

Strategic Marketing Playbook

Brand Strategy

Ideal Target

Building Blocks & Deliverables

BRAND STRATEGY

Defines your brand and who you serve

DELIVERABLES:

- Why Your Brand Exists
- Promise & Secret Sauce
- **Ideal Target**
- Brand Architecture
- Naming Strategy
- Personality & Tone-of-Voice

COMMUNICATION STRATEGY

How, when and where you will communicate

DELIVERABLES:

- Hero's Story Outline
- One Liner vs Competition
- Key Messages
- Journey Map
- Channel Strategy
- Style Guide

MARKETING PLAN

How you will deliver business results

DELIVERABLES:

- Marketing Plan Overview
- Priorities, Tactics & KPI's
- Calendar Overview
- Budget Priorities
- KPI Tracker
- Results Dashboard

RESOURCE PLAN

How you will resource the marketing team

DELIVERABLES:

- Resource Plan Overview
- Team Structure
- Internal Roles & Responsibilities
- External Resource Scope

Ideal Target

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

Steps to Defining Your Ideal Target & Roles

- Think of customers who are in your “sweet spot” and you love to work with.
- Why are they in your “sweet spot”?
- Are they profitable?
- What size are they?
- What products/services do they need?
- What market or markets are they in?
- Who are the people in the buying process?
- What do they care about?
- What are their frustrations?



Example

The Ideal CMO-OnLoan Target Client is the CEO/Owner of a privately-held mid-market company (\$25-\$100MM) in the Cincinnati, Dayton or Northern Kentucky areas.

They:

- Provide B2B products and services.
- Have no marketing leadership.
- Do not believe they are ready for a full-time marketing leader (or they don't have the resources for one).
- Are dedicated to their company, their people and their communities.
- Are working to build an “evergreen” organization – one that outlives them.
- Are triggered by an event that spurs them to seek out marketing expertise. I.e.; growth goals, business decline, change in leadership, leader tired of doing ‘marketing’ in their spare time, strategic topic they want fixed, etc.



Roles & Personas

Roles

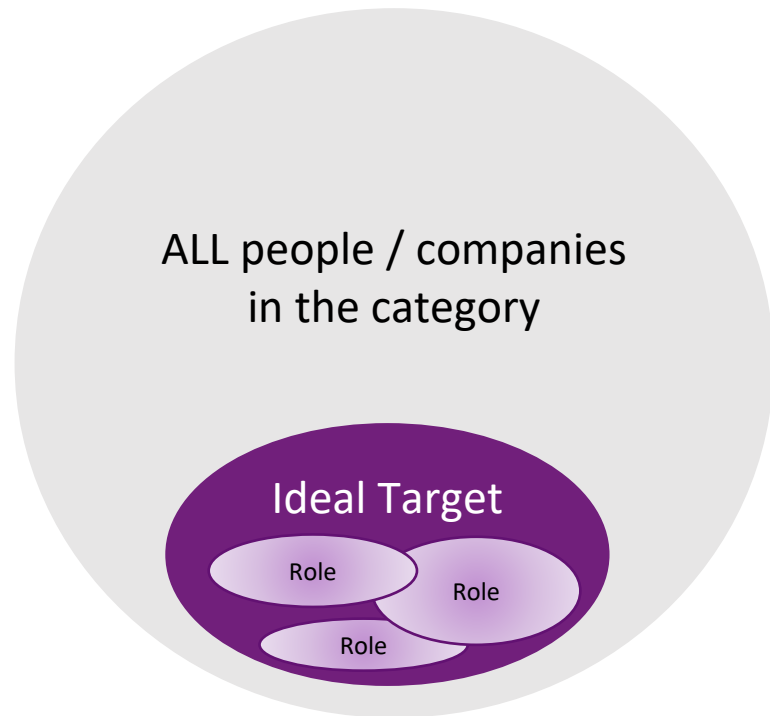
- Type of people involved in a buying process
- Who they are (title), role in the process, level of interest and knowledge and action we want
- Usually business-to-business
- Example Roles:
 - Decision Maker
 - Economic Buyer
 - Influencer
 - Technical Buyer

Personas

- Description of a specific type of person and/or role within the Ideal Target
- Includes information about the person's objectives, needs, barriers, competitive options, product or service priorities, etc.
- Both business-to-business and business-to-consumer

Roles

Within the ideal target, the different groups of people you want to reach



Broken out by:

- Who they are
- What their role is in the buying process
 - D= Decision Maker
 - E= Economic Buyer
 - I= Influencer
 - T= Technical Buyer
- What action we want them to take

