



# MARKETING PLAN 101



PRODUCTOS ARTESANAL

Golden State MARKETING 90

JABONES DE

ES / \$

**First E-Commerce position in 1998 in gourmet gift industry.  
21 years in wine industry in technology and marketing**

**Other industry experience includes motorcycle, aromatherapy, legal, activism, landscape design, financial, Non Profit, fitness, CBD/Cannabis, restaurants, tattoo, medical spa, education, transportation & logistics, coaching, consultants, health and wellness, food products, beauty, government, etc**

**Teach Marketing/Branding Classes for:  
SCORE (Multiple in and out of state chapters, SBDC's, Business Source Centers, Women Business Centers, Chambers of Commerce, Trade Associations, and private organizations.**

**Current Board Member-Venice Chamber of Commerce  
Current Board Member-NAWBO Los Angeles (Membership Director)  
Current Officer-BizFedLA-Small Biz, Employment & Labor Committee**



Patty Ross-CEO, Golden State Marketing

**ABOUT ME**



**SUCCESS**

**Did you know that 50% of small businesses do not have a documented marketing plan? This is crucial because statistics show that businesses with a well-defined marketing plan are 30% more likely to experience growth than those without.**

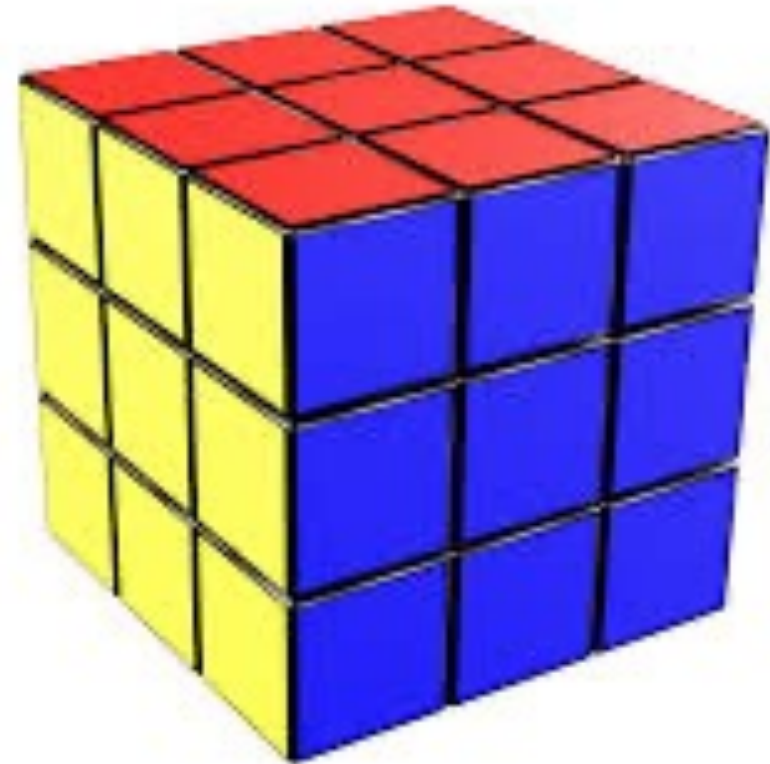
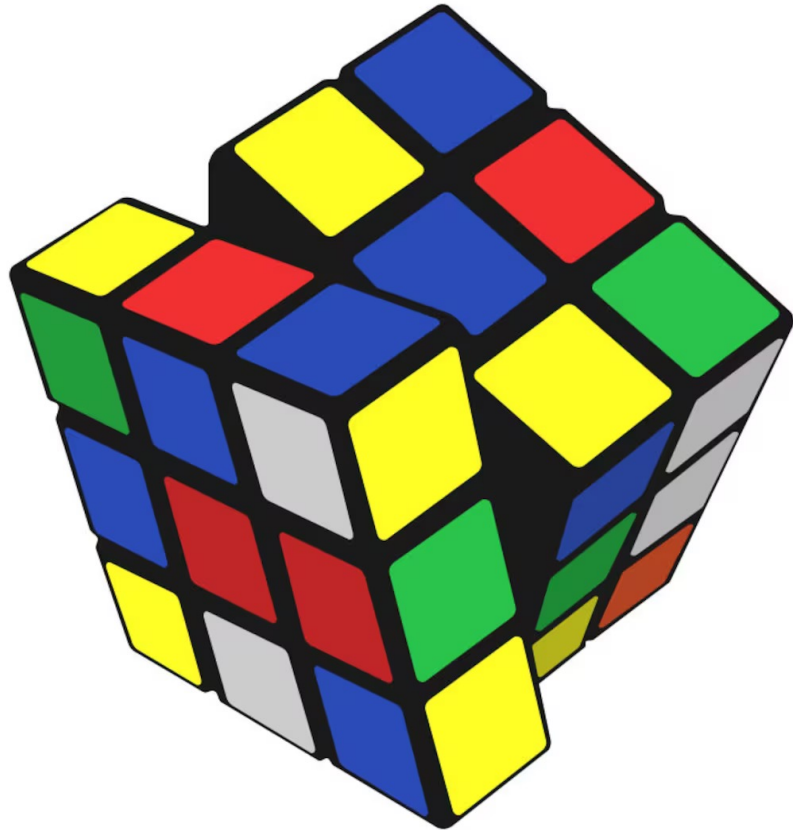




# Listen to Ben Franklin...



Which one is your current marketing plan?



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



Is this your marketing plan?!



# So what is Marketing?

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- ▶ 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.



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

**5 REASONS YOU  
NEED A  
MARKETING  
PLAN!**

**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

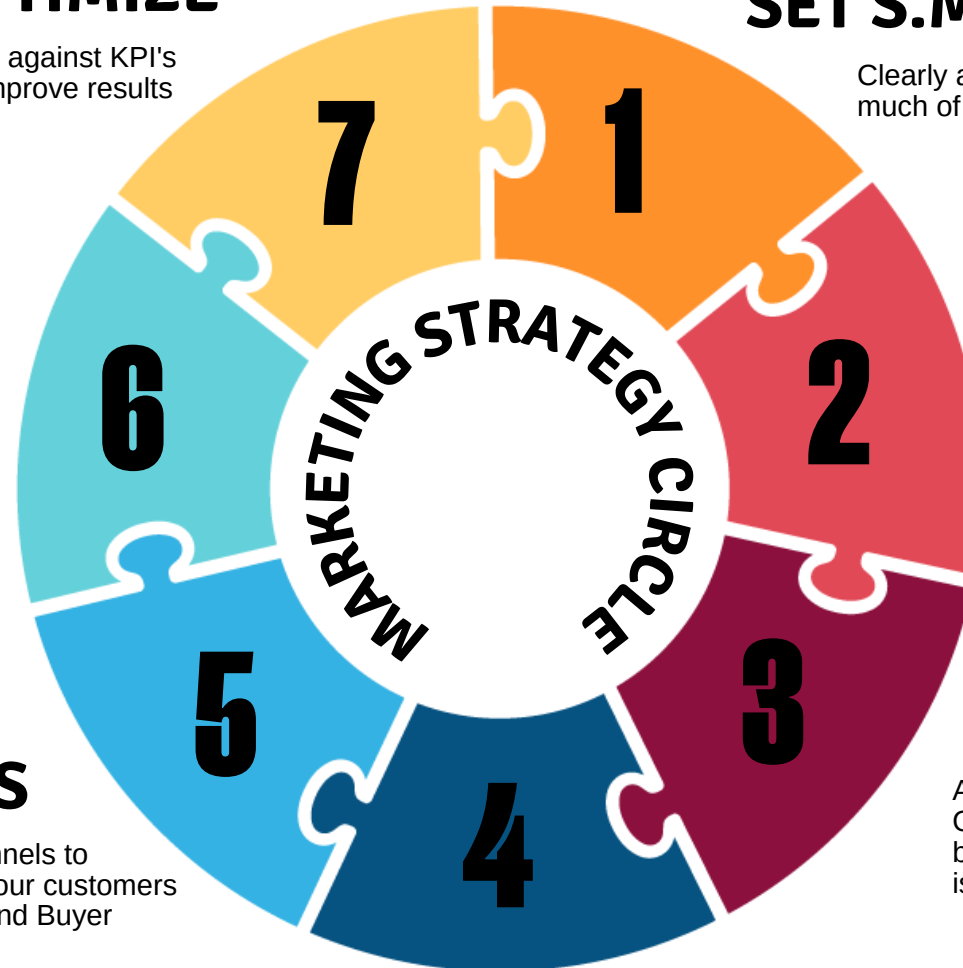
Clearly articulate what you want to achieve, how and when. How much of a commitment it will take-time, money and people?

