

LEARNING MADE EASY



6th Edition

Marketing

for
dummies[®]
A Wiley Brand



Use marketing strategies
to build brands and ROI

Master SEO, e-commerce, video,
digital, social and mobile channels

Apply psychology to win
loyalty and lifetime value

**Jeanette Maw
McMurtry, MBA**

Marketing and consumer behavior expert,
keynote presenter, and instructor



Marketing

6th Edition

by Jeanette Maw McMurtry, MBA

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Marketing For Dummies® 6th Edition

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Introduction

Marketing is part science, part art, and many parts technology, and is truly one of the most fulfilling roles you can play in business.

Science gives us data and analytics to understand and predict consumer behavior. Psychology sheds light on what really drives thoughts and choice. Art enables us to creatively engage and speak to consumers, and technology allows us to communicate personally and powerfully, and deliver on customers' expectations for products, marketing, and purchasing options. The key to successful marketing for any brand, business-to-business (B2B) or business-to-consumer (B2C), is to skillfully blend all of those tools and more.

Given how fragmented consumers' attention is from daily exposure to thousands of ads, all the social media channels on which we live, and the many shopping options consumers across industries now demand, it's increasingly important to craft a marketing plan designed to deliver strong returns on marketing investments as well as sustainable sales.

On top of all that, the fundamentals of human behavior remain unchanged, yet the rules of marketing continue to change. This book contains the insights, tips, and tactics you need to build successful and sustainable brands, marketing programs, and campaigns. Whether you are a small business owner or operator, or a marketing executive of a large enterprise, *Marketing For Dummies* enlightens you on what really drives consumers to purchases and loyalty, and how to build and execute messaging, pricing, experiences, direct and mass marketing campaigns, and selling strategies to achieve lifetime value.

Reading this book gives you an actionable understanding of tactics, technologies, and channels that can help you succeed in a consumer-driven world. When you finish this book, you'll know how to best get your products to market, engage consumers on profitable journeys, and compete in ever-changing markets and an increasingly consumer-driven world.

Marketing isn't for the fainthearted, but it is for those who love fun, creative, and exciting challenges. You are limited only by the limitations you put on yourself. Get set. Go. And have fun!

About This Book

The main rule of marketing today is that you can't blink. Few areas of business, if any, move as fast and change as often as marketing. This sixth edition of *Marketing For Dummies* serves as your guide for strategy and execution. It also helps you think about marketing at a higher level, and guides you in crafting successful marketing plans and campaigns that will help you build any brand and your own career in this exciting and ever-changing field.

Ultimately, *every* marketer, regardless of your business, size, or industry, can benefit from this book's insights on how to engage complex and demanding consumers, efficiently deploy the tools, channels, and technologies you have at your fingertips, and measure the impact of all you do, down to the individual customer level. These pages hold the key to executing successful customer journeys and experiences as well as direct mail, email, digital, and print campaigns that drive sales and profitability and, of course, tell you how to do all this while reducing costs and increasing efficiencies.

This book caters to everyone who wants to influence behavior and attitudes, whether you manage a business, political campaign, public service department, or nonprofit, or are an independent consultant. It helps you lay the foundation for growing any business by securing lifetime sales and loyalty.

Foolish Assumptions

Even though I admonish you to avoid assumptions about your customers and markets throughout this book, I have made some about you while writing this edition.

- » I assume you're entrepreneurial and have the responsibility and desire to market a brand or product successfully in your current business environment. But I don't assume that you have all the technical knowledge you need to execute successful campaigns today, so I explain each technique as clearly as possible. I also assume you're willing to try new ideas, technologies, and processes to improve sales and grow your organization.
- » Of course, I assume you're willing and able to switch from being imaginative and creative one moment to being analytical and strategic the next, because being successful at marketing requires both approaches. As you read this book, you sometimes find formulas that help you run the numbers and make projections for lifetime value, return on investment (ROI), and cost per

customer. Other times, you're guided to use your imagination and think of fun activities to help you communicate with emotional relevance and appeal. But most important, you're guided to think the way consumers think today and understand how to appeal to the psychology of choice.

- » I certainly do *not* assume you have an unlimited budget. This book provides recommendations for creating programs that you can execute on any budget.

Icons Used in This Book

Look for these symbols to help you find valuable info throughout the text:



REMEMBER

When I want to get you up to speed on essential or critical information you need to know to succeed, I mark it with this icon.



TIP

This icon flags specific advice you can try out in your marketing program right away. And because you sometimes need the right perspective on a problem to reach success, this icon also highlights suggestions for how to handle the task at hand in an easy manner.



TECHNICAL
STUFF

The Technical Stuff icon marks information of a highly technical nature that you can normally skip over.



WARNING

You can easily run into trouble in marketing because so many hidden mines are just waiting for you to step on them. I've marked them all with this symbol.

