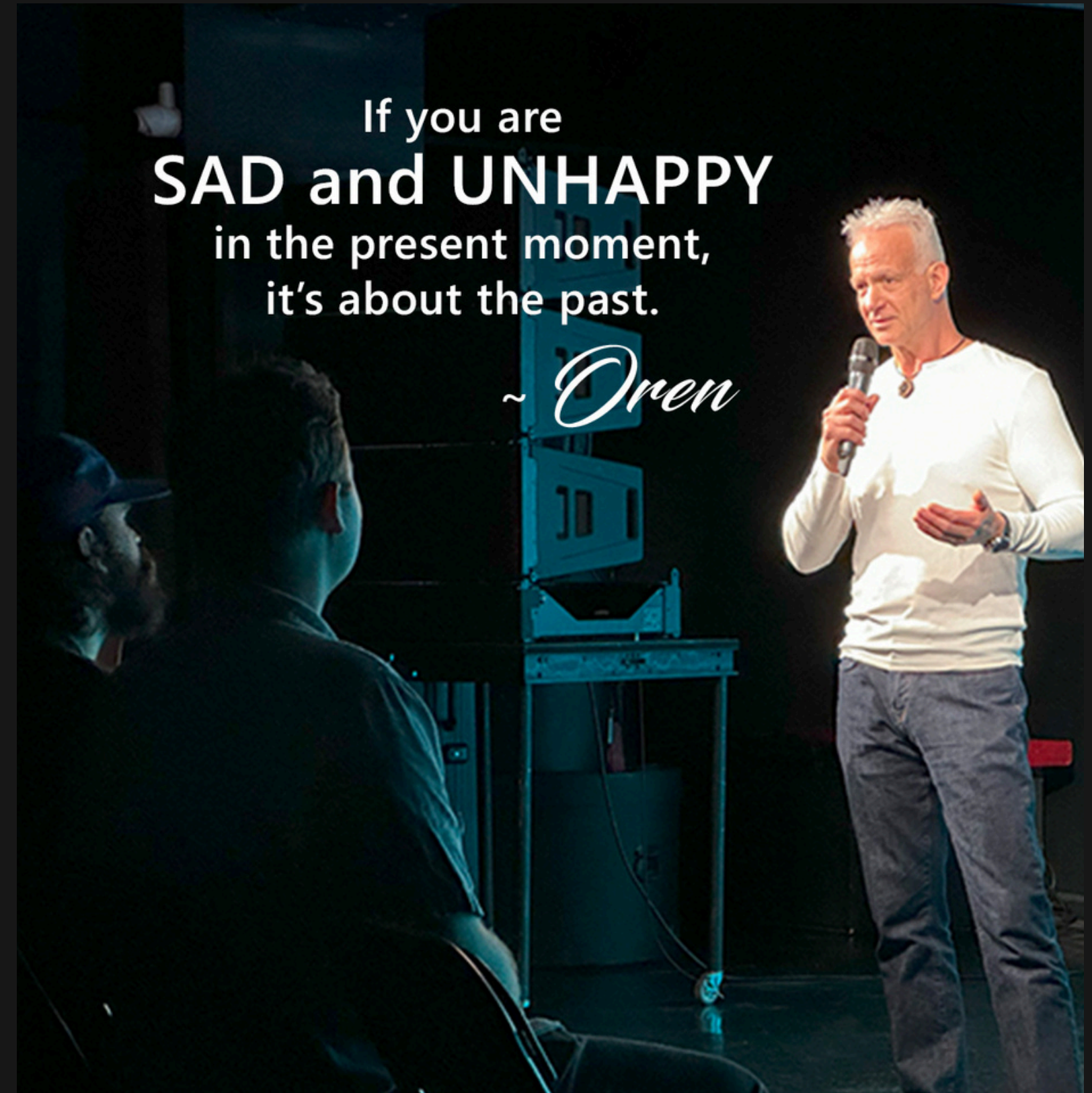
BRAND STRATEGY DEVELOPMENT

We identified brand differentiators, crafted his value proposition, and developed a cohesive visual identity.

We identified his unique skill sets, compared them to his passions and future vision for himself.