## 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?

## 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?



## TACTICAL PLAN

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

## 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?



# 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?



# What Are Your Business Goals? Your Marketing Goals?



**Business goals** – sales growth, market share, # of deals, deal size, geographical reach, employee growth, assets obtained, etc

**Marketing goals** – leads, prospects engaged, media coverage, new channels, sales conversion





## SPECIFIC

## MEASURABLE

## ACHIEVABLE


## RELEVANT

## TIME-BOUND

You need to be clear on what you want to accomplish.




The goals should be quantifiable. For example, generate one lead per month.




The goals should not be too easy or too hard. Set ambitious, but realistic targets.



The target should align with your business goals.



Set a time frame and/ or a clear deadline for achieving your goals.



# SMART GOAL EXAMPLES FOR E-COMMERCE WEBSITE

## #1

**Specific:** Obtain 2,000 new email newsletter sign-ups.

**Measurable:** Track the number of new sign-ups via the email marketing platform.

**Achievable:** Offer incentives for signing up to the newsletter, such as discounts or early access to new collections.

**Relevant:** Email marketing is a proven method to acquire new customers.

**Time-bound:** Reach this goal within the next 5 months.

## #2

**Specific:** Expand customer base by 15% through targeted social media advertising.

**Measurable:** Monitor ad analytics to measure the increase in new customers.

**Achievable:** Create engaging, targeted ads for various social media platforms.

**Relevant:** Social media advertising is effective for reaching potential new customers.

**Time-bound:** Achieve this within the next 3 months.



## 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?



# Who is Your Customer?



"EVERYONE  
IS NOT  
YOUR  
CUSTOMER."

SETH GODIN



# Are You “Fishing In The Ocean?”





Or “Fishing In A Pond?”



# Brand Archetypes vs 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. Buyer Personas have a human face, with a name and biographical information to show the user as a real person.

Brand archetypes are human character traits that most accurately reflect a brand. There are twelve brand archetypes: The Outlaw, Creator, Magician, Hero, Lover, Jester, Everyman, Caregiver, Ruler, Sage, and Explorer.

# Brand Archetypes

## What are Brand Archetypes?

1. Imagine archetypes as distinct personalities, like characters in a story. There are 12 common archetypes, each representing a set of values, attitudes, and behaviors. Each archetype appeals to a different aspect of human experience.

## 1. Why Use Them?

1. Using an archetype helps a brand connect emotionally with its audience. For example, a brand that adopts the 'Caregiver' archetype might focus on nurturing and protection, appealing to consumers who value support and compassion.

## 2. How Businesses Use Them:

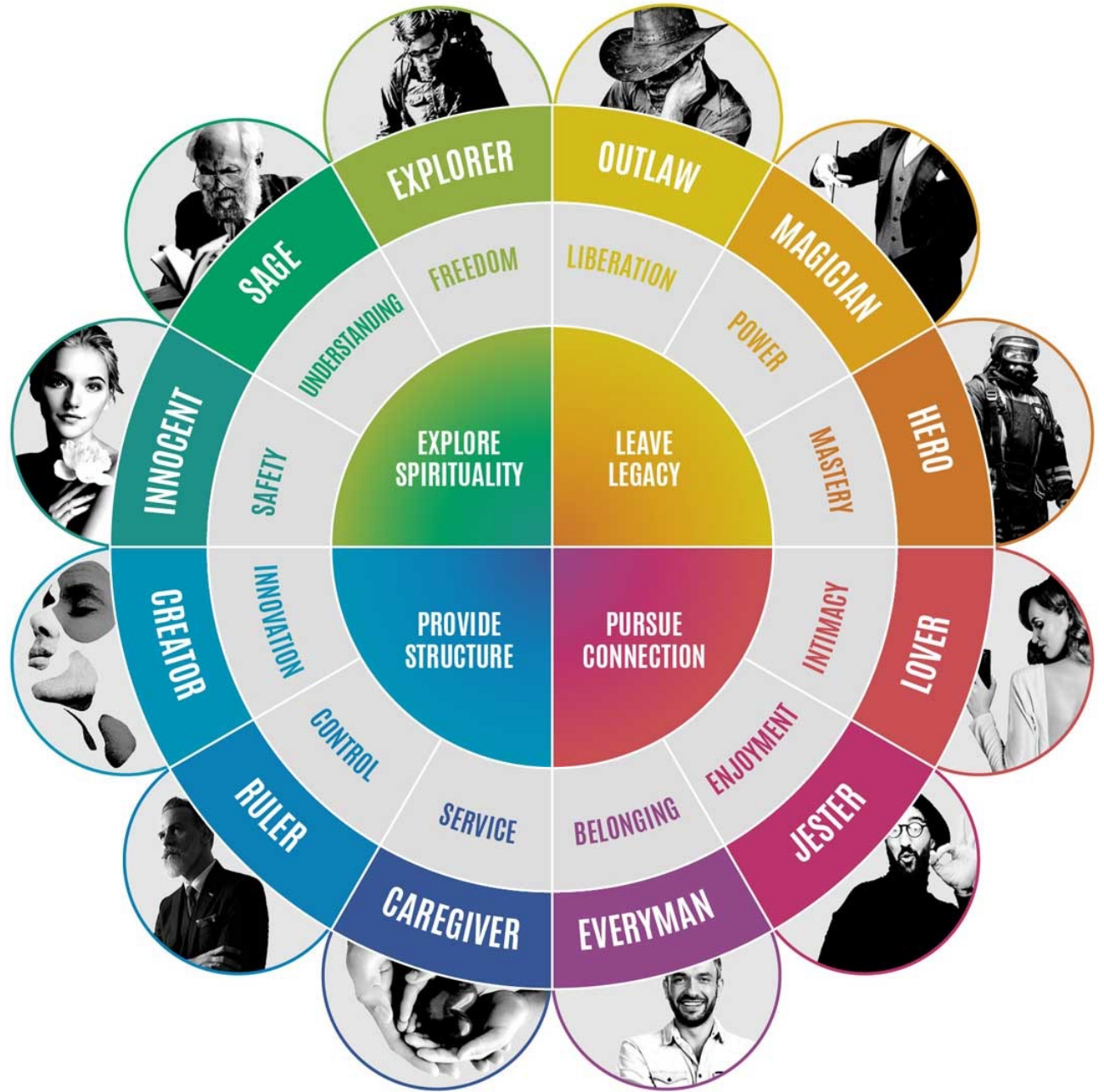
1. **Identification:** A business first identifies which archetype aligns closely with its values, mission, and the interests of its target audience.
2. **Consistency:** The chosen archetype guides the tone of voice, visual style, and overall communication strategy. This consistency helps in building a strong, recognizable brand.
3. **Differentiation:** By embodying a particular archetype, a brand can differentiate itself from competitors. For instance, a 'Rebel' brand can stand out in a conservative market.
4. **Emotional Connection:** Brands use their archetype to tell stories and create messages that resonate emotionally with their audience, fostering loyalty and engagement.

## 3. Example in Action:

1. A company like Nike, embodying the 'Hero' archetype, inspires and motivates through its messaging, appealing to individuals who value triumph and perseverance. Or Harley-Davidson embodies the 'Outlaw' archetype appealing the rebellious freedom lovers.

# BRAND ARCHETYPES

- 1. [The Outlaw Archetype](#)
- 2. [The Creator Archetype](#)
- 3. [The Magician Archetype](#)
- 4. [The Hero Archetype](#)
- 5. [The Lover Archetype](#)
- 6. [The Jester Archetype](#)
- 7. [The Everyman Archetype](#)
- 8. [The Caregiver Archetype](#)
- 9. [The Ruler Archetype](#)
- 10. [The Innocent Archetype](#)
- 11. [The Sage Archetype](#)
- 12. [The Explorer Archetype](#)



## The Outlaw Archetype

The Outlaw is the harbinger of change. They are your rebels *with* a cause. That cause is to challenge the status quo.

Outlaws disdain rules, conformity, and a disregard for authority or anything that threatens their (or anyone else's) freedom to choose.

While Outlaws are good at their core, they are motivated mainly by anger and might resort to more disruptive or destructive ways of achieving their goals.

•**Desire:** Liberation

•**Branding style:** Criticize or denounce the status quo; disrupt and shock

•**Ideal industries:** Body art, automobile, alternative clothing

•**Examples of Brands with the Outlaw Archetype:** *Virgin, Harley-Davidson, DocMartens, MTV*

## How to apply the Outlaw brand strategy

To appeal to customers with Outlaw archetypes, brands must first prove that they see the world as the Outlaw does: authority, conformity, and the mainstream are common enemies.

Outlaw brands must challenge societal norms and everyday habits in their marketing campaigns to connect with like-minded customers. Avoid formality in the language and tone when communicating with them. Grit, attitude, and a devil-may-care approach to your marketing strategy – and in your visual designs like your [company logo](#) – will resonate best with this audience.



# The Outlaw

♥ REVOLUTION

“ Rules are made to be broken ”

📣 BRAND VOICE

💬 BRAND MESSAGE

Disruptive

Rebellious

Combative

You don't have to settle for status quo. First, demand more, second, go out and get it.

