



Client Business Profile



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Business Information

- Business Name:
- Business Website:
https:
- Website Host:
- Business Email:
- Business Address:
- Business Phone Number:
- Business WhatsApp:
- Contact Person:
- Contact Phone Number:
- Contact Address:
- Contact Email:
- Colorado Secretary of State Business Listing:
[Link](#)

Software

- Customer Relationship Management (CRM)
- Marketing Automation
- Email Marketing
- Social Media Management Tools
- Content Management System (CMS)
- Analytics and Reporting Tools
- Point of Sale (POS) Systems
- Human Resources Management Systems (HRMS)
- Accounting Software
- E-commerce Platforms

Search and Social Media Links

- Facebook
<https://www.facebook.com/>
- Instagram
<https://www.instagram.com/>
- Nextdoor
<https://nextdoor.com/pages/>
- YouTube
<https://www.youtube.com/>
- Twitter
<https://twitter.com/>
- LinkedIn Owner
<https://www.linkedin.com>
- LinkedIn Business
<https://www.linkedin.com>
- TikTok
<https://www.tiktok.com/@username>
- Pinterest
<https://www.pinterest.com/username>
- Snapchat
[https://www.](https://www)
- Tumblr
[https://www.](https://www)

Service Platforms

- Thumback
- HomeAdvisor
- HomeGuide
- BuildZoom

Manufacturers and Brands

-

Search and Review Links

- Google My Business
<https://>
- Google Maps
<https://>
- Bing Places for Business
<https://>
- BBB
<https>
- Yelp
<https://www.yelp.com>
- Alignable
<https://www.alignable.com/>
- BNI
<https://bnicolorado.com>

- Chamber of Commerce
https

Mission and Values

- **Mission Statement**

- Succinctly express the company's core purpose, values, and objectives, ensuring clarity, authenticity, and inspiration for both internal and external stakeholders.

Empowering our community through [specific products or services] by [core values], [small business name] is dedicated to [primary goal or purpose].

- **Vision**

- A concise articulation of an organization's aspirational future, outlining its long-term goals and desired impact.

Transforming lives through exceptional [service offerings] with a steadfast commitment to [core values], [small business name] envisions a future where our services empower individuals and communities for lasting positive impact.

- **Values**

- Company values are guiding principles that define an organization's culture, behavior, and decision-making, with selected examples such as integrity, innovation, customer-centricity, and collaboration. Select from the list below, or write your own.

- Integrity: Ethical and honest.
- Innovation: Creative problem-solving.
- Customer-Centricity: Client satisfaction focus.
- Collaboration: Teamwork and synergy.
- Respect: Mutual consideration.
- Excellence: Continuous improvement.
- Diversity: Inclusive representation.
- Adaptability: Flexibility and responsiveness.
- Accountability: Ownership of actions.
- Transparency: Open communication.
- Quality: High standards maintained.
- Sustainability: Environmental responsibility.

- **Short-Term Goals**

- Align your short-term goals with immediate business needs, addressing challenges, and capitalizing on opportunities, while determining the time frame based on the complexity and urgency, typically ranging from a few weeks to a year. Select from the list below, or write your own.

- Increase Revenue: Achieve a specified percentage growth in sales.
- Enhance Customer Satisfaction: Improve customer feedback and ratings.
- Expand Market Reach: Enter new geographical areas or demographics.
- Boost Employee Productivity: Implement efficiency measures.
- Launch New Products/Services: Introduce innovative offerings to the market.
- Improve Operational Efficiency: Streamline internal processes.
- Build Strategic Partnerships: Establish collaborations for mutual benefit.
- Increase Brand Awareness: Enhance visibility through marketing efforts.
- Reduce Costs: Identify and implement cost-saving measures.

- Enhance Employee: Training Invest in skill development programs.
- Improve Online Presence: Optimize digital marketing strategies.
- Achieve Short-Term Financial Targets: Meet specific financial milestones.
- **Long-Term Goals**
 - Set your long-term goals by aligning them with overarching business strategies, addressing persistent challenges, and strategically leveraging opportunities, determining the time frame based on the complexity and long-term vision, typically ranging from one to five years. Select from the list below, or write your own.
 - Sustainable Revenue Growth: Achieve consistent sales increase.
 - Enduring Customer Loyalty: Cultivate lasting customer relationships.
 - Global Market Expansion: Establish international market presence.
 - High-Performing Workforce: Boost employee productivity long-term.
 - Ongoing Innovation: Drive continuous cutting-edge products.
 - Optimized Organizational Processes: Streamline and enhance operations.
 - Strategic Alliance Development: Cultivate mutually beneficial partnerships.
 - Lasting Brand Recognition: Build enduring brand awareness.
 - Sustainable Cost Management: Implement effective cost-saving measures.
 - Continuous Employee Development: Invest in ongoing skill development.
 - Dominant Online Presence: Optimize sustained digital visibility.
 - Financial Excellence: Attainment Achieve and sustain fiscal targets.

Business Overview

Products/Services

- Brief overview of your business's products or services.
 - Products
 - Services

Unique Selling Proposition (USP)

- **USP**
 - Identify your target audience and their pain point. What specific problem do you solve for them? Highlight your unique value proposition (UVP). How do you address their need differently from your competitors? Combine these elements into a concise statement, emphasizing the benefit your audience receives.
 - [Your business] helps [target audience] by [solving their pain point] through [your unique approach], unlike [competitors] who [how competitors approach it].
- **Warranty**
 - Outline of warranty terms and conditions for products/services. A promise from the seller or manufacturer about fixing or replacing a product if it doesn't meet certain standards within a specified time.
- **Guarantee**
 - Specification of guarantees offered for customer satisfaction. A general assurance about the quality or performance of a product, outlining conditions for a refund or replacement if it falls short.
- **Satisfaction Guarantee**
 - Details about the commitment to customer satisfaction and how it is guaranteed. A commitment to refund or replace a product if the customer isn't happy, even if the product is not faulty. Focuses on customer satisfaction.
- **Refund Policy**
 - Clear statement regarding the refund policy, including conditions and timeframes.
- **Damage Policy**
 - Description of how your business handles damaged products or services.
- **Auto Insurance**
 - Contact
 - Policy Number
- **Business Insurance**
 - Contact
 - Policy Number
 - COI Contact and Procedure

Brand and Marketing

- **Target Market**
 - Define the target audience, including demographics, interests, and needs. Different target markets may exist for different products or services.
- **Brand Story**
 - Narrative about the brand's origin and journey.
- **Company Bio/About**
 - **100 characters**
5-10 second introduction.
 - **250-300 characters**
This range is widely used on platforms like Twitter, Instagram bios, and company directories. It's ideal for concise, impactful summaries.

- **500 characters**
This is another common limit on platforms like LinkedIn company descriptions and some directory listings. It allows for slightly more detail than the 250-300 range.
- **1000 characters**
Platforms like Facebook bios and some company directory sites sometimes offer this limit. It provides a decent amount of space to share a more comprehensive overview of your company.
- **2000 characters**
While less common, some directories and platforms like Google My Business allow longer bios exceeding 1000 characters. This allows for in-depth storytelling and information sharing.
- **Value Proposition**
 - Craft a compelling value proposition for your small business by clearly communicating the unique benefits and solutions you offer to your target customers, addressing their needs or pain points succinctly, and emphasizing the distinctive value that sets your business apart from competitors.
- **Tagline**
 -
- Brand Personality Traits**
 - Authentic
 - Innovative
 - Reliable
 - Friendly
 - Professional
 - Playful
 - Empathetic
 - Bold
 - Sincere
 - Sophisticated
 - Adventurous
 - Nurturing
- **Brand Positioning**
 - Indication of where the brand stands in the market.
- **Licenses** [Verify a Colorado Professional or Business License](#)
 - Business License
 - Personal Licenses
- **Memberships**
 -
- **Associations**
 -
- **Service Platforms**
 -
- **Brands Used, Recommended Manufacturers**
 -
- **Awards and Images**
 -
 -

