

MARKETING PLAN 101: CREATE YOUR ROADMAP TO SUCCESS



Housekeeping

- Slides, recording, calendar will be emailed after class.
- Please put questions in Q&A, comments in chat.

SHARE!

Please share your business type and what your biggest marketing challenge is right now!



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Business Success Starts Here.

SCORE is the nation's largest network of volunteer, expert business mentors, with more than 10,000 volunteers in 300 chapters.

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Feedback



Why SCORE Works

You Don't Have to Go It Alone



- Our team of SCORE mentors offers over 300,000 total years of business experience.
- We're here *for the life of your business* – providing free advice for as long as you own your business.

SCORE offers:



- **Confidential Face-to-Face, email and video mentoring** with volunteer mentors who have backgrounds in a variety of business disciplines including finance, marketing, sales, management, business planning and manufacturing.
- **Workshops like this one** –geared to meet the needs of our clients
- **And, both a local and National website** with webinars, online training, blogs and templates to meet every stage of your business growth.



Hosted By:



<https://santabarbara.score.org/>

National:

<https://www.score.org/>

Workshops, Mentors, Resources for small business owners at any stage of your business



Tue Jan 18th 12:00pm - 2:00pm

Social Media Essentials For Business-WEBINAR

Hosted by SCORE Los Angeles Social media can be overwhelming for business owners. Which platforms. How often to post. What to



Wed Jan 19th 8:00am - 10:00am

E-Mail Marketing Essentials For Business-WEBINAR

Hosted by SCORE Austin Research says that for every \$1 spent on E-Mail marketing there is an average \$44 return on investment. To generate ...



Thu Jan 20th 10:00am - 12:00pm

E-Mail Marketing Essentials For Business-WEBINAR

Hosted by SCORE Los Angeles Research says that for every \$1 spent on E-Mail marketing there is an average \$44 return on investment. To



Thu Feb 10th 9:00am - 10:30am

Marketing Plan 101 - Create Your Roadmap To Success-WEBINAR

Hosted by SCORE Charlotte, NC Are you overwhelmed by all the choices for marketing your business? Not sure where your time and money



Thu Feb 24th 10:00am - 11:30am

Social Media Essentials For Business - Webinar Part 1

Hosted by SCORE Santa



Thu Mar 3rd 10:00am - 11:30am

Social Media Essentials For Business PART 2 - Webinar

Hosted by SCORE Santa



Thu Mar 10th 9:00am - 10:30am

Social Media Essentials For Business-WEBINAR

Hosted by SCORE Charlotte, NC Social media can be



Thu Mar 24th 10:00am - 11:30am

E-Mail Marketing Essentials For Business-WEBINAR Part 1

First E-Commerce position in 1998 in gourmet gift basket industry.

Brand management experience includes wine & spirits, motorcycle, aromatherapy, legal, NAACP, landscape design, religion, financial, Non-Profit, fitness, CBD/Cannabis, restaurant, tattoo, medical spa, medical devices

Teach Marketing/Branding Classes for: SCORE (Multiple in and out of state chapters, Chambers, Trade Associations, and private organizations.



ABOUT ME



WORLD OF MARKETING

Website

Internet
Ads

Social
Media

E-Mail
Marketing

SEO
SEM

SMS/Text
Marketing

TV

Retargeting

Radio

Geo
Fencing

Print
Ads

Influencers

Billboards

Public
Relations

Promo
Products

Wi-Fi
Marketing



Listen to Ben Franklin...



This is how
many companies do
marketing..do you??



Is this your marketing plan?!



So what is Marketing?

- ▶ Marketing is the process of getting potential clients or customers (prospects) interested in your products and / or services.
- ▶ The key word in this definition is "process" as marketing involves researching, promoting, selling, and distributing your products or services.
- ▶ Very simply put, marketing is telling people what you do – over and over and over again.





5 REASONS YOU NEED A MARKETING PLAN!

**REASON #1:
MAXIMIZES YOUR
MARKETING BUDGET
AND ROI**

**REASON #2:
CREATES
CONSISTENCY**

**REASON #3:
ENCOURAGES DEEPER
THOUGHT ABOUT
YOUR BUSINESS AND
MARKETING**

**REASON #4:
UNIFIES YOUR TEAM**

**REASON #5:
IMPROVES YOUR
CHANCES OF
ACCOMPLISHING
YOUR MARKETING
GOALS**



MEASURE/OPTIMIZE

Measure how marketing is performing against KPI's and benchmarks. Then, optimize to improve results and performance.

SET S.M.A.R.T. GOALS

Clearly articulate what you want to achieve, how and when. How much of a commitment it will take-time, money and people?

TACTICAL PLAN

Develop a tactical implementation plan to guide who does what, when and how, as well as tools processes, budgets and best practices.

BUYER PERSONAS

Focus on who matters to you? Is it more than one type of buyer? Can you look at past customers to find buyer personas? Who are they? Where are they? What do they need? What do they want?

CHANNELS

Focus on the most effective channels to engage, educate and entertain your customers based on your SWOT, GOALS and Buyer Personas.

YOUR STORY

Your story is your messaging, visuals, people. What is your brand story saying about you to your ideal customers?

S.W.O.T. AND U.S.P.

Analyze your Strengths, Weaknesses, Opportunities and Threats to improve your business and better compete in your space. What is your Unique Selling Proposition?



What Are Your Business Goals? Your Marketing Goals?



Business goals – sales growth, market share, # of deals, deal size, geographical reach

Marketing goals – leads, demos, prospects engaged, media coverage, new channels



S



Specific

M



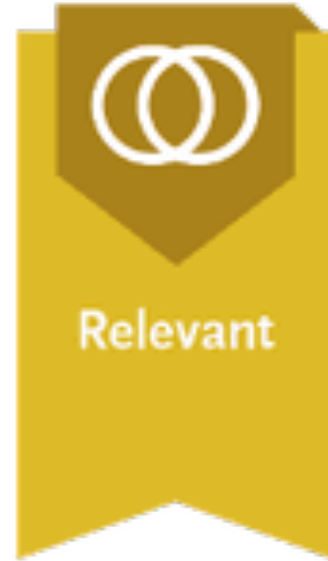
Measurable

A



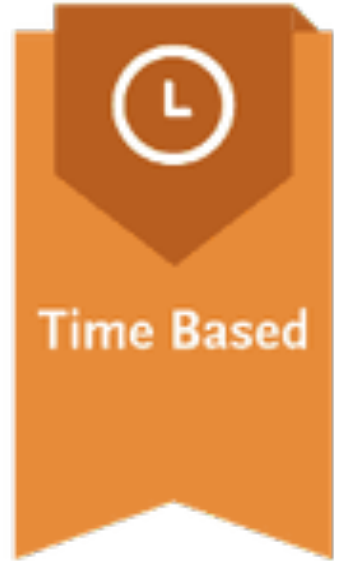
Attainable

R



Relevant

T



Time Based





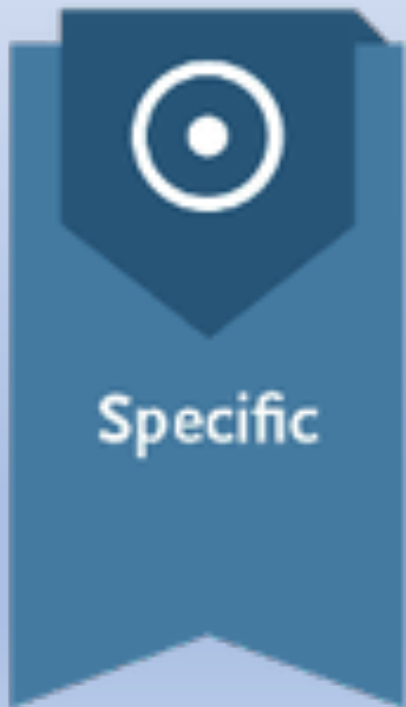
Without defining exactly what you're trying to improve, it's difficult to outline the steps you need to take to make progress. A specific goal is one that you could share with your team in 10 seconds that would clearly explain what you're trying to improve.

