

MARKETING PLANNER

Navigate Your Way to More Customers



Ready to make this the year that you'll truly tackle marketing for your small business?

There's no better time to start planning for than now. In our Marketing Planner for Small Biz, we'll tackle a plan for defining your target buyer, attracting the right type of prospect, converting more prospects into customers, and turning your customers into raving fans of your business.

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STEP 1: Define Who You'd Like to Attract

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STEP 3: Convert More Leads into Customers

STEP 4: Turn Customers into Loyal, Raving Fans

STEP 1:

DEFINE WHO YOU'D LIKE TO ATTRACT



The first step to a successful marketing plan is to set your sights on the type of customer you'd like to attract for your business.

Yes, there are bad customers...you know the ones. They require excessive time and resources to keep happy, but never seem satisfied.

On the flip side, your ideal buyer is the perfect customer - the one that loves your products and services just as they are and is a champion of your small business. They are repeat buyers and tend to refer new customers your way.

Effective marketing begins by appealing to more of those perfect customers, and avoiding the detractors who suck the life out of your business.

IDENTIFY YOUR IDEAL BUYER

Creating a persona for your ideal customer helps you to attract the right type of buyer to your business.

Personas help you to address the challenges your ideal buyer faces and understand what motivates them to act, whether you are creating an email marketing campaign, sending out a direct mail piece, speaking at an event, or updating your website content.

To build an effective persona:

1. Create an identity.
2. Understand their day-to-day challenges.
3. Uncover the problems that your business can help them solve.
4. Continue to research and learn more.

IDENTIFY YOUR IDEAL BUYER

1. CRAFT AN IDENTITY

Find out who your persona is and give them a backstory. Ask:

- What is their name?
- What generation are they from?
- What is their home life like?
- What is their level of education?



Joe the single twenty-something is going to have different motivations than Mary the 40-something divorcée with 2.5 kids.

IDENTIFY YOUR IDEAL BUYER

2. CONSTRUCT A DAY-IN-THE-LIFE

Think about the routines and processes your persona embarks upon every day. Ask questions like:

- Where do they go every day? Do they wake up and head to the office each day? Are they the jet-setting type?
- How do they communicate? Do they pick up the phone and dial? Do they send out a Tweet?
- What is their role? Do they wear many hats each day? Are they in a stringent role?

- How do they work? Are they managing a team? Do they work independently?
- What is the best way to reach them? Are they tech-savvy? Are they technically challenged?
- What personality characteristics do they possess? Are they goal oriented? Do they tend to be complacent?
- What is their environment like? Are they suburbanites? City folk?

Use insights about the daily achievements, struggles, and processes of your personas to uncover what motivates them to take action.

IDENTIFY YOUR IDEAL BUYER

3. UNCOVER PAIN-POINTS

Think about the biggest challenges your persona might face.

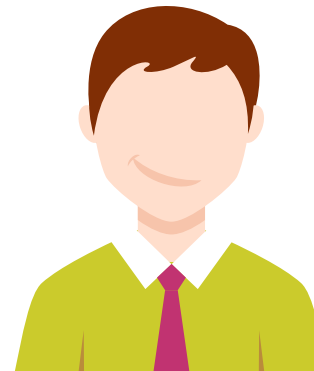
- What problems does your persona have?
- Where do their obstacles intersect with your expertise?
- What specific challenges can you help them overcome?

Once you've tapped into your customers' challenges you can:

- Develop value-added content that solves

a problem for your customers, keeping your business top-of-mind.

- Position your products and services in a way that addresses their challenges.
- Create new programs, products, and service offerings that meet their needs.



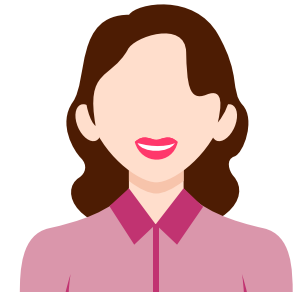
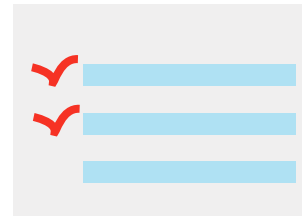
IDENTIFY YOUR IDEAL BUYER

4. CONTINUE PERSONA RESEARCH

The first version of your persona might be built on educated guesses and hypothesis. That's a great start, since you innately know things about your customer base.