Who Are They	Role in Buying Process	Level of Interest / Knowledge	Action We Want
Role 1			
Role 2			
Role 3			
Role 4			

Roles Example

Who Are They	Role in Buying Process	Level of Interest/Knowledge	Action We Want
CEO/President	Decision Maker/Buyer	Interested and not very knowledgeable	Choose to work with us over competition
Senior Leadership	Influencer	Somewhat interested, not very knowledgeable	Advocate to work with us
Sales	Influencer	Interested but could be skeptical, knowledgeable	Advocate to work with us

Persona Examples

BRUNCHERS



Description

Mostly 20-30 something, well-off, young professionals who are unencumbered by children and can fritter away a weekend day over a boozy brunch. Racially diverse, they get dressed up, indulge in yummy food, bottomless mimosas, and connecting with friends. They will post the event on Instagram stories or TikTok. While it is mostly "for the girls", they may also include their best guy friends.

Can also include families or groups of friends after church enjoying a meal together.

When/Why visiting TOB?

Saturday or Sunday. Often following a wild night-out, this is an excuse to eat indulgent food, drink during the day, and laugh/connect with friends. Can be any weekend, but especially when girlfriends come in town to visit.

Also, a post-church family get together and alternative to going out to dinner when everybody is already dressed.



Influencers/ Information Sources

Google searches for best place for brunch. Recommendations from friends. Having a good deal on bottomless Mimosas or another fun brunchy drink. Tik Tok as a search engine. And IG stories from influencers and friends or tagged photos in IG. WOM is very important.

What Does This Person Value? What type of experience are they looking for?

They care about being all together in a fun and inviting environment - even better if there is a cool outdoor sitting area. If they are drinking, then they are *drinking* and want a good deal on bottomless mimosas. They think about how many people are going and then find a place where they can get a reservation that will fit them all nicely at a time they want. They do care about accessibility – how easy it will be to park and/or get there if there is a big group.

Why don't they choose us? Where else do they go?

First Watch, Toast & Berry, Sleepy Bee, Another Broken Egg
The killers - - being too expensive, having bad reviews, or a past experience of bad service.

How do they decide on where to go?

1. First, think about many people are coming
2. Then look at options
3. Are we drinking/what's the deal on bottomless mimosas?
4. What does the menu look like (including prices)?
5. What do others say about the options?
6. Is it easy to make happen (easy to get a reservation, then park/access)

The stories that will help us win?

Overall: Live life to fullest. Bistro (a touch European). Escape and connect. Sit. Sip. Stay.
Food: Brunch focused indulgence. The best waffles you will ever have. Create the crave. Tempt the tastebuds.
Drink: Bottomless cocktails (mimosas, innovative craft cocktails featuring Genever), Barista
Loyalty: 6 for 5 brunch. mimosa deals/flight.
Reservations?: Make it super easy to get your group in. Highlight brunch availability for large groups.
Location Notes: Highlight the following as available: outdoor seating; easy parking;

The places we need to be seen/heard?

Instagram, TikTok and Facebook (paid and organic)
Social influencers
Best of Lists for Brunch, Boozy Brunch
Potential keywords: Best Brunch Near Me; Bottomless Brunch Near Me; Best Bottomless Brunch Near Me

EDUCATION: LARGE PUBLIC SCHOOLS

Overview

- Student, faculty & staff security is critical
- Many visitors in/out all the time
- Locations vary widely
- Budget is an issue

Desired Outcomes

- Active Incident Prevention/Response
- Perception (do I feel safe?)
- Theft, Burglary, and Vandalism
- Safety Hazards (slips, trips, falls, etc.)
- Property Damage (leaks)

Tactics

- Referrals from peer schools
- Organizations / Events
- Hot List (Security Grants)
- Cold Outreach
- New Construction (GC's, architects, etc.)



Buyer	Top Factors
IT Manager (Tech)	Innovative tech, customer service, coverage
Admin (Business Office)	One-stop-shop, innovative tech, customer service, coverage

Recap – Ideal Target

- Ideal Target identifies and describes the people / companies who have similar needs and are likely to be interested in buying from you
 - Roles are the people involved in a buying process (usually B2B)
 - Personas are a description of a specific type of person and/or role within the Ideal Target

Step to Defining Your Ideal Target

1. Think of customers who are in your “sweet spot” and you love to work with.
2. Why are they in your “sweet spot” and good customers?
3. What market or markets are they in?
4. What do they care about?
5. What is their buying process?
6. Determine what additional information you need successfully sell your product or service and develop roles and/or personas