



Bizperity



**Includes 20 Small
Business Models**

QUICK START Marketing Strategies

**Campaign Guides For
Six Small Business
Categories**

PREVIEW

**Managing The
Customer Journey**

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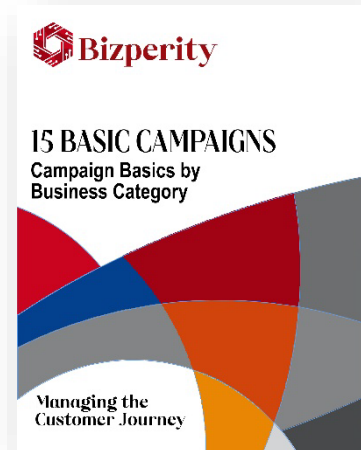
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How to Use this Guide

Under the six business categories we have identified, there are a total of 20 unique business models described. Find the one that best describes your business. Each model is described in its own section, identified with a Red Headline to make it easy to scroll through the list of 20 business models. Each model includes a brief description of the key marketing challenges and additional elements that impact your marketing strategy unique to that business model.

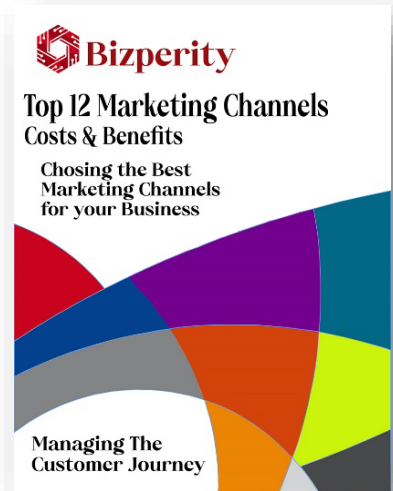
Next is a list of Best Marketing Practices for that business model followed by the Quick Start Marketing Strategy. Finally, there is a list of marketing channels and tactics that are recommended for that business model, based on our 15 Basic Campaigns. You can decide exactly which set of marketing channels and best practices to start with when you launch a new business.



Fifteen Basic Campaigns			
	Campaign Goal / Campaign Name	Campaign Types	Conversion (Objective)
1. Capture a New Customer			
1	A Lead Capture (with content)	Content Marketing	to a Lead/New Customer
2	B Lead Capture (with special offer)	Sale/Special Offer	to a Sale/New Customer
3	C Paid Referral	Referral	to a Sale/New Customer
	D Self-Discovery (Pospects email/call/walk-in)	Campaign Types	Conversion (Objective)
4	D1 Brand Awareness	Branding	to a Sales Qualified Lead/New Customer
5	D2 Organic Referral (WOM)	WOM (Word of Mouth)	to a Sales Qualified Lead/New Customer
6	D3 Online Search (SEO)	Organic Search/Website Optimization	to a Sales Qualified Lead/New Customer
	Campaign Goal / Campaign Name	Campaign Types	Conversion (Objective)
2. Nurture an Existing Lead (with content or special offer)			
7	A New Lead Nurturing	Content Marketing	to a Lead/New Customer
8	B Existing Customer	Sale/Special Offer	to a Sale/New Customer
	Campaign Goal / Campaign Name	Campaign Types	Conversion (Objective)
3. Product Education			
9	A Product Education using Content Marketing	Content Marketing	to a Sales Qualified Lead
10	B Product Promotion & Content	Promotion (Sale or Special Offer)	to a Sales Qualified Lead/Sale
	Campaign Goal / Campaign Name	Campaign Types	Conversion (Objective)
4. Event Marketing			
11	A Marketing Event	Event Promotion	to a Marketing Qualified Lead/Sales Qualified Lead
	Campaign Goal / Campaign Name	Campaign Types	Conversion (Objective)
5. Product/Service Sale			
12	A Price Discount	Sale	to a Sales Qualified Lead/Purchase
13	B Free Service (Assessment, Evaluation, Testing)	Promotion with Content	to a Marketing Qualified Lead/Sales Qualified Lead
14	C Free Content	Content Marketing	to a Marketing Qualified Lead/Sales Qualified Lead
15	D Special Offer	Can be mixed in with any campaign	Varies with Offer (tied to the main campaign)

See our eBook, **15 Basic Campaigns, Campaign Basics by Business Category for campaign details**. You can decide exactly which set of marketing channels and tactics to start with when you launch a new business.

The strategies are designed to get a small business up and running quickly and maintain their marketing needs they mature into sustainable businesses. You should also see our eBook, **Strategic Planning, A Marketing Planning Process**, for suggestions on how to further customize your own marketing strategy. Exactly what marketing channels and tactics you chose to begin building your Marketing Strategy will depend on your financial resources. According to the Small Business Administration, undercapitalization is one of the key factors that cause new business failures. Before you start a new business, design a marketing plan with a budget for the first year, and include it in your fundraising. Treat a marketing budget just like any other expense, like rent, utilities, taxes, etc. Failing to budget for marketing is the second main reason new businesses fail. Other key factors listed by the SBA include ineffective marketing and lack of planning. This guide was designed to address these weaknesses common to many new businesses.



For more information about marketing channels, including pricing, read our eBook, **Top 12 Marketing Channels, Choosing the Best Marketing Channels for your Business**.

As you implement your marketing strategy, return to our guide to find new ideas for how you can add new campaigns and marketing channels. Our number one piece of advice for small businesses, build your marketing system one campaign at a time!

You build a marketing system one campaign at a time!

Each of our Quick Start Marketing Strategies is designed to be flexible, allowing you to implement only part or all the suggestions, based on your financial resources. All successful

businesses grow their revenues as they become profitable and can afford to expand their marketing efforts along the way. To create a sustainable business, you should aim to expand your initial customer base to capacity and achieve profitability as quickly as possible. Some of the business models we describe are limited in terms of their customer capacity and some are not. A Hair Salon can only handle so many customers per chair. A sole practitioner, like an attorney or business consultant, is similarly limited. These businesses can reduce the time they spend searching for new clients by improving their marketing strategy. Businesses that can scale should invest heavily in building an effective marketing system so they can continue to expand. Avoid over expanding beyond your financial resources or your managerial capacity. There is a hard stop that varies depending on the nature of your business, but often you will see it appear at around \$10 million in revenue. That is when the owners must add additional managers and create a hierarchical business structure to manage the continued growth of their business. Be aware of this limitation so you can avoid hitting it like a brick wall. If you are naturally a micromanager you may find this difficult to overcome but it is the challenge that every founder must navigate if they want to grow their business beyond what they can manage themselves.

Quick Start Marketing Strategies

The whole point of this learning series, available in eBook format and offered on a limited basis during one-day workshops, is to provide a simple and easy to use marketing strategy customized for specific business models commonly found in any local community. Inspired by workshops I did for six years, offered for free through my local Chamber of Commerce where I engaged with every type of local business in my own community, I learned firsthand the diverse marketing needs of the many different types of small businesses and local non-profits that attended these workshops. At the time, I thought that I could teach these entrepreneurs and small business owners everything they needed to know about marketing so they could effectively market their own businesses. I learned the hard way that this was nearly impossible. Most of these businesspeople listened carefully and asked good questions, but it became apparent to me that virtually none of them applied the best practices that I so carefully explained to them. After six years, I got caught up in my own ventures and I stopped doing the workshops, disappointed in my failure to deliver a simple and easy way to implement simple marketing strategies. I often thought about these people and the great underserved need small businesses have when it comes to marketing education. They simply don't have the time to learn marketing the way it is taught in colleges and universities, and they would never go back to school to learn it. In addition, larger businesses simply outsource their marketing to the growing number of digital agencies. But this creates a new problem: How should a small business engage with a digital agency? How do they know what they should expect in terms of outcomes? What do they need to explain about their own marketing needs so an agency can provide a comprehensive solution to their unique marketing needs?

We created the six basic business categories described in the series along with the 15 Basic Campaigns which cover virtually every common marketing goal that can be addressed with a campaign. These are organized around two broad subjects: 1) The Customer Journey, simple best practices and tactics in digital advertising; and 2) Strategic Planning from a simple, straightforward approach that anyone can understand.

We call these, ***Quick Start Marketing Strategies***, because they are designed to be implemented by any business owner or entrepreneur, quickly and easily, with flexible approaches that allow a businessperson to choose among a set of recommended campaigns, depending on what they feel is most important. They also allow for limited marketing budgets, highlighting free marketing channels, so a business owner can start with a small budget then invest more money into their marketing strategies as they grow their revenue.

If you compare different *Quick Start Marketing Strategies* within a group or sub-group, you will find that many of the best practices and recommended campaigns are very similar or in some cases, even identical in part. Each Quick Start marketing Strategy was written with an eye on customizing them for each individual business model.

Flexible Strategies

All our Quick Start Marketing Strategies are designed to be highly flexible. For example, you can implement only some or all the recommended campaigns. The more complex strategies may be difficult and expensive to implement all at once. In fact, we don't recommend that you do so. You need to test offers and optimize campaigns before you implement everything that you might want to do. Give yourself time to implement a comprehensive marketing strategy. As we like to say, you build a marketing system one campaign at a time. If you are limited in your marketing budget, we have identified campaigns and best practices that are free. Begin with these and try to grow your revenue quickly so your marketing budgets can grow to support a more diverse set of campaigns.

Each Quick Start Marketing Strategy includes:

1. ***A brief overview of the business model and key marketing challenges.***
2. ***A list of best marketing practices useful for that business model***
3. ***An overview of the Quick Start Marketing Strategy for that business model.***
4. ***A list of recommended campaigns from which you can choose.***

If you have additional questions about our Quick Start Marketing Strategies, you can contact us at info@bizperity.com

Strategic Planning

Our *Quick Start Marketing Strategies* are designed to provide you with choices about marketing channels, tactics, and best practices for businesses similar to yours. They are organized in six main categories that cover businesses that share fundamental business characteristics and marketing needs. Within these six categories, we have identified twenty specific business models that you can easily recognize. These twenty specific businesses represent most of the small businesses in any community. Confirmed through years of working with local small businesses, these specific business models provide the foundation for our *Quick Start Marketing Strategies*.

In each case we provide an overview of the business model and key marketing challenges, a list of *best marketing practices*, a list of *specific marketing channels* that are well suited to fit the marketing needs and challenges of that business model, and a brief overview of *the Quick Start Marketing Strategies*. In other words, we have done the hard work required to help you begin building a marketing system. These strategies and tactics let you begin building a marketing system, one campaign at a time, but you still need to think deeply about how to customize these plans moving forward. We include here a quick lesson on Strategic Planning [This information is provided in more detail in our eBook, **Strategic Planning, A Marketing Planning Process**. The Quick Start Marketing Strategies give you options that you can apply immediately to begin building campaigns and help define your marketing strategy for you, so you don't have to figure it out all on your own. Below we describe a three-step process that helps guide your thinking when you are doing strategic planning. It illustrates three key levels of strategic planning when developing a marketing plan for your business.

The Quick Start Marketing Strategies give you options that you can apply immediately to begin building campaigns and help you define your marketing strategy for you, so you don't have to figure it out all on your own.

Our *Quick Start Marketing Strategies* give you options from which to choose when you begin implementing campaigns. These include marketing channels, tactics, and best practices. We provided all the options that could be used, but it is still up to you to decide where to begin. If you are limited in funding for your campaigns, there are plenty of free options you can use to begin. For consumer facing businesses (B2C), this includes social media marketing in Facebook/Instagram. For business facing businesses (B2B) this includes LinkedIn. Creating and posting content and information you curate and post on your feed, linking to the content. These simple practices are easy to do and when combined with simple SEO on your website, can provide significant improvements in your brand awareness in your

community, which improves Word-of-Mouth advertising, and enhances all your other marketing efforts. As you grow your revenues, you can add new marketing channels. B2C businesses can easily boost Facebook posts and reach a much larger audience beyond their own followers. Continue to create campaigns in the recommended marketing channels as you build a more mature marketing system.

Business Knowledge About Your Business

Before we describe the three levels of strategic planning, it is important that you get grounded in basic knowledge about your own business. These are key business variables you should consider when developing your marketing strategy. Many of these are common to the six main business categories we have defined for small businesses. Others will be unique to your business model. Just review the categories and business models in the Table of Content to find your business model.

There are four *key sets of variables* that apply to your business model:

- 1. Structural Factors**
- 2. Agency Services**
- 3. Key Customer Variables**
- 4. Key Marketing Challenges**

1. Structural Factors

A. The Sales Process

You either have a formal sales process or you don't. If you have professional salespeople, you have a sales process with a funnel through which prospects are processed with help from your sales team. If you don't have professional salespeople, you don't have a formal sales process. For example, Retail and eCommerce drive customers from promotional ads directly to a sale transaction, often without any human intervention at all. Whether you have a formal sales process determines many of the key choices about marketing channels and tactics.

B. The Sales Cycle

Every business has a sales cycle. It may be long or short. It may include a sales funnel for processing prospects with a sales team. It may involve no human engagement at all. Your sales cycle is defined by how often you sell to the same customer, how big the sales are, and how long it is before they come back. Customer loyalty has a big impact on these factors, and we discuss these at length in each of our *Quick Start Marketing Strategies*.

C. Transaction Size

Transaction size is defined by the size of a single transaction, which may be for one item, like a car or boat, or a group of items purchased by a consumer at one time. This is

important because it helps you calculate key metrics you will use to manage your campaigns. Often large transactions for things like cars and boats occur only once every three to five years. Customer loyalty in these business models is all over the place and it is a key marketing challenge for these types of businesses. Retail businesses sell multiple items per transaction and may have multiple transactions per month or even per week. Customer loyalty is stronger for most Retail businesses, but it still needs to be monitored and improved if possible.

D. Marketing Staff

Small businesses sometimes have a small in-house marketing team, consisting of only a few people who are responsible for managing simpler tasks. Many small businesses do their own marketing when they first start and usually that is done by the owner without any help. If you follow our strategies and manage your business well, you should be able to increase your marketing budget to the point where you can work with a digital agency that can run your campaigns for you. Online campaigns are complex and require time that you probably don't have. A small marketing staff can help you with simple items you can do in-house, but we highly recommend you outsource as much of the work to a full-service digital agency as soon as you can afford to start making media buys (beginning at \$1,000 - \$1,500 per month).

E. Marketing Budget

Even small businesses with revenues under \$200,000 per year should budget roughly 10% of their gross to marketing. According to the Small Business Administration (SBA), poor marketing is a main factor in business failures. Not having a marketing budget is the single biggest mistake you can make as a business owner. As you grow your business, you should also be growing your revenue, at least to some maximum capacity. Some businesses can expand as they grow and are limited only by the effectiveness of their marketing system.

Write down a brief description of these key business variables as they apply to your business. Include it in the information you provide your digital agency. Whoever does your marketing should have a comprehensive understanding of your business and it begins with these four key variables.

2. Agency Services

There are eight important agency services, and many secondary services, usually related to these eight key services. You may or may not require all of these services, but you should be familiar with them in case you need to use them. We discuss agency services in our *Quick Start Marketing Strategies*. You can read more about them in our eBook, *Top 12 Marketing Channels*. Here is a list of the eight main agency services.

1. **Web Development**

You can do this yourself using a web builder like Godaddy, or Wix. If your marketing budget is greater than \$20,000 per year hire a full-service digital agency to build your website to ensure it looks great and works properly.

2. **SEO**

If you use a web builder like Godaddy, you can use their built in SEO tools to optimize your webpages. If you work with an agency, they will do this for you, and also manage your business listings for you.

3. **Creative (Print & Video)**

If you are creating your own ads you can rely on online ad platforms to create your ads, but you still have to provide the copy and images. If you work with a full-service digital agency, they can do this all for you. If your digital agency doesn't work with mass media, you will have to find a separate agency that does. We recommend that you use a digital agency experienced in online advertising in your industry. Legacy agencies often deal primarily with large enterprise businesses and have services that tend to be pricy for small businesses. It is possible to find a smaller agency that works with traditional mass media, like television, radio, and outdoor. They may even offer online advertising (programmatic advertising) services but carefully vet them to ensure they have broad experience managing online campaigns in your industry because specific knowledge required to optimize online campaigns varies by industry. A full-service digital agency that does not support offline ad buying may have much better experience in your industry. Work with two agencies if necessary but it is preferable to have one full-service digital agency do everything.

4. **Social Media Services**

While you can do this yourself easily, your time is still constrained and managing employees who do this for you is more difficult than working with a digital agency that can create your posts for you. They will have to pick your brain from time to time, but that will be far easier for you than trying to manage your own social media marketing. Once again, look for a digital agency with experience in your industry.

5. **Online Ad Buying**

Online ad buying is more complicated than it might at first seem. You can learn to run your own online ad campaigns, but ask yourself, is it worth your time.

Outsourcing these tasks to an experienced digital agency will manage these tasks for you, saving you time you probably need for running your business. A digital agency experienced in your industry can do a far better job of setting up, managing, and optimizing your online ad campaigns. Turn this over to a digital agency as soon as you can afford to hire them.

6. Traditional Ad Buying

As we said, you may have to find another agency to handle offline campaigns, including media buying in television, radio, print, and outdoor. Offline mass media are still viable marketing channels even in the age of smart phones. Traditional media reaches much larger audiences who may not discover your business any other way. They provide the means to do branding campaigns that can support all your other campaigns, online included. They also can be used to traditional promotional ad campaigns. We recommend them when we think they may be of value in our Quick Start Marketing Strategies.

7. Public Relations (PR)

Public Relations (PR) is generally used only by larger enterprise organizations, but many small businesses are big enough to require some PR. This is more significant if your business is well connected within your community to senior leadership in the community, including public (government agencies and private organizations (churches, non-profits, etc.)). There are small PR agencies that focus primarily on PR alone but often they can help you with content creation. If you need a PR firm, find a small local company or sole proprietor that offers services at affordable prices. Legacy, full-service agencies are pricey and tend to serve only large enterprise businesses.

8. Reputation Management

Reputation Management can be handled by a PR firm, but it is generally offered by web developers and small agencies, with or without digital services. Since we recommend that you work with a full-service digital agency, it is best to avoid working with small web developers who may have only limited experience in services outside of building websites. Reputation management includes managing your business listings (critically important for local small businesses). It can also include managing reviews place on business listing services and review sites common in your area. A full-service digital agency is our first choice for finding these services. If you are getting bad review, you need to address that not only with the help of a digital agency, but also by improving your service and increasing your customer satisfaction ratings.

3. Key Customer Variables

There are eight important agency services, and many secondary services, usually related to these eight key services. You may or may not require all these services, but you should be familiar with them in case you need to use them. We discuss agency services in our *Quick Start Marketing Strategies*. You can read more about them in our eBook, *Top 12 Marketing Channels*. Here is a list of the eight main agency services.

A. Customer Acquisition Cost (CAC)

If you ever watch Shark Tank, you know that Customer Acquisition Cost (CAC) is a critical number you need to know. Managing CAC means is all about managing your campaigns to maximize your Return on Ad Spend. *The higher your ROAS, the lower your CAC.* Optimizing your campaigns by customer segment, messaging, ad quality, and key word selection provide the means to achieve higher ROAS and lower CAC. If you don't want to do this yourself, hire a full-service agency to do it for you.

B. Customer Lifetime Value (CLV or LTV)

In order to know how much you can afford to spend on your campaigns, you need to know the Customer Lifetime Value for a typical customer. Outside e-Commerce, which personalizes campaigns to the individual customer, an average value is all you need, unless this value changes across customer segments. If it does, then calculate it for each customer segment. The greater the lifetime value of a customer, the more you can afford to acquire a new customer. Even small businesses, like laundry services, can have a high CLV. Their customers typically spend between \$40 and \$100 per month and they can remain loyal for many years. This means that an average lifetime value would equal to $(\$70 \times 12) = (\$840 \times 8 \text{ years}) = \$8,400$ (based on an average customer lifetime of eight years). That kind of CLV means your Customer Acquisition Cost (CAC) can be quite high. For example, 1% of your CLV would be \$840! A more reasonable number would be between 10% and 20% of one year of service, or \$84 to \$168. That would more than cover the cost of their first cleaning. It may seem risky to give away free cleaning. After all, it would attract people who would only come in for the free service then go back to their regular cleaning service. But you could extend this discount over a longer period (such as 20% off for your first three months). The point is that you should calculate your CLV before making strategic decisions about what you can afford to spend to acquire a new customer. Split that expense between ad buys and special offers.

C. Customer Loyalty

We have just described customer loyalty and what it means in Customer Acquisition campaigns, but Customer Loyalty has far reaching impact on almost every aspect of your marketing strategy. That is why you should do everything you can to increase Customer Loyalty. Primarily that means you should constantly be looking for ways to improve the customer experience, during the sale and after the sale. Customer satisfaction is a good measure of customer loyalty, and you can track that separately because it is easier to measure. But research has shown that for most business segments, the willingness of a customer to recommend your business to a friend or

colleague is the best predictor of profitability.¹ There is a reluctance to recommend anything to friends and colleagues because someone has a bad experience, it reflects badly on the person who made the referral. They are risking their personal brand reputation whenever they make a referral. That is why it is also a good measure of customer loyalty. That a referral is also the best predictor of profitability gives you plenty of reason to track referrals over time. For most businesses, this value can tell you if you are headed in the right direction and it helps you manage efforts to improve customer loyalty. Thus, measuring the rate of referrals is an excellent way to measure both customer satisfaction and customer loyalty. That is why we recommend virtually all businesses have a referral campaign in place, if only to measure changes in customer loyalty over time.

4. Key Marketing Challenges

Our six business categories share common marketing challenges within the group of businesses in each category. This insight was a significant factor in organizing these categories. Each category is unique in these shared marketing challenges. Beyond this simple analysis, additional marketing challenges are often unique to the individual types of businesses within a category. Home Pest Control, Air Conditioning Services, and Plumbing Services all share some common challenges because they are all Home Services, but they each have their own unique challenges.

- ❖ Structurally, they have the same selling challenges when closing new customers.
- ❖ But Pest Control has safety issues to overcome that are unique to their industry.
- ❖ On the other hand, pricing issues are more difficult challenges for Air Conditioning repair and Plumbing companies.

So, consider those common variables first, then drill down into challenges unique to your type of business as necessary when considering your main marketing goals and campaign objectives. Then consider those variables that are completely unique to the nature of your business.