However, continue to reach out to the customers and prospects in your target market to learn more about their identity, motivations and challenges.

Meet with customers in person, create places for feedback at your brick and mortar location, or send out quarterly surveys with tools like Surveygizmo or Survey Monkey.



READY TO CREATE YOUR OWN IDEAL BUYER PERSONA? TRY IT ON THE NEXT PAGE >

MY IDEAL BUYER PERSONA



MY PERSONA'S NAME

IDENTITY & DEMOGRAPHICS

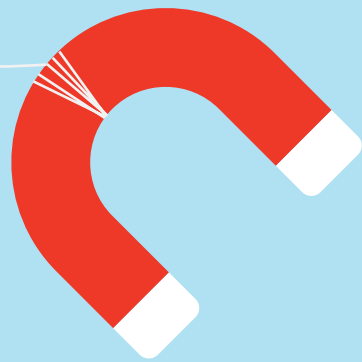
A DAY IN THE LIFE

BIGGEST CHALLENGES

MOTIVATIONS

When you're a small business with limited time and limited budget, you want to do everything you can to get the greatest impact from the least amount of resources. Identifying the right buyer for your product can help you make a big splash and get your small business noticed in a sea of multiple marketing channels and distractions.

**STEP 2:
ATTRACT YOUR TARGET BUYER**



Once you define *who* you're trying to attract, it's much easier to figure out *how* to attract them. Now, instead of wasting marketing dollars on broad programs that may or may not work, you can be much more strategic in where you spend your budget.

ATTRACTING CUSTOMERS

EVENTS

Where is your ideal buyer hanging out? Trade shows, happy hours, a local conference? Now that you know who your buyer is, you can more easily pin-point which events they attend.

So, if there are two major trade shows in your industry every year, but your ideal buyer tends to go to one over the other, you know which show to invest more in to make a bigger impact. You can invest in things like buying a list of attendees, leveraging a bigger booth, or running a contest on social media during the event.

EVENTS TO ATTEND

ATTRACTING CUSTOMERS

KEYWORD STRATEGY AND SEO

Search engine optimization, or SEO, is all about creating quality content that is highly relevant to your target audience.

Think about your ideal buyer and the keywords they might be searching for, then create content on your website for each keyword on your list.

These terms can be directly related to your business. Or, they can be an area where your ideal buyer's problem and your expertise intersect.

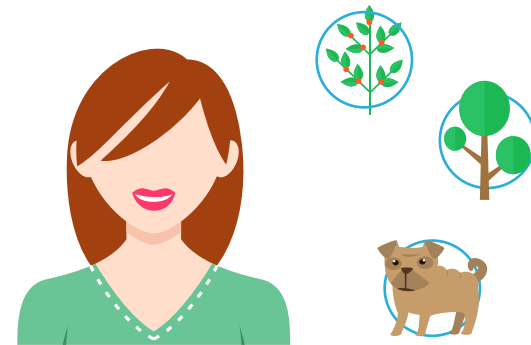
ATTRACTING CUSTOMERS

For example, let's say you run a landscaping business, and your ideal buyer persona is **"BECKY, THE STAY-AT-HOME SOCCER MOM."**

Becky might search, "Landscapers near me," when she's ready to re-do the landscaping in front of her home. However, you can connect with Becky much earlier in the sales process. She might be searching for things like:

- Pet-friendly turf
- Modern landscaping trends
- Maintaining trees and shrubs

Targeting keywords for every stage of the buying process, from "just browsing" to "shopping around," to "ready to buy" can help you connect with and convert more customers.



ATTRACTING CUSTOMERS

KEYWORDS TO TARGET



ATTRACTING CUSTOMERS

CONTENT STRATEGY

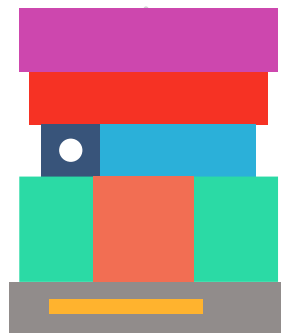
Now that you've outlined the keywords you want to target, you can map out a content strategy to match. Each keyword on your list can be broken down into several content topics.