Not Specific:

I want to generate more leads.

Specific:

I want to generate a greater number of qualified leads from our blog for our sales team.



M

It's crucial that your goal is trackable and numeric. Many businesses simply say that they want to grow their social media following, for example, but they don't specify by how much they'd like to grow it. As soon as you attach a number to your goal, you'll be able to track exactly how far you've come since you set the goal and how far you have left until you reach it.



Measurable

Measurable: I want to grow the number of leads generated per month from our blog by 20%.





While aiming to break records can be beneficial , it's important to keep these goals realistic. If your company has historically gained 10 social media followers per month, aiming to grow your social following by 1,000 followers next month would be drastic. Don't get so discouraged by a huge goal that you lose motivation. Instead, set yourself up to succeed by creating goals that are realistic.



Attainable

Attainable Goal:

Since we generate around 100 leads per month from our blog right now, I want to grow the number of leads generated per month from our blog to 120 per month.



R

Ask yourself why you're setting the goal that you are. How is it going to contribute to the company's bottom line? Ultimately, the marketing goal you set should be tied back to business impact. If it's not, consider how you can change or adjust your initial goal.



Relevant

I want to grow the number of leads generated per month from our blog to 120 per month because our sales team finds that blog leads convert to customers at 3X the rate of leads from PPC advertising.





Time Based

The final aspect of the SMART framework is one of the most important: setting a timeline for meeting your goal. Without a timeline, you won't be able to determine whether the smaller changes you're making are keeping you on track toward achieving your ultimate goal. Setting a timeline is also key for internal alignment. When you're generating significantly more leads, for example, you'll need to make sure your sales team has the bandwidth to reach out to all of them.

I want to grow the number of leads generated per month from our blog to 120 per month because we find that blog leads convert to customers at 3X the rate of leads from PPC advertising.



Who is Your Customer?



"EVERYONE
IS NOT
YOUR
CUSTOMER."

SETH GODIN



Are You “Fishing In The Ocean?”





Or “Fishing In A Pond?”



Buyer Personas



A Buyer Persona is a semi-fictional representation of your ideal customer based on market research and real data about your existing customers.



Why are creating Buyer Personas Important for Business?

- Meet the needs of each Micro-Segment
- Create more appealing content to each segment
- Add consistency to your marketing strategy.
- Generate higher quality leads.



How to Find Data to Create a Buyer Persona

Taking data from existing customers

- Carry out customer interviews
- Get insights from the sales team
- Gather insights from business/digital data
- Gathering buyer persona data from market research
- Explore the audiences of the biggest industry players



5 simple questions to ask about your buyers

1. What are the values of this audience?

Example: stay at home mom (budget conscious) vs corporate executive (luxury lifestyle)

How do you appeal to these types?

2. What are the pain points? Need vs want.

Example: HVAC service- They need to save money vs they want to cool down now!

3. Where and how will they be reading?

Example: casual at home with ipad on the sofa or on their mobile while riding the train or waiting in doctor's office?

4. Do your buyers want to be talked to or talked with? Conversational or clear instruction

5. What action do you want your buyer to take? (direct sell or planting seed?)



BUYER PERSONA

Starter Questions

PERSONAL INFO:

- Age
- Gender
- Children
- Marital Status
- Location
- Income
- Education



GOALS & CHALLENGES:

- What are their personal/career goals?
- How do they prioritize those goals?
- What challenges impact achieving these goals?
- How could you help?
- What questions do they ask when seeking solutions to these challenges?

PROFESSIONAL INFO:

- Job Title / Role
- Career Path
- Company / Industry
- Company Size
- Special Skills
- What is a typical day like?
- What tools do they use?
- Who is their boss?
- Do they manage others?
- How is their success measured?



WHERE ARE THEY?

- How do they get information?
- How do they communicate?
- What media do they consume?
- Do they belong to any associations?
- What social media do they use?
- Do they attend events or conferences?
- Where do they spend their days?
- Do they have relevant hobbies?

VALUES AND FEARS:

- What do they value in their personal or professional life?
- What is important to them when considering a product like yours?
- What objections might they have?
- What drives their decision making process?

NEGATIVE INFO:

- Are there customers you don't want?
 - Too difficult?
 - Too expensive to support?
 - Not enough budget?
 - Wrong industry?



Bachelor Brice

MARITAL STATUS Single

AGE 30 to 50

LOCATION Within 60 miles of animal shelter



KEY IDENTIFIERS

Adventurous

Active lifestyle

Stable job

Nurturing spirit

Feelings of loneliness

Background

Brice is a single, successful individual that is generally happy in life, but is a bit lonely at times. He lives an active lifestyle and has a stable job, but feels like something is missing. He's got a lot of love to give.

Goals

- Find companionship
- Stay fit and healthy

Challenges

- Loves animals, but is unsure if pet ownership is for him
- Doesn't know where to begin on dog selection process

How We Help

- Provide information on pet ownership
- Assist with "matchmaking" - helping people find their perfect furry friend based on personality and lifestyle
- Communicate the social and health benefits of having a pet



Working Mom Wendy

ROLE Healthcare decision maker

AGE 30 to 50

FAMILY Kids under 18



KEY IDENTIFIERS

Full-time career

Family-first values

Educated

Seeks health information online

Does her research

Background

Wendy is a working mom who is balancing her career with raising a family. She's an educated, on-the-go woman who uses online resources for just about every aspect of her life - from cooking to parenting.

Goals

- Keep her family healthy
- When someone in her family is ill, she wants quick, convenient, and reliable care

Challenges

- As her children grow older, she doesn't necessarily have a dedicated primary care physician
- Her busy work schedule makes it challenging to take sick days for her or her children

How We Help

- Provide online scheduling and same-day appointments for quick service
- Make care easily accessible from work or home with convenient locations
- Produce online health resources



Coffee Shop Marketing Persona



Sarah Student

"I need to be able to go somewhere to relax, re-focus, and get inspired without breaking the bank."

A DAY IN THE LIFE OF SARAH

- Early mornings, late nights describes her daily routines, so she lives on coffee
- She goes to school all day, studies at nights and works freelance jobs
- She has a cat that keeps her grounded with a sense of responsibility
- She's a carefree college student
- Her house is never in order, her fridge is empty and she's always buried in a book or her laptop
- She takes the train and Ubers everywhere

BACKGROUND

- 20 years old
- Single
- Lives in San Francisco, CA
- Full-Time Interior Design Student, Part Time Worker

FINANCES

- Household income of \$30,000
- She's super conscious about what she spends her money on
- Prefers to use her credit / debit cards

ONLINE BEHAVIORS

- Facebook is her life-line
- Active on Twitter, Instagram, and Pinterest
- Looks for coupons and good deals on cool, new experiences or restaurants

WHAT SHE'S LOOKING FOR

- A place to de-compress after a hectic week
- A quiet place to study where she's not distracted by her messy room
- A good deal to make her feel better about purchases
- A sense of stability in her chaotic world
- Cool, new experiences or adventures

WHAT INFLUENCES HER

- Her friends and colleagues
- Magazines, blogs, articles, and design publications

BRAND AFFINITIES

- Starbucks, H&M, Forever21, American Eagle, Target

HOPES & DREAMS

- Become a reputable interior designer
- Travel the world
- Have the flexibility to be able to pick up and go as she pleases
- Not have to worry about finances

