



Bizperity

Managing the Customer Journey

**How to Use Goals, Objectives,
& Conversions in Campaigns**



**Managing The
Customer Journey**

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Managing the Customer Journey

Adapting to Your Business Environment

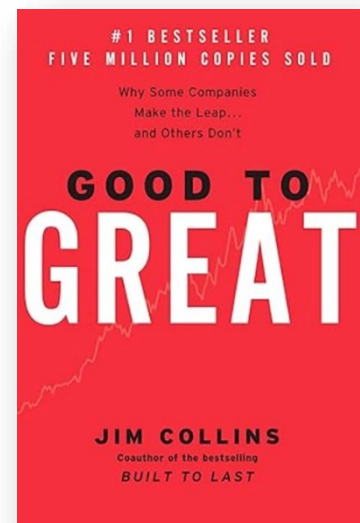
You've probably heard this common saying... **"Don't Fix What's Not Broken"**. Here is the other side of the story...

"Keep What Works and Change the Rest"

Jim Collins

This is from *Good to Great*, by Jim Collins and his previous book with Jerry Poras, *Built to Last*. Every Entrepreneur is a natural born change agent. They constantly analyze what works and what doesn't. And they change what isn't working. This is probably the #1 trait of a successful entrepreneur. **THIS IS AT THE HEAR OF ALL STRATEGIC PLANNING.** Whether you are planning business operations or a marketing plan.

- **Successful entrepreneurs are always finding creative and innovative solutions to every challenge they face... including marketing!**



Here's the BOTTOM LINE: IT'S ALL ABOUT RESULTS! Adapting to CRM Solutions is Essential

- **This means being aware of how AI is already changing how marketing technology works.**

We will cover both the current state of AI in marketing and the future of AI in marketing in this series of eBooks.

The Best Day of Your Life

The best day of your life: **The day you started your business.**

The worst day of your life: **When you realize you don't know how to market your business.**

You may have heard that 50% of all businesses fail in the first. It's not true! Here are the real statistics.¹

- **70% of new businesses survive beyond 2 years**
- **50% of new businesses survive beyond 5 years**
- **30% of new businesses survive beyond 10 years**
- **25% of new businesses survive beyond 15 years**

Small Businesses Fail Because of:

- 1. Lack of Capital**
- 2. Poor Management**
- 3. Poor Financial Planning**
- 4. Poor Business Planning**
- 5. Poor Marketing**
- 6. Ignoring/Not Understanding Customer Needs**

Lack of capital is often cited as the number one reason small businesses fail. Large businesses raise capital before they open from angel investors, venture capitalists, or by assuming debt based on their initial investment. Small businesses are usually self-funded and that is why they are so often undercapitalized. If you are starting a new small business, multiple the amount of funding you think you need to start your business by a factor of 2 to 3

¹ From the Small Business Administration/Bureau of Labor Statistics

times. If you don't spend the money, you can disburse it back to yourself. If you still don't think you may have enough money to start your business, we recommend you beg, borrow, or steal the rest. We are just joking about stealing money... but you get the idea. Don't become a statistic by joining the ranks of businesses that fail because they didn't have enough capital to get off the ground.

Poor management, poor financial planning, and poor business planning are the next three reasons small businesses fail. Successful entrepreneurs are naturally good at all three. If you feel you don't know enough, then find a business coach to help you get up to speed or reach out to the Small Business Administration. Their SCORE program provides volunteer advisors who have enterprise experience. Be aware that while many of these retired executives are well grounded in business basics, they often have little if any knowledge about marketing. We will provide you with the basic marketing knowledge you need to successfully market your business.

Poor marketing is the fifth reason small businesses fail, and we understand why. Rarely do entrepreneurs or small business owners educated about business. They don't go to college and get business degrees, and they rarely have any education in marketing and advertising. Instead, they learn it the hard way, by doing it. Many successful small businesspeople learn marketing this way, but it is a time consuming and expensive way to learn, and you may not have enough time to learn what you need to know before your business becomes profitable. Again, this eBook series is designed to provide you with the basic marketing knowledge you need to successfully market your business.

The last reason small businesses fail is because they either ignore or fail to understand their customers' needs. We will cover this in our eBook, ***The Voice of the Customer, Tracking the Customer Experience***. Knowing and understanding your customer's needs is essential to your business. It is the reason you are in business! It begins with your visions for the kind of customer experience you create, and it is delivered by fulfilling your brand promise to your customers. We cover this in more detail in our eBook, ***Creating Your Brand, From Vision to Brand Promise***.

When You Can't Find the Forest for the Trees...

To see the forest, you have to get to an elevation high enough you can see the whole landscape. Only then can you see what the forest really looks like. This is the perfect metaphor to describe the challenge of understanding marketing today.

On one level, AI is making digital marketing easier....

- **Simplifying workflows**
- **Generating content for ads, emails, and other content**
- **Automating online bidding**
- **Analyzing Metrics**
- **Identifying customer segments**
- **Improving campaign performance**
- **Optimizing conversions**
- **Identifying the best leads**

Because many of these functions have been automated by human made algorithms, it is sometimes unclear if, or to what degree, AI is being used to enhance them. AI creates tremendous value for businesses by simplifying these processes.

