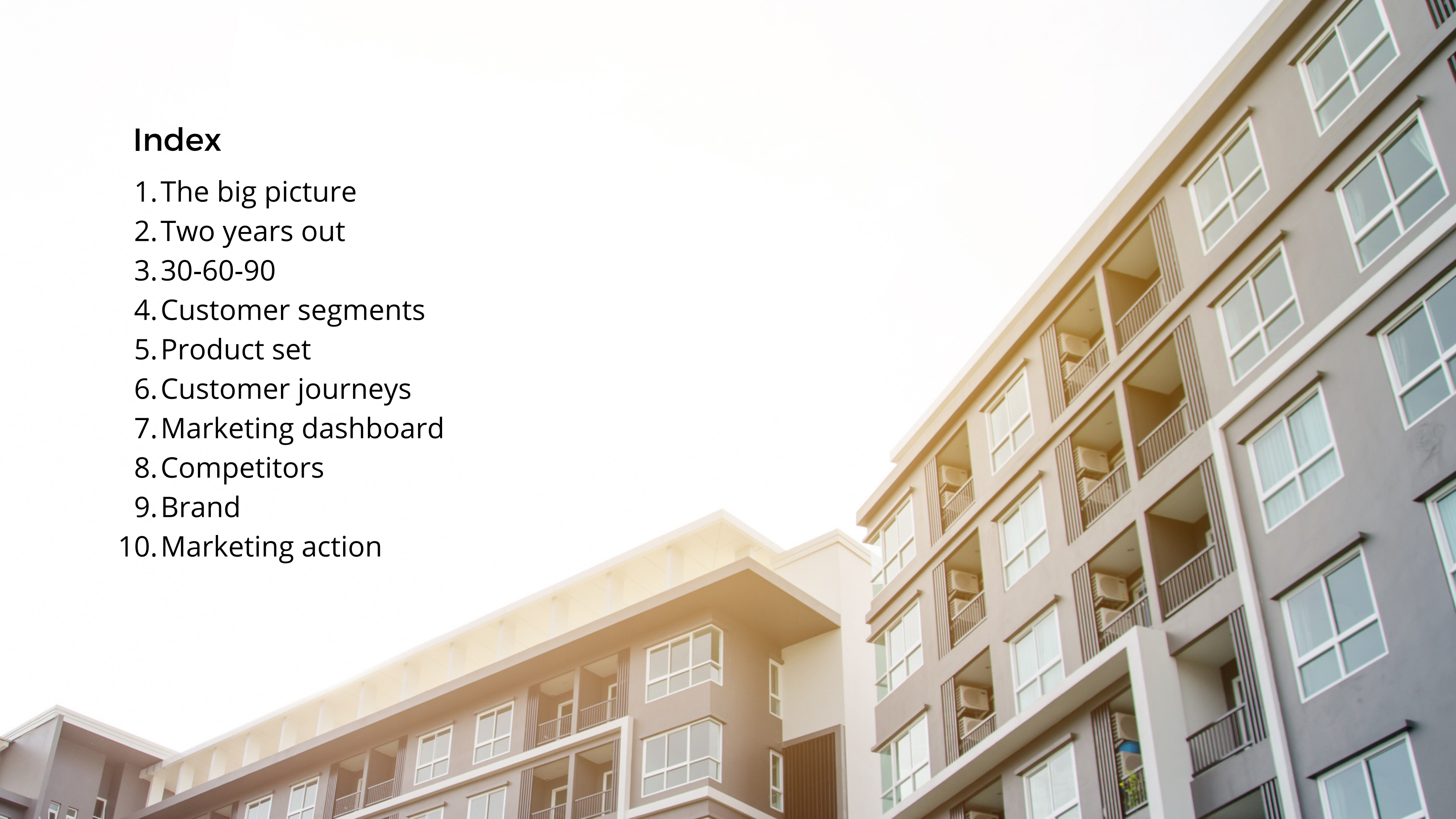


Marketing Playbook 2023



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The Big Picture

This is where our big purpose, passion and brand statements go. The idea we share with investors, shareholders, our team, and PR. It can't be money. That's an outcome.

Our purpose is to...

Our brand is...

*Stage 1. Plan for 1 hour, with leadership.
Leave with shared big picture. Move to stage 2.
Everyone signs this.*



Two years out.