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Brand Guidelines

- **Brand Elements**
 -
- **Web Logo**
 -
- **Vector Logo**
 -
- **Logo Font**
 -
- **Brand Fonts**
 - Title:
 - Subtitle:
 - Heading 1:
 - Heading 2:
 - Heading 3:
 - Heading 4:
 - Normal Text:
 - Quotes:
 - Footnotes:

- **Colors**
 - [Adobe Color Palette](#)
- **Clear Space Guidelines**
 - Example Maintain a clear space around the logo equal to at least twice the height of the _____ in the logo mark to ensure visibility and legibility. No other visual elements or text should encroach upon this designated clear space.
- **Minimum Size Guidelines**
 - Example Ensure the logo is reproduced at a minimum size of _____ in width to preserve legibility and visual impact. Scaling below this dimension may compromise the integrity of the brand identity.
- **Logo Usage on White Background**
 - When using the logo on a white background, ensure a clear and uncluttered presentation. Maintain a minimum clear space around the logo, and use the approved color variations specified in the brand guidelines for optimal visibility and brand consistency.
- **Logo Usage on Dark Background**
 - When using the logo on a black background, utilize the approved reversed version to ensure visibility and contrast. Maintain a minimum clear space around the logo, and adhere to specified color variations outlined in the brand guidelines for consistent and impactful representation.
- **Typography**
 - Logo Font Spy Agency Italic
 - Primary Fonts (with examples)

Brand Guidelines

- **General Use Tips**
 -

- **Brand Imagery**
 -
- **Site Photos**
 -
- **Project Photos**
 -
- **Before After Photos**
 -
- **Staff Photos**
 -
- **Staff Bios**
 -
- **Videos**
 -
- **Basic Guidelines for Images (if any)**
 -
- **Content Voice and Tone**
 -
- **Brand Voice**
 - Craft your brand voice by identifying the personality traits that best represent your small business and infuse them into your communication style.

Basic Guidelines for Print and Digital

- **Business Cards**
 -
- **Letterhead**
 -
- **Website and Social Media**
 -
- **Email Signatures**
 -
- **Embroidery**
 -
- **Screen Printing**
 -
- **Specific Tips for**
 - Commercial B2B Posts
 -
 - Social Media Posts
 -

Discovery and Insights

Customer Insight and Journey

- Who are our ideal customers in terms of age, location, and interests?
 -
- What problems does our product or service solve for our customers?
 -
- What challenges do customers face during their journey?
 -
- What information do customers need at each decision-making stage?
 -
- What emotions do customers experience when considering or using our product?
 -
- What motivates customers to choose us over competitors?
 -
- How do customers measure success or satisfaction after purchasing from us?
 -
- How do customers engage with our company post-purchase, like leaving reviews or mentioning us on social media?
 -
- What prompts a customer to purchase from us again?
 -

Purchasing Insights Discovery and Awareness

- How do customers find us?
 -
- Which online platforms get the most attention?
 -
- Is our business discovered through search engines?
 -
- What keywords are linked to our business?
 -
- How effective is our advertising at attracting customers?
 -
- Are we prominent in industry directories?
 -
- Does participation in events boost visibility?
 -
- Do we engage with influencers, associations, or forums?
 -
- How does our location impact discovery?
 -
- Have traditional ads increased awareness?
 -
- How visible are we on mobile apps/maps?
 -

Trends in Customer Discovery

- How did historical trends shape discovery?
 -
- What future trends may impact finding us?

-
- How have trends impacted discovery over time?
-
- How has adaptation to trends been approached?
-

Purchasing Behavior

- How do customers make purchasing decisions?
-
- What factors influence choices over competitors?
-
- What factors influence customer choice in selecting different brands we offer?
-
- Are there observed trends in purchasing behavior?
-
- How does pricing strategy impact decisions?
-

Influences on Purchasing

- What role do reviews play in purchasing decisions?
-
- Are there seasonal trends in purchasing habits?
 - Spring
 - Summer
 - Fall
 - Winter
 - Holidays
- How do demographics impact purchasing preferences?
-
- How does customer feedback affect behavior?
-

Improving Purchasing Experience

- Do promotions or discounts influence decisions?
-
- Which touchpoints impact purchasing behavior?
-
- How does the overall customer experience contribute to repeat purchases?
-
- What strategies can enhance understanding and cater to evolving purchasing behavior?
-

Marketing, Advertising, and Branding Platforms

Provide a detailed inventory, listing, and assessment of marketing initiatives.