Back to our landscaping example, think about the keyword phrase, "Maintaining Trees and Shrubs."

Content topics might include:

- How often to water my trees
- A guide to pruning shrubs
- When to mulch around trees and shrubs

Creating quality, in-depth content for each of the keywords on your list will help your business get found online.



ATTRACTING CUSTOMERS

CONTENT TOPICS

Our [Content Strategy Playbook](#) is a great resource for developing your content strategy, but you can start here by listing out the content topics that relate to your keyword strategy.



ATTRACTING CUSTOMERS

CONTENT TOPICS (CONT.)



ATTRACTING CUSTOMERS

SOCIAL MEDIA STRATEGY

Targeting the right keywords and creating valuable content for your audience will attract your ideal buyer as they search online.

Another way to engage with your audience is through social media:

- Share the content you're creating for your website.
- Have a two-way conversation with prospects and customers.
- Listen in on what customers and prospects are saying.

One social media pitfall for small businesses is spreading themselves too thin. That's why knowing your ideal buyer is so key. Instead of tackling every new social media channel, you can focus on the top one or two channels they engage with.

So, back to our landscaping business, Becky the stay-at-home soccer mom might be on Facebook and Instagram all day posting pics of the kids, but is less likely to be hanging out on LinkedIn.

If you need more help with your social media strategy, check out our [social media series](#).

ATTRACTING CUSTOMERS

DIGITAL ADVERTISING STRATEGY

You own your content marketing and social media collateral, earning your business exposure through search engines and social channels.

But to augment the number of ideal buyers you can attract, consider investing in a paid channel or two as well. If you're a newbie when it comes to online ads, or want some help, consider outsourcing your ad campaigns.

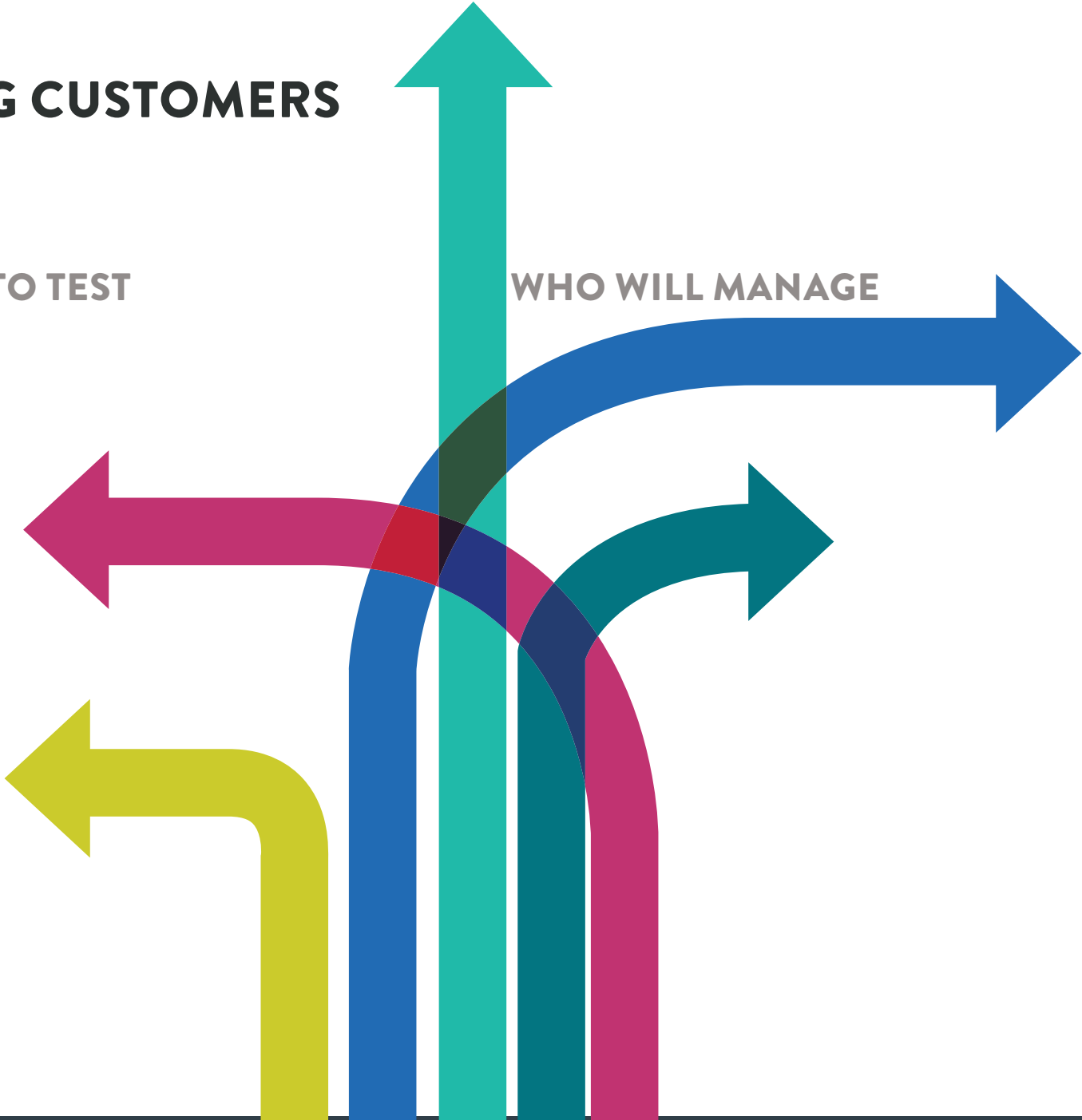
SEARCH ENGINE ADS: You can advertise with search engines like Google or Bing on the keywords you are already targeting. That way, when potential customers search for your keywords, your ads will appear at the top of the search results, boosting your exposure.

