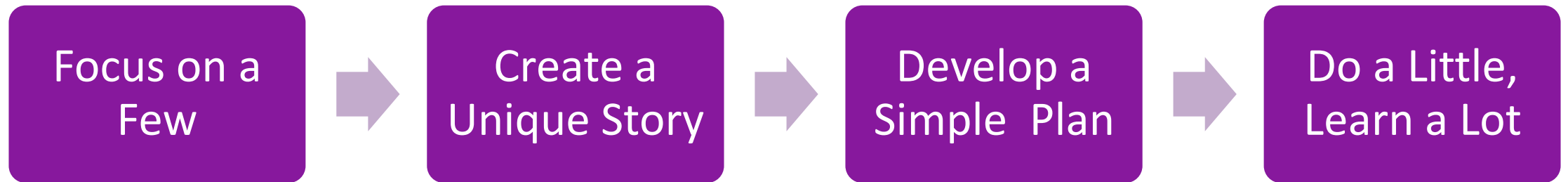


Essential Steps to Creating a Simple Marketing Plan

Essential Steps



1. Focus on a Few (Ideal Target)

Within the category, the people / companies who have similar needs and are likely to be interested in buying from you.

1. Think of customers who are in your “sweet spot” and you love to work with.
2. Why are they in your “sweet spot”?
3. Are they profitable?
4. What size are they?
5. What products/services do they need?
6. What market or markets are they in?
7. What do they care about?
8. What are their frustrations?



Ideal Target - Example

Ideal Target

- Manufacturers That Need Custom, Durable Labels
- 300 mile radius, \$250MM+ annual revenue

Frustrations

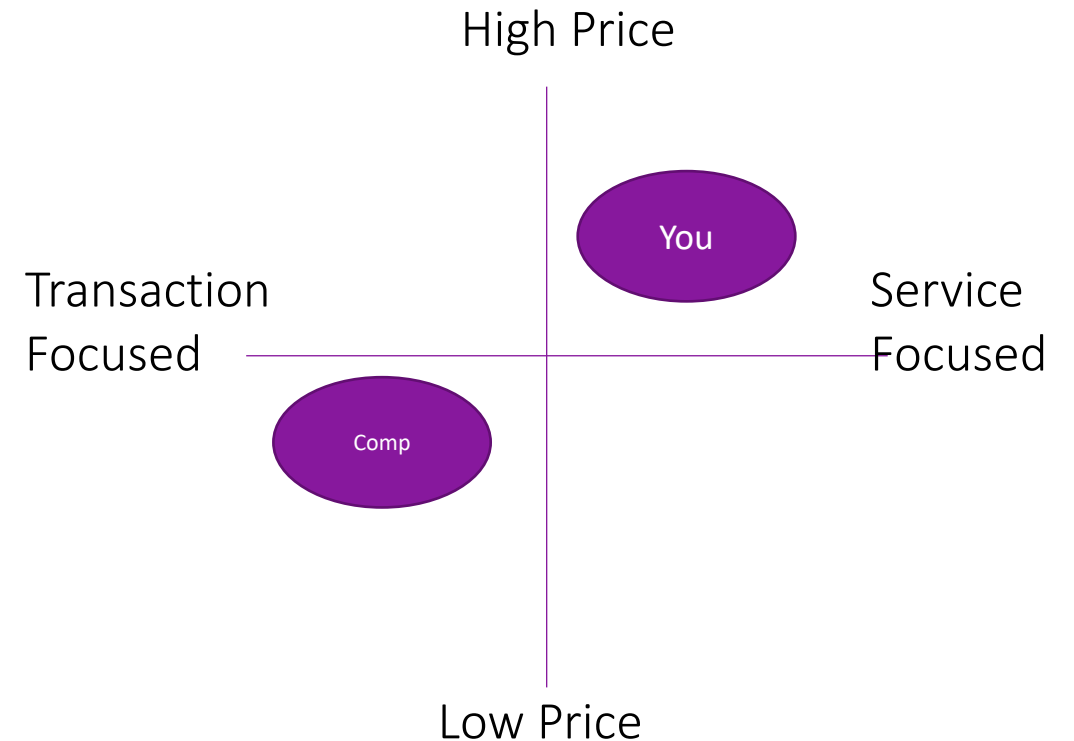
- Labels Fall off or Are Damaged During Manufacturing, Distribution or Use
- Vendors Can't Provide High Quality Labels in Timing Needed

Discussion

- Describe Your Ideal Target
- What Are a Few Frustrations (You Can Help With)?

2. Create a Unique Story

1. Addresses Their Frustration
2. Says How You Help Solve the Frustration
3. Says How You are Different Than Competition



Unique Story - Example

You know how leaders struggle when sales is driving the business in a direction different from strategy?

We customize a Sales MasterPlan to bridge the gap to grow the business faster.

Others provide training and/or templates, but don't help you grow the business faster.

Discussion

- What Frustrations Can You Help With?
- How Can You Help Solve Their Frustrations?
- How Are You Different from Competition?