AI also creates new risks:

- **Privacy issues**
- **Data security**
- **Data permissions**
- **Copyright issues**
- **Inaccurate content**
- **Complex processes**

These issues are often greater for enterprise organizations but small businesses must be aware of the risks so they can avoid creating bad customer experiences or legal violations, but small businesses have been fined for privacy violations, so follow best marketing practices when collecting and sharing customer data.

***SMALL BUSINESS HAVE BEEN FINED BY REGULATORS FOR VIOLATING
DATA PRIVACY LAWS (usually at the state level (CA has one of the
strongest data privacy laws).***

Here are key best practices for staying safe with regard to data privacy and data security regulations.

- 1. Keep the customer profile data you collect in your CRM clean and accurate.**
 - ✓ Eliminate duplicate files
 - ✓ Respond immediately to requests to delete customer information
- 2. Clean up email lists for hard bounces.**
 - ✓ CRMs like Mailchimp provide tools to manage your email lists.
- 3. Use cookie warnings (built into Godaddy and similar web builders).**
 - ✓ Third-Party cookies are no longer being used simplifying these issues
 - ✓ This makes first party data more valuable (i.e. customer data you collect directly on your website or on landing pages).
- 4. Customize your privacy terms to match your practices.**
 - ✓ Follow best practices to eliminate these risks.
- 5. Don't sell your customers data to anyone.**
- 6. Share it only with trusted partners, like Google, Facebook, and LinkedIn – to stay safe.**
- 7. ONLY COLLECT CUSTOMER CONTACT INFORMATION WITH THEIR PERMISSION**
 - ✓ Use forms only (on your website and landing pages or in a trusted ad platform or social media site)
 - ✓ Don't scrape data from online lists (company employees), business cards (without permission), and other extraneous sources.
 - ✓ Don't enter contact info from business cards (unless you explicitly ask permission)
 - ✓ Don't copy or import contacts from an event registration, except to use for the event (as with Eventbrite)
 - ❖ The better practice is to tag these people and then email them with a request to add them to your contacts (with double opt in)
 - ❖ Do this when you first ask customers & prospects to send them marketing information.

CHECK WITH AN ATTORNEY FAMILIAR WITH FEDERAL AND STATE PRIVACY AND DATA SECURITY LAWS WHERE YOU OPERATE IF YOU HAVE QUESTIONS ABOUT SPECIFIC

REGULATIONS THAT MAY APPLY TO YOUR BUSINESS (ESPECIALLY IF YOU DO BUSINESS IN CALIFORNIA)

Online ad platforms like Facebook and Google have already integrated AI into their systems. This has been going on in the background largely without notice. CRMs are now in an AI arms race. Many of the leading CRMs are creating their own customized AI assistants, usually built on top of an AI platform produced by one of the leading AI developers.

- Hubspot has “ChatSpot”
- Zoho has “Zia”
- Salesforce has “Einstein”
- Intuit Mailchimp has “Creative Assistant”

Here is a list of AI Platforms and who owns them or provides funding for their development.¹

Open AI (funding from Microsoft)

DeepMind (Owned by Google)

Anthropic (Funding from Google)

Stability (\$1 billion in Independent Investors)

HuggingFace (\$2billion in funding from Amazon)³

Inflection (\$4 billion in funding from Microsoft & Nvidia)

xAI (Owned by Elon Musk)

Janet Balis, Managing Director and Partner, Buston Consulting Group, and formerly CMO Practice Leader at Ernst & Young says, ***“We must achieve the perfect balance of humans and automation to unlock a future of better analytics and deployment of AI at scale.”***

“We must achieve the perfect balance of humans and automation to unlock a future of better analytics and deployment of AI at scale.”

Digital marketing has already transformed marketing over the last twenty years... now AI is going to supercharge these processes. AI will operate primarily at the campaign level, optimizing customer segments, conversions, and overall campaign performance. Most of these changes will make it easier to run campaigns yourself, but strategic decisions will

¹ Microsoft, Google, CNBC, Yahoo Finance.

³ HuggingFace is an Open Source and Collaborative AI platform.

remain at the highest level of your strategic planning. Meaning that you will still need to make the major decisions when it comes to identifying marketing goals, setting campaign objectives, and analyzing the results. We cover this in our eBook, *Quick Start Marketing Strategies, Campaign Guides for Six Small Business Categories*, where we cover the three levels of strategic planning.

This includes:

Level 1: Marketing Level Strategy

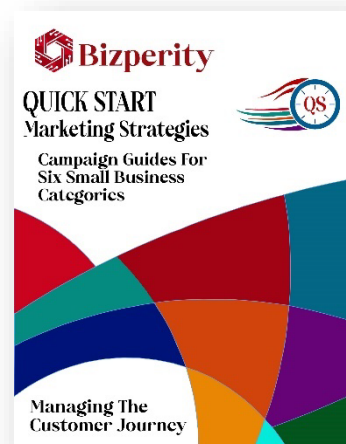
- ❖ Defining your Marketing Goals

Level 2: Channel Level Strategy

- ❖ Picking Marketing Channels & Tactics

Level 3: Campaign Level Strategy

- ❖ Optimizing Segments, Conversions, and Campaign Performance



Our ***Quick Start Marketing Strategies*** also describe marketing strategies for twenty business models within the six business categories we have identified. For each model we describe the key marketing challenges, provide a list of best marketing practices for that business, provide a summary of our Quick Start Marketing Strategy that you can easily

implement on any budget, and provide a list of specific campaigns and marketing channels (from our 15 Basic Campaigns).