WORRIES & FEARS

- Not being able to pay her bills
- Getting stuck somewhere and not being able to travel
- Not having enough time with her cat
- Not being able to pay back her school debt

MAKE HER LIFE EASIER

- Funky atmosphere that's inviting and relaxing
- Deals and coupons
- Provide a job-board inside the coffee shop for freelance jobs
- Cozy seating with plenty of charging stations
- Order drinks to-go online or through an app
- Social media engagement incentives for discounts



WINE BUYER PERSONAS



IMAGE SEEKERS



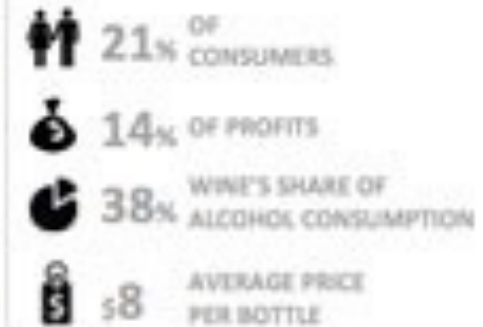
ENGAGED NEWCOMERS



EVERYDAY LOYALS



PRICE DRIVEN




ENTHUSIASTS



OVERWHELMED




Buyer Persona Creation

<p>DEMOGRAPHICS</p> <p>Gender Age Marital Status Goals and values Employer: industry, size</p>	<p>RESPONSIBILITIES</p> <p>What are their titles?</p> <p>What are their duties and responsibilities?</p> <p>Who do they report to? How are they evaluated?</p>	<p>GOALS/ASPIRATIONS</p> <p>What do they want to achieve?</p> <p>What would make them look at a rock star?</p> <p>What are their buying triggers or motivations?</p>	<p>FRUSTRATIONS</p> <p>What are their pain points?</p> <p>What are the obstacles stopping them from reaching their goals?</p> <p>What problems do they have with existing products or tools?</p>	<p>NEEDS</p> <p>What are they looking to do? What does success look like?</p> <hr/> <p>OBJECTIONS</p> <p>What would prevent them from making a purchase?</p>
<p>BUYING ROLES</p> <p>What role do they play in purchases: decision makers, influencers?</p> <p>When and how do they participate?</p>	<p>CHANNELS</p> <p>What channels do they use?</p> <p>Where can they be found on social media?</p> <p>What are their digital and non-digital activities?</p>	<p>BUYER'S JOURNEY</p> <p>What is the buying path look like: awareness, consideration, purchase and advocacy?</p> <p>What is the marketing, content and information for different parts of the funnel?</p>	<p>CONTENT SOURCES</p> <p>Where do they look for content and information?</p> <p>What kind of content affects purchase decisions?</p> <p>How do they use and share content?</p>	<p>QUOTE/PHOTO</p>  <p>"My goal is to drive the number of MQLs by 25% this year....."</p>



BUYER PERSONA CREATION

DEMOGRAPHICS	RESPONSIBILITIES	GOALS/ASPIRATIONS	FRUSTRATIONS	NEEDS
				OBJECTIONS
BUYING ROLES	CHANNELS	BUYER'S JOURNEY	CONTENT SOURCES	QUOTE/PHOTO
				

S

STRENGTHS

- Things your company does well
- Qualities that separate you from your competitors
- Internal resources such as skilled, knowledgeable staff
- Tangible assets such as intellectual property, capital, proprietary technologies etc.

W

WEAKNESSES

- Things your company lacks
- Things your competitors do better than you
- Resource limitations
- Unclear unique selling proposition

O

OPPORTUNITIES

- Underserved markets for specific products
- Few competitors in your area
- Emerging need for your products or services
- Press/media coverage of your company

T

THREATS

- Emerging competitors
- Changing regulatory environment
- Negative press/media coverage
- Changing customer attitudes toward your company



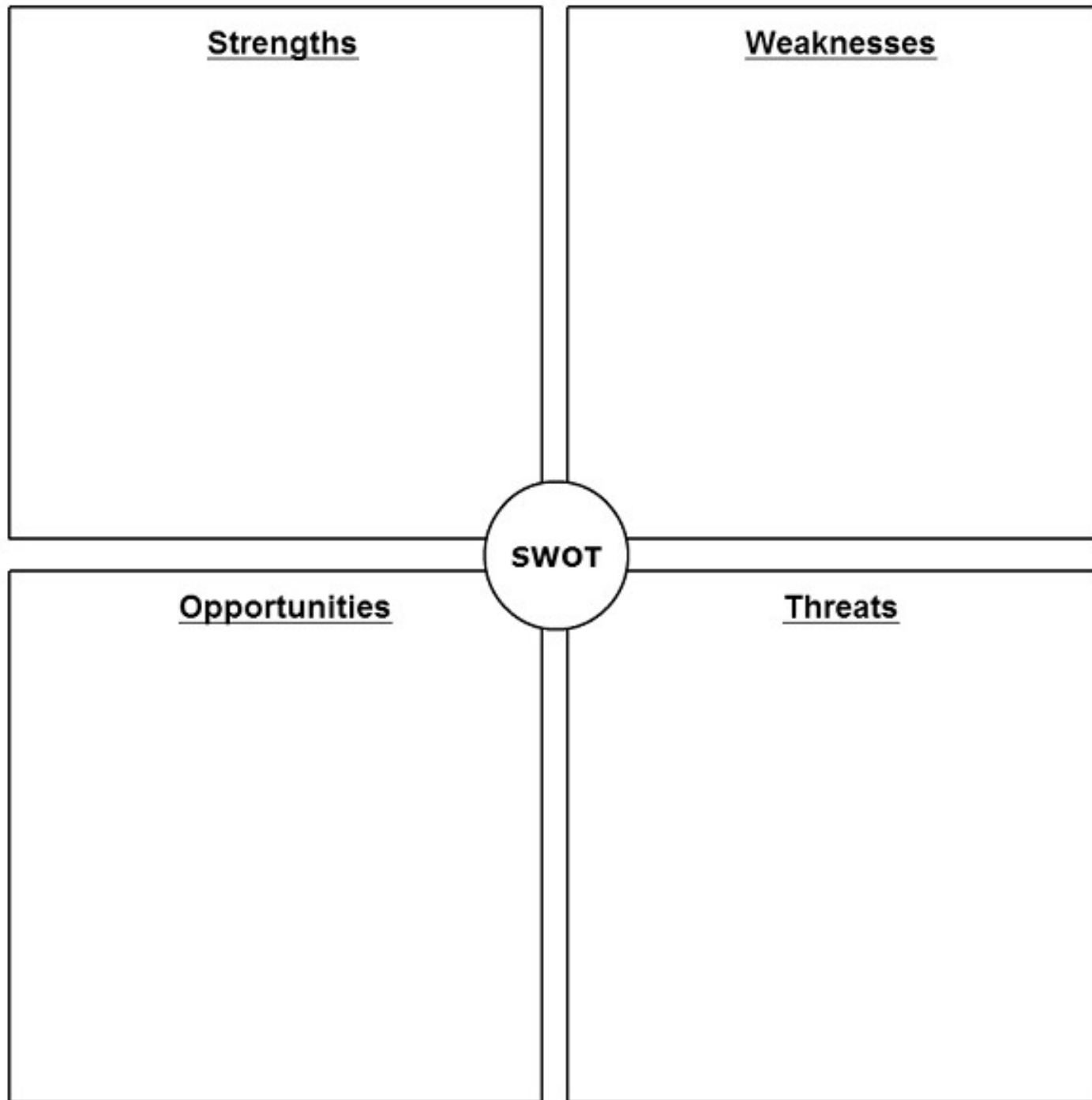
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Excellent, well-trafficked location • Good reputation among local community • Seasonal menu, locally sourced 	<ul style="list-style-type: none"> • Higher costs than comparable chain restaurants • Single location means limited reach • Modest advertising budget • Not currently using food delivery apps/technology
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Growing interest in/support for locally sourced ingredients • Seasonal menu keeps things fresh and interesting • Potential for growth via food delivery apps/technology 	<ul style="list-style-type: none"> • Intensifying competition from established chain restaurants • Uncertain economic environment • Rising costs of ingredients • COVID!!