### OUTLAW BRANDS

Virgin

MOTOR HARLEY-DAVIDSON CYCLES

DIESEL

## The Creator Archetype

The Creator is the champion of imagination and self-expression. They are driven by their need to build exceptional and enduring creations. This archetype values design and aesthetics.

They must express themselves with their talent and strive to bring their vision to life through that expression. Creators believe that if you imagine it, you can create it.

- **Desire:** Innovation, self-expression
- **Branding style:** Unlocking one's imagination, the pursuit of originality
- **Ideal industries:** Arts and design, information technology, marketing
- **Examples of brands with the Creative Archetype:** *Adobe, LEGO, Pinterest*

## How to apply the Creator brand strategy

The Creator type of audience is not a big fan of traditional advertising, mediocre products, and existing features.


These people are willing to pay a premium for products that inspire creativity and help them express themselves best.

To appeal to a creator, you must celebrate the creative process and inspire self-expression.

[Brand messaging](#) should stir the desire for the creative process and inspire customers to express their nature to the best of their ability.

Brands must constantly experiment with new solutions, [products, and designs](#) and focus on delivering [extraordinary experiences](#).

Creator brands tend to have loyal followers because they often inspire their customers to be better creatives.



The infographic is titled "The Creator" in a large, black, brush-stroke font. On the left, there is a black and white profile of a person's face with a white mask covering the nose and mouth. Below the title, there are three horizontal sections: a blue heart icon followed by the word "INNOVATION", a blue double-quote icon followed by the quote "If It Can Be Imagined It Can Be Created", and a blue megaphone icon followed by the text "BRAND VOICE". To the right of the megaphone icon is a blue speech bubble icon followed by the text "BRAND MESSAGE". Below these sections are three stacked boxes: "Inspirational", "Daring", and "Provocative". To the right of these boxes is a larger box containing the text "See Potential Everywhere and Uncover Originality With Liberated Imagination." At the bottom, a blue banner reads "CREATOR BRANDS" above three logos: LEGO, Apple, and Adobe.

# The Creator

♥ INNOVATION

“ If It Can Be Imagined It Can Be Created

📣 BRAND VOICE

💬 BRAND MESSAGE

Inspirational

Daring

Provocative

See Potential Everywhere and Uncover Originality With Liberated Imagination.

## CREATOR BRANDS

LEGO

Apple

Adobe

## The Magician Archetype

The Magician is charismatic, clever, and dynamic.

The Magician is driven to make dreams come true through mystical ways. They can take people on a journey of transformation through the experience of a magical moment.

They are deep thinkers and are regarded as trusted advisors.

•**Desire:** Power

•**Branding style:** Wonder and mysticism; transformation

•**Ideal industries:** Beauty, entertainment, relaxation, health, and wellness

•**Examples of Brands with the Magician**

**archetype:** *Walt Disney, Polaroid, MAC Cosmetics, Dyson*

## How to apply the Magician brand strategy

The Magician archetype doesn't settle on a singular buyer persona.

However, it appeals to other personas because of its ability to transform. Brands that provide a product or service that takes their customers on a transformational journey (worn out to new; lost to found) could reasonably consider the Magician archetype as the personality to connect with their audience.

For example, resorts, theme parks, or spa retreats can use this archetype to attract customers seeking an escape from stress or the mundane by promising a magical, transformative time.

*The Magician*

♥ POWER

“ ” *It can happen*

📣 BRAND VOICE

💬 BRAND MESSAGE

Mystical

Informed

Reassuring

*Tomorrow is brighter than today and all your dreams can come true if you believe.*

MAGICIAN BRANDS

*Coca-Cola*      *Disney*      **dyson**

## The Hero Archetype

The Hero is society's savior and redeemer. Characterized by courage, self-sacrifice, and achievement, the Hero seeks personal transformation in their quest to triumph over adversity.

The Hero's primary motivation is to prove their worth through courage and determination.

They work hard to have the required skills and take pride that their work rate setting them apart from the rest.

They must meet challenges head-on and carry out defeats or failures until corrected.

The Hero wants to save the day to prove their worth to themselves so the world knows of their ability.

•**Desire:** Mastery

•**Branding style:** Be stronger and better

•**Ideal industries:** Sports apparel, sports equipment, trade services

•**Examples of Brands with the Hero archetype:** *Nike, Under Armour, Gatorade, FedEx*

## How to apply the Hero brand strategy

A Hero brand's most important asset is inspiring messaging and content that taps into their customers' ambitions and helps them take action. Hero brands benefit significantly from using high-achievers that customers can relate to as the face of their brand.

This is what sports brands like Nike and Adidas do when they use athletes such as LeBron James and David Beckham in their advertising campaigns.



**The Hero**

♥ MASTERY

“ *Where there's a will theres a way* ”

📣 BRAND VOICE

💬 BRAND MESSAGE

Honest

Candid

Brave

*We can make the world better. We have the grit and determination to outwork the rest.*

HERO BRANDS

adidas Nike FedEx

## The Lover Archetype

The Lover has an affection for the beautiful and a penchant for blissful experiences, both sensual and nurturing.

The Lover desires to be desired. They are motivated to become more physically and emotionally appealing to increase their capacity to attract others.

•**Desire:** Intimacy

•**Branding style:** Affirmation of beauty or value; VIP treatment

•**Ideal industries:** Fragrance, cosmetics, wine, luxury food, and travel

•**Examples of Brands with the Lover**

**archetype:** *Chanel, Hallmark Godiva, Tiffany, and Co.*

## How to apply the Lover brand strategy

Meaningful, intimate relationships—whether between partners, family members, or friends—is central to the Lover archetype.

Brands wishing to appeal to a Lover type of audience segment should create messaging that makes customers feel loved by not only the others around them but also by themselves.

To appeal to a Lover, you must make them feel attractive or stir their passionate desires for connection and intimacy. You can see this, among other places, in the [website design](#) of the brands that reflect this archetype.

Because of their attraction to sensory pleasure, communication and messaging should use sensual (not sexual) language and tone. Brands can leverage their audience's desire for sensual pleasure through sight, sound, smell, or touch.



*The Lover*

♥ INTIMACY

“ *I only have eyes for you* ”

📢 BRAND VOICE

💬 BRAND MESSAGE

*Sensual*

*Empathetic*

*Soothing*

*Your Striking Beauty Is  
Impossible To Ignore.*

## LOVER BRANDS



## The Jester Archetype

The Jester is all about having fun and living in the moment. They not only love having fun themselves, they see it as their duty to be a ray of sunshine in everyone's life around them.

The Jester can sometimes be a trickster who mocks convention using wit and humor. Most of the time, the humor can be self-effacing and satiric.

- Desire:** Enjoyment, fun
- Branding style:** Humor, promoting the "good times"
- Ideal industries:** Kids' entertainment, beer brands, confectionery
- Examples of Brands with the Jester archetype:** *Nickelodeon, Dollar Shave Club, M&Ms, Geico*

## How to apply the Jester brand strategy

Like Magicians, Jesters are rarely a buyer persona but can be a perfect archetype for brands in entertaining or wanting to associate themselves with good times.

Regardless of archetype and personality, everyone likes to laugh. Provided the context and the timing is correct, the Jester personality can be a unique and loving point of differentiation.

As the Jester Archetype, your brand should highlight life's light-hearted and positive side with a playful and entertaining spirit. Brands that can connect with their audience through happiness and laughter can become much-loved brands.



*The Jester*

♥ PLEASURE

“ If I can't dance, I'm not part of it ”

 BRAND VOICE

 BRAND MESSAGE

Fun Loving

Playful

Optimistic

*We're here for a short time, not for a long time. Let your hair down and start living life.*

JESTER BRANDS

DOLLAR SHAVE CLUB

## The Everyman Archetype

The Everyman, above all, wants to belong.

They tend to blend into society as ‘everybody’ and don’t like to stand out in the crowd. They’re friendly and easy to talk to without being overly funny, rude, or excessively loud.

They lend their trust easily though they fear being rejected.

They are relatively positive and strive to fit into the group.

•**Desire:** Belonging

•**Branding style:** Create an inclusive and welcoming community, align with core values

•**Ideal industries:** Home/family life, comfort foods, daily apparel

•**Examples of Brands with the Everyman archetype:** *Target, Gap, eBay, Walmart, Ikea*

## How to apply the Everyman brand strategy

To appeal to an Everyman, you must make them feel a sense of belonging. Brands that revolve around everyday activities might use this archetype to message that it’s ok to be normal.

Home or family life brands fit this archetype perfectly, while elitist [positioning](#) or “we’re better” messaging would be a turn-off.

Everyman brands must be friendly and down-to-earth to appeal to the typical person. Their target audience fears rejection or being singled out from the rest.

For these brands, adopting a cost leadership strategy can be highly rewarding. While it can be hard to differentiate an Everyman brand from the competition, it’s not a big deal if you continuously produce high-quality, affordable products that customers find value in.

