

Effective Marketing Plans: Your Roadmap to Dynamic Growth

CMO-OnLoan®

Nice to Meet You!



LUXOTTICA®

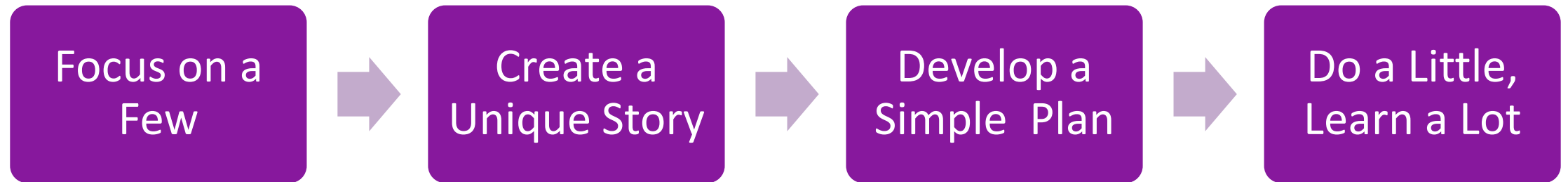


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Today's Objectives

- Deeper understanding of marketing & how it can benefit your business
- Confidence in creating and executing successful marketing
- Clarity on the next steps to take in your marketing journey
- Actionable marketing plan to drive true business growth

Essential Steps



1. Focus on a Few (Ideal Target)

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

People who are in your “sweet spot” and you love to work with.

1. Why are they in your “sweet spot”?
2. Are they profitable?
3. What size are they? What size could they be for you?
4. What products/services do they need?
5. What market or markets are they in?
6. What do they care about?
7. What are their frustrations?



Ideal Target - Example

Ideal Target

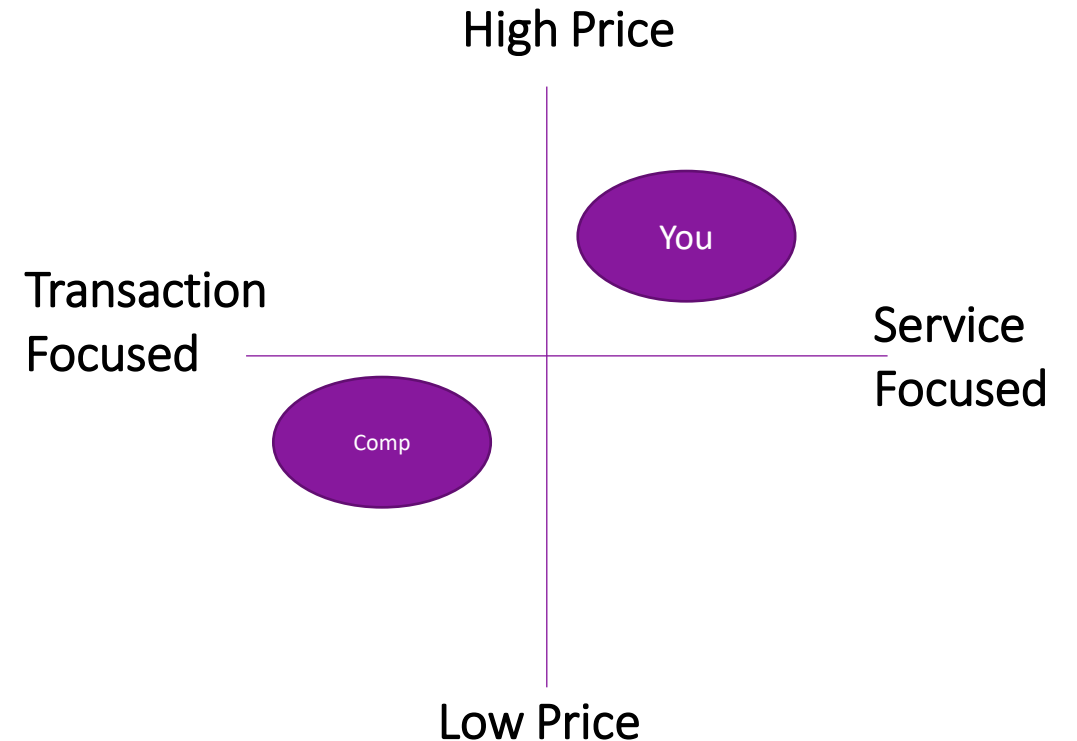
- Manufacturers That Need Custom, Durable Labels
- 300 mile radius, \$250MM+ annual revenue

Frustrations

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

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.