Restaurant Example

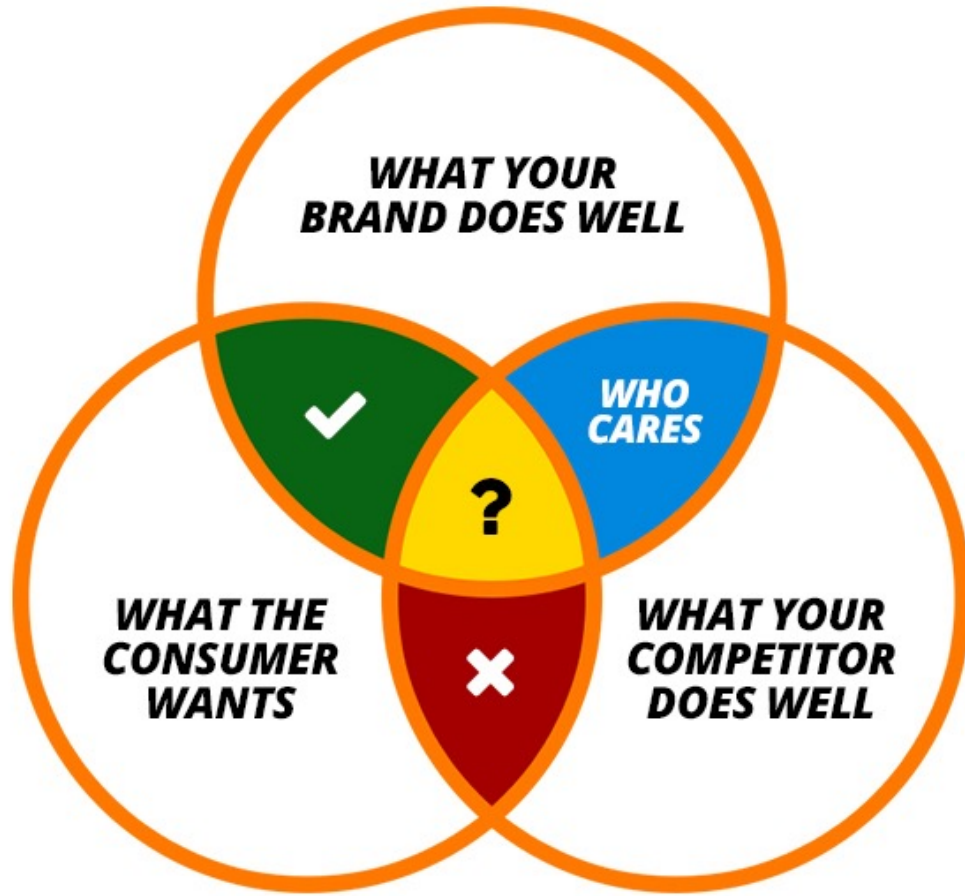


Feature/Company	Our Product	Competitor 1	Competitor 2	Competitor 3	Competitor 4
Strengths	Faster performance due to new technology	Seamless onboarding experience, great design	Uses social media to their advantage	Great design, usability	Emphasizes security
Weaknesses	Not much social media presence	Not much interaction with customers	Documents hard to navigate	Sporadic social media presence	Language is formal, not user-friendly
Pricing	\$800 per month	\$800 per month	\$900 per month	\$850 a month	\$950 a month
Social media	Twitter, Instagram	Blog posts, Twitter	Blog posts, Instagram	Blog posts, Instagram, Twitter	Blog posts
Onboarding experience	Moderate number of steps to sign up	Smooth instructions	Not much support after first step	Seamless, very few steps involved	Moderate number of steps





DO IT YOURSELF!



Unique Selling Proposition

✓ - *Winning Zone*

Clear point of difference that meets the needs.

✗ - *Losing Zone*

Your competitor does what you do better than you

? - *Risky*

Competitive battle ground. use emotion, innovative, superior execution.

Who Cares

Many times, competitors battle in areas the consumer just doesn't care about. Have fun wasting your time.





WE'RE BOMBAS.

We believe that a more comfortable world is a better world. That everyone, no matter their circumstances, deserves to put on clean clothes that makes them feel good. So we spent years perfecting socks and t-shirts you'll want to live in. Creating apparel you'll never want to take off. And for every item you purchase for yourself, we donate an item to someone affected by homelessness.





Women's Merino Tie Dye Gift Box

Color: Mixed



\$78.00

or 4 interest-free installments of \$19.50 by Afterpay ⓘ

Size: M (US Shoe Size 8-10½)

[Size Guide](#)



Add To Bag

4 PURCHASED = 4 DONATED

Order Now — Only 5 Days Left To Get Your Gifts By 12/24 | Free Shipping On Orders \$50+

Giving Merino Wool means you're giving socks made of the most soft, temperature regulating and breathable wool ever. Authentic Tie Dye means no two are exactly alike, and each pair comes in a unique pattern you wouldn't normally find in a merino wool sock. Bring the two together, and you've got a match made in gift-giving heaven.

As always, one purchased = one donated.

[Full Product Details](#)



Stay-Up Technology



Seamless Toe



Y-Stitched Heel

Your USP Checklist

Your Distinctives Compared with Other Providers

1. How are you different from your closest competition?
2. What additional services do you provide that others don't?
3. What services are better than your competition?
4. What services are more effective than your competition?
5. How do you offer a competitive price/value for your services?
6. How do you excel in quality?

Your Niche

7. What physical needs do you meet?
8. What emotional and spiritual needs do you meet?
9. How do you meet those needs in a special way?
10. What specific/timely event(s) do you address?

Your Demographic Distinctives

11. What product or service do you offer to a certain geographical radius?
12. What particular age group, gender, or income level do you serve?
13. What secondary demographic group do you serve?

Your Service Distinctives

14. In what ways are you known for their personal, courteous, go-the-extra mile service?
15. What kinds of contact methods do you offer (website, 24/7 hotline, toll-free number, e-mail, social media)?
16. What advice and technical support do you offer?
17. What confidentiality services do you offer?
18. How fast can you deliver information or answer an inquiry?
19. What range of services do you offer?
20. In what other ways do you excel in customer service?

Your Offers and Deals

21. What special incentives do you offer?
22. What unique, special premiums or information products do you offer?
23. What different seasonal specials do you offer?
24. What value-added incentives do you offer? (free information, newsletters, complimentary services)



Your Personal Distinctives

- 25. How do your special skills make you more attractive?
- 26. How do your unique training, experience, or story enhance your services?
- 27. How does your passion or excitement impact your product and services?

Your Track Record

- 28. How long have you successfully been in operation?
- 29. If you are new, how do you explain your success in such a short time?
- 30. What are your outcome statistics?
- 31. What are your client satisfaction statistics?
- 32. What do others say about your organization?
- 33. What endorsements can you share?

Your Vision

- 34. Is your product/service visionary in any way?
- 35. What trend are you leading?
- 36. How are your services unique or singular – or only duplicated in a cursory way elsewhere?
- 37. What drives your philosophy to repeatedly develop new approaches and services and stay on the cutting edge?
- 38. Why is your mission a calling?