Our business.

Revenue \$: _____

Customer #: _____

Profit: _____

Market share: _____

Our market.

Target market: _____

Special sauce: _____

Category: _____

TAM: _____

*Stage 2. Plan for 1 hour, with leadership, dept heads.
Leave with shared vision. Move to stage 3.
Everyone signs this.*



Customer segments

- ① Who: Segment one.
Why: (Why for them, not us)
- ② Who: Segment two.
Why: (Why for them, not us)
- ③ Who: Segment three.
Why: (Why for them, not us)
- ④ Who: Segment four. It's a trap.
Master three first!

*Stage 3. Plan for 2 hours, with work team.
Leave with shared customer set. Get help if needed.
Move to stage 4. Everyone signs this.*



Customer segment work. One for each.



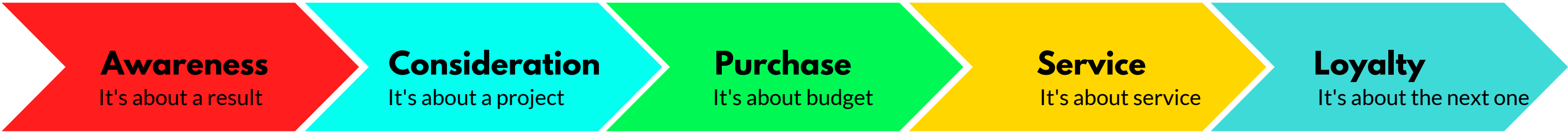
Find out where the process starts for her and map that journey out. This is not about you at all. It's only about them..

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Marketing

Social media
Advertising
SEO/Web
Networking
Opt in stuff
Webinars/Podcast
PR

Social media
Advertising
SEO/Web
Networking
Opt in stuff
Webinars/Podcast
PR

Client service team/comms
Email
1-1 mtgs
At office
Contract

Client service team/comms
Product deliver

Client service team/comms
Off site manage
Billing
Gratitude

Product
Service

Product 1
Product 2
Service 1
Service 2

Product 1
Product 2
Service 1
Service 2

Product 1
Product 2
Service 1
Service 2

Product 1
Product 2
Service 1
Service 2

Product set

Product/service one.

Feature:

Benefit:

Problem:

Solution:

Price:

Product/service two.

Feature:

Benefit:

Problem:

Solution:

Price:

Product/service three.

Feature:

Benefit:

Problem:

Solution:

Price:

*Stage 4. Plan for 2 hours, with work team.
Leave with shared customer set. Move to stage 5.
Everyone signs this.*



Marketing mix.

Unit	Who	Cadence	Budget	KPIs
Social media				
Advertising				
Email				
Website/landing pages				
PR				

*Stage 5. Plan for 2 hours with dept heads.
Leave with shared Action Plan. Move to stage 6. Everyone signs this.*



30-60-90 Action Plan.

30.	Owner.	60.	Owner.	60.	Owner.
Sales:		Sales:		Sales:	
Marketing:		Marketing:		Marketing:	
Product:		Product:		Product:	
Ops:		Ops:		Ops:	
Staff:		Staff:		Staff:	
Finance:		Finance:		Finance:	
IT:		IT:		IT:	

*Stage 6. Plan for 2 hours with dept heads.
Leave with shared Action Plan. Start marketing.
Everyone signs this.*



Marketing dashboard: Awareness

Awareness impressions	September	October	November	December	Total
Social media	0	0	0	0	0
Advertising	0	0	0	0	0
Email	0	0	0	0	0
Website/landing pages	0	0	0	0	0
PR	0	0	0	0	0

Marketing dashboard: Engagement

Prospect engagement	September	October	November	December	Total
Social media	0	0	0	0	0
Advertising	0	0	0	0	0
Email	0	0	0	0	0
Website/landing pages	0	0	0	0	0
PR	0	0	0	0	0

Marketing dashboard: Deals

Deal by stage	September	October	November	December	Total
Proposals out	0	0	0	0	0
Proposals closed	0	0	0	0	0
Revenue	0	0	0	0	0

Business cadence.

Meeting	Who	When
Sales:		
Marketing:	JA	Thursday, Bi weekly, 11 am
Product:		
Ops:		
Staff:		
Finance:		
IT:		