3. Develop a Simple Plan

- Define your business goals
- Brainstorm tactics to reach your Ideal Target
- Prioritize a few tactics based on the business goals

Define Your Business Goals

- How many customers do you have right now? How many more do you want?
- What part of the funnel do you need to enhance?
 - Build Awareness – new/small/niche brand that prospects don't know about
 - Increase Interest – Need more leads, engagement
 - Gain Commitment – need stronger ecommerce, in-store conversion, sales closes
 - Build Relationships – customer turnover, limited repeat business or cross purchases

Brainstorm Ways to Reach Them

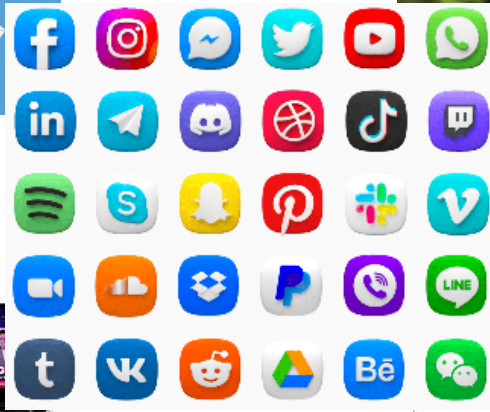


- How Do You Reach them Now?

- Who Do They Trust?

- Where Are They Talking & Listening?

- What Can You Do Well?



Prioritize Tactics by Funnel Stage

FUNNEL STAGE



Ask for each phase:

What tactics are most likely to work based on your Ideal Target and the places they go for information based on where they are in the process?

Tactics – Build Awareness

- Digital media (text ads, banner ads, video ads)
- LinkedIn ads/boosts
- Consistent social media presence (post 1 time per week)
- Sponsorships and events
- PR

Tactics – Increase Interest

- Websites / landing pages
- SEO optimization
- Event follow-up process
- Targeted landing pages
- Drip campaign / customer journey targeting
- Webinars
- Influencers

Tactics – Gain Commitment

- In-store Signage
- In-store materials
- Closing technique training
- Sales process and materials

Tactics - Build Relationships

- Consistently stay in touch (emails)
- Satisfaction surveys
- Increase Reviews
- Recommendations / Referrals
- Quarterly Business Reviews
- Peer referral materials
- Video success stories

Simple Plan - Example

FUNNEL STAGE	TACTICS
<p>Build Awareness</p>	<ul style="list-style-type: none"> •Events/Conferences •LinkedIn Posting 1+ / week (video content) •PR – Business •Test LinkedIn ads/boosts
<p>Increase Interest</p>	<ul style="list-style-type: none"> •Event follow-up process •Targeted landing pages •Drip campaign / customer journey targeting •SEO optimization •Webinars
<p>Gain Commitment</p>	<ul style="list-style-type: none"> •Demo/ “trial” experience on website •Develop supporting tools for the sales process
<p>Build Relationships</p>	<ul style="list-style-type: none"> •QBRs •Peer referral materials •Video success stories •Consistently stay in touch (emails)

Discussion

- What are your business goals?
- What phase of the funnel do you need to enhance?
- Where can you reach your Ideal Target?

4. Do a Little, Learn a Lot

- Create an Action Plan
- Track a few Metrics/KPIs
- Continually Analyze Results Enhance Your Plan

Create an Action Plan

- Use an excel template
- Add all of the activities being completed by all people involved.
 - Activities should be specific enough to be able to “check the box” when finished”
- Sort the activities by date
- Meet (weekly) with the team involved to check status, address issues and add activities based on the plans

Project	Activity	Date	Status	Responsible	Comments

Track a Few Metrics / KPIs

FUNNEL STAGE	Example KPIs
<p>Build Awareness</p>	<ul style="list-style-type: none"> • Ad Impressions • Digital & Social Impressions • Event / Webinar Attendees
<p>Increase Interest</p>	<ul style="list-style-type: none"> • Website Visitors • Cold Call Responses • Leads
<p>Gain Commitment</p>	<ul style="list-style-type: none"> • 1st Meeting with Decision Maker • Qualified Proposals • Total Revenue
<p>Build Relationships</p>	<ul style="list-style-type: none"> • Customer Retention • Customer Satisfaction • Customer Referrals

KPI Tracker - Example

- Google Ads
 - Impressions
 - # Clicks
 - % Click through rate
 - Media Costs
 - # Conversions
 - Cost Per Conversion
- Website
 - # New Visitors
 - # Conversions / Events
 - % Conversions / New Visitors

KPI	Period 1	Period 2
Google Ads		
Text Ad Impressions	1,805	1,856
# Clicks	185	219
% CTR	0.34%	0.40%
Media Costs	\$1,525	\$1,543
Adwords conversions	26	17
Cost Per Conversion	\$58.65	\$90.76
New Website Visitors	540	563
Total Conversions/Events	41	32
% Conversions / New Visitors	8%	6%

Continually Analyze & Enhance Your Plan

Answer these questions to analyze the data and enhance the plans

- What is above or below the average?
- What is causing the result? (look at more detailed data sources if needed)
- What ideas do you have to enhance the results in the next period?

Discussion

- How will you document and manage marketing activities?
- What few metrics do you/could you track?
- What time period will you track (weekly/monthly), and why?

What We've Learned

Actionable strategies to propel your business forward in today's competitive landscape.

1. Focus on a Few
2. Create a Unique Story
3. Develop a Simple Plan
4. Do a Little, Learn a Lot

Make it Actionable

What Are 3 Action Steps You Can Take in the Next Week?

1.

2.

3.