Winning USP Examples.

- ▶ **Example #1 - Package Shipping Industry**
- ▶ **Pain** - I have to get this package delivered quickly!
- ▶ **USP** - *"When it absolutely, positively has to be there overnight."* (Federal Express)
- ▶ **Example #2 – Quick Service Food Industry**
- ▶ **Pain** - The kids are starving, but Mum and Dad are too tired to cook!
- ▶ **USP** - *"Pizza delivered in 30 minutes or it's free."* (Dominos Pizza)
- ▶ **Example #3 – Hair Care Industry**
- ▶ **Pain** - People with dandruff.
- ▶ **USP** – *"Healthy, beautiful, dandruff free hair"* (Head & Shoulders)
- ▶ **Example #4 – Medical Profession**
- ▶ **Pain** – Long waiting times to see a doctor, dentist etc.
- ▶ **USP** - *"We guarantee that you will never have to wait more than 15 minutes" or your consultation will be free."*



WHAT'S YOUR
STORY?



WHY DO YOU NEED A BRAND STORY?

A brand story sets you apart. Without one, you're just another business or commodity.



When people know your story, they care about you and connect with you.

A connection means loyalty to your services or products.



You're crafting uniqueness and scarcity and dictating the value of your company.



Customers with a connection won't only buy your products but will pass up competitors in favor of yours.



Advertising that evokes emotional responses has a greater influence on customers.



ESSENTIAL THINGS TO REMEMBER



EVERYTHING YOU DO CRAFTS YOUR STORY

Every time you communicate with your customers you're telling your story.

Be conscientious in your communications to ensure you don't damage or confuse what you've previously done.



BE CONSISTENT ACROSS ALL PLATFORMS

Confusion is the greatest danger to your brand story.

Make sure everything from your logo to your sponsorships to your ads convey who you are and why you do what you do.



ONLY TELL THE TRUTH

Telling the truth about who you are without exaggeration and fabrication is compelling and energizing to customers.





BEFORE

You are already
branding yourself
with your online
image.

Are you telling the
right story?

GINICI Studios





AFTER

Branding is intentionally telling people who you are by strategically positioning yourself to appeal to a target audience.

GINICI Studios





Warm and
Friendly

Janice Studios

Compassion
and
Heart Felt



Janice Studios

Open and
Accessible



Janice Studios

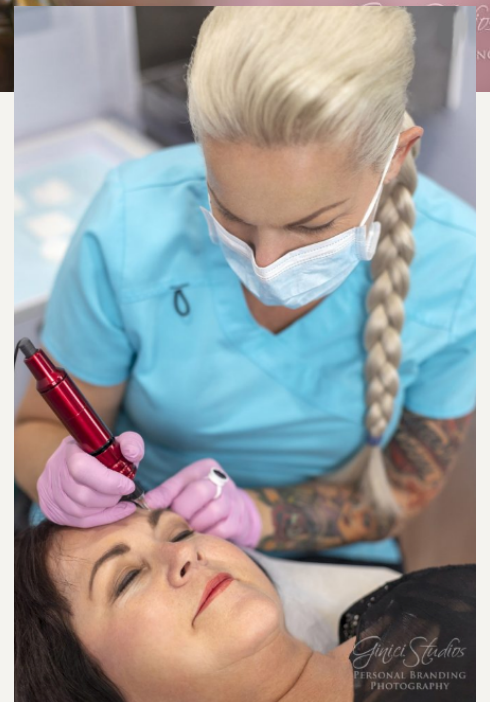


Hair & Skin Specialist

Selling Professional...



and Playful...



East Wellbeing & Tea

Selling Calm..





Real Estate Broker



*Not just selling a home...
selling a lifestyle...*

Branding

THE BUSINESS



Share the details



Share the products



Share the benefits



Share the feeling



Share the stories



Share the people





RED SOLES WINERY

ENTER TO WIN
Wine Tasting Experience For Four

Winner will be notified by e-mail



*Wine is sunlight
held together
by water
-Galileo Galilei*

#winewednesday



What Do These Brands Convey To The World?





word stories

(A mini-company description)



The image shows the Square website's landing page for credit card acceptance. At the top, there is a navigation bar with the Square logo, a 'Sell with Square' button, a 'Start Square Market' button, and a 'Sign In' button. The main content area features a background image of a person's hands holding a credit card over a Square Reader attached to an iPhone. The text on the page reads: 'Start accepting credit cards today.' followed by 'Sign up and we'll mail you a free Square Reader.' Below this are input fields for 'Email address', 'Password', and 'Confirm password', and a blue 'Get Free Card Reader' button. A rate of '2.75% per swipe, no additional fees, and next day deposits.' is displayed. At the bottom of the main section, there are logos for Visa, Mastercard, American Express, and Discover, along with the text 'Works with 100+ major Android devices.'



Let's Talk
An event series that brings local businesses together.
[Learn more >](#)

[Home](#) [Testimonials](#) [Pricing](#) [Support](#) [Legal](#) [Privacy](#) [Stock Location](#) [Jobs](#) [Square Wallet](#) [Square Cash](#) [Help Center](#)

Run your business anywhere.





It's how people meet.



Exercise:

What's Your 4 Word Story?

What's Your 10 Word Story?

What's Your 25 Word Story?



CALENDAR

- Add all holidays-traditional and non traditional (nationaldaycalendar.com)
- Add all seasonal promotional opportunities (ie. Black Friday, tax season, etc)
- Add any hashtag days that may apply (#winewednesday, #fitnessfriday)
- Add all events onsite, offsite, virtual
- Sync e-mail campaigns and social media posts on calendar

#MondayMotivation	If you are going for a more upbeat approach, #MondayMotivation is a great hashtag to show photos of a fantastic meal, a great workout, a team photo at t
#MondayMood	Monday Mood is a popular hashtag to show off a funny photo of a pet, start conversations surrounding being groggy from the weekend, or post an industry
#MondayMorning	
#MondayBlues	Feeling a little low after the weekend? People use this hashtag to share ways to counteract melancholy on Mondays.Popular content shared using the #Mo
#MondayFunday	
#MondayNight	
#MondayMemories	This hashtag is a great way to wax nostalgic at the beginning of the week.Post a memory from your business's past or celebrate an anniversary that falls on t
#MeowMonday	Any excuse to post a cute cat photo is a good one. Many use this hashtag to share adorable pics of their feline companions.If your business has an in-house c
#ManCrushMonday, #MCM	This hashtag is a trend on social where people reveal a male crush, typically accompanied by a photo. A professional take on this hashtag is to feature men y
#MusicMonday	People use this hashtag to tweet about their favorite music or what they're listening to right now. They also use it to share inspirational stories about musi
#MarketingMonday	
#MeatlessMonday	
#MaxoutMonday	
#MondayRun	
#MondayOutfit	
#MindfulMonday	
#ManicureMonday	
#MondayQuotes	
#MondaySuck	
#MondayOff	
#MondayMuse	
#ManicMonday	
Tuesday:	
#TuesdayVibes	
#TuesdayThoughts	
#TipTuesday	This hashtag is a way for people to give helpful tips on pretty much any topic. Use this hashtag if you've got some industry advice you'd like to share and it f
#TuesdayTreat	
#TuesdayTruth	
#TuesdayTrivia	
#TransformationTuesday	A popular hashtag for fitness coaches and businesses to show off the physical transformations of their clients, whether that be weight loss or muscle gain. Y
#TastingTuesday	Manage a social media feed for a restaurant, winery, or chef? Use this tasty hashtag to share all the delicious meals and dishes you've cooked up for custom
#TechTuesday	This is a great hashtag to share all the latest gadgets your business uses or sells. You can give tech reviews, offer up cool tips and hacks, or you can just show
#TopicTuesday	#TopicTuesday is a good opportunity to focus your posts on just one topic for the day. This topic can be anything related to your business, industry, or trer
#TravelTuesday	#TravelTuesday is for the voyager in all of us. People typically share vacation pictures, ask for travel tips, or express their desire to travel somewhere.If you'r
#TastyTuesday	
#TuesdayVibes	
#TuesdayThoughts	
#TuesdayTip	
#TuesdayTreat	
#TuesdayTruth	
#TuesdayTrivia	
#TuesdayTurnup	
#TuesdayLook	