**The Everyman**

♥ **BELONGING**

“ *You’re Just Like Me  
And I’m Just Like You* ”

**BRAND VOICE**

- Friendly
- Humble
- Authentic

**BRAND MESSAGE**

*When we treat each other with honesty and friendliness we can live together in harmony*

**EVERYMAN BRANDS**

**IKEA**      **TARGET**      **LYNX**

## The Caregiver Archetype

The Caregiver is a selfless personality driven by the desire to protect and care for others, especially those in need.

They are often maternity figures and take those who need care under their wing until they are stronger to take care of themselves.

Caregivers are not just reactive; they are also preventative and tend to be in and around an event of harm, before or after.

- **Desire:** Service
- **Branding style:** Others before self; for the greater good
- **Ideal industries:** Healthcare, education, hospitals, non-profits
- **Examples of Brands with the Caregiver archetype:** *World Wildlife Foundation, Unicef, Pampers*

### How to apply the Caregiver brand strategy

The Caregiver archetype perfectly fits brands that help those in need. The people such brands help are often vulnerable and sensitive and require a soft touch. A warm, thoughtful, generous, and motherly approach offers a feeling of safety that will appeal to their needs.

Caregiver brands always put their customers first, and this needs to be reflected in everything — from their products and packaging to advertisements and overall brand voice.

The Caregiver's target audience relies on them for compassion and support. This is why they will likely respond to marketing campaigns incorporating [emotional elements](#) or showing empathy toward their lifestyle.



*The Caregiver*

♥ SERVICE

“ Love Your Neighbour  
As Yourself

📣 BRAND VOICE

💬 BRAND MESSAGE

Caring

Warm

Reassuring

*Everyone deserves care and we must all strive to bestow service upon one another.*

### CAREGIVER BRANDS



## The Ruler Archetype

The Ruler desires control above all else and is a dominant personality. They are authoritative in their communication and actions and possess a sense of intimidation.

Their goal is for prosperity and success, trickling down to those loyal to his rule.

They are confident, responsible, and in control of their lives and expect the same from others.

Rulers see themselves at the top of the food chain and aggressively defend that position.

- Desire:** Freedom, liberation
- Branding style:** Demonstrate dominance and leadership
- Ideal industries:** Finance, luxury/high-end products and services, hotels, formal wear
- Examples of Brands with the Ruler archetype:** Rolex, Rolls-Royce, Mercedes Benz, American Express

## How to apply the Ruler brand strategy

To appeal to a Ruler, you must reaffirm their sense of power, control, and respect. Rulers want to feel a sense of superiority and be part of an exclusive club.

Appealing to the masses will not get the Ruler's attention and would likely turn them off. Ruler brands must reaffirm to their customers that they are at the top of the ladder of success and are part of an exclusive club.



## The Innocent Archetype

The innocent is an upbeat personality with an optimistic outlook on life.

They crave safety but ultimately want themselves and everyone else to be happy.

They are honest and pure and have no ill will towards anybody. They don't hold grudges and believe everyone has the divine right to be who they are.

They see beauty in everyone and have a knack for seeing inner beauty that others don't.

•**Desire:** Safety

•**Branding style:** Positivity, feel-good messaging, promote wholesome values

•**Ideal industries:** Skincare/beauty, natural/organic products

•**Examples of Brands with the Innocent archetype:** *Ivory, Dove, Whole Foods, Biossance*

## How to apply the Innocent brand strategy

To appeal to an innocent, you must earn their trust with straightforward, honest, and, most importantly, positive communication. Negative or guilt-based communication is a complete turnoff.

They need to associate your brand with safety and will feel a connection when their inner beauty is recognized.

Innocent brands embrace an all-natural approach in their messaging — no pretension.

Innocent archetype customers value simple solutions, so avoid confusing jargon or discussing complicated ingredients and features. Honesty and transparency are essential to Innocent customers. Brands targeting this type of audience should let these values influence their vision, mission, products, services, and messaging.



# The Innocent

♥ SAFETY

“ *Life Is Simple  
And Simplicity Is Elegant* ”

📣 BRAND VOICE

💬 BRAND MESSAGE

*Optimistic*

*Honest*

*Humble*

*The Most Wholesome Things in  
Life are Unadulterated and Pure.*

## INNOCENT BRANDS

Aveeno  
ACTIVE NATURALS<sup>®</sup>

Dove

innocent

## The Sage Archetype

The Sage is a seeker of truth, knowledge, and wisdom. Their drive comes from the desire to understand the world and to share that understanding with others.

They are lifelong learners and enjoy expressing their knowledge through philosophical conversations. They are more likely to pass on their wisdom to someone who can use it to change the world rather than change it themselves.

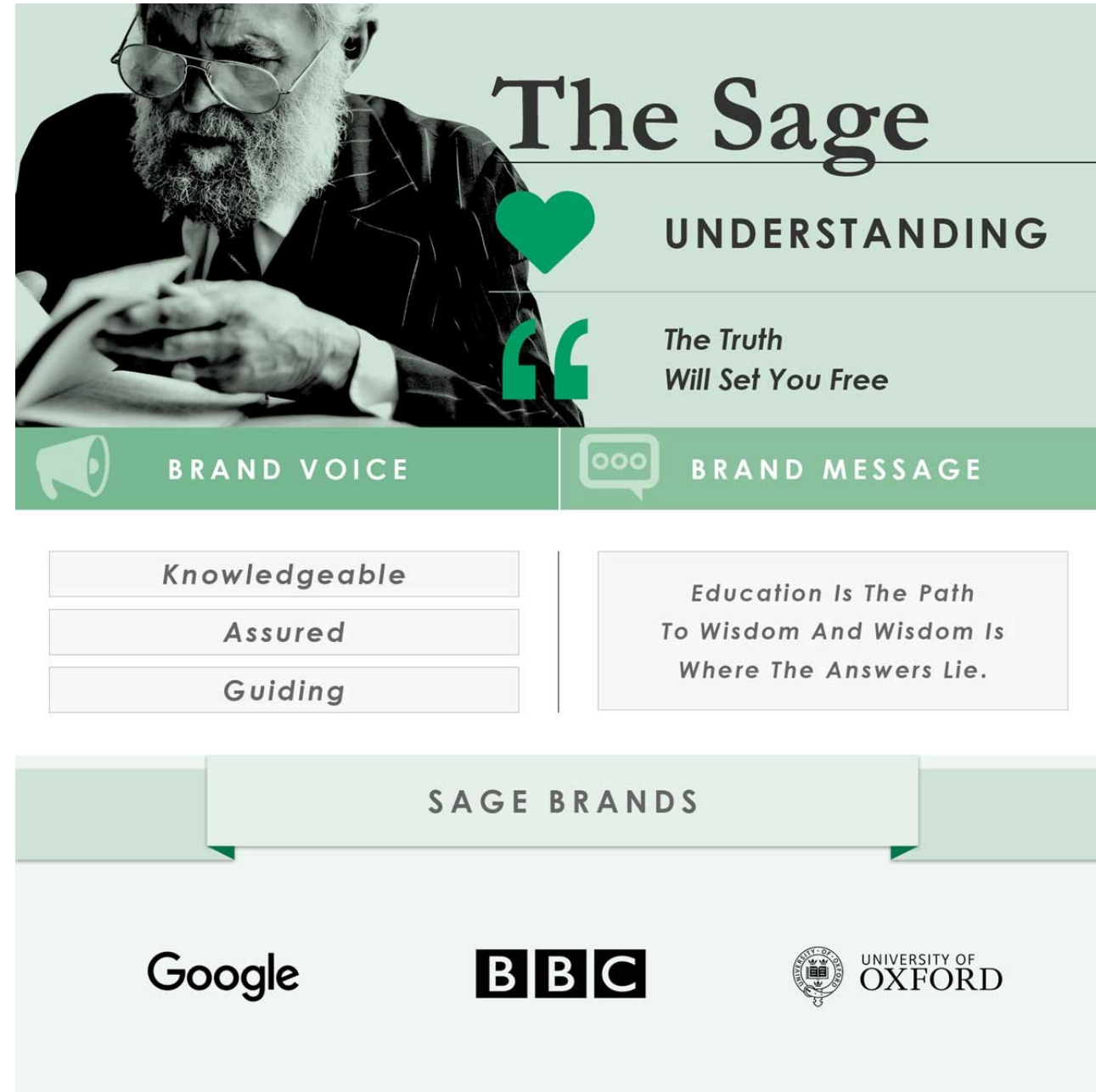
- **Desire:** Freedom, liberation
- **Branding style:** Celebrate life-long learning,
- **Ideal industries:** Media/news networks, universities, research foundations
- **Examples of Brands with the Sage archetype:** *Harvard, The Mayo Clinic, The Smithsonian*

## How to apply the Sage brand strategy


To appeal to a sage, you must pay homage to their intelligence as you communicate.


Higher-level vocabulary with layered or philosophical meaning will be acknowledged and appreciated, while oversimplified or dumbed-down messages will not.


They expect factual and well-researched information, which should be watertight to avoid challenges.




# The Sage

 **UNDERSTANDING**

 *The Truth Will Set You Free*

 **BRAND VOICE**

 **BRAND MESSAGE**


*Knowledgeable*

*Assured*

*Guiding*

*Education Is The Path To Wisdom And Wisdom Is Where The Answers Lie.*

## SAGE BRANDS

**Google** **BBC**  **UNIVERSITY OF OXFORD**

## The Explorer Archetype

The explorer has a palpable inner drive to push themselves outside their comfort and conformity of everyday life into the rugged environment.

They are brave, adventurous, and love a challenge. The challenges are more about understanding themselves than proving themselves to others.

Explorers are on an endless journey of discovery.

•**Desire:** Freedom

•**Branding style:** Celebrating exploration and adventure

•**Ideal industries:** Automobiles (SUV), adventure travel, outdoor apparel, and equipment

•**Examples of Brands with the Explorer**

**archetype:** *NatGeo, Patagonia, Jeep, Subaru, NASA*

### How to apply the Explorer brand strategy

To appeal to an explorer, you need to challenge them.

Challenging modern life's confines will allow you to resonate with them quickly.

You should promote the outdoors and the unknown as the land of the free and challenge them to explore it, with your brand, of course.

Modern society is the common enemy in which many explorers live. A stand against society can go a long way to resonating with the explorer and evoking their desires.



# THE EXPLORER

♥ FREEDOM

“ *Don't Fence Me In* ”

 BRAND VOICE

 BRAND MESSAGE

*Exciting*

*Fearless*

*Daring*

*You Only Get One Life.  
Get Out And Make It Count.*

### EXPLORER BRANDS

THE  
NORTH  
FACE

Jeep®

patagonia

# Same Product- Different Archetypes

## Brand Archetype: The Jester

- Key Characteristics:** Fun, humorous, light-hearted.

- Message:** Geico uses humor and light-heartedness to engage customers, making the insurance process seem less daunting and more approachable. Their slogan, "15 minutes could save you 15% or more on car insurance," is straightforward and memorable.

- Marketing Focus:** Geico's marketing is known for its humorous commercials and memorable mascots like the Geico Gecko and the Caveman. They aim to entertain while delivering a simple message about savings and convenience.



## Brand Archetype: The Everyman

- Key Characteristics:** Down-to-earth, relatable, approachable.

- Message:** Progressive aims to be the relatable and approachable option in the insurance market. Their character "Flo" embodies this archetype, presenting the brand as friendly and helpful.

- Marketing Focus:** Progressive's marketing often focuses on making insurance straightforward and accessible. They highlight comparison tools, bundling options, and other customer-centric features, reinforcing their image as the insurance company for the average person.



# Same Product- Different Archetypes



## Brand Archetype: The Caregiver

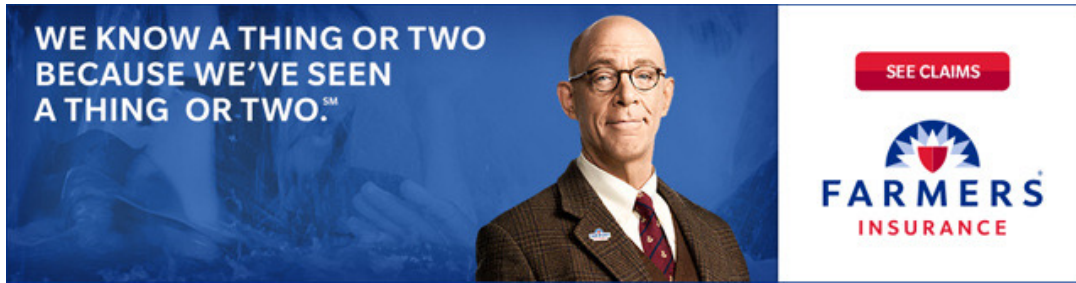
- Key Characteristics:** Compassionate, protective, nurturing.
- Message:** Allstate positions itself as a protector, offering security and peace of mind to its customers. Their slogan, "You're in good hands," emphasizes their commitment to caring for their clients in times of need.
- Marketing Focus:** Allstate's marketing often highlights scenarios where they help their customers recover from accidents or disasters, reinforcing their role as a dependable and caring presence.



## Secondary Brand Archetype: The Jester

- Key Characteristics:** Humorous, mischievous, unpredictable.
- Message:** The Mayhem character humorously demonstrates the various unpredictable and chaotic events that can occur in everyday life, emphasizing the importance of having insurance coverage to protect against such incidents.
- Marketing Focus:** Mayhem brings an element of entertainment and relatability to Allstate's marketing, showing how unexpected and sometimes amusing situations can lead to serious consequences. This approach makes the concept of insurance more engaging and memorable for consumers.

# Same Product- Different Archetypes



## Brand Archetype: The Sage

- Key Characteristics:** Wise, knowledgeable, trustworthy.
- Message:** Farmers emphasizes expertise and experience in the insurance industry. Their slogan, "We know a thing or two because we've seen a thing or two," underscores their deep understanding and wisdom in handling various insurance situations.
- Marketing Focus:** Farmers' marketing campaigns often focus on their knowledge and ability to handle unusual or complex claims, presenting themselves as the experts who can manage any situation.



## Brand Archetype: The Everyman

- Key Characteristics:** Relatable, approachable, dependable.
- Message:** State Farm positions itself as the friendly, reliable insurance provider that's always there for you, much like a helpful neighbor. Their slogan, "Like a good neighbor, State Farm is there," emphasizes their commitment to being accessible and supportive.
- Marketing Focus:** Jake's character makes the brand more engaging and memorable. He adds a personable and friendly face to the company, making it easier for consumers to connect with the brand on a personal level.

# Buyer Personas



## Persona

VS

## Target Audience



SPECIFIC DEFINITION

SPECIFIC CHARACTER

IDEAL CLIENT

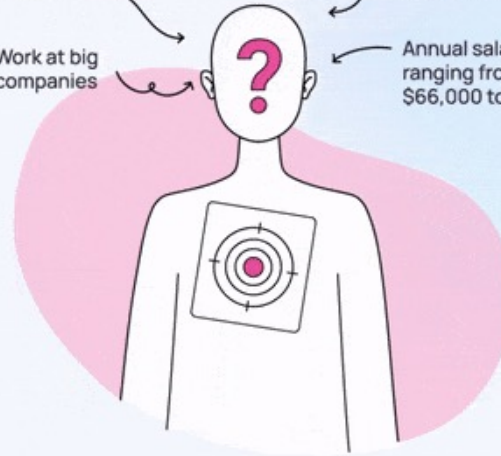
DETAILS ABOUT HABITS AND WORK

Marketing managers  
between 30 and 45  
years old

Work at big  
companies

Don't spend much  
time online

Annual salary  
ranging from  
\$66,000 to \$98,000



BROAD DEFINITION

DOESN'T TELL ABOUT HABITS

PEOPLE THAT MIGHT WANT YOUR PRODUCT

DOESN'T REFER TO SOMEONE IN SPECIFIC



# Why are creating Buyer Personas Important for Business?

- 1.Enhanced Customer Understanding:** Buyer personas allow businesses to understand customer needs, motivations, and behaviors more deeply.
- 2.Tailored Marketing Strategies:** Businesses can tailor marketing strategies to specific personas, improving effectiveness and ROI.
- 3.Improved Product Development:** Understanding your personas helps guide product development to create offerings that solve their unique challenges.
- 4.Increased Sales Efficiency:** Sales teams can communicate more effectively when they understand who their buyers are.
- 5.Customer Satisfaction and Retention:** By meeting the specific needs and wants of your customer personas, satisfaction and retention rates improve.



# How to Find Data to Create a Buyer Persona

## Taking data from existing customers

- Carry out customer interviews or surveys (incent them)
- 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
- Social Media-Facebook insights give some demographic info. Interests etc
- Ask the robots! Ask ChatGPT (PAID VERSION ONLY) to evaluate your website and see what it comes up with:

Based solely on the content on the website <https://www.goldenstatemarketing.net>, who is the ideal client for this business based on what you read on the website?

-Follow up with “Now build me five buyer personas based on the above info



# BUYER PERSONA

## Starter Questions

### PERSONAL INFO:

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



### 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?



### 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?

### 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?

### 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?



### NEGATIVE INFO:

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



**B2B** VS **B2C**

Target Audience      Target Audience

Building relationships with your target audience.		Building brand awareness across the market.	
Sharing expertise with them as they are more rationally driven.		Focusing on triggering emotions and quick emotions purchase decisions.	
Focusing on the niche market.		Focusing on large scale market.	
Long selling cycle		Short selling cycle	
Involve more people like decision-makers and influencers.		Involve individuals or families.	
Your main goal is to build trust and credibility with your content.		Your main goal is creating impulse and urge to buy with branding and messaging	



# 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



# 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





Selena **Daniels**

### FRUSTRATION & PAINS

She wants to focus on and develop more effective business strategies to scale her company, but she's stuck with menial, time-consuming repetitive tasks.