The Customer Journey

The 30,000-view begins with understanding the Customer Journey. Before you can design marketing campaigns in a meaningful way, you have to understand the Customer Journey as it works for your business. Only then can you design campaigns that produce the maximum Return on your Ad Spend (called ROAS). We will look at five specific conversions along the customer journey and see how we can manage them with campaigns designed to achieve these key campaign goals to move prospects further along the journey.

Ad platforms design their campaign structure to leverage their unique features and metrics that matter to them (likes, shares, engagement). These measures are useful but not as valuable as leads and new customers. So, you have to understand the difference between various campaign outcomes, as measured by different actions, and true conversion metrics. The overriding theme of this course is that campaigns must be driven by goals based on key conversions in the Customer Journey. Keep these key points in mind as we cover the landscape of digital marketing... they will come up over and over throughout this course.

The overriding theme of this course is that campaigns must be driven by goals based on key conversions in the Customer Journey.

Understanding the Customer Journey is key to designing campaigns for your specific type of business. The nature of the Customer Journey is different depending on the type of business you have. We have identified six main categories of businesses that share common approaches to marketing and building campaign strategies. We will provide specific campaigns you can use to begin building an overall marketing strategy, one campaign at a time. This approach can help you create a marketing system that can adapt to your needs as you continue to grow your business. All these groups fall into one of two different main categories.

Three have a professional sales process with professional salespeople who have been trained in the sales process and who have in-depth product knowledge needed to close a sale. And three do not.

Using a marketing strategy that designed within these six categories can help you create a marketing system that can adapt to your needs as you continue to grow your business. These six groups fall into one of two different main categories.

The first group (circled in red) has a professional sales process with professional salespeople who have been trained in the sales process and who have in-depth product knowledge needed to close a sale. The second group (circled in blue) does not have a professional sales



process. These businesses either sell online to customers or sell directly to customers in the local community. Some of the businesses in this second category do have a limited sales process, support provided by an employee who may or may not be trained in the sales process.

Stages in the Customer Journey

Businesses With a Professional Sales Process

We will begin with business that have professional salespeople and walk through the steps in the Customer Journey.

1. **The Customer Journey begins for individual prospects in your target market with UNKNOWN PROSPECTS.**
2. **You can convert them to a subscriber on your website if they want to download content of interest to them or subscribe to your blog.**
 - **This makes them a CONTENT QUALIFIED LEAD**
 - This is a new distinction we make in marketing, and it came out of the new practice called Content Marketing
 - At this stage, the content is non-promotional, dealing with customer needs and challenges but not promoting specific products or services.

3. The next conversion is to a **MARKETING QUALIFIED LEAD.**

- **This conversion means they are ready to consume marketing content designed to promote your products & services.**

- ✓ This could be an ad promoting a sale, a document with product information, or even pricing information.

4. The next conversion is to a **SALES QUALIFIED LEAD.**

- **This is where a prospect enters the top of the sales funnel, and a salesperson begins the sales process.**

- ✓ Marketing supports the sales process with more content.

- ✓ And ad campaigns can continue to retarget prospects throughout the sales process if it is drawn out.

5. The next conversion is to a **CUSTOMER.**

- This occurs when a salesperson closes a deal.

- This usually involves a signed agreement with the customer.

6. The next conversion is to a **FAN.**

- **Fans become advocates for your business.**

- Fans can promote you to their social network.

- Large businesses hire influencers to promote their business to thousands or even millions of followers.

- Small businesses can do the same thing locally on a smaller scale just by giving Fans gifts or special offers for Fans only.

Communications in the Customer Journey

Communications and messaging changes throughout the Customer Journey in important ways.

1. Your Target Market is full of **UNKNOWN PROSPECTS that you need to reach.**

- **You do that any time you run branding campaigns in mass media or target subgroups in online media platforms.**