¹ *The One Number You Need to Grow*, by Frederick F. Reichheld, The Harvard Business Review.

Three Levels of Strategic Planning

Creating a marketing strategy requires that you think through different issues beginning with **Marketing Level Strategy** where you define big goals you want your marketing strategy to achieve, then moving down to **Channel Level Strategy** where you pick channels and tactics to deliver outcomes that help achieve your marketing goals, and finally down to **Campaign Level Strategies** where you choose specific campaigns to produce engagement and conversions with prospects and customers. These three levels can be understood using the following analogy. If you want to improve your health you might decide to lose weight, improve your diet, or schedule testing that your doctor has been recommending for years, like cancer screening. Your goal is to improve your health. The path you choose is a strategic decision. If you choose wisely, you will fulfill your goal. These three different strategies are like campaigns that provide a practical way to implement a plan that produces measurable outcomes. In our analogy, the metrics are your weight, how many calories you eat, or what measure are provided by medical tests you take. In marketing, common campaigns produce levels of engagement (likes, comments, shares) or conversions in the Customer Journey. Defining marketing goals is the most difficult part of Strategic Planning designed to create a marketing plan. Choosing one or more marketing channels is a strategic decision and like your health, if you choose wisely, you will fulfill your goal.

LEVEL 1: Marketing Level Strategy

Not all marketing goals can be achieved with advertising campaigns. Here are some key questions that focus on marketing challenges that can help you define your marketing goals.

1. **How fast do you need to grow your customer base?**
2. **How large do you need to grow your customer base?**
3. **How much and how fast do you need to grow sales?**
4. **How do you manage your financial commitments and cash flow?**
5. **Do you have a Pricing and Discount Strategy?**
6. **How do you Identify Customer Segments?**
7. **How do you align Segments with Products or Customer Needs?**

Notice that four of the questions listed above don't necessarily lead to campaign strategies. Only the first three questions (in red) can be fulfilled using campaigns. Managing financial commitments and cash flow are financial issues. If you don't have a Pricing and Discount Strategy, you need to create one. Without a pricing model you have an incomplete business model. How you identify customer segments may involve designing campaigns to help you do that, or it might just require some commonsense analysis based on what you already know about your customers. Aligning customer segments with products or customer needs requires that you review previous campaign data for insights about who is buying what and why are they buying it. Whenever you engage in strategic planning, don't make things more

complicated than needed. Data is king, but understanding data is the real key to finding insights that help you better understand your customers.

These questions may or may not be important to your business. That is up to you to decide. Entrepreneurs exhibit great levels of common sense when identifying the things that matter the most. It is no different than managing your personal budget. If your car breaks down, your air conditioner stops working, and your roof springs a leak, you may be having a bad day, but how you deal with these challenges forces you to make strategic choices about how to manage these costs. Managing campaigns is much the same and it requires the same kind of common sense you apply to other types of challenges you have to deal with.

Data is king, but understanding data is the real key to finding insights that help you better understand your customers.

The challenge itself does not define a marketing goal, but it points you in the right direction. If you decide to grow your customer base as quickly as possible to become profitable by the end of the year, you might set a goal of adding 100 new customers in the last quarter. You determine the number of customers you need to add based on the key metrics we discussed above, CAC and CLV. Thinking in these terms may seem hard at first, but successful business owners will quickly figure out how to manage their businesses successfully by making smart strategic decisions based on important metrics like CAC and CLV and campaign metrics that measure conversions.

Once you have defined a marketing goal, the first question should be, “can a campaign help achieve this goal?” If the answer is no, you need to find a different solution. Building a mature marketing system is about more than designing campaigns. It includes putting in place all the resources you need to implement, manage, and analyze campaigns and their outcomes.

When you identify a marketing challenge, establish a broad goal to address the challenge. Then decide if a campaign can achieve the goal, or if you need to find a different solution.

Here are some marketing goals based on the questions listed above.

- **Add 100 customers in 3 months.**
 - ✓ **Launch a Product Sale**
- **Grow customer base by 25%.**
 - ✓ **Launch a Product Sale**



- **Increase revenue by 30% this year.**
 - ✓ Allocate funding for new software
 - ✓ Hire two new marketing employees
- **Pricing Model:**
 - ✓ Standard 100% mark-up (requires you decide)
 - ✓ Maximum discount 20% on select items (requires you decide)
- **Identify Customer segments based on:**
 - ✓ Demographics, online behaviors, creative groupings
 - ❖ Based on previous campaign results
 - ✓ Use AI with predictive analysis to identify unknown Customer Segments.
 - ❖ Based on previous campaign results.
- **Align Customer Segments with:**
 - ❖ Products
 - ✓ Requires some creative thinking
 - ❖ Product groups
 - ✓ Requires some creative thinking

Out of all these marketing challenges and associated goals, only the first two require that you create and run a campaign! Of course, some of the others could be addressed with a campaign, but they don't have to be. Customer segments can be studied based on campaign metrics then adjusted in future campaigns. Always ask yourself, will a campaign fulfill my marketing goal? If not, find another approach to achieving your goal.

LEVEL 2: Channel Level Strategy

Picking marketing channels and tactics occurs at the same time you create campaigns to fulfill your marketing goals. Typically, you will choose a campaign strategy that is aligned with your marketing goals, then decide what marketing channels you want to use. Multiple marketing channels can be used in a single campaign, but you will have to set up the campaigns individually in each marketing channel. For example, you can create a branding campaign with the same messaging and similar creative then run it in Facebook, Google Search, and local television. You should always pick one main goal or objective for your campaigns. This will almost always be a conversion in the Customer Journey.

We identify six conversions in the Customer Journey (See our eBook, ***Managing the Customer Journey, How to Use Goals, Objectives, & Conversions in Campaigns***). Here are the six Conversion we have defined in the Customer Journey. There are three extra minor

conversions under a *Sales Qualified Lead*. *These have* entered the sales process. They begin with a prospect who is ready to talk to a salesperson; to someone who is talking to a salesperson; to someone who is being closed by a salesperson. Once closed, they become a customer.

1. **Subscriber Conversion** (to a blog or other general content)
2. **Content Qualified Conversion** (to targeted content that connects customer needs and your business)
3. **Marketing Qualified Conversion** (to prospects who have expressed interest in your business)
4. **Sales Qualified Lead** (to your Sales Funnel, if you have one)
 - a) **Top of Funnel** (an active sales prospect)
 - b) **Middle Funnel** (a prospect engaged with a salesperson)
 - c) **Bottom Funnel** (the finale conversion to a customer)
5. **Customer Conversion** (to a customer who may buy again or buys regularly)
6. **Fan Conversion** (to a advocate to help you reach more prospects)

Free Marketing Channels & Tactics

Some marketing channels and tactics are free, or require only modest license fees (CRMs, Website builders, etc.). If you are limited in marketing funds, focus on using free marketing channels first. When you grow your revenues, you can add paid agency services and media buys when you can afford it. When you first start a business, you should try and raise enough funding to cover all your expenses, including marketing. You have one chance to introduce your business to the community. Underfunded marketing campaigns means you might not get to meet your community.

Below is a list of free marketing channels.

- ❖ **Social Media Marketing**
 - ✓ Free Posts, Stories (Facebook/Instagram); Posts, Articles (Linkedin)
- ❖ **SEO (Organic Search)**
 - ✓ Using SEO tools in website builders like Godaddy or Wix.
- ❖ **Online Listing, Business Directories, and Review Sites**
 - ✓ These are generally simple to set up and maintain.
- ❖ **Reputation Management**
 - ✓ By responding to online reviews in business listings and review sites.
- ❖ **Email Marketing**

- ✓ You can build list of contacts, including prospects and customers, through your Business Page, by capturing contacts who click on links to download content, or view your videos on your YouTube Channel, by capturing website visitors who subscribe to your blog or other content, and through Word-of-Mouth advertising and customer referrals (when new customers visit your store, make an office appointment, or simply call you on the phone).
- ❖ **Content Marketing**
 - ✓ Creating the content yourself in print or video.
 - ✓ Create your own YouTube Channel to post videos for free.

Paid for Marketing Channels include some of the channels listed above if you hire a digital agency to create and manage your campaigns. Here is a list of the best marketing channels to use with paid for ads and agency management fees, so you don't have to do the work.

Paid for Marketing Channels and Services

Below is a list of paid marketing channels.

- ❖ **Social Media Marketing**
 - ✓ **Boosted Posts** (Facebook/Instagram)
 - Hire a digital agency to create and manage your posts.
 - ✓ **Social Media Ads** (Facebook and LinkedIn)
 - Managing your own campaigns.
 - Hire a digital agency to create, manage, and optimize your campaigns.
- ❖ **Paid SEO**
 - ✓ Pay a digital agency to set up your website SEO and manage monthly.
- ❖ **Paid Search**
 - ✓ Pay a digital agency to set up and run Google Search Campaigns
- ❖ **Email Marketing**
 - ✓ Pay a digital agency to set up and run your email marketing campaigns.
- ❖ **Any traditional mass media (Offline marketing channels)**
 - ✓ **Connected TV** (local cable channels or Network Affiliates)
 - ✓ **Over-the-Top Television (Streaming Services like Netflix)**
 - Local commercials are available, but it is pricy. Contact Wonder Ads if you can afford to buy these ads (\$5,000 monthly minimum).
 - ✓ **Local Radio Stations**
 - Mostly available in larger cities.
 - ✓ **Outdoor**
 - Primarily billboards

Top 12 Marketing Channels

Here is a list of the top 12 Marketing Channels showing the percentages of businesses that use them. Not all small businesses use paid marketing channels. That is a shame because if they knew how to build a marketing strategy and manage campaigns, they could grow their business, then turn over this work to a digital agency. That should be a main marketing goal for you. Rather than trying to build an in-house marketing department, find a good digital agency experienced in your industry and hire them to do this work for you. It still requires that you drive the strategic planning at the highest level (Marketing Level Strategy) so first learn how to do that can how to create campaigns, then hire a digital agency.

1. **Social Media Marketing (Paid or [Free])**
 - ❖ 77% (review 42)
2. **Social Media Ads (PPC) [Paid]**
 - ❖ 49% (Forbes)
3. **SEO (Organic Search) & Website (Paid or [Free])**
 - ❖ 49% (Social.com)
4. **Paid Search Ads (PPC) [Google Search Ads] [Paid]**
 - ❖ 65% (DemandSage)
5. **Email Marketing (& Social) (Paid or [Free])**
 - ❖ 64% (Forbes)
6. **Video Ads (Google Ads or YouTube commercials) [Paid]**
 - ❖ 9% (Teamwork)
7. **Online Listings/Directories (Paid or [Free])**
 - ❖ 56% (Thrive)
8. **Online Display Ads [Google Display Network] [Paid]**
 - ❖ 55% (DemandSage)
9. **Traditional Media (TV, Radio, Print, Outdoor, Direct Mail) [Paid]**
 - ❖ 57% (The Manifest)
10. **Over The Top (OTT) or Connected TV (CTV) [Paid]**
 - ❖ 29% (Spiceworks)
11. **PR [Press Relations] (Paid or [Free])**
 - ❖ 49% (Spiceworks)
12. **Reputation Management (Paid or [Free])**
 - ❖ 88% (Juphy)

LEVEL 3: Campaign Level Strategy – Optimizing Campaigns

At the campaign level the main tasks involve optimizing campaigns. You can optimize customer segments (based on campaign data and insights), Conversions, and Campaign performance with online campaigns at 1) the Ad Set Level (based on optimization settings, bid strategies, and budgets); and 2) at the Ad Level (based on your offer, ad creative, and messaging). You are working with tactics at this level, but what you chose to test is a strategic decision. The best way to get good at optimizing campaigns is by running campaigns. As you become more familiar with how an ad platform works, the smarter you will get at running them. When you begin to analyze campaign metrics to improve performance, you will improve your campaign management skills. The challenge with doing this all yourself is *do you have the time?* Unless you can find an experienced online ad buyer, you will be better served by outsourcing this work to a digital agency.