Once we were all on the same page, we were able to create his visual identity to help tell the story.

Client Example



COMPETITOR & MARKET RESEARCH

Identified wellness industry gaps, analyzed competitor messaging, and assessed market positioning opportunities.

Re-phrasing Content so we are fresh, intriguing, & exciting!

- We identified several topic areas where Oren's expertise overlapped with common industry terminology, so we developed more specific language that better reflects his unique approach. Rather than using the overused term “psychological safety”, we now use precise co-regulation language like “calming presence; secure based conversations”, and “grounding influence” Terms that accurately describe the neurobiological processes he specializes in but are unique to the market.



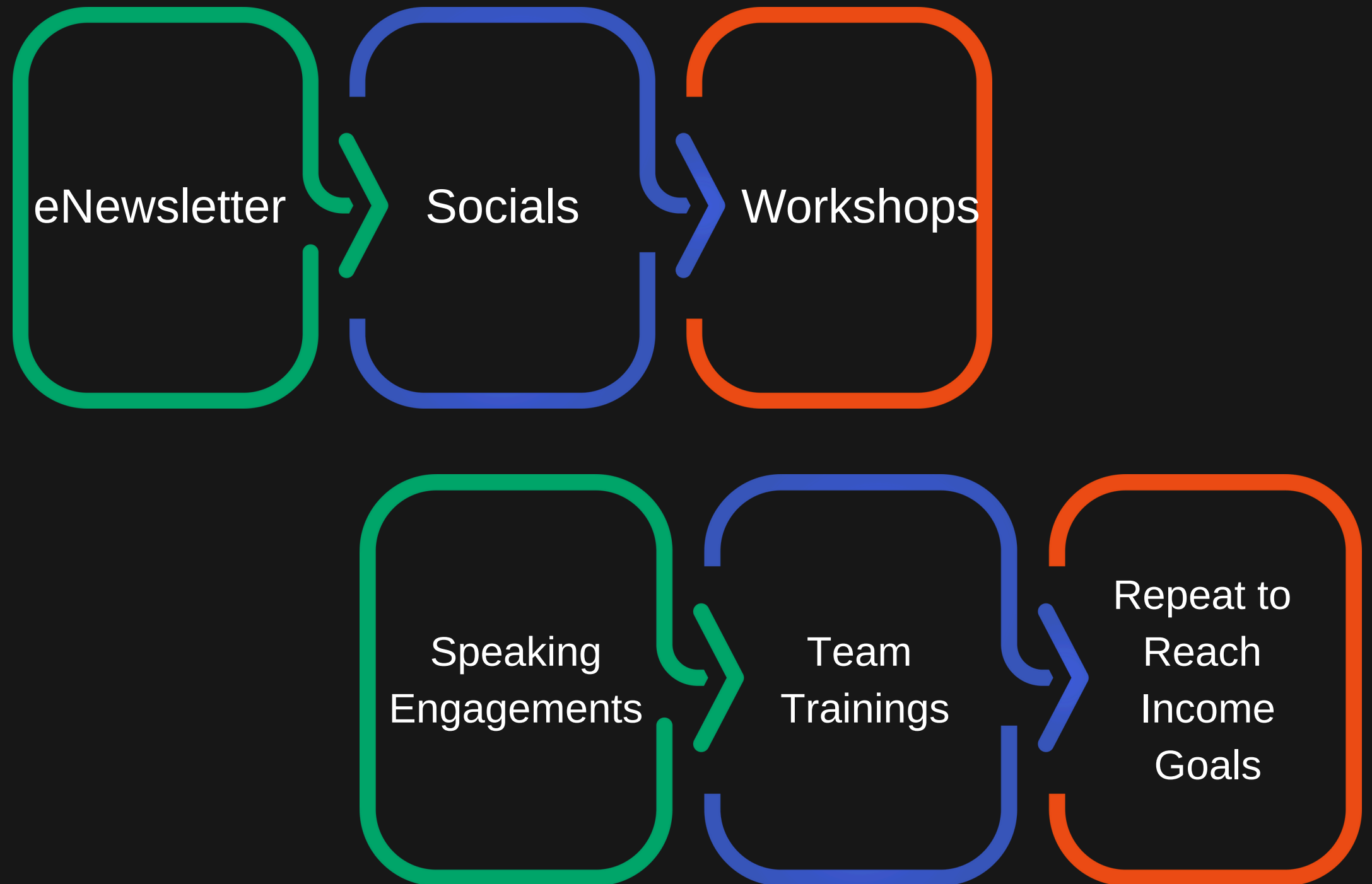
System(s)

MARKETING FUNNEL DESIGN WE CALL IT CLIENT JOURNEY



We Mapped customer journey from awareness through conversion, designing touchpoints for each stage.