Hashtag Days

A	B	C	D	E	F	G	H	I
UNIQUE PHOTOS & VIDEOS	BE THE EXPERT	GET PERSONAL		TIMELY TOPICS				UPLIFTING
Before and after	Industry article	Fun fact		Federal or religious holiday				Inspirational quote
Inboxing video	Answer an FAQ	Hobby or passion		National day / week / month				Origin story
Screenshot	Ask me anything	Family time		Special event				Share a win
Screen recording	What's working now	Cute kids or pets		Industry news or update				Overcome an obstacle
Caption request	Featured expert	Explore your city		Trending topic or news event				Motivating mantra
Behind the scenes	Award winner	Book you're reading		Viral video				Helpful routines
Sneak peek	How-to video	Relaxation time						Inspiring person
Flat lay or styled image	Live one-on-one coaching	Bucket list						Spread joy
	Common mistakes	Challenge						Balance tip
	Industry fact							
	Infographic							
	Time-saving tip							
	Money-saving tip							
	Quick hack							
	Solve a problem							

Content ideas

Theme	Example
 Big Ideas	Share expert advice or a short quote.
 Humor	Share a comic, humorous image, meme, or phrase.
 Interaction	Ask a question, share a photo contest or quiz, or post a fill-in-the-blank sentence.
 Current News	Share POSITIVE news about your business, your industry, or your community.
 Giving Back	Feature customers, launch/share a giveaway, or make a coupon or discount available.
 Day in the Life	Share candid photos from your business or feature an employee.
 Education	Tell people about your product, what it can do, or teach people how to use it better.

	A	B	C	D	E	F	G	H	I	J	K	L
1	1st											
2	Fools Day											
3	National One Cent Day											
4	National Sourdough Bread Day											
5	National Burrito Day – First Thursday in April											
6	2nd											
7	National Ferret Day											
8	National Peanut Butter and Jelly Day											
9	National Reconciliation Day											
10	World Autism Awareness Day											
11	3rd											
12	National Chocolate Mousse Day											
13	National Film Score Day											
14	National Find a Rainbow Day											
15	National Tweed Day											
16	World Party Day											
17	National Love Our Children Day – First Saturday In April											
18	National Handmade Day – First Saturday in April											
19	4th											
20	National Chicken Cordon Bleu Day											
21	National Hug a Newsperson Day											
22	Jeep 4x4 Day											
23	National School Librarian Day											
24	National Vitamin C Day											
25	National Walk Around Things Day											
26	Easter – Changes Annually 2020											
27	Geologists Day – First Sunday In April											
28	5th											
29	First Contact Day											
30	Gold Star Spouses Day											
31	National Caramel Day											
32	National Deep Dish Pizza Day											
33	National Flash Drive Day											
34	National Go For Broke Day											
35	National Nebraska Day											
36	National Raisin and Spice Bar Day											
37	National Read a Road Map Day											
38	6th											
39	National Caramel Popcorn Day											
40	New Beer’s Eve											
41	National Sorry Charlie Day											
42	National Student-Athlete Day											
43	National Tartan Day											
44	National Teflon Day											
45	SAAM Day of Action – First Tuesday in											
46	National Library Workers Day – Tuesday of National Library Week											

National “Holidays”

NOVEMBER

COLOR-CODING KEY:

- Holiday
- Email Campaign
- Event
- Blog Post
- Social Posts

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		1	2	3	4	5	6
2		Wine Club Party	#tastingroomtuesday Thanksgiving Wine Special	#Winewednesday Merlot Tasting Video	National Donut Day #nationaldonutday	#foodiefriday Chardonnay/ Pasta	Int'l Merlot Day
3			Thanksgiving Wine Special				Wine Tourism Day
4							#Int'MerlotDay
5							#WineTourismDay
6							Merlot 3 Pack Special
7	7	8	9	10	11	12	13
8	Merlot 3 Pack Special	Thanksgiving Wine Special Blog: Thksgiving wine pairings	#tastingroomtuesday	#Winewednesday Wine Humor	Veterans Day #veteransday	#foodiefriday ZIn and Pork	Ask A Question Favorite Tgiving Side Dish
9				Wine Club Party			
10							
11							
12							
13							
14	14	15	16	17	18	19	20
15		Inspirational Quote Give Thanks Quote	#tastingroomtuesday Thanksgiving Wine Special	#Winewednesday	#thirstythursday	#foodiefriday Cab and Stew	Wine Club Party
16			Thanksgiving Wine Special			Wine Club Party	
17							
18							
19							
20							
21	21	22	23	24	25	26	27
22		Ask A Question What Will You Pair with Thanksgiving dinner?	#tastingroomtuesday	#Winewednesday Tgiving and Wine Post	Thanksgiving Day #thanksgiving	Black Friday #BlackFriday	Small Business Saturday #SmallbizSaturday
23						Black Friday	Small Business Saturday
24							
25							
26							
27							
28	28	29	30				
29	HANUKKAH Begins #hannukah	Cyber Monday #cybermonday	Giving Tuesday #givingtuesday				
30		Cyber Monday	Giving Tuesday				
31							
32							
33							
34							
35							
36							
37							
38							
39							
40							
41							
42							
43							

Coordinate Social Media and E-Mail Campaigns

SPREAD THE WORD AND SHARE THE LOVE:

Share Tweet Forward

SANGER FAMILY OF WINES



NATIONAL CABERNET SAUVIGNON DAY!

30% off 2014 Consilience SBC Cabernet Sauvignon
Thursday, August 29th - Saturday August 31st
Tasting room or Online
*Cannot be combined with any other promotions or discounts

[Buy Online](#)



NATIONAL CABERNET SAUVIGNON DAY!

30% off 2014 Consilience SBC Cabernet Sauvignon
Thursday, August 29th - Saturday August 31st
Tasting room or Online
*Cannot be combined with any other promotions or discounts

sangerfamilyofwines • Follow
The Sanger Family of Wines

sangerfamilyofwines
We're celebrating
#NationalCabernetDay for 3 days! Come visit us in the tasting room and pick up some delicious 2014 Consilience SBC Cabernet Sauvignon for 30% off, or click the link below to shop from home. Cheers 🍷

<https://www.sangerwines.com/product/2014-Cabernet-Sauvignon-Santa-Barbara-County>

#nationalcabernetday
#cabernetsauvignon #consilience
#sangerfamilyofwines #sangerwines
#marianello #treanelli
#santabarbarawines #solvangwines

24w

26 likes
AUGUST 29, 2019

Add a comment... [Post](#)

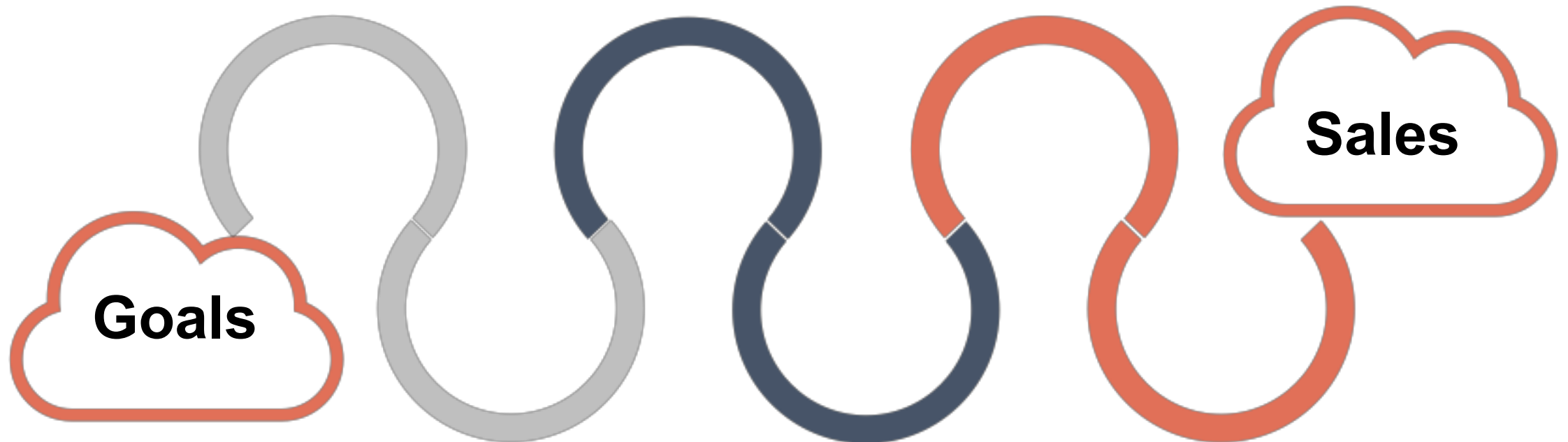


TACTICS

How will your strategy be implemented?

Can YOU do it all? Do you need a team? Do you hire outside agency?

What tools will you need?





	1-Jun	1-Jul	1-Aug	1-Sep	1-Oct	1-Nov	1-Dec
	1.307,85	1.240,64	1.235,42	939,09	1.300,67	843,29	1.300,67
	0,00	698,18	0,00	0,00	40,07	0,00	0,00
	115,80	78,42	38,16	15,62	256,67	25,46	25,46
	2,03	1.485,22	6.062,23	447,24	16.048,05	349,55	349,55
	5	677,87	503,91	1.094,97	5.620,31	2.560,60	2.560,60
		0,00	310,01	3.142,38	9.779,24	14.693,66	14.693,66
		0,00	670,64	1.259,50	4.294,85	7.473,24	7.473,24
		83,58	39.386,87	17.848,02	34.414,47	0,00	0,00
		0,00	0,00	0,00	0,00	0,00	0,00
			19.577,90	11.799,74	14.874,16	33.010,21	33.010,21
			1.335,55	21,76	865,15	348,10	348,10
			0,00	0,00	12.032,74	24.740,68	24.740,68
			0,00	0,00	4.387,73	18.444,80	18.444,80
			0,00	701,60	4.796,53	502,91	502,91
				2.144,68	2.144,68	1.727,45	1.727,45
				10.857,02	10.857,02	82,02	82,02
				0,00	0,00	0,00	0,00
				0,00	0,00	0,00	0,00
				2,93	0,00	4.829,68	4.829,68
				0,00	0,00	0,00	0,00
				0,00	48.000,19	15,23	15,23
				131,43	160,07	0,00	0,00
				101.087,81	143.638,64	0,00	0,00
				8.466,82	16.979,67	0,00	0,00
				0,00	0,00	0,00	0,00
				63.475,90	17.167,82	50.288,56	35,5
				492,26	391,49	595,27	595,27

CAMPAIGN TYPE	QTY	PROJECTED COST PER UNIT	PROJECTED SUBTOTAL	COMMENTS
National Marketing			SUBTOTAL \$ 2,000.00	
Banner Ads	4	\$ 500.00	\$ 2,000.00	
			\$ -	
			\$ -	
Local Marketing			SUBTOTAL \$ 6,200.00	
Newspaper	6	\$ 600.00	\$ 3,600.00	
In-Store Marketing	4	\$ 400.00	\$ 1,600.00	
POP	2	\$ 500.00	\$ 1,000.00	
			\$ -	
Public Relations			SUBTOTAL \$ 800.00	
Public Events			\$ -	
Sponsorships			\$ -	
Press Releases	8	\$ 100.00	\$ 800.00	
Webinars			\$ -	
Conferences			\$ -	
Client Events			\$ -	
			\$ -	
Content Marketing			SUBTOTAL \$ 14,400.00	
Sponsored Content			\$ -	
Landing Page	12	\$ 1,200.00	\$ 14,400.00	
White Papers / ebooks			\$ -	
			\$ -	
Social Media			SUBTOTAL \$ 6,800.00	
Twitter	20	\$ 100.00	\$ 2,000.00	
Facebook	20	\$ 100.00	\$ 2,000.00	
			\$ -	

Marketing Expenses

- Direct selling costs
- Advertising
- Sales promotion (print, direct mail, electronic) PR
- Marketing administration/staffing
- Indirect costs (training, subscriptions)

MEASUREMENT



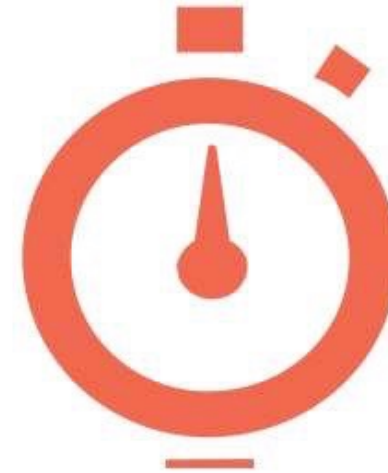
TOOLS



REPORTS



ROI



OPTIMIZATION

Key Metrics

Content marketing: downloads/views, # of prospects, # of opportunities, # of deals

Website: conversion rates, leads generated, content influence, visitors, sales

SEM/PPC: # of leads, cost/lead, cost/click, sale

Social media: leads, followers growth, engagement rate, referrals

Email marketing: # of subscribers, open rate, click-through rate, # of clicks, conversion rates

A man in a blue shirt is leaning over the open hood of a car, inspecting the engine. The background is slightly blurred, showing greenery and a building. A dark red banner is overlaid at the top of the image.

Why It's Important to Look "Under the Hood" of Your Website!