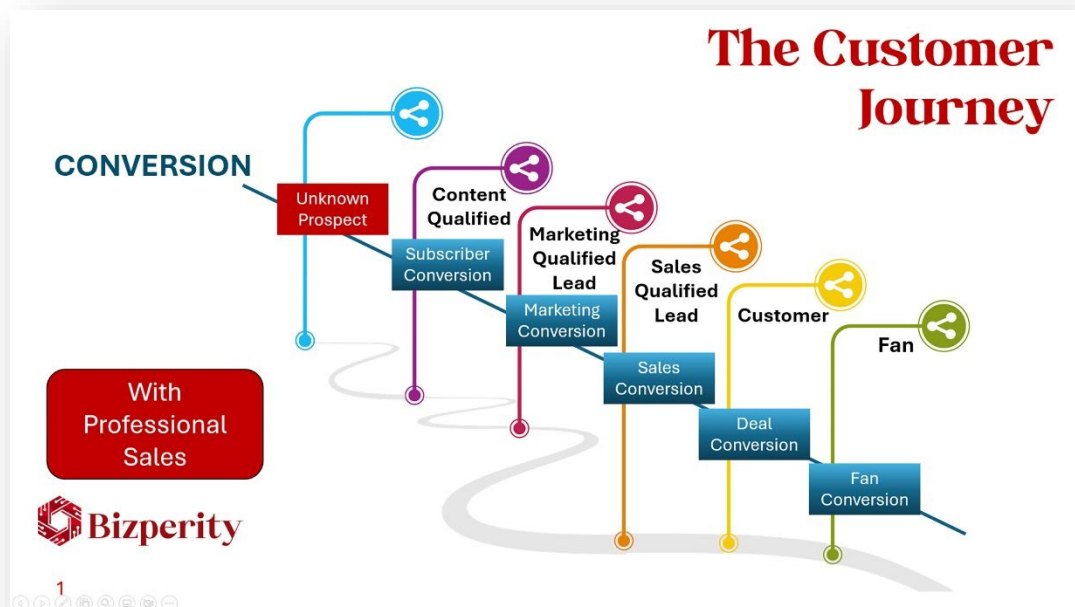
- These campaigns promote your business and your brand rather than products and services.

2. **SUBSCRIBERS** consume content you create as part of a content marketing campaign.

- This is non-promotional content designed to capture the attention and interest of a prospect or potential customer before they are ready to buy, or they are just becoming aware of a problem they need to solve, like a leaky roof, or a new printer for their business.

3. **MARKETING QUALIFIED LEADS** are ready for promotional content and ads that actively promote your products and services.

- For any business with a professional sales staff, nurturing leads with content at this stage as well as the previous stage, is a critical part of the marketing process.
 - Content is the primary means to do this, and you may need a lot of content.
 - Content can provide information from experts on specific customer needs and challenges.
 - It can provide best practices in how to use your products, for example, about farming, or business practices.
 - And it can provide specific details about your products and services that can help solve their problems.



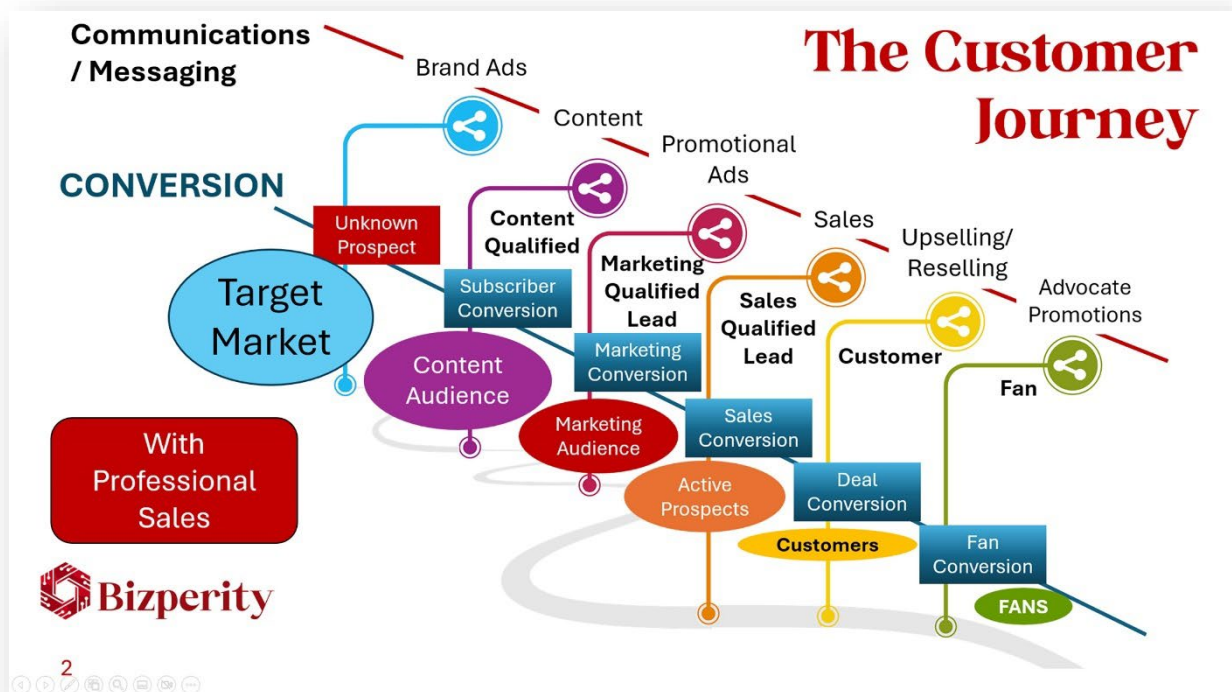
4. **A SALES CONVERSION occurs when a prospect engages with a salesperson who guides them through the sales process. Besides the communication between the prospect and the salesperson, the sales process is supported with content like detailed product specs, contracts or agreements, and slide shows, or videos.**
 - **Some of this content can be used during the previous stage with Marketing Qualified Leads, but some of it should be made available only through the sales process.**
 - ✓ Salespeople use this content to move a prospect through the sales funnel so they can close them in a signed deal.
5. **A CUSTOMER CONVERSION occurs when a CUSTOMER has been closed and bought something. They may remain in a Buying Cycle and continue to buy products from you.**
 - **Maintaining Customer Loyalty becomes a major goal for most business at this point in the Customer Journey.**
 - ✓ Customers can recycle through previous steps in the Customer Journey over and over again as they continue to buy from you.
6. **A FAN conversion occurs when you select a customer to help promote your business, based on their connections. When a customer becomes a Fan, they get access to special promotions or free gifts as a reward for promoting your business in social media and in some cases, to friends and family or business associates.**
 - **Small businesses can do this on a small scale and greatly improve the reach and power of their marketing efforts, just like big businesses do.**
 - ✓ You only want a small portion of your customer base to become Fans, or the program will lose its value and be seen as just another promotion.
 - ✓ Select customers who have large numbers of followers in social media, who are good communicators, and who have a great reputation in the community.