SOCIAL ADVERTISING: Social media channels like Facebook, Twitter, and Pinterest let you run ads to promote your brand to your ideal buyer. Test running ads on the same social channels you're investing time in to boost your reach.

ATTRACTING CUSTOMERS

AD CHANNELS TO TEST

WHO WILL MANAGE



Attracting the right buyer is simple when you have a plan. Target relevant keywords, build content that correlates to your keyword strategy, and distribute content through marketing channels like social media and digital advertising to grow your reach.

STEP 3: CONVERT LEADS INTO CUSTOMERS



LEADS (Awareness Stage):

Anyone in your market. At this stage, your goal is to get your brand on their radar, bumping them into the prospect stage.

PROSPECTS (Interest Stage):

Those who know of your brand and have a pain-point you can solve. Your goal is to provide value and educate them on how the types of products and services you deliver can alleviate their challenges.

OPPORTUNITIES (Consideration Stage):

Those who are actively evaluating your business against other solutions. Your goal here is to provide all of the resources opportunities need to decide to buy.

CUSTOMERS (Closed Stage):

Those opportunities you have won and want to stay engaged with. Your goal is to keep them engaged so they become repeat customers.

Now that you've planned out how you'll engage more people that fit your ideal buyer persona, the next step is to convert those leads into customers.

As a small business, every opportunity counts. Email nurturing, partnerships and referrals ensure that you can take advantage of your business relationships and turn connections into customers.

INCREASE CONVERSIONS

EMAIL NURTURING CAMPAIGNS

You have a lot of information you'd like to share with your prospects, but you don't want to overwhelm them. Email nurturing campaigns help you to break down big ideas into digestible chunks delivered over time, until a prospect is ready to buy.

Email campaigns educate prospects and help them down a path to conversion. So instead of sitting stagnant in your database, leads move from learning about your business, to exploring your solutions to making a purchase.

Create a 6-step email campaign for new leads. Start by introducing yourself and your business, then stay in touch with helpful content - like interesting articles or how-to tips. Finally, help your leads to learn about your products and services through a case study and a call-to-action to speak with a sales rep or make a purchase.