Financial Metrics

Ask yourself these key questions.

1. **Produce the highest ROAS?**
2. **Have the highest conversion rates?**
3. **Produce the highest revenue?**
4. **Are the most profitable?**
5. **Are the easiest to close?**

For e-Commerce businesses, their integrated software solutions can identify niche segments based on sales, automating the marketing process in real time. Few other business models have this level of integration between an online market, like Shopify, and a CRM. Most other business models can find correlations like these with the help of an accounting department. Enterprise organizations use Enterprise Resource Planning (ERP) system like Microsoft Dynamics which has both a financial system and a CRM that are already integrated. License fees for individual employees are quite reasonably priced but some do get pricy. If you are large enough to license an ERP, investigate the possibility of using its CRM. One word of caution. Like all Enterprise software, they come with complex features that can be difficult to learn and hard to master.

The five key questions listed above can be answered by digging through your financial data. The first two questions can be answered by your CRM data or metrics provided by whatever online ad platform you are using.

Create a report that outlines all your campaigns, their goals, and outcomes, with supporting data, including your own financial data. Do this at least twice a year, if not monthly. Then you can better analyze what is working and what isn't. Remember our favorite piece of advice: Keep what works and change the rest!

Modifying Campaign Tactics

You can modify tactics based on:

1. The Types of Campaigns you Run
2. Customer Segments you Target
3. Ad Creative (images and graphics)
4. Messaging
5. Offers and Promotions.

At the tactical level, you manage specific tactics to better achieve your objective. This begins with picking the type of campaign you run, which is part of Level 2: Channel Level Strategy. Picking channels is at a higher level of strategic planning because it is more strategic than optimizing campaigns. We list it here because at the tactical level, you can change campaign types based on their outcomes. If an online campaign is not working, you can always stop or pause it. You can't do that with offline, mass media. Then you have a strategic decision to make. Do you just cancel the campaign altogether, or do you test out a different campaign to achieve your original marketing goal?

1. Types of Campaigns You Run

Use our 15 Basic Campaigns to match campaign objectives with your marketing goals. Understanding what campaigns work best for you is a bit like playing chess. Because they all work together, you have to build a strategy that enhances the collaborative effects they have on each other. If a campaign is not producing positive ROI, you can optimize the other tactics listed above. It might just need a better message, offer or target a different customer segment. Don't waste a lot of money on campaigns that are not producing positive ROAS. Focus on optimizing your better performing campaigns.

When you are matching up Marketing Goals to specific Campaign Goals, choose one that fits best based on how well it addresses your goal. This is not as difficult as it sounds. Here are three examples:

Campaign Goal / Campaign Name		
1. Capture a New Customer		
1	A	Lead Capture (with content)
2	B	Lead Capture (with special offer)
3	C	Paid Referral
	D	Self-Discovery (Prospects email/call/walk-in)
4	D1	Brand Awareness
5	D2	Organic Referral (WOM)
6	D3	Online Search (SEO)
2. Nurture an Existing Lead (with content or special offer)		
7	A	New Lead Nurturing
8	B	Existing Customer
3. Product Education		
9	A	Product Education using Content Marketing
10	B	Product Promotion & Content
4. Event Marketing		
11	A	Marketing Event
5. Product/Service Sale		
12	A	Price Discount
13	B	Free Service (Assessment, Evaluation, Testing)
14	C	Free Content
15	D	Special Offer

1. GOAL: Add 100 Customers in 3 months

✓ [Run a Lead Nurturing campaigns].

2. Identify prospects most likely to convert.

➤ [Run an email campaign and ask about intent to buy].

- ✓ Prospects in your CRM database are easy to contact. They are part of your owned audience that you control. You can ask them anything you want in an email campaign.
- ✓ Keep the questions short and ask only about the key issue. Here it is intent to buy.

3. Increase the awareness of your brand in the marketplace.

➤ [Run a Brand Marketing Campaign in social media and on local television].

- a) Target broadly across your target market and bid on impressions.
- b) ...or focus on only *Marketing Qualified Leads* uncertain about your company

As you can see, choosing a campaign is largely a matter of reviewing different types of campaigns, (use our 15 Basic Campaigns as a guide), and picking one that can achieve your marketing goal. Notice in the last example we provided two different targeting choices. This is a strategic decision. Normally branding campaigns are run in mass media and seek to

build your brand broadly across your entire target market, but there are sometimes reasons to target different audience segments. In this hypothetical example, we are choosing to target *Marketing Qualified Leads* because we learned (through an email survey or just talking to our sales team) that many prospects that should be ready to convert to *Sales Qualified Leads*. After asking our sales team to contact some of their prospects it is discovered that many are not familiar with our company and need to be better educated about our brand values and our unique value proposition. This is a classic branding issue, but it can apply at any point in the Customer Journey.

2. Customer Segments Targeted

We have already touched on this subject in the last section where we suggested that you do some A/B testing on campaigns at the Campaign Level. You can set up one campaign on Facebook that has two ad groups, one for each of two different segments. Ideally you would not change anything else, but realistically, one Customer segment may not respond well to the same offer as another Customer Segment. This is where you need to use your own judgement and be clear about what you are testing for. When you are doing A/B testing like this, make note of the differences between groups, messages, and offers. This kind of testing can uncover genuine insights about your customers that you can apply to all your future campaigns.

If you are an e-Commerce business, you probably prefer to let the algorithms, and the AI programming identify buying trends and report the results after the fact. Good reporting will reveal insights that can also inform future campaigns. Then again, sometimes a fad is just a fad and trends quickly disappear. AI will have to get a lot smarter to take over all the strategic planning for your campaigns and your marketing strategy.

Segmentation allows you to develop campaigns that target specific customer segments with information and promotions designed specifically for them.

As AI continues to evolve, expect to see more AI Assistants analyzing your campaign data to identify new Customer Segments. AI will also analyze interactions, interests, and purchasing behavior, providing more insights into your Customer Segments.

Identifying new Customer Segments is very helpful but test them out to ensure they are real. Use common sense when thinking about Customer Segments. Most entrepreneurs know their Customer Segments and understand their different needs. If two Customer Segments have the same needs and buy the same products, you probably don't have two different

Customer Segments. You may just have one segment with different demographic data (i.e. men/women, young adults/older adults, etc.).

Studying Customer Segments is a full-time job so always be looking for new ways to test them out. When you find a new need or a special offer that works well, you can make dramatic improvements in conversions, sales, and total revenue.

3. Ad Creative

Ad creative includes all the images, graphics, video, and ad copy in ad. Online ads come in various formats that limit what you can say compared to print ads where it is completely up to you how much ad copy you want to include. Ad platforms understand one of the most important rules of ad creation; less is more. If you create copy (written text) use the strict limits of online ads as a model to produce better quality print ads.

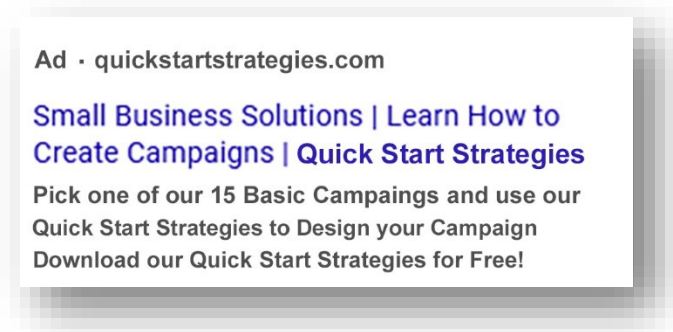
Online ads are short and sweet so you can't include everything you would in a print ad. Sometimes online ads are processed only on the ad platform where engagement (likes, comments, shares, etc.) and other actions are recorded and reported by the ad platform. This is also true for email campaigns (bounces, opens, responses, etc.). A response to an email (button click) can go to a landing page. Online Ads often are set up to click through to a landing page. Whenever you set up a landing page for a campaign, you can consider the combination of online ad and landing page the whole ad. This means that important elements that don't fit in the online ad can be included in the landing page. This can include any combination of brand/logo, message, offer, value proposition, features & benefits, and additional actions (like completing a form). Here is a list of ten key pieces of information you might want to include in a full ad (either in print or on a landing page).

1. **Objective**
2. **Message**
3. **Value Proposition**
4. **Brand/Logo**
5. **Offer**
6. **Benefit**
7. **Destination (physical address, website, or landing page)**
8. **Location/Phone/Website**
9. **Call-to-Action (CTA)**
10. **Social sites**

Because these are not all required, think through what you really need to include. If a landing page is set up as a "squeeze page", designed to capture lead contact information, you don't need to include your destination, location, phone, or website, or social sites (your business

page). The landing page can redirect the user to your website when they hit the submit button.

You also need to compress much of this information into the smallest amount of text possible for online ads. This is also good practice when writing copy for online ads. Here is an example of a search ad. The first line is the destination, either to your website or a landing page.



We choose our three headlines and the message of the ad:

1. To capture people searching for **Small Business Solutions** – our target market.
2. ...who want to **Learn How to Create Campaigns** – the purpose of our product.
3. And finally, the name of our product – our **Quick Start Marketing Strategies**.

Our message is simple and to the point, “**Pick one of our 15 Basic Campaigns and use our Quick Start Marketing Strategies to Design Your Campaigns.**”

Finally, we added the action we want them to take, “**Download our Quick Start Strategies for Free**”

Note that you don’t have space in this small ad to include all the elements of an ad, but that’s o.k. In this example, we included our **brand name**, our **product name**, our **target market**, the **need for the solution** we address, a **short explanation of our solution**, a **call to action**, and **the price**... which is free. That’s a lot of information to pack into five short lines. The Google wizard that you use for this is very good at forcing you to write clear, short ad copy...

Messaging

Critical elements of an Ad like messaging, offers, and content more generally, can all produce significant improvements in campaign performance. A/B testing is the bread and butter of finding out what works best. If you work with a digital agency, they will spend a lot of time testing all of these elements, including keywords, graphics, images, etc. This is an area where it is hard to compete against the greater skills and experience of a digital agency.

If you have to create your own ads until you increase your revenue to the point you can hire a digital agency, focus on messaging and offers, with an eye on improving the look and feel of your ads.

Finding the right message can be simple and obvious, or difficult and challenging. Here are some guidelines to follow.