Digital Marketing

- Website development and maintenance
 -
- Social media advertising
 -
- Search engine marketing (SEM)
 -
- Email marketing
 - Newsletter Emails
 - Promotional Emails
 - Transactional Emails
 - Welcome Emails
 - Drip Campaigns

Traditional Advertising

- Print advertising (newspapers, magazines)
 -
- Television and radio ads
 -
- Direct mail campaigns
 -

Content Creation

- Blog posts, articles, and other written content
 -
- Graphics and visual content
 -
- Video production
 -

Public Relations

- Media relations
 -
- Press releases
 -
- Event sponsorships
 -

Marketing Collateral

- Brochures, flyers, and printed materials
 -
- Business cards
 -
- Uniforms, signage, auto wrap
 -
- Promotional items
 -

Market Research

- Surveys and focus groups
 -
- Competitor analysis
 -
- Customer feedback tools
 -

Events and Sponsorships

- Hosting or participating in events
 -
- Sponsorship of community activities
 -
- Trade shows and exhibitions
 -
- Associations and memberships
 -

Search Engine Optimization (SEO)

- Website optimization
 -
- Keyword research
 -
- Backlinks
 -

Analytics and Measurement Tools

- Marketing analytics platforms
 -
- Ad tracking tools
 -
- Customer relationship management (CRM) systems
 -

Training and Skill Development

- Employee training in marketing tools and strategies
 -
- Hiring external consultants or agencies
 -

Hashtags General

Company	Location
Tag Line	Brands or Manufacturers

Hashtag Topics

Situation 1	Situation 2
Situation 2	Situation 3

Keywords

Keywords	Search volume	Top of page bid (low range)	Top of page bid (high range)	Competition

Social Media Ads

Blog Posts

Blog Lengths and Titles

- **Short Blogs (300-700 words)**
 - Headline Attention-grabbing and informative.
 - News articles, press releases, quick tips, and listicles.
- **Medium Blogs (700-1,500 words)**
 - Headline Clear and descriptive, indicating the post's value proposition.
 - In-depth guides, tutorials, and "how-to" posts.
- **Long Blogs (1,500+ words)**
 - Headline Compelling and informative, accurately reflecting the post's depth and value.
 - Comprehensive guides, research papers, and industry reports.

Recommendations

- Short-Term Goals
 -
- Long-Term Goals
 -
- Website
 -
- Social Media
 -
- Branding
 -
- Customer Journey
 -
- Content Creation
 -
- Email Marketing
 -
- Data Analysis
 -
- Reputation Management
 -
- Customer Service
 -
- Keyword Optimization
 -
- Community Engagement
 -
- Employee Involvement
 -
- Competitive Landscape
 -
- [Annual Marketing Budget Planning Tool](#)

Reference

Social Media Image Sizes					
	Facebook	Instagram	Twitter	LinkedIn	TikTok
Profile Photo	170 x 170	320 x 320	400 x 400	400 x 400	200 x 200
Landscape	1200 x 628	1080 x 566	1600 x 900	1200 x 627	1920 x 1080
Portrait	628 x 1200	1080 x 1350	1080 x 1350	627 x 1200	1080 x 1920
Square	1200 x 1200	1080 x 1080	1080 x 1080	1080 x 1080	1080 x 1080
Stories	1080 x 1920	1080 x 1920	N/A	N/A	1080 x 1920
Cover Photo	851 x 315	N/A	1500 x 500	1584 x 396	N/A

Image size guidelines for social media platforms

- Facebook Image Size 1200 x 628
- Twitter Image Size 900 x 450
- Instagram Size 1080 x 1080
- LinkedIn Size 1350 x 440
- Pinterest Size Pin size 236 x Adjustable Height; 23 ratio for vertical pins (recommended) Board image size 222 x 150
- Snapchat Size 1080 x 1920
- Tumblr Size 500 x 750

<https://www.facebook.com/business/ads-guide/update>

<https://adsmanager.facebook.com/adsmanager/>