Target Audiences in the Customer Journey

As prospects move through the Customer Journey, they move into more highly targeted groups or audiences.

1. All prospects begin in your **TARGET MARKET** as **UNKNOWN PROSPECTS**

- **This is not the entire population.**
 - ✓ For most small businesses this is a geographically area that is usually less than ten miles from your place of business.
 - ✓ It is also restricted to people or families who need or may need your products or services.
- **For larger homes services and B2C businesses this might be city wide or region wide.**



2. SUBSCRIBERS join your CONTENT AUDIENCE when they fill out a form on your website or on a landing page and provide you with their contact information.

- **If capture their contact information in a CRM, like Hubspot, or Mailchimp, you can begin email campaigns directly to these prospects.**
 - ✓ This expands the kinds of campaigns and accelerates the entire marketing and sales process.
 - ✓ It also allows you to upload contacts to Facebook, LinkedIn, or Google where they can be retargeted!

3. When a prospect becomes a MARKETING QUALIFIED LEAD, they join your MARKETING AUDIENCE, and you can begin placing promotional content and ads in front of them.

- **LEAD NURTURING CAMPAIGNS are designed to put this content in front of your MARKETING AUDIENCE.**
 - ✓ When using mass media to reach a larger audience, it is perfectly fine for anyone to see your promotional ads.
 - ✓ These ads are not as effective as they are with people in your MARKETING AUDIENCE.
 - ❖ Which is why using online media is the cost-effective way to reach these people if you have a professional sales process.

4. When a prospect enters the SALES PROCESS, they enter at the top of your sales funnel and engage with professional salespeople.

- **If this process is drawn out over a number of days, or longer, salespeople will continue to reach out to engage these prospects.**
 - ✓ Salespeople can use marketing support as they continue to work on closing a sale.
 - ✓ Prospects can continue to see ads which are retargeted directly for them.
 - ✓ Prospects can also be reached directly by email, so marketing can help design emails to make them more effective.

5. Once a Prospect has become a CUSTOMER, the relationship changes and you focus on maintaining customer loyalty and reselling or upselling more goods and services.

➤ **Maintaining loyalty is harder to do for some businesses.**

- ✓ Doctors and dentists have long term customer or patient loyalty.
- ✓ Many other consumer facing businesses may or may not have long time customers.
- ✓ Know what is typical for your industry or type of business so you can set benchmarks for yourself.
- ✓ Customer loyalty programs can help improve customer loyalty over long periods of time. You can improve loyalty by:
 - ❖ Regularly posting in social media.
 - ❖ Running email campaigns delivering content that is relevant to their needs.
 - ❖ Retargeting them with online branding campaigns to keep your brand “top of mind”.
 - ❖ Various kinds of special or free services (like free oil changes).

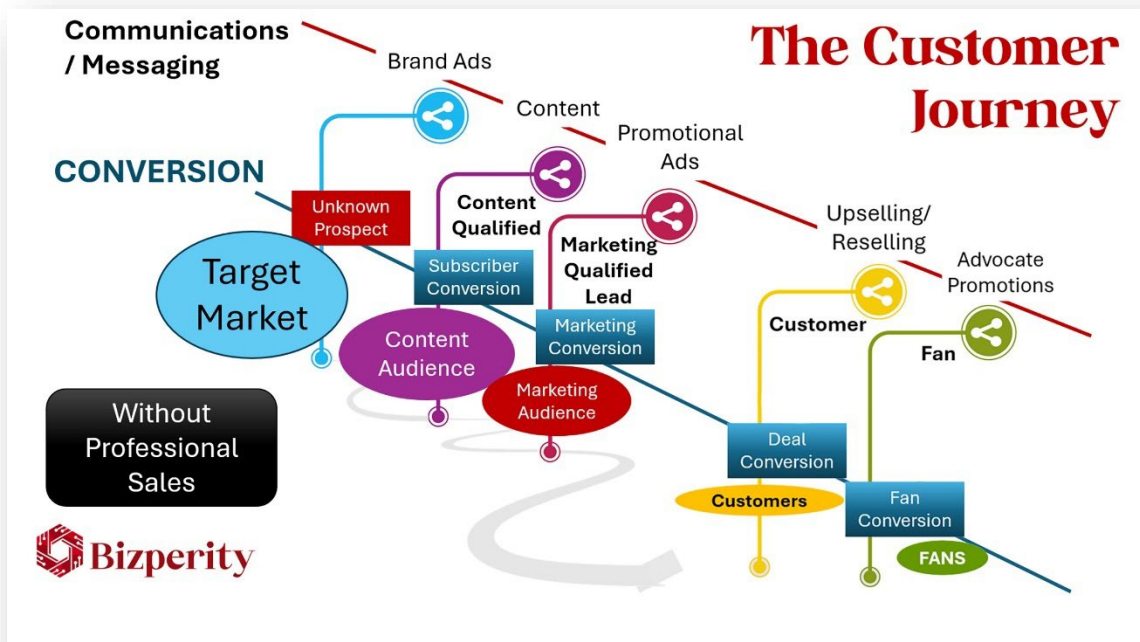
6. Only a few of your customers should be converted to FANS.