- **The message should be tied to a benefit, which could be a *brand value*, or an *offer*, or a *product benefit*.**
- **You can also use your value proposition which explains what distinguishes your business in the marketplace.**
 - ✓ For example, a Hardware store could run an ad like this:
 - ❖ “Builder’s Center is the Hardware Place... giving you the right advice when you need it.”
 - ✓ Then use a visual, either in print or video, showing an assistant helping a customer in the store,”

By itself, this is just a branding ad, but it could be the opening part of a commercial that goes on to present an offer.

- **The key to writing or designing a compelling ad is to simply focus on the customer experience.**
 - ❖ That’s why it’s good to collect lots of customer stories....
 - ❖ These can be used as testimonials..... or made into a storyline for an ad.

Your message needs to motivate the customer, not explain why you are running the ad. For example, if you want to grow sales, you don’t need to tell the customer that is your goal... you only need to motivate them to buy something! Your message should express the benefit you are using to motivate the action you want your prospect or customer to take.

If you are simply building brand awareness, use your value proposition for the message. Drive it home with examples inspired by your brand values.

- **For example, a famous theme park could say,**
 - ❖ “Making families happy... one smile at a time.”
 - ❖ Then show or describe the customer experience that proves your point.
 - ❖ Add an offer and you have a perfect ad for a sales conversion.
- **Use A/B testing at the ad level to test different messages.**

4. Offers and Promotions

Offers and promotions are the bread and butter of advertising. Never stop experimenting with creative offers and new types of promotions. What you can and can't do varies from one business segment to the next.

Certain businesses like insurance agents and financial agents must comply with strict regulatory requirements. Be informed about all regulations in your industry that limit how you can advertise.

➤ **Don't be afraid of testing new kinds of offers.**

When you find a promotion that resonates with a target audience, all that time testing offers will pay off.

➤ **Use A/B Testing at the ad level to test offers.**

➤ **Be sure and carefully think through the limitations to ensure that you don't have to give away the store.**

Don't give away the store when you only need a small incentive to create a sales conversion.

➤ **Be aware of offers and promotions that are typical within your industry.**

These vary greatly from one business segment to another.

➤ **Most, but not all, promotions are time sensitive.**

- ❖ Time limited promotions create a sense of urgency.
- ❖ Urgency is a key element of the sales process.
- ❖ Good salespeople are trained to use urgency to close sales.

The Future of AI

We referred to processes that are already being driven by AI in Ad Platforms and CRMs. AI is going to make dramatic transformations in how Ad Platforms work. These changes will increase performance, through Generative AI, Predictive AI, and Big Data Set Analytics.

These changes will transform how we use ad platforms, generally making them easier to use, by automating personalization, automatically testing campaigns, customer segments, ad messages, and offers. Generative is already working at customizing ad formats and creating images, text, and even videos. Automated processes written by humans will increasingly be replaced with AI enhanced analysis. Already 25% of Google programming code is being written by AI. In other words, not only is AI analyzing data sets, but AI code is being written by AI... and that may be a little scary for some.

That is why the leading developers of AI, most of whom have ad platforms, have named their AI Assistants... not to make them seem more human, but as a way to indicate when and where they are at work. Automated processes have always been located “*under the hood*”, where the marketing professional could not see them working. Enhanced AI is also hidden but that makes it difficult to trust. Facebook has created an AI feature that lets you compare the performance of your own manual campaigns against Meta AI campaigns in order to convince their customers that they can trust AI to do a better job than they can. Facebook is currently testing this feature with select Advertisers, but it will likely be made more widely available.

This is also why you will see AI options being presented by their virtual avatars, such as Google’s **BARD**, and Bing’s **COPILLOT**. CRMs have also named their AI Assistants, such as Salesforce’s **Einstein**, Hubspot’s **ChatSpot**, and Zoho’s **Zia**.

Facebook Advantage +

Facebook consolidated their automated AI product line under a single portfolio called Meta “**Advantage +**”. Their proprietary AI that drives all the AI products is called **Andromeda**. These capabilities are being tested and will be rolling out soon. You will see them inserted as options in various places inside Facebook Ad Manager.

Advantage + Shopping

- ✓ **Text Variation**
- ✓ **Background Generation**

Advantage + Shopping is primarily for eCommerce, but it can also benefit small, local retailers.

Video Creative

- ✓ **Picks the best video to show across Feed, Stores, Watch, and Reels**

Generative AI is transforming the process of creating images, text, and video. In just the last year, FreePik has updated their AI feature several times and the quality of the images has made huge jumps forward in terms of quality, composition, human faces, and more. Recently FreePik added the ability to use AI to create variations on any image in its portfolio of images.

Performance Comparisons

- ✓ **Automated Report** compares Facebook manual campaigns with **Advantage+ Shopping** campaigns
 - ✓ This helps you understand AI campaign improvement based on metrics, including impressions, clicks, conversions, and return on ad spend (ROAS). **Facebook realizes it has to prove their AI is better than a human analyst to drive adoption.**

Performance comparisons will always be a useful tool for comparing two or more campaigns. This will transform the work of strategic planning, providing you with a wealth of data to inform decisions about what campaigns, segments, and offers perform best.

Audience Enhancements

- ✓ **Audience Insights**
 - ❖ **See how different audience segments respond to their ads. This includes demographic breakdowns, geographic data, and behavioral insights,**
- ✓ **Advantage + Audience**
 - ❖ **Adds new audience to Advertisers inputs (Men 13-35 who like Baseball)**
 - ❖ Essentially Facebook added AI to Lookalike Audiences. Previously audiences were expanded based on demographics, interests, and behaviors.

This will help overcome the loss of 3rd party cookies which were intrusive to being with. Instead, Facebook can extend your audience or an uploaded customer audience to a much finer degree of data matching, based on not just interests, but on online behaviors (clicks), and conversions. When you think about the level of personalization that is possible, you can see the power of this. Imagine that you can know the details of an individual Customer Journey, not only for your own customers, but for thousands of people who have never heard of your business.

Facebook + Audience uses complex data analysis strategies to match audience interest with what you sell, building more qualified target audiences and increasing conversions. In early testing, individual advertisers reported that **Facebook+** increased ROAS by 22%. These performance levels are likely to increase even more over time as Facebook continues to make improvements to its AI programming models.

Predictive Analytics

- ✓ Uses AI to predict the performance of ads (**requires large datasets**).

This means that predictive analytics may not work as well for small businesses that don't reach larger audiences. Predicting performance means increasing the likelihood of conversions. You should create larger audiences to give Facebook+ more data to work with. It also requires that you run larger campaigns or run them for longer periods of time. If the ROAS increases for you, then this makes sense, but you need to keep a close eye on increases in ROAS for your campaigns as AI continues to roll out.

Comparative Analysis:

- ✓ Compares the performance of different campaigns and ad sets.

Facebook already lets you test campaigns manually by running different campaigns and comparing the outcomes. Predictive Analytics and Comparative Analysis automates this work, and it will transform marketing in ways that are hard to imagine but we can see where these trends are going, and they promise to revolutionize marketing forever. This will mean that we will have more data, more accurate data, and clearer choices about what works and what doesn't. It also means that the tasks of programmatic ad buying and marketing more generally will become simpler and easier to accomplish.

***PREDICTIVE AI AND COMPARATIVE ANALYSIS WILL ALLOW
AI TO SIMPLIFY ALL ANALYTICAL PROCESS... SO IT IS GOING
TO GET EASIER FOR YOU.***

Facebook will be integrating **Meta Advantage +** with continuous updates into the future. As this trend continues, managing campaigns will get easier to the extent that **Meta Advantage +** provides new automations and optimization options. On the other hand, the amount of information you get back will significantly increase, forcing you to improve your strategic planning skills (but that's a good thing!)

Here are just some ways that **Meta Advantage +** can improve campaign performance.

- **Identifies Engaged audiences (producing engagement metrics but haven't bought yet) and Customers (who have made a purchase)**
- **Analyses interactions, interest, and purchasing behavior.**
- **Increased Personalization**
 - **Dynamic ads with tailored images and text based on past interactions**
 - **Behavioral Analysis (what type of contact appeals to different segments)**
 - **Generative AI (creates unique ad creatives based on your brand's style and voice.**
 - **Automated Optimization (Tools like Meta's Advantage+ automatically optimize ads for different formats)**
 - **Predictive Targeting (predicts which users are most likely to engage with or convert from specific ads, to focus on most promising segments.**
- **Performance Reporting**
 - **Detailed metrics, impressions, clicks, conversions, and ROAS)**
 - **Audience Insights (how different segments responds to ads and offers (demographic breakdowns, geo data, behavioral insights)**
 - **Predictive Analytics (how will ads perform – requires large datasets)**
 - **Comparative Analysis (compare performance of different campaigns and ad sets)**

You still need to apply common sense when examining Customer Segments to make sure they are viable and productive. We have already described how you can test Customer Segments with online campaigns, at the Campaign level, by running the same campaign with two different Customer Segments. If your Customer Segments are aligned with industry standards, then your job is pretty simple. That is why you should search for information on Customer Segments within your industry or Business Vertical. This is more granular than our six small business categories. **Don't assume your Customer Segments are in perfect alignment with industry standards or your competitors.**

- **You may have more or fewer customer segments because of the nature of your products or services.**
- **Test your Customer Segments to see which are the best.**
- **And use predictive analytics whenever you can to identify new Customer Segments you did not know about.**

Conclusion

Marketing has always been a blend of art and science. There are professionals working in the industry that are talented on one side of this equation or the other. There are also a large number of gifted individuals who are blessed with both left and right brain talent. Today, AI has created another dichotomy, one between computer intelligence and human intelligence. This is not a battle. It is a dance. As we move forward in the world of marketing we will certainly stumble and fall more than once but that is how you learn how to dance. Future textbooks on marketing will detail the emerging best practices that we are all learning how to use today. Don't be intimidated by these changes. They promise to simplify rudimentary tasks, provide big picture views of your target market that will help you grow your business, and simplify strategic planning making it easier to analyze performance at every level of strategic planning.

AI promises to simplify rudimentary tasks, provide big picture views of your target market that will help you grow your business, and simplify strategic planning, making it easier to analyze performance at every level of strategic planning, from the highest marketing level, through the Campaign Level, down to the

Quick Start Marketing Strategies

The following business models cover typical small businesses found in any community in the U.S. Each model is within one of the six business categories we have identified that include most small businesses. The business models are divided into two main groups, 1) Businesses without Professional Sales; and 2) Businesses with Professional Sales. These two main groups are subdivided into 3 groups each. The twenty business models included here contain a brief description of the model and their marketing challenges; the *Quick Start Marketing Strategy* for that model; best marketing practices for that model; and recommended campaigns, based on our 15 Basic Campaigns.