LEAD

PROSPECT

OPPORTUNITY



AWARENESS

INTEREST

CONSIDERATION

INCREASE CONVERSIONS

EMAIL NURTURING CAMPAIGN

Subject Line 1: Introduction

Subject Line 4: Helpful Hint or Resource

Subject Line 2: Interesting Article

Subject Line 5: Customer Case Study

Subject Line 3: How-To Article or Guide

Subject Line 6: Call to Action

Need help creating campaigns and sending the right email to the right person at the right time? Check out our [email nurturing infographic](#).

INCREASE CONVERSIONS

INCENTIVES

Everyone loves to feel like they've gotten a bargain, and offering up an incentive each month can be a great way to get prospects who are on the fence about buying to pull the trigger.

Think about the incentives you can offer potential customers this year, like:

- Product discount
- Free trial
- Free consultation
- Free upgrade
- Bonus add-on



INCREASE CONVERSIONS

INCENTIVES TO OFFER

January Incentive

February Incentive

March Incentive

April Incentive

May Incentive

June Incentive

July Incentive

August Incentive

September Incentive

October Incentive

November Incentive

December Incentive

INCREASE CONVERSIONS

PARTNERSHIPS

Partnerships are relationships you can build with other organizations to help open new avenues to more customers.

Back to our landscaping business example, you could partner with a lawn care service to reach their list of customers - after all, if they are enlisting a service to maintain their lawn, they may enlist your landscaping business to replace or revamp trees, shrubs and flowers.

Leverage partnerships to quickly scale your customer base.

PARTNERS TO CONNECT WITH

INCREASE CONVERSIONS

REFERRALS

According to Nielsen, people are 4 times more likely to buy when referred by a friend.

You can boost conversions by offering incentives to your network to refer business your way. Find out how much it costs your business to acquire a new customer by adding up sales and marketing expenses in the past year and dividing by the number of customers you acquired in that same time frame.

This number will give you a good idea of how much you can afford to incentivize your referral

partners with. For instance, if it cost your business an average of \$125 to acquire a new customer, it may be well worth it to offer a \$100 gift card or give a \$100 discount to anyone who sends a new customer your way.

Need help managing a customer referral program? There are many B2C and B2B apps that can help you organize and track customer referrals. You should also track who is referring customers and who has been referred to you in your CRM so you can pinpoint where your best referrals are coming from.

INCREASE CONVERSIONS

REFERRAL PROGRAM

Last Year's Sales and Marketing Expenses

Number of Customers Acquired Last Year

Average Cost to Acquire a New Customer

Target Referral Incentive Value

Incentives We Can Offer Referral Partners

If you've ever heard the phrase that "there's money in the list," it's true. There is a ton of opportunity for your business when you tap into your network. Stay relevant with helpful email nurturing campaigns, help prospects make the decision to convert by reaching out with a promotion, and leverage partnerships to find burstable channels of new customers.

**STEP 4:
TURN CUSTOMERS INTO LOYAL,
RAVING FANS**

Dear Friend,

Sales and marketing is hard work, and in the midst of it all, it's easy to forget about the customers you've worked hard to win.

But taking care of your customers after the sale pays off. According to SumAll, returning customers spend, on average, 20% more than first time buyers.

In addition, happy customers will send more customers your way through word-of-mouth and social referrals.

Nurture your customers with email campaigns, thank them for their business with perks, and tap into them for reviews and referrals to boost your sales while getting the most out of your marketing budget.

TURN CUSTOMERS INTO FANS

EVENT CAMPAIGNS

Let your customers know you're thinking about them on those milestone days, like their birthday, a renewal date, or the day they became a customer. Thank them for their business with a special coupon, exclusive discount, or fun freebie.

With a CRM and marketing automation, you can track milestones for each customer and automatically send a personalized email to your customers on those special days, reminding them how much you value their business.