It's pretty tough managing clients and simultaneously growing her company.

Most of her projects are still managed via documents and spreadsheets which has taken a toll on her performance and efficiency.

She has more clients and employees now, but it still feels like she's a solopreneur.

### FACTORS INFLUENCING BUYING DECISIONS

Affordable subscription plan for small businesses

Free trials options and discounts

A responsive customer support

Great value for money

### BIO

Selena is a career-driven professional managing a startup project management firm that provides project management services to small and medium-sized organizations.

### JOB TO BE DONE

I want to manage projects in a way that allows me to delegate tasks easily, increase overall productivity, while also keeping my eyes on things, so I can focus on scaling my business.

### KNOWLEDGE AND INDUSTRY EXPERIENCE

She knows the main players because she has already researched different project management tools and software.

She is familiar with several project management automation tools when she was an employer but has never adopted any at a company level.

### KEY INFO

Age: 35

Location: Houston, TX

Job title: CEO / Founder

Company Type: Startup

### GAINS FROM OUR PRODUCT

She can create a workflow and oversee all assigned projects in her agency, so she doesn't have to spend hours going through several documents and spreadsheets.

Help her find bottlenecks within project management processes and identify when there's a need for new employees and investments.

Ensure she can delegate project management tasks while also keeping an eye on things.

# B2B



# John Johnson



**Title:** Marketing Manager

**Decision-Maker:** No

**Industry:** Software and Technology

**Age:** 30

**Salary:** \$75,000/year

**Education:** B.S. in Marketing

B2B

---

**Goals:** Deliver qualified leads to sales to grow user base and achieve revenue goals.

**Challenges:** Need to improve conversion rates on website with more relevant content.

**How We Help:** Connect John with tech savvy tech writers through ClearVoice.

**Messaging Strategy:** Focus on how to increase engagement for John by providing subject matter experts to write B2B content.



# WINE BUYER PERSONAS



IMAGE SEEKERS



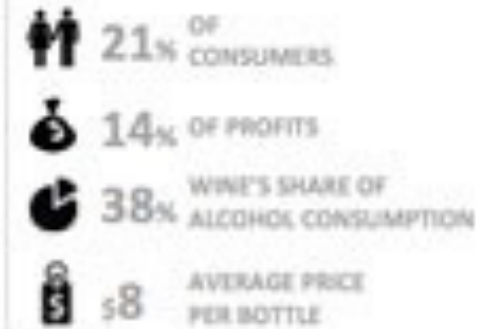
ENGAGED NEWCOMERS



EVERYDAY LOYALS



PRICE DRIVEN



ENTHUSIASTS



OVERWHELMED



B2C



# THE BUYER'S JOURNEY





# Buyer's Journey

BUYER STAGE	AWARENESS	INTEREST	DECISION	ADVOCACY
User Behaviour	They have a problem and looking for ways to solve it.	Potential options have been identified; need to explore each product or solution.	The list has been narrowed down, need to evaluate shortlist best options.	Customers who love your product and happy to spread the word.
Research & Info Needs	Need to learn about potential solutions and whether they could meet needs	Focused on understanding how different products work and the benefits	Completed research; now looking to make recommendations and a final decision.	Need easy ways to share content and their experiences with others.
Content	<ul style="list-style-type: none"> <li>Blog posts</li> <li>Newsletter</li> <li>Video</li> <li>Infographic</li> <li>eBook</li> <li>Advertising</li> </ul>	<ul style="list-style-type: none"> <li>Case studies</li> <li>Demo video</li> <li>Sales sheets</li> <li>Free trial</li> <li>Webinars</li> <li>Events</li> <li>Pricing</li> </ul>	<ul style="list-style-type: none"> <li>Live demo</li> <li>Estimate or proposal</li> <li>Consultation</li> <li>Analyst reports</li> <li>Vendor comparisons</li> <li>FAQ</li> <li>References</li> </ul>	<ul style="list-style-type: none"> <li>Social media</li> <li>Case studies</li> <li>Newsletters</li> <li>Blog posts</li> </ul>





## **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?



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

## Restaurant Example



Who are your biggest competitors?



# Identify Your Competitors

- **Direct competitors:** These are the businesses that offer similar products and services and target the same customers in the geographic area that your business serves.
- **Secondary/indirect competitors:** These are the businesses that offer different products and services and target a different clientele, but are in your same general category (e.g., a winery and a brewery are secondary competitors because they both sell alcohol).
- **Substitute competitors:** These are businesses that offer different products and services but target the same customers in your geographic area.

“For an in-person business like a nail salon, home nail kits are an example of substitute competition,” Kazim explains. “During the pandemic, people got used to doing their nails at home. That likely encroached on a lot of salons’ business.”



## Marketing competitive analysis

### Branding

Points of interest such as taglines, visual imagery, tone, and core messaging.

### Value proposition

How the product promises to solve customers' problems.

### Content

Types of content created - such as blog posts, whitepapers, webinars, case studies, articles etc.

### Social media

Social media channels used - such as Facebook, Twitter, and LinkedIn - and the level of engagement.

### Keywords

Organic and paid keywords the competitor competes for and how they rank.

### Advertising spend

Average spend on online ads per month.

### Campaigns

Campaigns the competitor is currently running and the target audience, message, and CTA.

### Events

Events and tradeshow the competitor sponsors.

### Community

How they interact with communities of potential and existing customers.

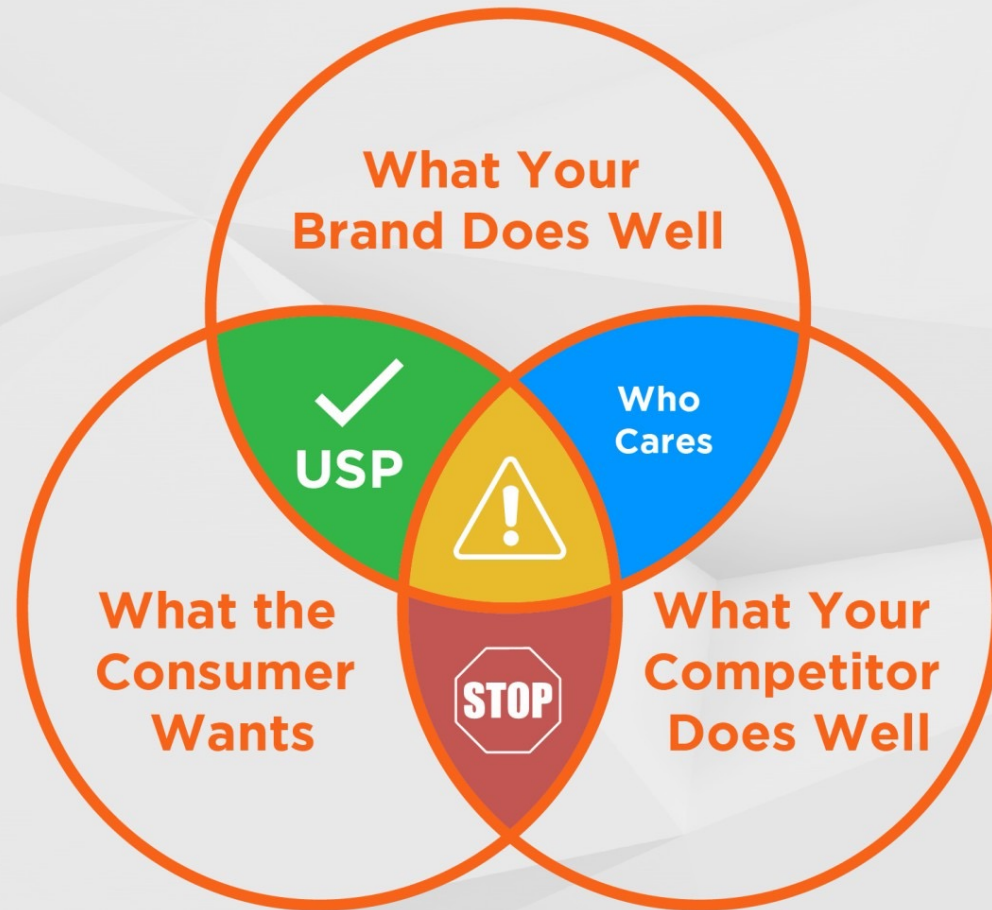


# UNIQUE SELLING PROPOSITION

A good USP streamlines your strategy by allowing you to communicate how you want your market to perceive your product and brand, and focus on its particular benefits.



# UNIQUE SELLING PROPOSITION



## USP- Winning Zone

When your brand makes exactly what your consumers want.