Part I Business without Professional Sales p. 35**Group 1: Restaurants, Retail Stores & Homes Services p. 35**

- E. Local Restaurants p.36
- F. Local Retail p. 41
- G. E-Commerce p. 45
- H. Local Home Services p. 49

Group 2: Health, Beauty, & Personal Services p. 53

- D. Hair & Nail Salons p. 54
- E. Gyms & Fitness Centers p. 58
- F. Family Physicians & Dentists p. 62

Group 3: Non-Profit p. 68

- E. Local Charitable Non-Profits p. 69
- F. Local/Regional Chapters of National Non-Profits p. 76
- G. Local EDOs p. 77
- H. Local Business Organizations p. 83

Part II Businesses with Professional Sales p. 91**Group 4: B2C Professional Sales p.91**

- E. Big-ticket Dealers p. 92
- F. High-End Retailers p. 99
- G. Big-Ticket Home Services p. 105
- H. Home Builders p. 111

Group 5: B2B Professional Sales p. 117

- D. Local Business Services p. 118
- E. Small Manufacturer, Suppliers, & Vendors p. 124
- F. National/Regional Business Consultants p. 130

Group 6A: Independent Sales Agents p. 138

- C. Real Estate Brokers & Agents p. 139
- D. Insurance & Financial Services p. 147

NO PROFESSIONAL SALES

GROUP 1: Retail Stores & Homes Services

1A: Local Restaurants

1B: Local Retail

1C: E-Commerce

1D: LOCAL Home Services

CATEGORY	Retail & Home Services
Types of Businesses	Small Retail and consumer facing home services
Examples	Many small storefront businesses selling consumer goods, specialty stores, and home services like pest control, electrical repair, air and heating repair, and other specialized services.
Sales Process	Self-Buying
Sales Team	Clerks or Service Personnel
Transactions	Small price points with recurring sales
Marketing Budgets	\$100K - \$1M
Marketing Staff & Services	Direct media buys/Small Ad Agency
Ad Agencies	None or Small Digital Agency

#1 Marketing Challenge	Customer Acquisition
#2 Marketing Challenge	Driving Recurring Sales
CAC	CAC is Low
CLV	CLV is High
Customer Loyalty	Customer Loyalty is Medium
Strategic Needs	Sales are low and recurring. Driving recurring sales requires continuous advertising. Revenue depends on retaining customers.

These three groups are all consumer facing and have little if any professional sales processes. They all have low Customer Acquisition Cost, but it is greater for local home services which also has semi-professional processes, usually performed by a service person, but sometimes by inside sales. Customer Lifetime Value is high as most customers are fairly loyal, but loyalty is not guaranteed. Excellent customer service helps improve loyalty and customer satisfaction. Home service companies must provide excellent service to hold onto their customers.

Group 1A: Local Restaurants

Local Restaurants and bars are one of the oldest business models in history, operating successfully for centuries. They began as part of the agricultural revolution when the first cities were built. Food markets and restaurants are as old as civilization itself. Today, the restaurant industry is dominated by national chains, but local restaurants still thrive. Because they are forced to compete against national chains, the requirements for success are quite stiff. Before even considering marketing challenges, food quality and the overall customer experience must be on par with similar restaurants that are part of a national chain. The customer experience includes not only food quality and price, but also atmosphere and service quality. If you are operating a local restaurant you can compete on all counts, and in some cases, even provide superior quality if you provide fresh foods and excellent food presentation. It is a high bar to meet, but you should not aspire for anything less. Remember the number one piece of marketing advice we love to give, the most important thing you can do to improve your marketing is to improve your service!

Customer acquisition is the number one marketing challenge for new restaurants when they first open. Once you have reached your customer capacity, and achieved profitability, you should focus on the second most important marketing challenge, driving recurring sales. Whether you are open for breakfast, lunch, or dinner is a business decision, but it will impact your strategic thinking on how to grow your business. Often local restaurants are open only for lunch and dinner but make most of their profit during dinner when higher prices are typical. If you are breaking even on lunch, you will have to get creative on offering more profitable meals. Again, these are not marketing issues, but following best practices of national chains is the smart way to improve your profitability which should be a marketing goal. Study similar restaurants in your area that are part of a national chain and examine their meals to see which ones are the most profitable. Make note of how they are featured on the menu. More profitable meals usually have enhanced presentation on the menu.

Lunch specials are another way to drive traffic but be careful about selling meals that undercut your lunch profits. Balance the number of items offered in a lunch special with price to better manage your profit line. Typically, dinner is more profitable than lunch for most local restaurants. Dinner specials are often more expensive, not less, in contrast to lunch specials. These provide a better dining experience so be sure you are using dinner specials to create a high-end dinner experience.

If you offer specials or discount coupons, you need to manage costs carefully to avoid negatively impacting your bottom line. Consider offering items that are not normally purchased at either lunch or dinner, like appetizers or desserts. It only takes one item to create a special offer, so limit what you offer in your discounts or coupons. There is no need

to offer 20% off all desserts when you can offer one item at 20% off or offer special deserts that are not normally on the menu. We know of one restaurant that has taken this approach to their entire menu, offering a different menu every night... and it changes throughout the month. That obviously requires a lot of work and a creative chef, but you can do the same with single items or recurring weekly specials.

As always, be sure you define a strong brand image based on your customer experience and a unique value proposition. Support these with a simple website that has been optimized for SEO.

Best Marketing Practices for Local Restaurants

- ✓ Focus on a unique niche market with specially prepared food items not found elsewhere.
- ✓ Define your brand around a superior customer experience
- ✓ Define a powerful value proposition and seal it with a strong slogan
- ✓ Build a simple website that showcases your brand and your products.
 - ❖ Feature your store experience in photos and videos with real customers (get a release).
- ✓ Engage in Social Marketing with your own content posts (on your Business Page) Post weekly or daily specials and promote special menus or offers for holidays and other special events. **FREE**
- ✓ Use a CRM to capture all your customers so you can run email campaigns with your daily specials, special menu items, and holiday offers. **FREE**
- ✓ Experiment with offers to find which ones work best for you (Posted on our Facebook Business Page) **FREE**
 - ❖ **Download our Guide on Offers & Promotions**
- ✓ Use a landing page offering Promo codes or coupons with your offers to capture more profile data for your CRM contacts. **FREE**
- ✓ **Boost Posts** that have successful offers on Facebook.
- ✓ When you have an offer that works well, try it in a Facebook Ad Campaign.
- ✓ Run a separate Facebook Ad Branding Campaign to build awareness of your business in the community. Create a slow drip campaign with a low budget. Increase the budget when you need more customers and decrease it or turn it off during holidays and busy seasons.
- ✓ Join a business organization like the Chamber of Commerce to build brand awareness and network in your community. **NEARLY FREE**
- ✓ Get involved with other organizations to build your brand awareness. **NEARLY FREE**
- ✓ If you have enough sales to invest in offline marketing, test local cable areas with a commercial produced by a video production company that produces local TV

commercials. Run it for six to twelve weeks. Include a special offer (one that you have already tested). Be sure to include your brand promise and your slogan.

- ✓ If you have enough sales revenue, test sales campaigns in Facebook/Instagram throughout the year for seasonal trends, holidays, or any other reason that makes sense and works.
- ✓ Experiment with Email campaigns using your CRM to test different specials. **FREE**
- ✓ Experiment with setting up multiple campaigns combining sales campaigns with email campaigns and branding campaigns to maximize your ROAS when you first open your restaurant to reach maximum capacity as quickly as possible.



Quick Start Marketing Strategy

Your overall marketing strategy should be focused on testing one sales campaign at a time, experimenting with offers to find the ones that produce the greatest responses. Talk with your customers and get to know everything about them in terms of what they like your restaurant and your meals. Get the basics right as quickly as possible, especially for your branding. Invest in a great logo and put your slogan in all your advertising. Be sure you create the greatest customer experience possible. This includes everything about the look and feel of your restaurant, the atmosphere, and the personal interactions provided by you and your servers and employees.

Build your customer base and capture it in your CRM. Actively use email campaigns for free distribution to your Owned Audience. Email campaigns are a good marketing channel for almost any of our 15 Basic Campaigns.

You build a marketing system one campaign at a time. Continuously experiment with offers and promotions, varying the kinds of specials you run to continuously improve their performance. If you build your sales to the point where you can afford to work with a digital agency (Budget >\$15K/year minimum) then turn over most of your campaign creation and management to them and focus on working on your business, not in your business. If Hearst Newspapers has an online paper in your business region, test out sales campaigns following their advice (*Hearst is one of the largest Google Ad Partners. They have integrated Google Search and Google Ad Words into the Hearst advertising platform, providing what could be a one stop solution for local advertisers.*)

Campaigns

[Campaign numbers refer to our list of 15 Basic Campaigns]

Implement these in any combination that you think will work best for you. If you are working with small budgets, concentrate on using free marketing channels (Facebook/Instagram posts, email campaigns to existing customers, and paid referrals).

#2 Lead Capture (with Special Offer)

Download our eBook, **Campaign Offers & Promotions**, to get started. Facebook is the least expensive ad platform, beginning at \$1/day. Experiment with lunch and dinner special following our best practices. Lead capture differs from a product sale (See #12 below) in that your goal is to capture a new lead that can be converted into a new customer. Prospects may need many ad impressions or online engagements before they convert to a customer. Once you have captured a new lead you can retarget them in your online ad campaigns or email them directly (free) by running email nurturing campaigns.

CHANNELS: **Facebook Boosted Posts; Facebook Ads; and email campaigns; Local Television; Newspapers)**

#12 Product Sale (Special Offers)

This is classic advertising as it has been done for over a century, if not longer. Download our eBook, **Campaign Offers & Promotions**, to get started. Facebook is the least expensive ad platform, beginning at \$1/day. Experiment with lunch and dinner special following our best practices.

CHANNELS: **Facebook Boosted Posts; Facebook Ads; and email campaigns; Local Television; Newspapers))**

#9 Product Education with Content

While you are posting your sales in Facebook, you can sprinkle them in with promotional posts which include posts about weekly specials and holiday promotions. Feature new menu items in your posts.

#7 Lead Nurturing (*seeking a New Customer Conversion*)

Use a Content Marketing campaign to promote menu items and specials on Facebook and Instagram. Post pictures of new products weekly or up to 3 days per week. Once you create a regular schedule, stick to it, always using photos of new menu items and meals featured in your special offers. You can recycle these whenever they are offered.

CHANNELS: **Facebook Boosted Posts; Facebook Ads; and email campaigns; Local Television; Newspapers)**

#5 Organic Referral (Word-of-Mouth)

This will always be working for you in the background. It is only as effective as your customer experience is good. Get your basic SEO set up well to add lift to WOM. This will

enhance organic search without paying for Google Search Ads. SEO also improves paid search performance (Google Search)

CHANNELS: (***Organic Search; Google Search***)

#4 Brand Awareness

Run a brand awareness Facebook Ad campaign using a long term, slow-drip strategy, with a small daily budget. Alternate it off and on at three- or six-week intervals to test to see if it lifts sales on top of your other campaigns and marketing efforts. You can start a new business off with a bigger Branding campaign. Run it for six weeks, then pause and switch to the slow-dip campaign. Once you have reach your customer capacity, use your branding campaigns to help control the number of customers during on and off seasons. Increase your ad buy to increase the number of customers during slow seasons and decrease it or pause it during busy seasons.

CHANNELS: ***Facebook Boosted Posts; Facebook Ads; and email campaigns; Local Television; Newspapers)***

#15 Special Offer

Experiment with special offers in any campaign. You can use a QR code in all your marketing channels, online and off. Offer bigger specials during down times to drive conversions.