Each phase provides education, kindness, and knowledge the potential client wants while inviting them to the next phase of the client journey. It is like a slow-dance!



System(s)

**MARKETING FUNNEL DESIGN =
CLIENT JOURNEY**

Systems and content tracking are put into place so we can make sure all potential clients are on our radar as we walk them through the client journey.

Marketing Leadership & Management	Developing Strategy, Con Focused on Forward Mov
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Developing Strategy, Content, and Keeping the Team Organized and Focused on Forward Movement

A screenshot of a Notion workspace showing a collection of blog post templates. The templates are arranged in a grid, each with a title, a brief description, and a date. The templates are: 'Blog Post Template' (0/10), 'Transforming Communication Through Co-Regulation - Creating Emotionally Intelligent Workplaces' (3/10), 'The Power of Equal Voice - Why Conversational Turn-Taking Transforms Teams' (3/10), 'The Neuroscience of Trust - How Leaders Shape Team Performance Through Emotional Regulation' (3/10), 'The Neuroscience Behind Google's Team Research: How Nervous System Regulation Creates High-Performance Teams' (3/10), 'Blog Post Template' (0/5), 'BLOGS FOR CIRCLE OF GOODNESS' (3/11 • Jul 26), 'Children Are People too. ALL APPROVED READY FOR SHARING' (6/9 • Jul 31), 'Beyond the Surface: Unmasking the Real Problem Underneath Addiction' (Jun 6, 6/9 • Aug 1), 'The Compass of Connection: Why Empathy for Shared Fear Bridges Divides' (4/9 • Jun 16), and 'The Unsettled Self: Navigating Emotional Dysregulation in a'.

Each Event Creates Visibility

DATABASE / CONTACTS
1,200 People

SOCIALS
1,200 Facebook 2000 LinkedIn

PUBLIC CALENDARS
3,000 Average Views

PRESS & MEDIA
5,000 Average Views

EVENTS
30 people per event x 4 Events/Month

8/19 CGI Leadership Team for Oren

8/26 Agenda CGI Team & Oren

9/2 Agenda CGI Team & Oren

	Blog Title	Video Creation	Video link series and transcripts	Approved by Oren	Blog Created and Posted	Worksheet Created	Social Media Posts Done	Monthly Event Created and Posted	Event Shared with Connections	Team Prepped for Event Note	RSVP Count	Reminder to Attend to People Who RSVP'd	
	Oren Intro Part 1	2/17/2025	Link to full video		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	Oren Intro Part 2	2/26/2025	Link to full video		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	What is Therapy Q&A	3/12/2025	Link to full video		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	Let Kids Be Kids, Parents Be Parents Part 1	3/19/2025	Link to full video		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	What is Emotional Trauma?	3/5/2025	Link to full video	Oren Approved Date	Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	Workplace Well-Being in Today's Chaos	3/19/2025	????		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	Today's Chaos: CEO's Role, Effects on Public & Self Help Tips	3/24/2025	Link to folder		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	What is happening in the world today (globally) is affecting and triggering our inner self.	3/25/2025	Link to folder		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	CEO: Being a leader of an organization is like being a father. You need to create a safe space. PART 1	3/26/2025	Link to full video		Christine's done date	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	Let Kids Be Kids, Let Parents Be Parents Part 2	3/28/2025	Link to full video		Christine's done date and links	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	Neuroplasticity and Inner Peace	3/31/2025	Link to full video		Christine's done date	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team Confirmed	# goes here	AUTO EMAIL SENT DATE	
	How Does Emotional Trauma as a Child Affect	4/1/2025	Link to full video		Christine's done date	Christine's done date and link	Christine's done date	Christine's done date	Christine's done date	Team	# goes	AUTO EMAIL SENT DATE	