Patty Ross

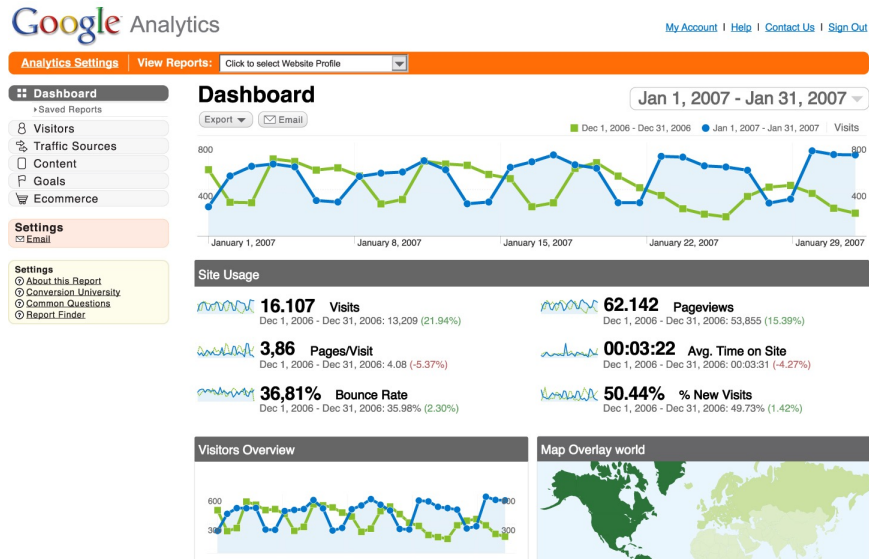




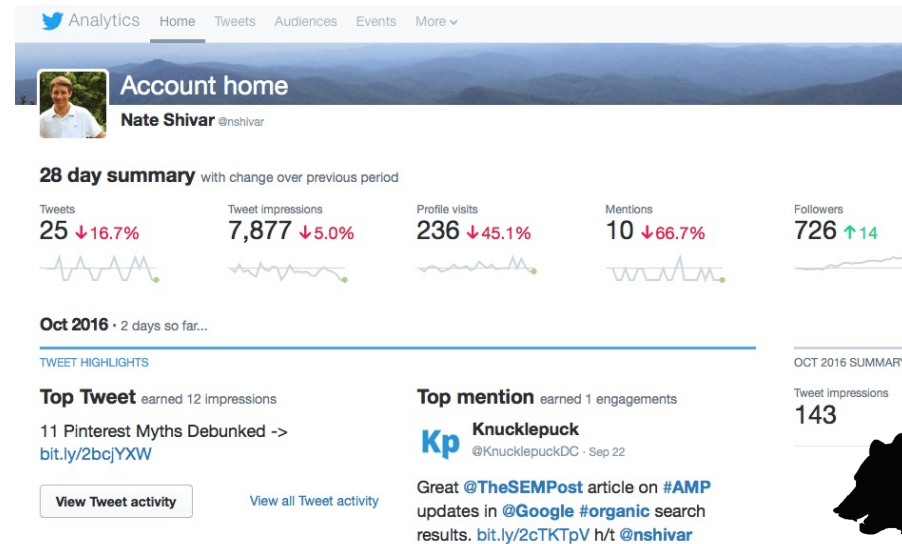
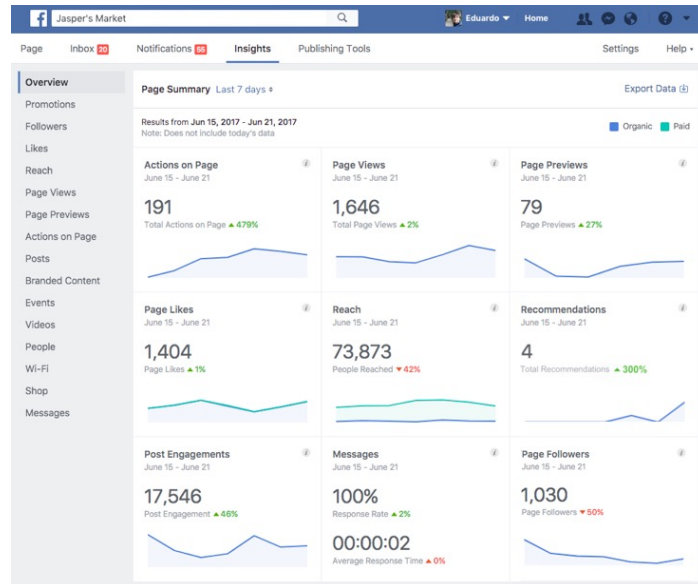
If you don't look at your accounting books, how do you know what you've spent, if you are spending in the right places or if you are losing money?

If you don't look at your analytics, how do you know if you're wasting time and/or money?





THERE ARE MANY HOODS TO LOOK UNDER!



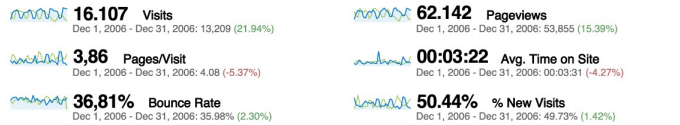
Dashboard

Dashboard

Jan 1, 2007 - Jan 31, 2007



Site Usage



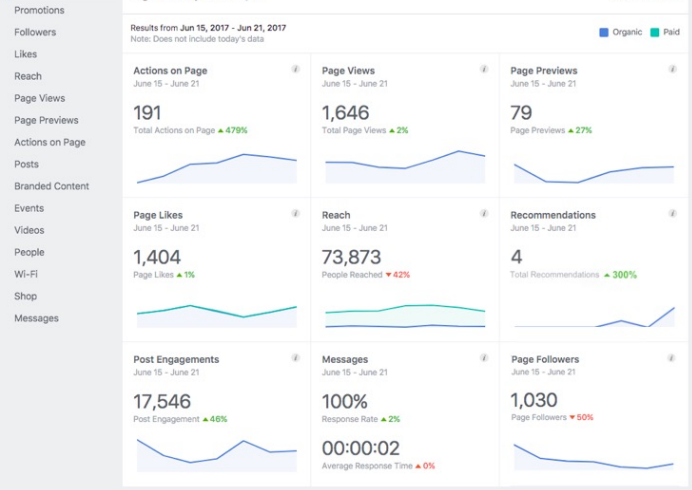
Visitors Overview



Map Overlay world



Overview



Account home

Nate Shivar @nshivar



Oct 2016 • 2 days so far...

TWEET HIGHLIGHTS



All Users
100.00% Sessions

Mobile and Tablet Traffic
16.02% Sessions

Overview

Sessions VS. Select a metric

Sessions (All Users) Sessions (Mobile and Tablet Traffic)

100

50

Sessions
All Users
699

Mobile and Tablet Traffic
112

Pages / Session
All Users
1.74

Mobile and Tablet Traffic

Users
All Users
627

Avg. Session Duration
All Users
00:01:07

Mobile and Tablet Traffic

Pageviews
All Users
1,217

Bounce Rate
All Users
73.68%

Mobile and Tablet Traffic

Client Use Cases

Motorcycle Glove Co-Uses GA to

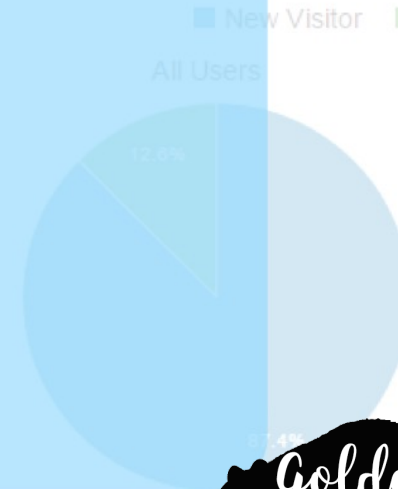
1. Track which referral sites were sending traffic/orders so they knew where to look for opportunities for magazine features
2. Track Google Adwords spending and effectiveness.

Dirtbike Accessories Website-Uses GA to

1. Track where traffic was coming from globally so they could better target for shipping/product offers
2. Which landing pages were most popular so they could change up their product mix
3. Evaluated search queries to see if they needed to enhance SEO for better results
4. Tracked sales from social media promotions

French Wine Importer/Retailer-Uses GA to

1. Track email and social media promotions
2. Track effectiveness of SEO and search query updates on website
3. Track who is referring traffic from wine industry to consider ad spending changes



NEXT STEPS

- Do you need to create a marketing plan? Can you do it yourself or do you need help?
- Imagine what it would mean for your business if a plan was in place?
- Are you budgeting for marketing or waiting to make money to have marketing budget?

Ready To Grow Your Business?

Free 15 Minute Discovery Call!

Get on my calendar: callwithpatty.com

or scan here:

