



## Create Your “Why” Statement

### **BUSINESS NAME:**

### **WHAT DOES YOUR BUSINESS DO?**

What products do you sell/what services do you offer?

### **HOW DO YOU DO IT?**

These should be distinct characteristics about how your company operates that sets it apart from the competition. They should be specific and actionable, and written in a way that that people can be held accountable.

- 1.
- 2.
- 3.
- 4.
- 5.

### **WHY DO YOU DO WHAT YOU DO?**

Start your statement with “I/We believe...” and keep it simple – not more than two lines. Don’t focus on what you sell or do – this should be vision and values based.



# Customer Persona #1



### DEMOGRAPHIC INFORMATION

Name:

Age:

Location:

Job Title:

Family:

**BIO:**

### GOALS:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### FRUSTRATIONS:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### MOTIVATIONS:

Incentive  
○○○○○○○○○○○○

Fear  
○○○○○○○○○○○○

Achievement  
○○○○○○○○○○○○

Social  
○○○○○○○○○○○○

### PREFERRED CHANNELS:

Traditional Ads  
○○○○○○○○○○○○

Online & Social Media  
○○○○○○○○○○○○

Referral  
○○○○○○○○○○○○

Guerrilla & PR  
○○○○○○○○○○○○

### FAVORITE BRANDS:



## Customer Persona #2



### DEMOGRAPHIC INFORMATION

Name:

Age:

Location:

Job Title:

Family:

**BIO:**

**GOALS:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**FRUSTRATIONS:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**MOTIVATIONS:**

Incentive  
○○○○○○○○○○○○

Fear  
○○○○○○○○○○○○

Achievement  
○○○○○○○○○○○○

Social  
○○○○○○○○○○○○

**PREFERRED CHANNELS:**

Traditional Ads  
○○○○○○○○○○○○

Online & Social Media  
○○○○○○○○○○○○

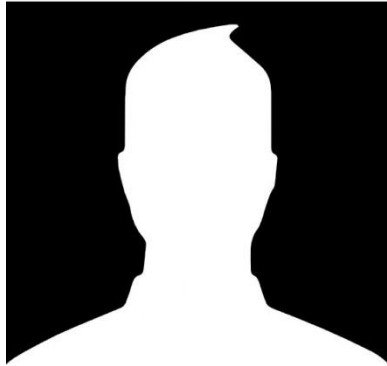
Referral  
○○○○○○○○○○○○

Guerrilla & PR  
○○○○○○○○○○○○

**FAVORITE BRANDS:**



# Customer Persona #3



### DEMOGRAPHIC INFORMATION

Name:

Age:

Location:

Job Title:

Family:

**BIO:**

**GOALS:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**FRUSTRATIONS:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**MOTIVATIONS:**

Incentive  
○○○○○○○○○○○○

Fear  
○○○○○○○○○○○○

Achievement  
○○○○○○○○○○○○

Social  
○○○○○○○○○○○○

**PREFERRED CHANNELS:**

Traditional Ads  
○○○○○○○○○○○○

Online & Social Media  
○○○○○○○○○○○○

Referral  
○○○○○○○○○○○○

Guerrilla & PR  
○○○○○○○○○○○○

**FAVORITE BRANDS:**



## Create SMART Goals

SMART goals are specific, measurable, attainable, realistic, and timebound. Create goals for your online presence that you can track and realistically achieve. Examples for SMART goals for building a digital footprint might be "Create" or "Post one update to my LinkedIn page every week for the rest of this year."