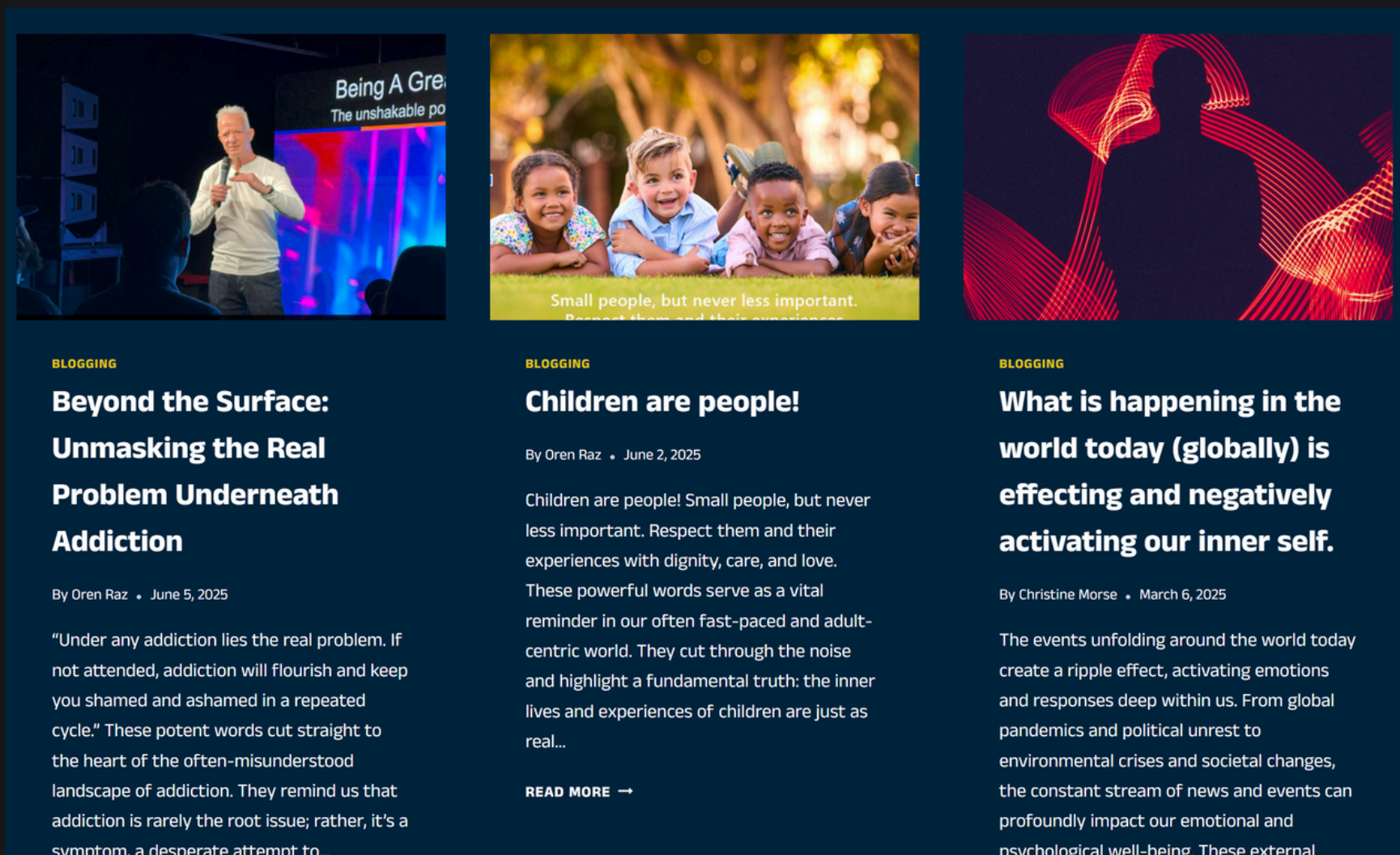
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Promise

DIGITAL MARKETING STRATEGY



We created an integrated content calendar, social media strategy, and email campaigns for growth.