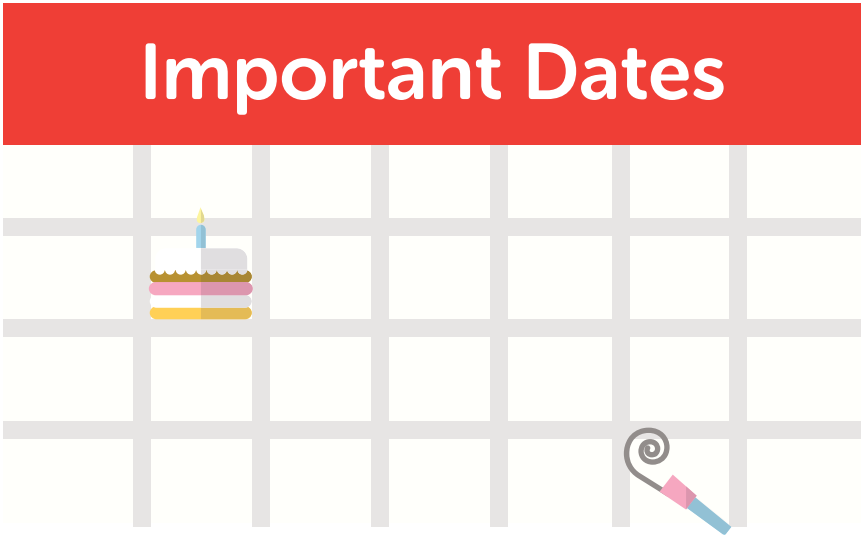
List out the events that you want to highlight for your customers, and build an email around each one.

A few examples of event campaigns you might want to implement are:

- New customer welcome email
- Birthday email
- Anniversary email
- Renewal reminder email
- 30-day, 60-day or 90-day check-in email

TURN CUSTOMERS INTO FANS

EVENTS TO HIGHLIGHT



A graphic for a calendar titled "Important Dates". The title is in white text on a red rectangular background. Below the title is a light yellow grid with gray lines. In the second row, first column, there is an icon of a three-layered cake with a single lit candle. In the third row, fifth column, there is an icon of a blue pen with a pink eraser and a spiral binding.

TURN CUSTOMERS INTO FANS

CROSS-SELL & UPSELL CAMPAIGNS

If you're like most small businesses, you know that your sales are built on repeat customers. But, you don't have to wait for your customers to come back to you. Instead, reach out with an upsell or cross-sell campaign.

You can track and note the type of purchases your customers make in your CRM, then use your customer's purchase history to determine what other products and services they might be interested in.



TURN CUSTOMERS INTO FANS

MY PRODUCTS

COMPATIBLE PRODUCT TO UPSELL OR
CROSS-SELL

TURN CUSTOMERS INTO FANS

REVIEW CAMPAIGNS

Have you ever googled your business? If you have, you may be surprised to find that after your website, review sites are often next in line at the top of the search results.

Reviews can be the first impression of your business, and potential customers will take reviews into account as they research your business online. To make sure your reputation remains sparkling clean, periodically ask your happiest customers to leave a glowing review.

For best results:

- Offer an incentive (hey, a \$5 gift card is a small price to pay for a testimonial)
- Ask for one review on one review site at a time (make it as simple as possible for your customers to participate)

Review sites to target:

- Industry review sites
- Better Business Bureau
- Your Google page
- Your Facebook page

TURN CUSTOMERS INTO FANS

REVIEW SITES TO TARGET



You've invested many marketing dollars into attracting and converting customers for your business. But the payoff doesn't have to end there. Keeping your customers happy long after the sale is key to scaling your revenue.

Stay in touch with your customers through event-based campaigns, offer compatible products and services they might like, and tap into your happiest customers for reviews.

You'll be rewarded with repeat business in addition to harnessing the power of word-of-mouth referrals and positive reviews to attract new customers.

You've identified your ideal customer, are set to attract your target buyer, have a game plan for converting more prospects into customers, and are prepped to nurture customers long after you've made a sale.

Congrats, the stage is set for remarkable marketing success!

MEET HATCHBUCK

Self-made business owners go to depths that others won't to capitalize on opportunity. We get it. Hatchback makes small business sales and marketing software for you - the adventurer, the risk taker. When it comes to your business, it's sink or swim. You can't be anchored down by bulky software. So we promise that no solution is as easy to use or as effective at propelling relationships into sales as Hatchback.

Hatchback. **Seize the Opportunity.**