Table Discussion – 5 Minutes

- Describe Your Ideal Target
- 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**
- Determine the **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 – Prospects don't know about you
 - Increase Interest – Need more leads, engagement
 - Gain Commitment – Need stronger conversion
 - Build Relationships – Stronger customer base and/or referrals

Determine Ways to Reach Them

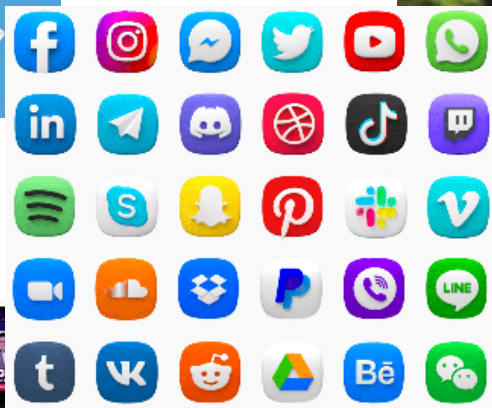


- How Do You Reach them Now?

- Who Do They Trust?

- Where Are They Talking & Listening?

- What Can You Do Well?



Simple Plan – Example Tactics

FUNNEL STAGE	TACTICS
Build Awareness	<ul style="list-style-type: none">•Events & Conferences•TV, Print, Billboards, Radio, PR•Digital ad & Social ads•Cold Outreach
Increase Interest	<ul style="list-style-type: none">•Website / SEO optimization•Influencer programs•Webinars
Gain Commitment	<ul style="list-style-type: none">•eCommerce optimization•Develop supporting tools for the sales process
Build Relationships	<ul style="list-style-type: none">•Referral & Review Programs•Case Studies•Quarterly Business Reviews•Contact plan

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

- All activities, timing and the person responsible

Project	Activity	Date	Status	Responsible

- Meet regularly to check status, address issues and add activities

Track a Few Metrics / KPIs

- Goal = show how all marketing tactics work together
- During a time period and over time
- Marketing counts the number of “people”
- KPIs by Funnel Phase

Metrics / KPIs Examples

FUNNEL STAGE

Example KPIs

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

Continually Analyze & Enhance Your Plan

Answer these questions to analyze the data and enhance the plans

- What KPIs are above or below the average?
- What is causing the result?
- How could you enhance the results in the next period?

Analysis Example

	KPI	Avg	1
BUILD AWARENESS	Google Ads		
	Text Ad Impressions	1,850	1,805
	# Clicks	200	185
	Adwords conversions	20	26
INCREASE INTEREST	New Website Visitors	550	540
	Total Conversions/Events	38	41
	% Conversions / New Visitors	7%	8%
GAIN COMMITMENT	Leads – New Clients		
	# Qualified Leads	26	30
	% Qualified	68%	75%
	# New Clients	21	24

- **Clicks lower but more people converted**

- **Fewer visitors but more conversions**

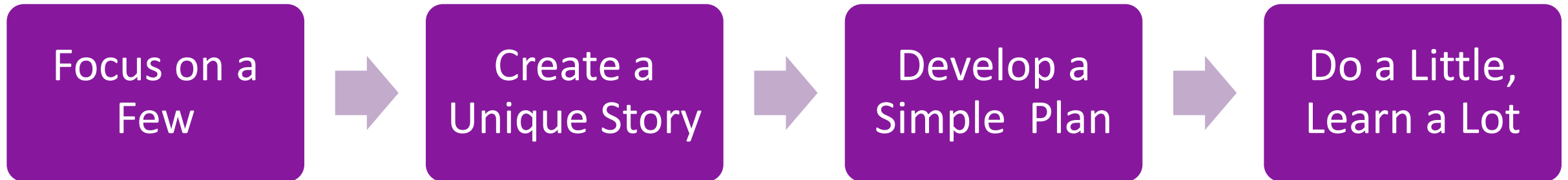
- **High % Qualified**

Table Discussion – 5 Minutes

- **What are your business goals?**
- **Where can you reach your Ideal Target?**
- **How will you document and manage marketing activities?**
- **What few metrics do you or could you track?**
- **What time period will you track (weekly/monthly), and why?**

What We've Learned

The essential tools and knowledge needed to drive real growth in your business.



Panel Discussion



Jake Jerow

VP of Strategic Initiatives & Marketing
Modern Ice Equipment & Supply



Jonathan Adams

President
SALIX Data



Brian Dubay

President and Co-Owner
The Metalworking Group

Questions?



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Let's Connect on LinkedIn!