Each Blog Turned Into 3 Social Posts, Meme's, and Posts
The Most Engaged Content is Turned Into an eNewsletter

We call this our “Circle of Goodness”



All measured and reported each month so we can make the best decisions on ad spend.

AUDIENCE PERSONA DEVELOPMENT



We worked with Oren to determine the list of trauma survivors' pain points, motivations, and behaviors to define target personas.

- These are used in his blog headlines (which is also great for SEO)
- Social posts and Meme's are using these words
- His workshops, online courses, and stage presentations are all titled with these words that will best attract ideal clients.



CAMPAIGN PLANNING & KPI'S

We have many activities that are monitored.
Our 3 big KPI's are focused on what is most
important for our client.



01.

REACH

Audience Growth & Engagement



At the core of our brand strategy lies a commitment to clarity, consistency, and customer connection. To reach as many people as we can with the messages and bring them into our client journey.

02.

SALES

Number of Sales



Oren's goal is to expand his work to impact more people globally beyond his private practice. Our goal is to be able to help him do that within 18 months.

03.

IMPACT

Scaling



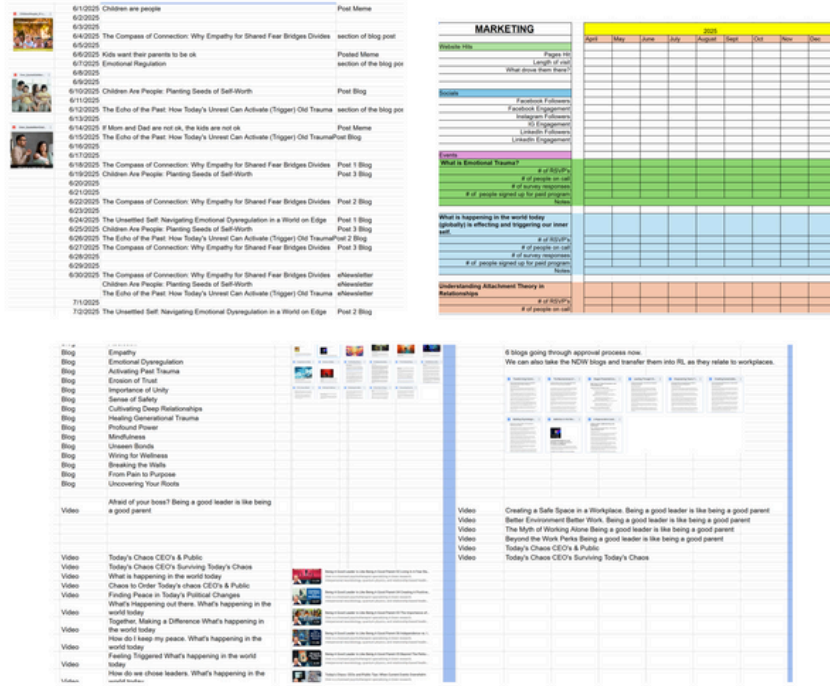
We intentionally designed our strategy for global reach rather than limiting ourselves to local or national markets.

Goals

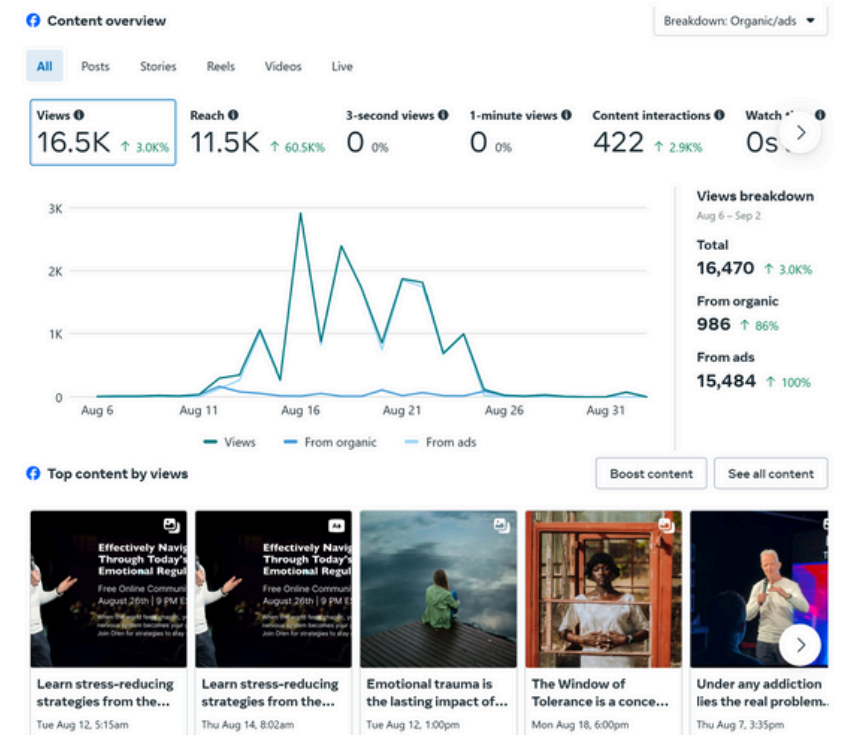
CAMPAIGN PLANNING & KPI'S

EVERYTHING is measured.

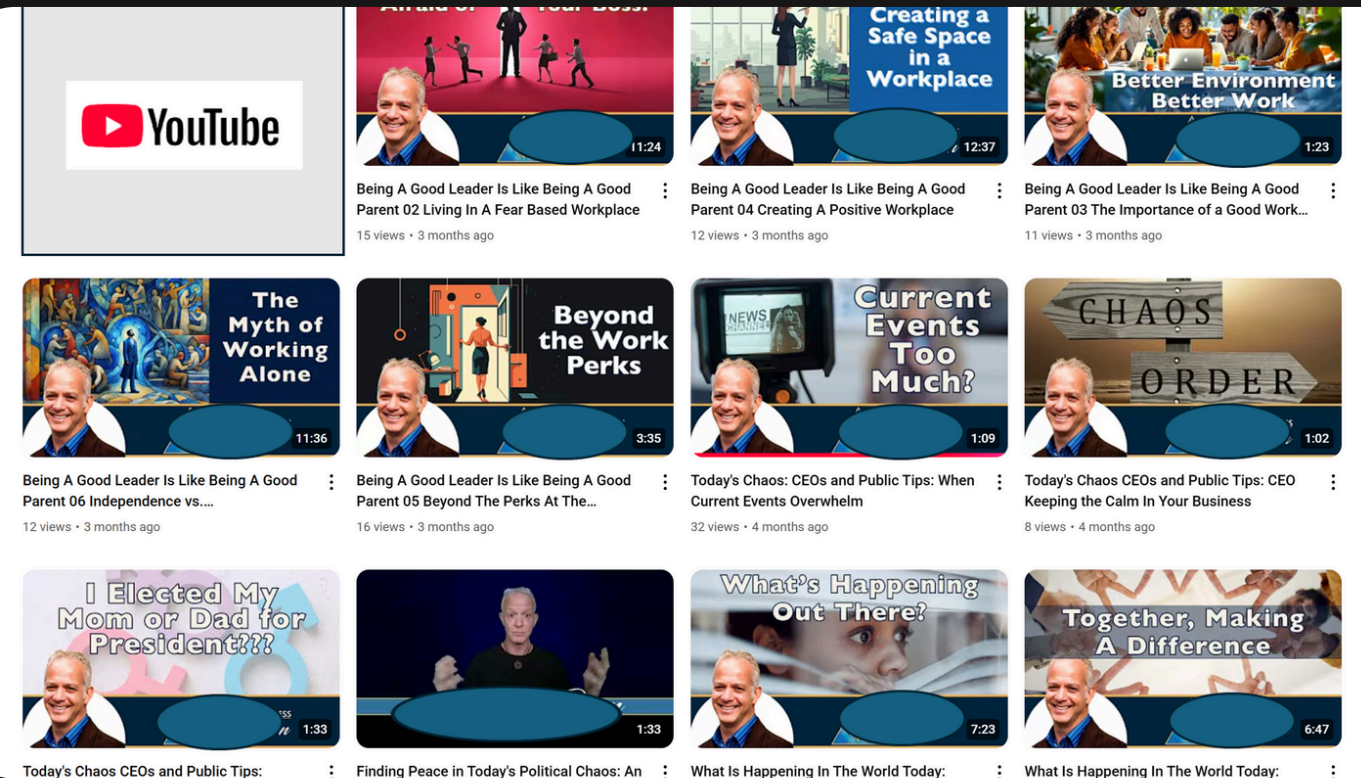
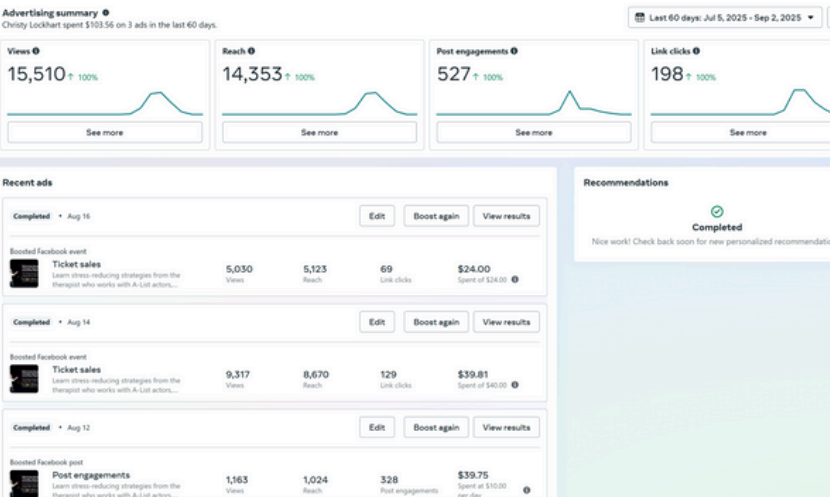
Project
Management
Calendar



Meta
Advertising
\$100 budget!



Meta
Advertising
\$100 budget!



AI & AUTOMATION IN MARKETING

We believe in automation with human consciousness involved with every step of the way.



Recommended automation tools for email sequences, social scheduling, and performance analytics tracking.

Only when it saves our team or Oren time, money, and makes life easier. We do not use it as a substitute for doing our work. However, we need to focus on the bigger mission and messages.

FAVES!

Several AI's

LinkedIn Navigator

Walaaxy

SocialMonials

Buffer

Sales Blitz

Builds Trust When Used Correctly

Strategic use of AI and automation ensures we capture all angles, stay current with tactics, and maintain consistency while focusing on large-scale impact and necessary adjustments.





BUSINESS CONSULTING MINDSET



Christine Lockhart-Morse

Marketing & Sales
Strategist



**16 Years of Helping People and
Organizations Grow**

**A Combination of Creative
and Tactical**

**Enjoys Systems and Measurement
for Proving ROI**

New Strategies and Idea Creation

**A born “connector” so strategic
alliances are fun to develop. Then,
creating the actual
flow between the client and their
strategic alliance partner is the icing
on the cake!**

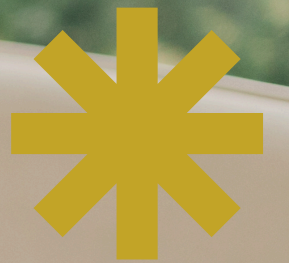
800+ Positive Testimonials

Bringing New Ideas

**Systems Implementor with a
passion for training teams to
do the work without me**

Sustainable growth focus

Strategy before tactics



STRONG COMMUNICATION SKILLS

Communication is my passion because unclear messaging creates costly conflicts—the ability to articulate your thoughts so others understand your thinking requires practice, patience, and empathy. I've learned that mastering the art of listening makes strategy development more relaxed and collaborative. My mentor taught me to always bring a document” that expresses my thoughts clearly, giving everyone the same starting point so ideas can evolve.

Collaboration is the key to success!

Thank you for your time, energy, and
if I have gotten this in front of you, it
is because I want to help you grow.



**BUSINESS
GROWTH
SYSTEMS FOR
INCREASED
REVENUE**

LET'S GO GET THIS!