## Losing Zone

If your consumer wants something your competitors do much better than you, you've lost.

## Risky

Competitive battle, expensive, and you do not have a clear advantage. Find a way to stand out.

## Who cares

If your consumer does not want your goods, who cares?





## 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 8-10%]

[Size Guide](#)

Size selection buttons: S, M (selected), L

**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+

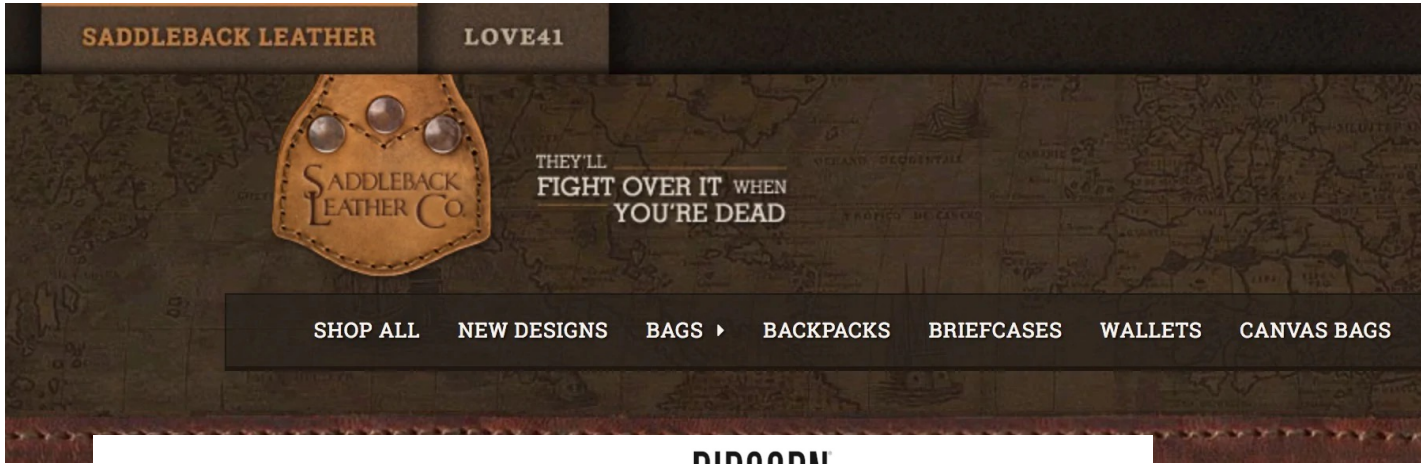
Giving Merino Wool means you're giving socks made of the most soft, temperature regulating and breathable wool ever. Authentic Tie Dye means no two are exactly alike, and each pair comes in a unique pattern you wouldn't normally find in a merino wool sock. Bring the two together, and you've got a match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

As always, one purchased = one donated.

[Full Product Details](#)



“They’ll fight over it when you’re dead.”



“all natural,” “whole grain,” and “small batches”



“world's strongest coffee.”



SHOP ▾

CONTACT + FAQ

EXPLORE ▾

ABOUT

LOG IN



# BUY THE WORLD'S **STRONGEST** COFFEE

FREE DOMESTIC SHIPPING OVER \$50

SELECT COFFEE TYPE



GROUND



WHOLE BEAN



DEATH CUPS

One-time purchase \$19.99

Subscribe & Save 20%: \$15.99

Deliver every 7 Days ▾

BUY NOW





**“Fake tattoos by real artists.”**

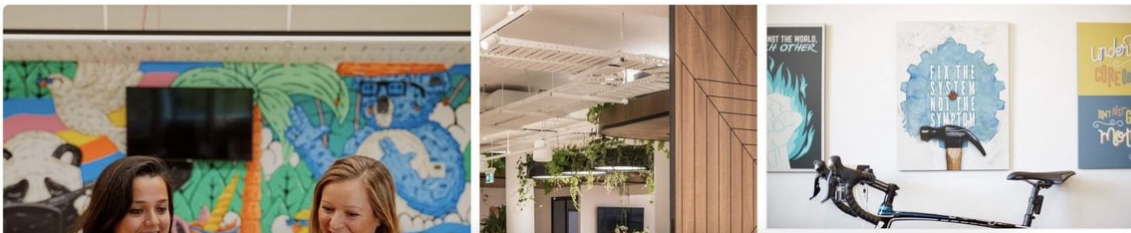
## About

At Tattly, we believe that great design and art can make people happy. We believe that quality products and great customer support are the only options. And we believe that, whether for a child or an adult, every Tattly should come with a smile.

ABOUT CANVA

## Empowering the world to design

Launched in 2013, Canva is an online design and publishing tool with a mission to empower everyone in the world to design anything and publish anywhere.



**"Empowering the world to design"**

## UNIQUE SELLING PROPOSITION EXAMPLES

- **Avis:** "We're number two. We try harder."
- **FedEx Corporation:** "When it absolutely, positively has to be there overnight."
- **Domino's Pizza:** "Fresh hot pizza, delivered in 30 minutes or less or it's free."
- **Target:** "Expect More. Pay Less."
- **Canva:** "Empowering the world to design"
- **Shopify:** "The platform commerce is built on."
- **M&M:** "Melts in your mouth, not in your hand."
- **HelloFresh:** "America's Most Popular Meal Kit"
- **Postmates:** "Anything, anytime, anywhere."
- **Starbucks:** Expect more than coffee.



# 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?





## **YOUR STORY**

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



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.

A connection means loyalty to your services or products.

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



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

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

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.



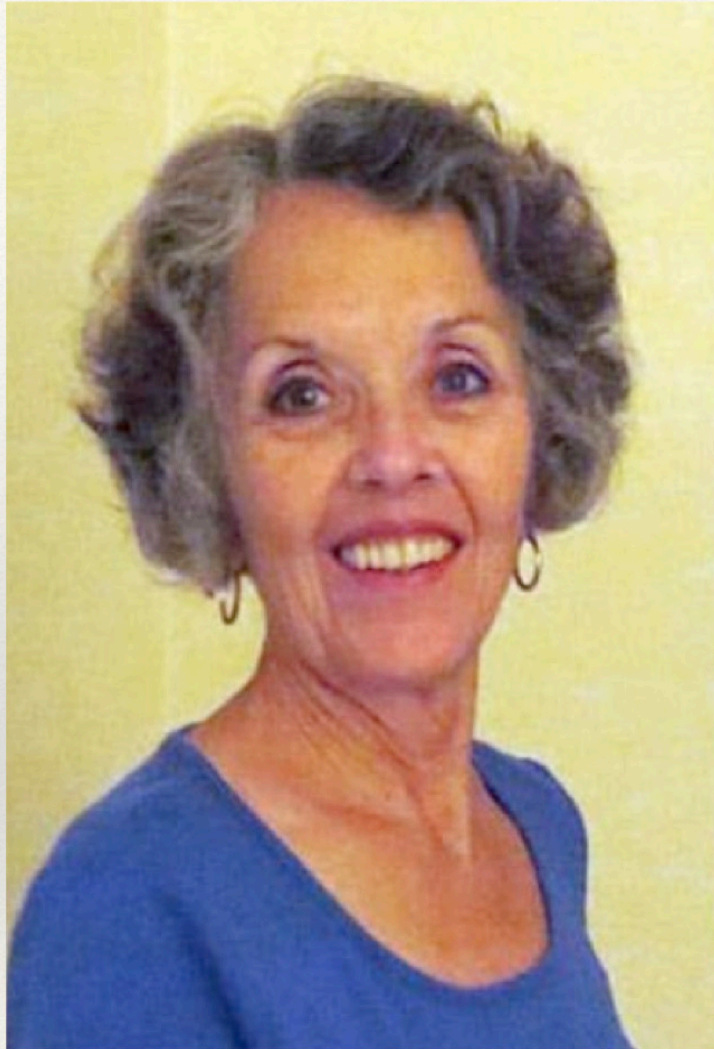
## ONLY TELL THE TRUTH

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



# BRAND VISUALS





**BEFORE**

You are already  
branding yourself  
with your online  
image.

Are you telling the  
right story?

*GINJICI 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*



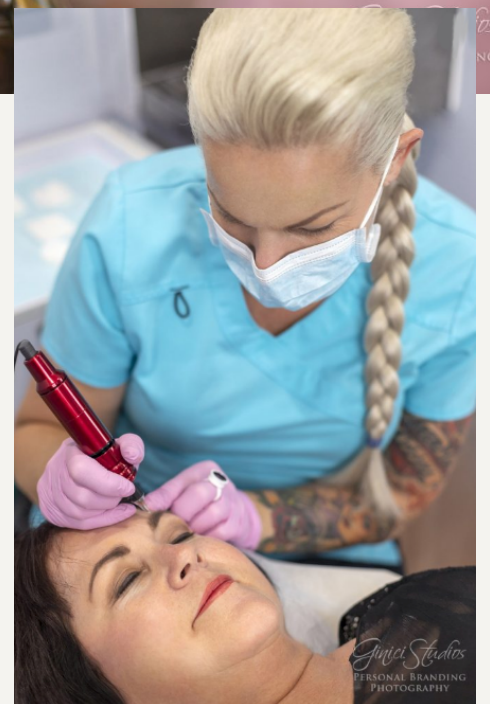


*Hair & Skin Specialist*

*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?