Group 1B: Local Retail

While customer acquisition costs are low, driving recurring sales is a significant marketing expense. Large box retailers spend millions on brand advertising and have various pricing strategies, running from low-cost discount stores that rarely have sales, to higher end chains that offer promotions throughout the year. National chains have consumed much of the retail market in urban areas making it virtually impossible for a small business to compete against them. Millions of small businesses have gone out of business over the last fifty years as big chains have grown larger and larger every year. It takes a niche retailer to even have a chance of succeeding locally but there are some that do. Typically, these include clothing boutiques that specialize in unique styles of clothing and a variety of specialty stores that have found a profitable niche market.

Small retailers also must compete with the vast number of small businesses using a national distribution partner like Amazon, or Etsy (See the Next Group). If you are competing against all this competition, there are several things you need to do right.

As always, be sure you define a strong brand image based on your customer experience and a unique value proposition. Support these with a simple website that has been optimized for SEO.

Best Marketing Practices for Small Local Retailers

- ✓ Focus on a unique niche market with hard-to-find products
- ✓ Provide consultative sales support on sight to educate your customers.
- ✓ Define your brand around a superior customer experience
- ✓ Define a powerful value proposition and seal it with a strong slogan
- ✓ Build a simple website that showcases your brand and your products.
 - ❖ Feature your store experience in photos and videos with real customers (get a release).
- ✓ Engage in Social Marketing with your own content posts (on your Business Page) **FREE**
- ✓ Use a CRM to capture all your customers with contests. **FREE**
- ✓ Experiment with offers to find which ones work best for you (Posted on our Facebook Business Page) **FREE**
 - ❖ **Download our Guide on Offers & Promotions**
- ✓ Use a landing page with Promo codes with your offers to capture more profile data. **FREE**
- ✓ **Boost Posts** that have successful offers on Facebook.
- ✓ When you have an offer that works well, try it in a Facebook Ad Campaign.

- ✓ Run a separate Facebook Ad Branding Campaign to build awareness of your business in the community.
- ✓ Join a business organization like the Chamber of Commerce to build brand awareness and network in your community. **NEARLY FREE**
- ✓ Get involved with other organizations to build your brand awareness. **NEARLY FREE**
- ✓ If you have enough sales to invest in offline marketing, test local cable areas with a commercial produced by a video production company that produces local TV commercials. Run it for six to twelve weeks. Include a special offer (one that you have already tested with a solid branding).
- ✓ IF you have enough sales revenue, test sales campaigns in Facebook/Instagram throughout the year for seasonal trends, holidays, or any other reason that makes sense and works.
- ✓ Experiment with Email campaigns using your CRM. **FREE**
- ✓ Experiment with setting up multiple campaigns combining sales campaigns with email campaigns and branding campaigns to maximize your ROAS.
- ✓ If it makes to engage in online sales, build a campaign to support that, locally if that makes sense, or nationally (See the next business group).



Quick Start Marketing Strategy

Your overall marketing strategy should be focused on testing one sales campaign at a time, experimenting with offers to find the ones that produce the greatest responses. Talk with your customers and get to know everything about them in terms of what they like about the merchandise you sell. Get the basics right as quickly as possible, especially for your branding. Invest in a great logo and put your slogan in all your advertising. Be sure you create the greatest customer experience possible. This includes everything about the look and feel of your store, the atmosphere, and the personal interactions provided by you and your employees when you engage with customers in-store.

Build your customer base and capture it in your CRM. Actively use email campaigns for free distribution to your Owned Audience. Email campaigns are a good marketing channel for almost any of our 15 Basic Campaigns.

For retailers especially, you build a marketing system one campaign at a time. Continuously experiment with offers and promotions and varying the kinds of sales campaigns you run to continuously improve their performance. If you build your sales to the point where you can afford to work with a digital agency (Budget >\$15K/year minimum) then turn over most of your campaign creation and management to them and focus on working on your business, not in your business. If Hearst Newspapers has an online paper in your business region, test out sales campaigns following their advice.



Implement these in any combination that you think will work best for you. If you are working with small budgets, concentrate on using free marketing channels (Facebook/Instagram posts, email campaigns to existing customers, and paid referrals).

Campaigns

[Campaign numbers refer to our list of 15 Basic Campaigns]

#12 Product Sale

This is classic advertising as it has been done for over a century, if not longer. Download our eBook, Campaign Offers & Promotions, to get started. Facebook is the least expensive ad platform, beginning at \$1/day. Experiment with building offers around different product groups. Avoid storewide sales. Narrow down the offer and mention in the ad you have many other in-store offers during your sale.

CHANNELS: **Facebook Boosted Posts; Facebook Ads; and email campaigns**

#9 Product Education with Content

While you are posting your sales in Facebook, you can sprinkle them in with non-promotional posts which includes posts about products, just not promotional sales.

#7 Lead Nurturing (*seeking a New Customer Conversion*)

Use a Content Marketing campaign to promote your products on Facebook and Instagram. Post pictures of new products weekly or up to 3 days per week. Once you create a regular schedule, stick to it, always using photos of new products. You can recycle these after a year if you still carry some of the same products.

CHANNELS: **(Facebook posts; Instagram posts; Facebook Boosted Posts)**

Loss Leader Sale

A loss leader is usually a single item that you sell at or even below cost to generate foot traffic in your store. Experiment with different loss leaders and different types of offers (20% off, buy-one, get-one-free, etc.) to see which ones perform best.

CHANNELS: **Facebook Boosted Post; Facebook Ads; and email campaigns**

#5 Organic Referral (Word-of-Mouth)

This will always be working for you in the background. It is only as effective as your customer experience is good. Get your basic SEO set up well to add lift to WOM. This will enhance organic search without paying for Google Search Ads.

CHANNELS: **(Google Search)**

#3 Paid Referral

Enhance organic referral with a Paid Referral discount for new customers. There is an inexpensive way to do this: Give out business cards with “Referred by” printed on the back

and ask your customers to pass them out. Offer the discount only for a completed sale with a new customer and insist that customers who want to participate (Fans) by giving out cards register in your CRM (so you can contact them with the referral discount offer). At the same time, you can make the referral offer directly by email to customers already in your CRM.

Alternatively, set up a landing page for customers to register for the referral offer. It is easier to track than doing this manually. E-commerce software should do this or have an agency create the process for you.

#4 Brand Awareness

Run a brand awareness Facebook Ad campaign using a long term, slow-drip strategy, with a small daily budget. Alternate it off and on at three- or six-week intervals to test to see if it lifts sales on top of your other campaigns and marketing efforts. You can start a new business off with a bigger Branding campaign. Run it for six weeks, then pause and switch to the slow-dip campaign.

CHANNELS: **(Facebook Boosted Posts, Facebook Ads)**

#15 Special Offer

Hold a contest, giving away a product, services, or samples/trials. Set up a Landing Page to register entrants. Tag them as Contest entrants so you can segment them later in your CRM. You can use a QR code in all your marketing channels, online and off. Give away something of significant value to drive conversions. Contests are one of the most powerful drivers of conversions and brand awareness, so you get a lot for your money with this campaign. You can combine it with any other campaign to get more mileage for your investment.

Group 1C: E-Commerce

This includes businesses which are reselling goods purchased at wholesale and businesses producing their own products and selling them through a national distributor like Amazon, Shopify, or Etsy. Anyone can start a business by selling crafts and artwork but scaling up to make this model work usually requires that you be a reseller or have a manufacturing partner or supplier that allows you to rebrand their products. Social media is the place of choice for these businesses because they can easily reach a national audience through Facebook and Instagram. These are the kinds of businesses that you most often see on Shark Tank. The goal is to scale up sales on your own in the same way.

Try to work with a digital agency as soon as you can afford to do so. Viral videos can provide explosive sales for a business like this, but they are extremely rare. Don't bet the farm on viral marketing. Instead, do the hard work of promoting your brand and your products with online campaigns on Facebook and Instagram. The key is to manage the cost of customer acquisition and extend customer loyalty as long as possible. If you can master these two variables you can build a sustainable business.

As always, be sure you define a strong brand image based on your customer experience and a unique value proposition. Support these with a simple website that has been optimized for SEO.

Best Marketing Practices for Small E-Commerce

- ✓ Focus on a unique niche market with hard-to-find products.
- ✓ Provide non-promotional content to educate your customers and help generate new leads.
- ✓ Define your brand around a superior customer experience based on what that experience is like for a typical customer.
- ✓ If you sell only through a national distributor, build a simple website that showcases your brand and your products (build it inside Shopify or integrate with Amazon).
 - ❖ Include photos and videos of the customer experience with your products after purchase. Use friends or actors in place of real customers.
- ✓ If you sell from your site, turn it into an ecommerce site and drive traffic directly to product pages. A digital agency has all the tools and the experience to maximize ecommerce sales so don't try and do this yourself except as necessary when you are just getting started. Find a good agency as soon as you can afford it.
- ✓ Do online focus groups to pick your customer's brain about their experience after the sale and to find prospects you can convert into Fans. **FREE**
- ✓ Create a special Fan Program to recruit and reward Fans. **NEARLY FREE**
- ✓ Define a powerful value proposition and seal it with a strong slogan

- ✓ Engage in Social Marketing with your own content posts (on your Business Page) **FREE**
- ✓ Use a CRM to capture all your customers with contests. **FREE**
- ✓ Experiment with offers to find which ones work best for you (Posted on our Facebook Business Page) **FREE**

❖ **Download our Guide on Offers & Promotions**

- ✓ Use a landing page with Promo codes to capture more profile data. **FREE**
- ✓ **Boost Posts** that have successful offers on Facebook.
- ✓ When you have an offer that works well, try it in a Facebook Ad Campaign.
- ✓ Run a separate Facebook Ad Branding Campaign to build awareness of your business in the community.
- ✓ If you have a single product and a simple product line, consider creating a meriting video with the help of an experienced video production company.
- ✓ Test sales campaigns on Facebook/Instagram throughout the year for seasonal trends, holidays, or any other reason that makes sense and works.
- ✓ Experiment with Email campaigns using your CRM. **FREE**
- ✓ Experiment with setting up multiple campaigns combining sales campaigns with email campaigns and branding campaigns to maximize your ROAS.



Quick Start Marketing Strategy

Your overall marketing strategy should be focused on testing one sales campaign at a time, experimenting with offers to find the ones that produce the greatest responses. Talk with your customers and get to know everything about them in terms of what they like about the merchandise you sell. Get the basics right as quickly as possible, especially for your branding. Invest in a great logo and put your slogan in all your advertising. Be sure you create the greatest customer experience possible. This is primarily about the after-purchase experience. Be sure to deliver excellent customer service to build brand loyalty and customer satisfaction.

For retailers especially, you build a marketing system one campaign at a time. Continuously experiment with offers and promotions and varying the kinds of sales campaigns you run to continuously improve their performance. If you build your sales to the point where you can afford to work with a digital agency (Budget >\$20K/year) then turn over most of your campaign creation and management to them and focus on working on your business, not in your business. Branding campaigns can be crucial to building a national reputation as a trustworthy source for unique products.

Campaigns

[Campaign numbers refer to our list of 15 Basic Campaigns]

#12 Product Sale

Product sale campaigns are the workhorse of e-Commerce Marketing Strategies. Download our eBook, Campaign Offers & Promotions, to explore ideas about offers and promotions. Experiment with building offers around different product groups.