### GOAL 1:

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### GOAL 2:

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### GOAL 3:

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## Before You Start Checklist

- Know your "Why"
- Know your audience
- Create a professional logo
- Create brand guidelines & convey to staff/team members
- Create professional marketing materials
- Setup email addresses at your domain (not Gmail/Yahoo, etc)
- Establish an appropriate online presence – website & social media
- Setup Google Analytics, including goals and conversions tracking
- Setup Google Search Console
- Use Google Alerts or Mention to track your business name & relevant terms
- Create a marketing plan
- Create a sales funnel & system for managing customer relationships

*Is everything done? Now you can execute the plan and achieve your goals!*



# Marketing Strategy Overview

Marketing Budget for 2017:

Weekly Time Investment:

## WEBSITE

URL: \_\_\_\_\_

Content Management System: \_\_\_\_\_

Hosting platform: \_\_\_\_\_

Included features:

- |                                          |                                             |                                       |
|------------------------------------------|---------------------------------------------|---------------------------------------|
| <input type="checkbox"/> About Page      | <input type="checkbox"/> Email Signup       | <input type="checkbox"/> Products     |
| <input type="checkbox"/> Blog            | <input type="checkbox"/> Payment Processing | <input type="checkbox"/> Services     |
| <input type="checkbox"/> Calls-to-Action | <input type="checkbox"/> Portfolio          | <input type="checkbox"/> Staff Bios   |
| <input type="checkbox"/> Contact Page    | <input type="checkbox"/> Press/Media        | <input type="checkbox"/> Testimonials |

Necessary Tools/Resources for Goal Achievement:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Other website notes/plans:

## SOCIAL MEDIA SITES TO USE:

- |                                      |                                    |                                  |
|--------------------------------------|------------------------------------|----------------------------------|
| <input type="checkbox"/> Dribble     | <input type="checkbox"/> Medium    | <input type="checkbox"/> Twitter |
| <input type="checkbox"/> Facebook    | <input type="checkbox"/> Meetup    | <input type="checkbox"/> Vimeo   |
| <input type="checkbox"/> Flickr      | <input type="checkbox"/> Pinterest | <input type="checkbox"/> Vine    |
| <input type="checkbox"/> Google Plus | <input type="checkbox"/> Reddit    | <input type="checkbox"/> YouTube |
| <input type="checkbox"/> Instagram   | <input type="checkbox"/> Snapchat  | <input type="checkbox"/> _____   |
| <input type="checkbox"/> LinkedIn    | <input type="checkbox"/> Tumblr    | <input type="checkbox"/> _____   |



## ADDITIONAL MARKETING CHANNELS:

**Television**

Budget:

Channels to target:

Number & Frequency of Ads:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:

**Radio**

Budget:

Stations to target:

Number & Frequency of Ads:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:



**Print Ads**

Budget:

Publications to target:

Number & Frequency of Ads:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:

**Online Display Ads**

Budget:

Websites to target:

Number & Frequency of Ads:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:





**Paid Social Media Boosts & Ads**

Budget:

Social Media Platforms to target:

Number, Type, & Frequency of Boosts/Ads:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:

**Search Engine Marketing**

Daily Budget:

Which Search Engines?

Frequency of Ads (ongoing or at specific times):

Keyword Groups to Target:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:



**Guerrilla**

Budget:

Number of Campaigns & Timing:

Campaign Description(s):

Location of Campaigns:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:

## Present Yourself as an Expert

- Join relevant industry associations
- Read at least 3 popular books related to your industry
- Join the Colorado Public Radio Insight Network
- Join HARO (helpareporter.com) as a source
- Join ProfNet for Experts (paid) or ProfNet Connect (free)
- Create a plan for continuing education/staying relevant and informed
- Add logos of any websites where quoted/interviewed or a guest blogger to your website and email signature, and share articles on social media



## Write & Share Quality Content

### TOP FOCUS AREAS FOR MY BLOG/SOCIAL MEDIA SHARES:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### BLOG

Frequency of Posts:

Monthly Theme:

January

July

February

August

March

September

April

October

May

November

June

December

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:



**LOCAL WEBSITES/SMALL BLOGS TO SUBMIT GUEST POSTS/PITCH STORIES:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**“REACH” WEBSITES TO SUBMIT GUEST POSTS/PITCH STORIES:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**SOCIAL MEDIA**

Site 1:

Frequency of Posts:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success:

Site 1:

Frequency of Posts:

Necessary Tools/Resources/Outside Help:

Metric(s) for tracking success: