



Marketing Prep Kit

2020 INTERACTIVE WORKBOOK

ROCKPAPERSIMPLE.
Your Marketing Partner 



This Marketing Prep Kit is intended to help you
***UNDERSTAND YOUR BUSINESS BETTER,
PUT YOUR GOALS DOWN ON PAPER AND
PUT YOUR PLAN TOGETHER.***

Sometimes it can be hard to know where to start when you are planning your marketing... so we put together this handy marketing prep kit to give you a head start! It is intended to be used as a work book, so give it a run through, write all over it and be brutally honest with your answers to get the best result. Don't worry, no one else has to see it (unless you want to share... then we'd love to see what you created!).





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Planning

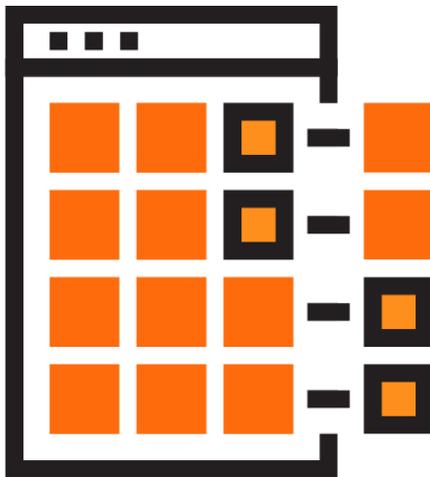
“If you don’t know where you are going, you’ll end up someplace else.” -Yogi Berra

Gaining Clarity

Many ideas never reach greatness simply because there isn’t a clear understanding of the process necessary to make a vision a reality. A powerful vision can inspire, ignite, and empower your team.

Planning is essential to make your ideas and goals come to fruition. With a strong plan, you and your team will be able to see your vision and stay on track.

Making your vision a reality requires a clear-cut understanding of where you are going, why you are going, and how you will get there.



Developing a Strategy

Developing a marketing plan is a main step for your business to do each year. You should have a monthly and weekly plan that you and the rest of your team can look at to keep you in line with your yearly marketing goals. An annual marketing plan guides your decisions throughout the year and helps to streamline your efforts.

Once you finish your marketing plan, share the plan with your team, and remember to leave some wiggle room for when those unexpected hiccups occur.

Here are the important steps necessary to create a great marketing plan:

- | | | |
|---------------------------|--------------------------|-----------------------|
| 1. Define Target Audience | 4. Set Your Goals | 7. Pick Channels |
| 2. Define Brand | 5. Track Analytics | 8. Set Your Budget |
| 3. Know Your Competition | 6. Evaluate Brand Assets | 9. Review & Implement |

Developing a plan may seem overwhelming at first, but once you have these items figured out, your marketing strategy will fall into place!

Know Thyself

“If you aim at nothing, you will hit it every time.” -Zig Ziglar

There are many elements to creating a great marketing plan, but the first step is knowing yourself/your business. This section of the kit will walk you through defining your target audience, getting to know your brand, and pinpointing who your competition is. All of this will be necessary to move forward with your plan, and once it's refined your team will have a clear idea of what your company stands for.

Define Target Audience

Defining your target audience is needed for your marketing plan because it will help you aim your messaging to those who want to hear it or those who would benefit from it the most. Think about who frequently purchases your product or services, what stage of life they are in, and who else may find use for your product or service.

Here are some items you should write down to begin your journey in defining your audience. Remember, this is just your target audience, the group that is most likely to purchase from you. It doesn't mean you can't sell to others outside of this group... it just means that is the group that is most ideal to direct your marketing efforts.

Here are some questions to help you in defining your audience:

Age

What is the age range of your average customer? _____

Gender

Does your offering appeal more to one gender? _____

Income

What is their income range? _____

Interests

Does your audience enjoy Sports, Magazines, Dancing, Travel, etc? _____

Ethnicity

Does your audience typically belong to a specific ethnicity? _____

Geographics

Where does your audience live? _____

Education

Is your audience typically higher-educated and if so, to what level? _____

Marital Status

Are they single, married, and does it matter? _____

Kids

Does your audience have children? Does it matter what age these children are? _____

Employment

What industry does your audience work for? _____

Clubs or other groups

Does your audience participate in volunteer groups or other hobby groups? _____

Personality types

Is your audience outgoing, reserved, organized, nurturing, etc? _____

Free-write: What else can you think of about your target audience?

Who is that ideal client? Write anything else you can think of.

Honing in on your target audience requires reviewing data and even performing additional research into your industry, but the above will get you further than most businesses ever get. The team here at Rock Paper Simple is happy to help refine what you come up with if you'd like the help! Let us know!



Define Your Brand

Now that you have a better understanding of who your target audience is, think about how well you know your brand. You should know what your brand stands for and what sets you apart from other brands. The better you know your brand, the better you can market it to those who want your product or service.

The brand that better knows itself and defines itself will always have the edge when it comes to messaging and marketing.

Here are some questions that will help you really define what sets you apart from other brands:

What are your core offerings?

What is the need or problem you are solving with your product or service?

What is your unique value proposition? The one thing that truly sets you apart from your competition.

And here are some questions that will help further define your brand:

What are your brand's core values? How do they influence your offerings, your customer service and how you present your brand?



If you visualized your brand as a person... can you describe that person?

If you were to describe your brand as a personality, how would you describe that personality?

If you were to describe the tone your brand conveys, how would you describe that tone? (tone in regards to how your brand sounds).

Do you have specific things you and your team say to customers or prospective customers a lot? Write these down and make sure they are consistent.

How would you rate your logo (terrible, could be better, good, great, perfect)?
Does it require any work? If so, when do you plan to have this work completed?
(it should be completed before working on brand assets)

What is your tagline?



What is/are your slogan(s)?

Do you have guidelines of the fonts and colors your brand should be using consistently? If not, when will you plan to have this defined?



Know Your Competition

A Lesson From Our Head Honcho

I was taught early on in my career the importance of knowing my competition and how my company stood apart and above them. I was in what I thought was the closing meeting of a very large account, sitting across from a very wise business owner who had seemed to take a liking to me. I was positive we had the deal... the biggest deal I had ever closed! Then he asked me a question... "so who is your competition... and why are you better?". I froze! I didn't know how to answer and I quickly named a few other companies in the area, but leaned on the cop-out answer of why we were better... Quality and Service of course! (WRONG ANSWER!). Everyone says their quality and service is better... and I knew it. I lost the sale and will forever remember what that gentleman told me on his way out. "You've got to know your competition, kid".



Ever since, I have made it my business to know who my key competitors are and what they sell as their key strengths. I know where they stand in the marketplace and I can make decisions to differentiate us from them.

Always, always know your competition... kid.

List your Top Competitors:

What do they offer?

What are their strengths?

What are their weaknesses?

What are they doing well (in both service and marketing)?

How can you position yourself ahead of them?

Once you've honestly answered these questions, you will have a clear idea of what you need to do to come ahead of your competition and it will help direct your marketing strategy.



Set Your Goals

“Goals allow you to control the direction of change in your favor.” - Brian Tracy

All of your planning will be in vain if you do not set a few realistic goals for the year. Think about your numbers for the past year or two and write down a few generic goals that you would like this marketing plan to accomplish. We will get more specific shortly.

Now it's time to think about how you will measure the success of your marketing this year. Will it be through Revenue? Sales? Leads generated?

Take some time out to write down and decide on some KPIs (Key Performance Indicators). A KPI is a measurable value that will help you keep in line with your goals. A few examples of good KPIs are:

- Number of customers retained
- Net Sales-in either dollar or percentage growth
- Average ticket/support resolution time
- Conversion rate for call-to-action content
- Dollar value for new contracts signed per period

Write in below the KPI's you've chosen and how much you'd like to see them grow in the first month, each quarter of the coming year and the entire year. Be realistic, but also ensure your goals stretch you and your team.



Know Thy Numbers

For some of you this is the fun part, but for most it can be pretty daunting. You will not be able to measure the success of your marketing plan without knowing your analytics and sales data.

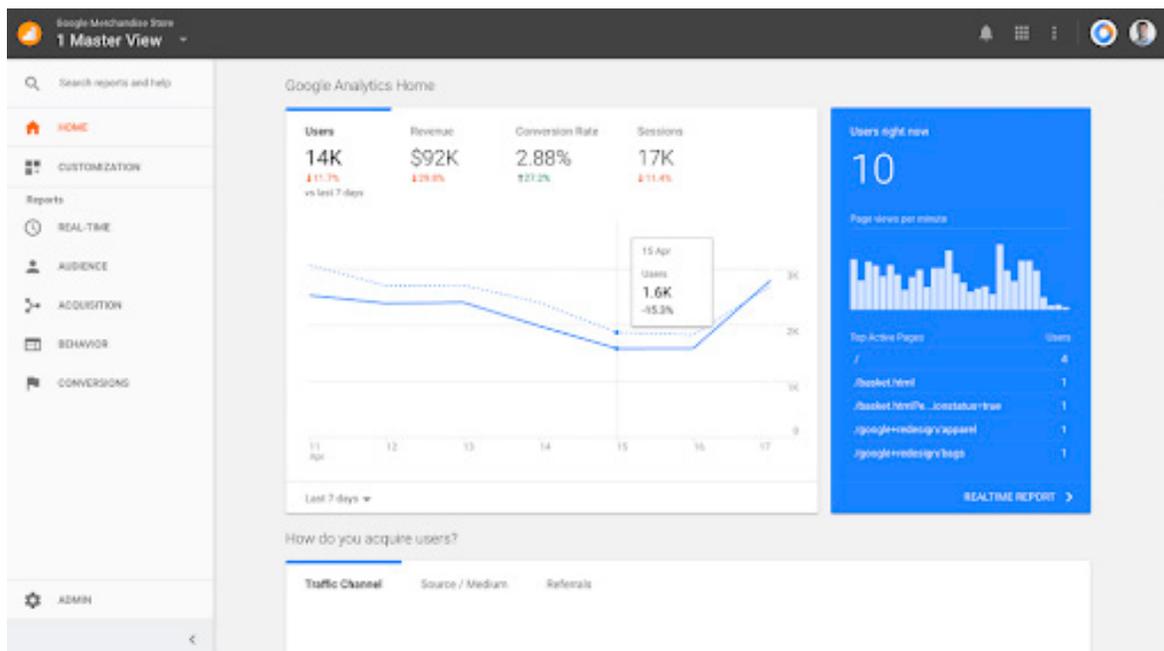
Gather data going back to the last 1-2 years and take note of the time of year when sales dropped or spiked and when your website had the most and the least traffic. Look at website traffic numbers to know which pages are most engaging to visitors and try to track what current marketing is working. You'll also want to look at your social media engagement numbers and how your sales numbers are split among specific offerings (which offerings generate the most profit?). This will help you to make that monthly marketing plan because you will see when and where you should invest more time and money.

Track Analytics

The more data you collect, the better informed you will be as you continue to make marketing decisions for your company. Make sure you measure everything this year! If you don't know if a marketing channel is working, you won't know if you should spend more or less on it next year.

You decided on Key Performance Indicators earlier, so make sure you have implemented ways to measure those KPI's. There are many ways to track this data, from Google Analytics to form submission tracking, call tracking, Customer Relationship Management (CRM) systems, and good old-fashioned asking, "where did you hear about us?". You want to know what's working and what's not so you can make wise decisions about where to allocate your marketing money.

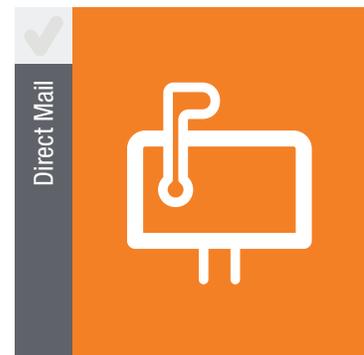
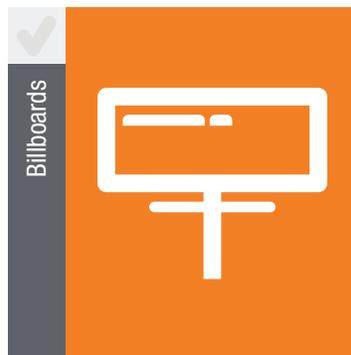
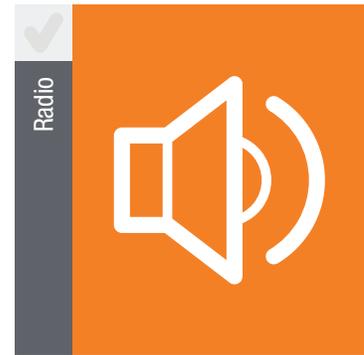
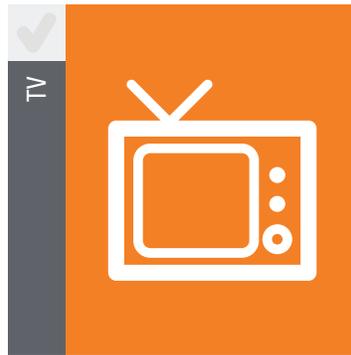
When you know the data, you can be more effective!



Channels

There are various marketing channels where you may or may not want to designate time and money. Decide which of these marketing channels would be the most effective in reaching your target audience.

Check off the channels that would best benefit your company. Some examples of the many marketing channels include:



Other Channels: _____



Social Media Channels

With social media channels, you have the option between paid and organic marketing. There are a plethora of social media channels you can use; these are our favorites:

With organic marketing, you are able to create and share content for free on your social channels. With paid marketing, you can set an ad spend and audience that you want your marketing to target.

Facebook

Paid Organic

Instagram

Paid Organic

YouTube

Paid Organic

LinkedIn

Paid Organic

Twitter

Paid Organic

Snapchat

Paid Organic

Pinterest

Paid Organic

Reddit

Paid Organic

Other Social Channels: _____



Set Your Budget

Setting a budget for your marketing is important because it helps you keep track of estimated costs and what your actual costs are at the end of the year. The budget always determines the marketing strategy because it will define what and how much you can do. It will also help you to decide if you can focus on items that require a spend budget or if you have to focus on more time-intensive methods.

Ideally, your budget will be planned for the year and broken into a monthly budget. You can adjust this budget based on the seasonality of your industry. For example, some tourism-based companies will do well to up their budget during spring break or peak travel seasons. According to the U.S. Small Business Administration and the Counselors to America's Small Business, most companies should allocate between 2%-10% of their sales to their marketing budget.

Once you've decided on what channels you want to use, you will need to decide on how much you want to spend per channel, annually, then monthly. You should include costs for any brand assets such as design, printing or other costs. Make sure to set realistic budgets per channel. Knowing what your goals are helps to establish a sensible budget. If you want to see larger growth, be sure to establish a larger marketing budget.

Marketing Budget Spreadsheet

Example Budget

| <i>Channels</i> | <i>January</i> | <i>February</i> | <i>March</i> |
|--------------------------------|----------------|-----------------|--------------|
| <i>Paid Search (adwords)</i> | \$1000 | \$2500 | \$2500 |
| <i>Facebook Ads</i> | \$1000 | \$1500 | \$1500 |
| <i>Sponsored Events</i> | \$2500 | \$0 | \$0 |
| <i>Printing Brochures</i> | \$0 | \$1800 | \$0 |
| <i>Printing Business Cards</i> | \$200 | \$0 | \$200 |
| <i>Direct Mail</i> | \$2000 | \$0 | \$2000 |
| <i>Misc Marketing</i> | \$1000 | \$1000 | \$1000 |
| <i>Total Budget</i> | \$7700 | \$6800 | \$7200 |

First Quarter Marketing Budget

| <i>Channels</i> | <i>January</i> | <i>February</i> | <i>March</i> |
|---------------------|----------------|-----------------|--------------|
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| <i>Total Budget</i> | \$ | \$ | \$ |



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