E-commerce businesses use software integrated into their website, or build their website within a e-Commerce platform (like Shopify). This integration provides a wealth of data that makes e-Commerce such an effective and profitable business. You should work with an agency experienced in e-Commerce to ensure that you have all the proper integrations set up correctly and are using the data to drive conversions. ROAS is easy to calculate because of the direct connection between ad campaigns and online sales.

e-Commerce is a demanding business model in terms of creating campaigns integrated in real time. A good digital agency can help teach you this works and manage most of the work for you.

CHANNELS: **Facebook Boosted Posts; Facebook Ads; Google Search Ads; and email campaigns)**

#6 SEO Online Search

Optimize your site for the products you are selling to match up with your Google Search Ad campaigns (see above). This will enhance organic search without paying for Google Search Ads.

CHANNELS: **(Google Search)**

#3 Paid Referral

Enhance organic referral with a Paid Referral discount for new customers. Run this offer online using QR codes in your ads. Offer the discount only for a completed sale with a new customer and require that customers who want to participate (Fans) register in your CRM (so you can contact them with the referral discount offer). At the same time, you can make the referral offer directly by email to customers already in your CRM.

#4 Brand Awareness

Run a brand awareness Facebook/Instagram Ad campaign using a long term, slow-drip strategy, with a small daily budget. Alternate it off and on at three- or six-week intervals to test to see if it lifts sales on top of your other campaigns and marketing efforts. You can start a new business off with a bigger Branding campaign. Run it for six weeks, then pause and switch to the slow-dip campaign. Ramp it up if you find a direct correlation between your Branding campaigns and the additional sales from your Product Sales campaigns.

CHANNELS: **(Facebook Boosted Posts; Facebook/Instagram Ads)**

#7 Lead Nurturing (*seeking a New Customer Conversion*)

Use a Content Marketing campaign to promote your products on Facebook and Instagram. Post pictures of new products weekly or up to 3 days per week. Once you create a regular schedule, stick to it, always using photos of new products. You can recycle these after a year if you still carry some of the same products.

CHANNELS: (**Facebook posts; Instagram posts; Facebook Boosted Posts**)

#15 Special Offer

Create a loyalty program for your customers to keep them coming back. Use a e-Commerce program that supports loyalty programs. Check with the digital agency you choose to run your campaigns. A loyalty program should be integrated into your overall e-Commerce system from the very beginning.

Promote your loyalty program through your Facebook business page, your website, and on Instagram.

Group 1C: Local Home Services

This includes businesses like pest control, home A/C and heating repair, electrical repair, and a variety of other home services. Sometimes these companies are quite large, with dozens of service employees. Often, these companies have both a consumer division and a B2B division. If you have both, see B2B PROFESSIONAL SALES for marketing that business division. The sales process is often fast and simple for home services. Sales are closed either with inside sales or by a service professional on the site. Both should be trained in the sales process, at least to the extent that they are involved in it.

Excellent service by professional service technicians backed up by excellent customer service is key to building brand loyalty and customer satisfaction. Create the greatest customer experience possible, during the sales and service process, and with the product experience after purchase.

As always, be sure you define a strong brand image based on your customer experience and a unique value proposition. Support these with a simple website that has been optimized for SEO.

Best Marketing Practices for Local Home Services

- ✓ Define your brand around a superior customer experience based on what that experience is like for a typical customer.
- ✓ Hold focus groups to learn everything you can about your customer's experience after the sale and to find prospects you can convert into Fans. **FREE**
- ✓ Define a powerful value proposition and seal it with a strong slogan
- ✓ Social marketing may be of limited use, but you still need a business page to promote your business locally on Facebook.
- ✓ Engage in Social Marketing with your own content posts (on your Business Page) **FREE**
- ✓ Use a CRM to capture all your customers with promotions.
- ✓ Experiment with offers to find which ones work best for you (Posted on your Facebook Business Page) **FREE**
- ❖ **Download our Guide on Offers & Promotions**
- ✓ Use a landing page with Promo codes with your offers to capture more profile data from Lead Capture campaigns.
- ✓ **Boost Posts** that have successful offers on Facebook.
- ✓ When you have an offer that works well, try it in a Facebook Ad Campaign.
- ✓ Run a separate Branding campaign with Facebook Ads to build awareness of your business in the community.

- ✓ Consider creating a marketing video with the help of an experienced video production company to present your company, your Brand Promise and Unique Value Proposition. At the same time have them create multiple clips to use in your ad campaigns or in a TV commercial.
- ✓ Test sales campaigns on Facebook throughout the year for seasonal trends, holidays, or any other reason that makes sense and works.
- ✓ Join a business organization like the Chamber of Commerce to build brand awareness and network in your community. **Let an employee attend meetings when you can't. NEARLY FREE**
- ✓ Test local cable areas with a commercial produced by a video production company that produces local TV commercials. Run it for six to twelve weeks. Include a special offer (one that you have already tested with a solid branding). If you have positive ROAS on the campaign, rerun it regularly, skipping time between campaigns (buy in alternating flights).
- ✓ Experiment with Email campaigns targeting your existing customers to drive repeat business using your CRM. **FREE**



Quick Start Marketing Strategy

Your overall marketing strategy should be focused on testing one sales campaign at a time, experimenting with offers to find the ones that produce the greatest responses. Talk with your customers and get to know what they like and don't like about the customer experience, both during the sale and after-purchase. Get the basics right as quickly as possible, especially for your branding. Invest in a great logo and put your slogan in all your advertising. Be sure you create the greatest customer experience possible. This is primarily about the after-purchase experience. Be sure to deliver excellent customer service to build brand loyalty and customer satisfaction.

Experiment with offers and promotions to find what works best. Watch what your competitors are doing and test out their offers. Turn over your campaign creation and management to a digital agency and focus on working on your business, not in your business. Branding campaigns are often the only campaigns many home service providers use, typically delivered in mass media like TV or Radio, continuously throughout the year. You can alternate flights of six to twelve weeks, with breaks lasting one or more months in between. Test all the cable channels you can, by category. If your service region is large enough and covers a large city with a network affiliate, you can buy ad spots directly from them. If Hearst Newspapers has an online paper in your business region, test out campaigns following their advice.

Work with a full-service agency with deep, programmatic ad buying experience along with offline ad buying experience. A full-service digital agency can be good if they are experienced in both on and offline ad buying. If you can't find all these services in a single agency, consider splitting up the ad buying between the two, letting the more traditional agency produce your ads and commercials and buy offline media for you, while letting the digital agency focus on running your online campaigns.

Be sure to train your service personnel in sales. Lack of sales training is often a major discontent in smaller home service businesses. A good sales training course should take at least 3 days to complete. Be sure to take it yourself so you can better manage your sales staff.

Campaigns

[Campaign numbers refer to our list of 15 Basic Campaigns]

#13 Product Sale

Because you are selling a service, your primary campaign should be a Lead Capture using a special offer designed to convert prospect directly into customers. Instead of a discount, offer a free service, test, or evaluation).

CHANNELS: (**Facebook Ads; Google Search Ads; local television; local newspapers; and email campaigns**)

#5 Organic Referral (Word-of-Mouth)

This will always be working for you in the background. It is only as effective as your customer experience is good. This will enhance organic search without paying for Google Search Ads.

CHANNELS: (**Google Search**)

#6 Online Search (SEO)

Optimize your website to match keyword searches for your service and any type of customer problem that you solve. Work with a digital agency to maximize your SEO on a monthly basis. Spend about 15% of your marketing budget on SEO.

CHANNELS: (**Google Search Ads**)

#3 Paid Referral

Enhance organic referral with a Paid Referral discount for new customers. The most powerful measure of loyalty is the willingness to refer your business to another person, so tracking paid referrals gives you a solid metric of customer loyalty you can track over time. If you want to keep it simple, give out business cards with "Referred by" printed on the back and ask your customers to pass them out. Offer the discount only for a completed sale with a new

customer and insist that customers who want to participate (Fans) by giving out cards register in your CRM (so you can contact them with the referral discount offer). You can make the referral offer directly by email to customers already in your CRM. A more sophisticated approach to promoting a paid referral program is to advertise it to a larger audience in your target market. Anytime someone because a customer they are eligible. It is an added incentive to become a customer in the first place. Feature testimonials in your ads from customers (Fans) who have referred a friend.

#4 Brand Awareness

Run a brand awareness Facebook Ad campaign using a long term, slow-drip strategy, with a small daily budget. Alternate it off and on at three- or six-week intervals to test to see if it lifts sales on top of your other campaigns and marketing efforts. Run it for six weeks, then pause and switch to the slow-dip campaign.

Test a Brand Awareness in offline media like local television to measure its effectiveness. You measure that by measuring the lift or rise in sales in all other campaigns. If the ROAS is positive, continue running it throughout the year by flighting six-week campaigns).

CHANNELS: (**Facebook Boosted Posts, Facebook Ad, Local television**)

NO PROFESSIONAL SALES

GROUP 2: Health, Beauty, & Personal Services

2A: Hair & Nail Salons

2B: Gyms & Fitness Centers

2C: Family Physicians & Dentists

CATEGORY	Health, Beauty, & Personal Services
Types of Businesses	Personal services sold to consumers
Examples	Hair salons, nail salons, spas, fitness centers, gyms, and other specialized personal services.
Sales Process	None/Semi Pro-Sales
Sales Team	Service Personnel sometimes with Professional Sales
Transactions	Small price points with recurring sales
Marketing Budgets	\$100K - \$2M
Marketing Staff & Services	Direct media buys/Digital Agency
Ad Agencies	None or Small Digital Agency

#1 Marketing Challenge	Customer Acquisition
#2 Marketing Challenge	Driving Recurring Sales
CAC	CAC is Low
CLV	CLV is High
Customer Loyalty	Customer Loyalty is High
Strategic Needs	High Lifetime Value and high loyalty makes life easy!

These three sub-groups are all consumer facing and have little if any professional sales processes. They all have low Customer Acquisition Cost. Customer Lifetime Value is high as most customers are fairly loyal, but loyalty is not guaranteed. Excellent customer service helps improve loyalty and customer satisfaction. Family Physicians often have more patients than they can handle and don't advertise, but some do advertise special services to their patients. Physician and Dentist groups often do advertise to keep their customer pipeline full.



Group 2A: Hair & Nail Salons

Customer Acquisition Cost (CA) is low, and Customer Lifetime Value is high (CLV) makes these business models easy to manage. In addition, excellent customer experience (CX) can ensure business success. Because business owners are often personally involved in delivering the customer experience and training employees, they are in control of making these kinds of businesses succeed.

The number one marketing challenge for these businesses is Customer Acquisition, which is easy to do with a few simple marketing practices. The second most important marketing challenge is driving recurring sales. That's true in part because these businesses are limited by their capacity to process multiple customers. Once they have a full customer base, they rarely need to add new customers. Customer Acquisition is a challenge only when you first open a new business, and you have to quickly fill up your business with regular customers. Many small business owners fail to invest in the marketing necessary to achieve this initial level of profitability. Taking too long to fill up your customer base can lead to early failure.

These businesses need two different strategies, one designed to fill up the customer base, and one to maintain that customer base once it has been achieved. The first strategy consists of Customer Acquisition Campaigns. The second strategy is Customer Attrition Campaigns.

As always, be sure you define a strong brand image based on your customer experience and a unique value proposition. Support these with a simple website that has been optimized for SEO.

END OF PREVIEW