➤ **Small businesses rarely take advantage of the opportunity to create a Fan program.**

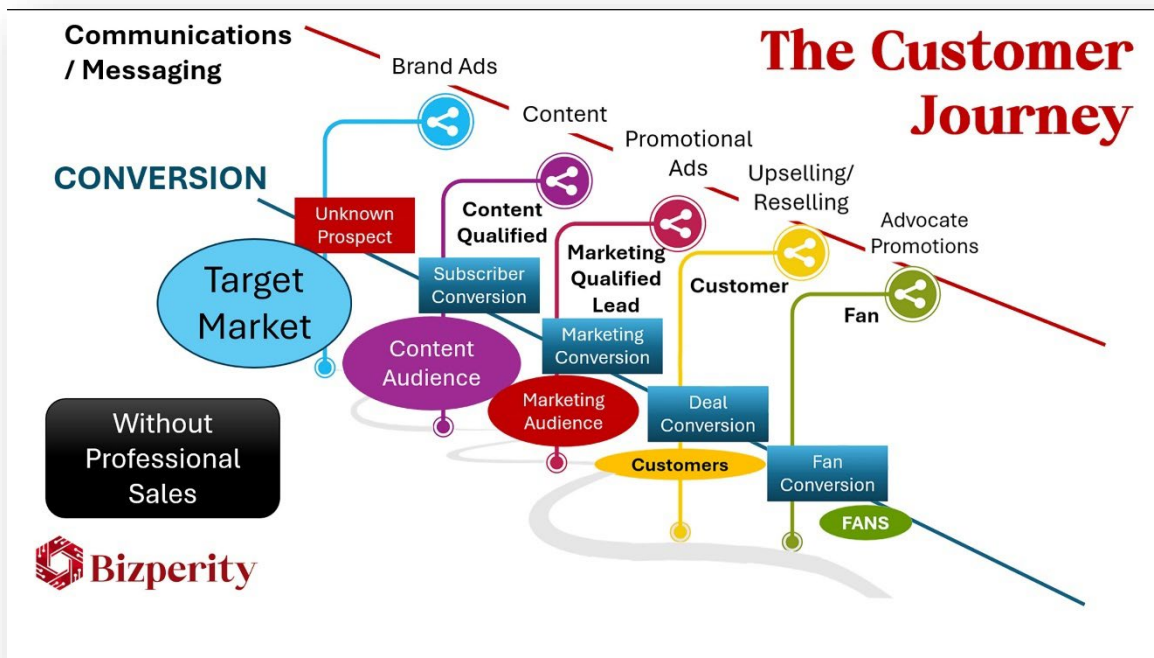
- ✓ **It is simply and easy to do so. Just identify people who are active in your community and have a good reputation.**
- ✓ **Then offer them special deals, gifts or promotions to encourage them to talk about your business.**
- ✓ **We will describe best practices for setting up a Fan program later in the workshop.**

Businesses Without a Professional Sales Process

When you remove the professional sales process from the Customer Journey you eliminate the Sales Process from the Journey.



Prospects convert directly to Customers without going through a sales funnel.



Otherwise, everything else stays exactly the same. You still have the other conversions to a Subscriber, then to a Marketing Qualified Lead, then directly to a Customer, and sometimes to a Fan. The audiences also remain the same. You have a Content Audience for non-promotional content (blogs, articles, etc.); a Marketing Audience with promotional ads and content; and a Customer Audience which you can continue to engage using content to maintain loyalty and market future purchases.

While fundamental marketing processes do not change, the Customer Journey can look very different from one business to the next...Down to individual types of businesses. For example, compare McDonald's to Chipotle. There is a reason that Chipotle has experienced double digit growth over the last ten years while McDonald's continues to grow only slowly by comparison. Consumer tastes have changed, and Chipotle built a business model using fresh ingredients made on the spot. It also has a more mature feel and is more attractive to adults of all ages compared to other fast-food restaurants. In a way, Chipotle has crafted a restaurant for an entire new target market. We can call this fast food for price conscious adults with adult tastes. The nature of your business defines what the Customer Journey looks like.

What Does Your Customer Journey Look Like?

Key Differences in our Six Business Categories

IF we take a closer look at our six business categories, we can find key characteristics that vary across the categories but remain constant within a category.

Retail Store & Home Services	Professional Sales – Consumer Facing (B2C)	Professional Business Facing (B2B)	Professional Sales Agents	Health, Beauty, & Personal Services	Local Non-Profit Organizations
CATEGORIES					
EXAMPLES					
FOUR KEY DIFFERENCES					

Here we see our six business categories across the top with examples of the kinds of businesses in each category listed just below the name of the category. We will go through each category, one at a time.

Retail Store & Home Services	Professional Sales – Consumer Facing (B2C)	Professional Sales – Business Facing (B2B)	Independent Sales Agents	Health, Beauty, & Personal Services	Local Non-Profit Organizations
<ul style="list-style-type: none"> • Retail Storefronts • Homes Services like electrical repair, pest services, etc. 	<ul style="list-style-type: none"> • Auto • Boats, RVs • Homebuilders • Furniture 	<ul style="list-style-type: none"> • Small Manufactures • Wholesale Products • Business Services • Business Consulting 	<ul style="list-style-type: none"> • Insurance • Financial • Real Estate 	<ul style="list-style-type: none"> • Hair Salons • Health Spas • Gyms • Beauty & Massage 	<ul style="list-style-type: none"> • Exclusive Local Non-Profits • Local Chapters of National Non-Profits
Salespeople Ads/ Promotions Social Media Content Marketing	Salespeople Ads Discounts Social Ads Content Marketing	Salespeople Ads Free Extras Linkedin Content Marketing	Salespeople Limited Promotions Linkedin Content Marketing	Salespeople Ads Promotions Social Media Content Marketing	Salespeople Ads Appeals Social Media Content Marketing

1. Retail Stores & Home Services

- ❖ **Salespeople:** Retail only has clerks; Home Services has phone sales or service techs trained to sell.
- ❖ **Ad/Promotions:** Retail has discounts & special offers; Home Services has free services (testing, evaluations) and limited discounts.
- ❖ **Social Media:** They both have limited presence on Facebook.
- ❖ **Content Marketing:** Little use of content marketing.

2. Consumer Facing Professional Sales (B2C)

- ❖ **Salespeople:** Professional Salespeople
- ❖ **Ad/Promotions:** Utilizes discounts and special offers.
- ❖ **Social Media:** Limited presence on Facebook.
- ❖ **Content Marketing:** Rarely uses content marketing.

3. Business Facing Professional Sales (B2B)

- ❖ **Salespeople:** Professional Salespeople.
- ❖ **Ad/Promotions:** Utilizes free services and limited pricing discounts.
- ❖ **Social Media:** Strong presence in LinkedIn.
- ❖ **Content Marketing:** Utilizes content marketing.

4. Independent Sales Agents

- ❖ **Salespeople:** Professional Salespeople.
- ❖ **Ad/Promotions:** Limited in promotions by regulations.
- ❖ **Social Media:** Minimum presence in Facebook.
- ❖ **Content Marketing:** Limited use of content marketing.

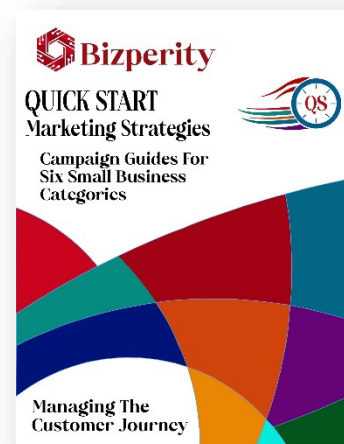
5. Healthy, Beauty, & Personal Services

- ❖ **Salespeople:** Limited use of professional salespeople.
- ❖ **Ad/Promotions:** Offer discounts and special offers.
- ❖ **Social Media:** Often Strong presence on Facebook.
- ❖ **Content Marketing:** Minimum use of content marketing.

6. Local Non-Profit Organizations

- ❖ **Salespeople:** Professional Salespeople for corporate sales.
- ❖ **Ad/Promotions:** Solicits Donations and corporate sponsors without promotions.
- ❖ **Social Media:** Strong presence on Facebook and/or LinkedIn.
- ❖ **Content Marketing:** Utilizes content marketing.

You can see significant differences in these key elements of the business models across these six business categories. Within a category, individual business models are highly similar. These key elements define and limit the marketing strategies for each category and provide a convenient starting point for developing marketing strategies. You can see these similarities reflected in our Quick Start Marketing Strategies. Refer to our eBook, Quick Start Marketing Strategies, , Campaign Guides for Six Small Business Categories. We provide Quick Start Marketing Strategies for 20 different small business models.