# GET TO THE HAND RAISE!



## TACTICAL PLAN

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

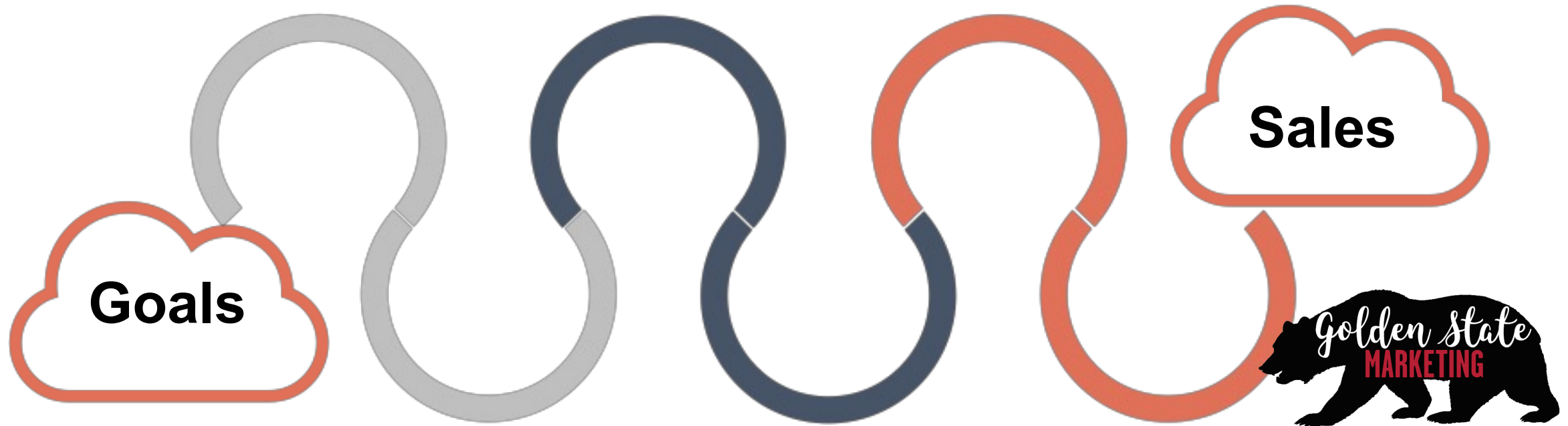


# TACTICS

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	0,00	0,00
				8.466,82	16	0,00	0,00
				0,00	0,00	0,00	0,00
				63.475,90	17.167,82	50.255,56	50.255,56
				492,26	391,49	595,25	595,25



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



# Marketing Expenses

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



## CRM

Client Organization-  
SalesForce, HubSpot, ZoHo, etc

# Tools

## E-Mail Marketing

Create e-mail campaigns-  
MailChimp, ConstantContact,  
SendGrid, etc

ChatGPT

## SEO

Moz, SEMRush, Yeost, SpyFu,  
etc

ChatGPT

## Social Media

Publishing Tools-  
Later.com, SproutSocial, etc.  
Metricool.com

## Calendar/Scheduling

Scheduling Tools-  
Calendly, Acuity, etc

## Sales

Lead Funnels, LinkedIn Sales  
Navigator, SalesForce, etc

ChatGPT

## Graphic Design

Canva, Photoshop, Illustrator, etc

ChatGPT

## Productivity/Tasks

Content Calendar, ToDo

ChatGPT



# MEASURE/OPTIMIZE

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



# 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



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

Patty Ross

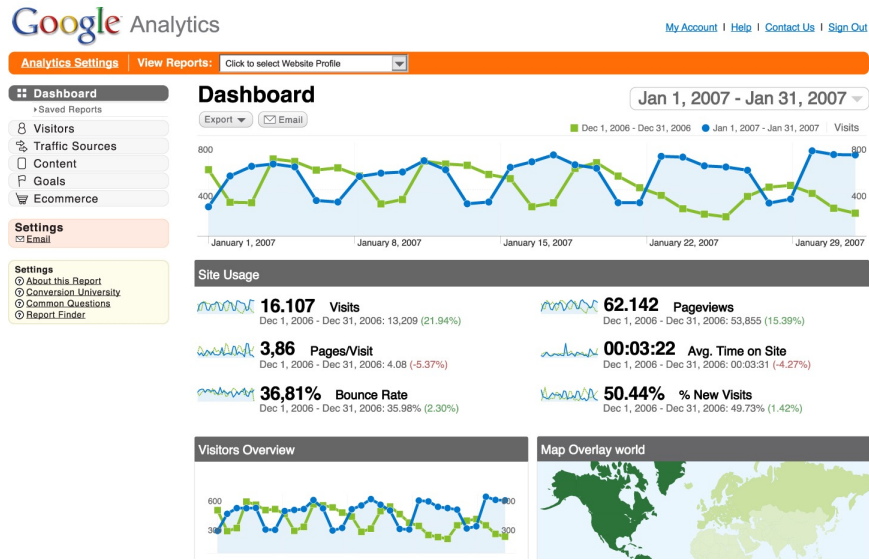




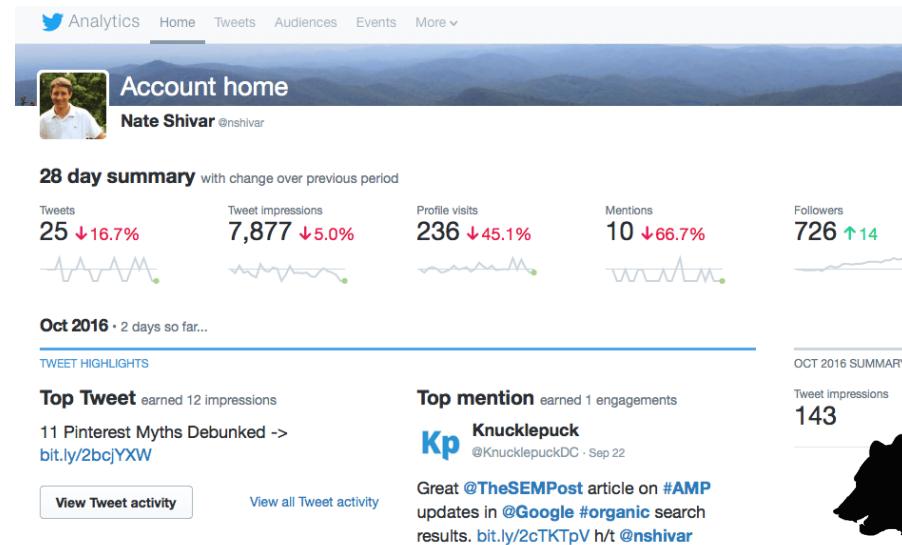
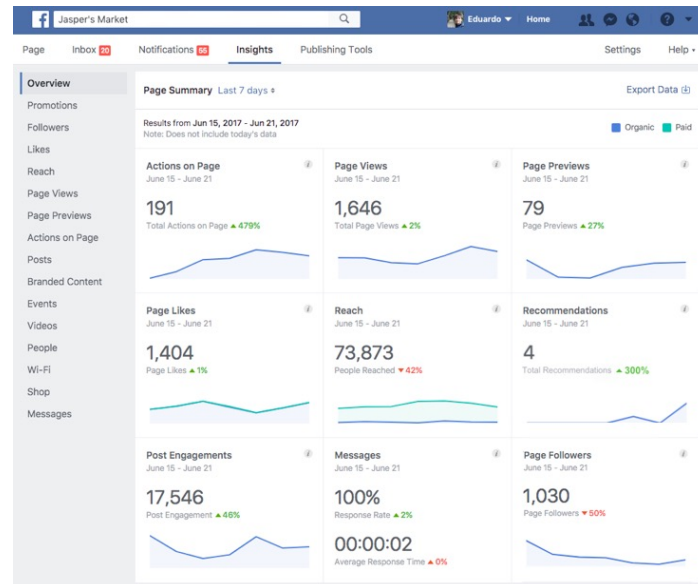
If you don't look at your accounting books, how do you know what you've spent, if you are spending in the right places or if you are losing money?

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!



Do You Know Who Your Customers Are?

Do You Know Where To Find Them?

Do You Know How To Tell Them How YOU Can Help Them?





*Tap Into My Expertise!*

**Schedule a Strategy Session Today!**  
**Scan or go to [callwithpatty.com](https://callwithpatty.com)**

**Join The Marketing  
Lab LinkedIn Group**