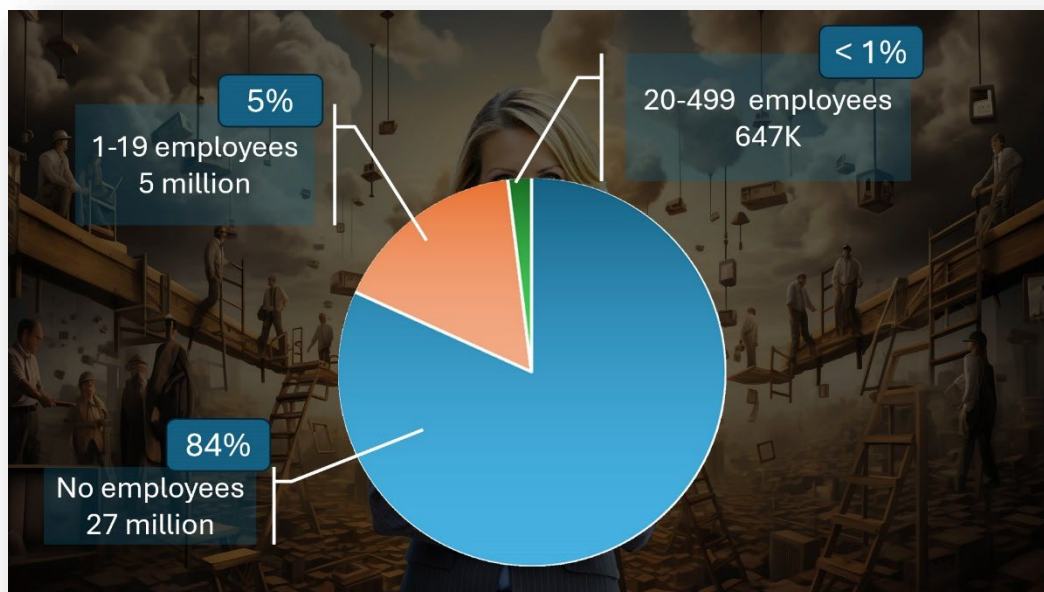
Small Businesses: How Small is Small?

This question is more important because it helps define where you are on the scale of businesses... and size matters. Size determines how much you can afford to invest in marketing, and it determines what kinds of marketing you can do. According to the SBA small businesses have less than 500 employees and between \$1 million and \$40 million in revenues.

The vast majority of all businesses in the U.S. are small businesses by this definition.

- 99% of all businesses are small business.
- 32 million small business in the U.S.
- 61.7 million employees or 46.4%

About 64% of small businesses are consumer facing (20 million) and other 36% are business facing (12 million). According to the U.S. Census Bureau, there are approximately 43,800 business with more than 500 employees, which represents less than 1% of all businesses. According to the U.S. Bureau of Labor Statistics, these large enterprise businesses employ approximately 50 million employees altogether. ***[If you do the math, you can see these numbers agree (we checked)].***



Of the 32 million small businesses in the U.S., 16% have between 1 and 19 employees and 84% owners are sole operators (5.4 million businesses).

As you can see, the vast number of small business owners are sole operators. This includes independent contractors, working in multiple industry sectors. This includes everything from construction workers and welders to artists and business consultants.

Owners Salaries

Owner salaries for small businesses are rather modest, beginning as low as \$32,000 and a maximum of \$147,000, with the average salary at only \$69,000 but this does not include

withdrawals and other forms of reimbursements which can significantly increase their total compensation. Certainly, for those small businesses with employees, the total income for the business owner is much higher.

Now we can define Small Businesses into categories based on revenue. There is no standard way to do this. The SBA does not provide any means for classifying businesses this way. To complicate this even more, Economic Development Professionals call small businesses “Small and Medium Size Enterprise” or SMEs. The IRS just divides businesses into those with assets less than \$10 million and those with assets more than \$10 million.

These numbers are just rough estimates we created to place small businesses into categories based on their size. (*There is some overlap between these categories)

Small Business Categories by Revenue			
Marketing Designation	Revenues		Employees
Sole Operator	\$32,000	\$500,000	0 - 10
Small Local	\$500,000	\$1 million	10-15
Small SME	\$1 million	\$5 million	< 50
*Medium SME	\$5 million	\$20 million	50 - 100
*Large SME	\$20 million	\$50 million	100 - 500

This is a useful guide for business owners, so they know where they stand when making investments in marketing. These groupings are arbitrary, but they are useful when thinking about how much you should be investing in marketing.

If you take 12% as a conservative estimate of how much you should invest in marketing, here are the numbers you get. Consider these numbers when creating your own marketing budgets.

Small Business Categories by Revenue			
Marketing Designation	Revenues		Marketing
Sole Operator	\$32,000	\$500,000	\$4K to \$60K
Small Local	\$500,000	\$1 million	\$60K to \$120K
Small SME	\$1 million	\$3 million	\$120K to \$360K
Medium SME	\$3 million	\$10 million	\$360K to \$1.2 M
Large SME	\$10 million	\$50 million	\$1.2M to \$6M

15 Basic Campaigns

We have simplified the work of creating campaigns by creating 15 Basic Campaigns from which you can choose. We list them here for reference. Refer to our eBook, **15 Basic Campaigns, Campaign Basics by Business Category**, for more information.

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 (Prospects 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)

The Customer Journey eBook Series

Here is a complete list of the eBooks included in the our series, **Managing the Customer Journey**.

1. **Managing the Customer Journey**, How to Use Goals, Objectives, & Conversions in Campaigns
2. **The Voice of the Customer**, Tracking the Customer Experience
3. **Creating Your Brand**, From Vision to Brand Promise
4. **Top 12 Marketing Channels**, Costs & Benefits
5. **Common Offers & Promotions**, Designed to Drive Sales and Close More Deals
6. **Strategic Planning, A marketing Planning Process**
7. **Quick Start Marketing Strategies**, Campaign Guides for Six Small Business Categories (including 20 different small business models).