Beyond the Book

In addition to the great content in the book or e-book you're reading right now, you can find more marketing tips and suggestions at www.dummies.com by using the search box to look for the "Marketing For Dummies Cheat Sheet." These, plus the numerous narrow-topic books on marketing in the *For Dummies* line, give you lots of additional options for researching your marketing program.

Where to Go from Here

If you read only one chapter in one business book this year, make it Chapter 2 of this book, which explains the psychology of choice and how to trigger consumers' unconscious minds for unthinkable ROI. Unless you know what really drives people's emotions, joys, fears, expectations, aspirations, and other triggers of behavior, you can't be effective in building a sustainable business founded on lifelong relationships with valuable customers.

Perhaps you have a pressing need in one of the many specific areas covered in this book. If elevating your SEO keeps you up at night, start with Chapter 13. If fixing your website is the top item on your to-do list, go to Chapter 12 first. If you need to increase the effectiveness of your sales strategies and approaches, try Chapter 16. Working on getting better open rates and conversions from email and direct mail? Chapter 11 outlines the elements of impactful campaigns and how to execute them successfully. Chapter 6 helps you build a workable and measurable marketing plan, and Chapter 9 guides you on using and managing many of the current digital tools and tactics proven to build sales and profitability.

Whatever your business and whatever your role, this book provides you with new ways of thinking and doing, all of which are proven to work for businesses both big and small, in the B2B and B2C sectors, and throughout all industries. So start reading, fire up your imagination, and let your marketing light shine.

1 Marketing in a Thriving Consumer Culture

IN THIS PART . . .

Learn the nuances of a complex consumer culture and how to engage consumers with diverse attitudes, mind-sets, and values.

Appeal to the psychology of choice, which drives most of our thoughts, attitudes, and behavior.

Create customer experiences that build brand enthusiasm and loyalty.

IN THIS CHAPTER

- » Understanding (and embracing) a new culture of consumerism
- » Reaching across and connecting generations
- » Creating trust equity in a low-trust society
- » Building relationships around a common purpose
- » Changing customer behavior with fun experiences

Chapter **1**

Understanding Consumer Values and Mind-sets

Consumer behavior, attitudes and loyalty constantly change, and more rapidly so in a dynamic market and society. Business owners, managers, and marketing professionals all must pay close attention to these changes and learn to adapt to meet new needs and demands.

The 2020s started out with more change than most of us could ever imagine. The way we shop was not excluded. Loyalty to brands shifted and so did the tendency to buy just for the sake of buying. Consumers starting rethinking what they value most in life and how they purchase. Research firms like Deloitte, EY, McKinsey, and Nielsen have dug deep into how consumers have evolved in recent years and what to expect in the future.

This chapter presents some of those firms' key insights as well as tips for applying them to your marketing programs. I let you in on what you need to know to keep up in all industries and with businesses of all sizes. In this chapter, you get started on a successful marketing journey.

Assessing the New Consumer Culture

A study by NielsenIQ showed the COVID-19 pandemic and its economic repercussions changed how 67 percent of consumers shop. Most said their purchases became centered around necessity more than frivolous wants, and they don't really see that changing anytime soon.

EY's report *US Future Consumer Index 8: Do consumers drive the market or does the market drive consumers?* (covering May 2021–October 2021) showed substantial bumps in the importance of service, quality, price, and, not coincidentally, product availability. These priorities are also not expected to change soon. Add these to the expectations consumers have that brands operate with high environmental, social, and governance (ESG) standards, and it's a whole new world of consumerism for brands across all business sectors.

Kathy Gramling, EY Americas' consumer industry markets leader, summed up the firm's research with the statement that perhaps we are in an environment where the consumer doesn't always decide what matters most, but rather the market forces consumers to make new choices about what's important.

As we explore how markets and consumers have changed, businesses small and large must find ways to adapt.

Following are examples of change in purchasing behavior sparked by the onset of the COVID-19 pandemic:

- » 50 percent say their values and the way they look at life have changed.
- » 45 percent don't want to go back to living exactly like before the pandemic.
- » 57 percent say they try to save more money than in the past.
- » 60 percent expect to save more in the long term and to be more aware/cautious about spending.
- » 48 percent buy less to save money.
- » 58 percent will continue to focus more on value for money spent in the future.

The dichotomy of the growing emphasis on spending less is that consumers have been conditioned to expect greater levels of convenience, including both online and in-store shopping options, home delivery, and curbside pickup, without paying for these extras.

Another very telling trend that no business can ignore is the sharp rise in e-commerce since 2020. According to the United Nations Conference on Trade and Development, the e-commerce sector of the global economy grew from 16-19 percent in 2020, which was considered a dramatic rise. Online business-to-consumer (B2C) sales for the world's top 13 companies generated \$2.9 trillion in 2020, according to the United Nations report. Global brands you'll recognize from the top 13 that grew substantially while small businesses struggled during the pandemic include Walmart at #1 followed by Amazon, Schwarz Group, Aldi, and Alibaba, rounding out the top 5.

In the U.S. alone, from 2018 to 2020, online retail sales rose from \$519 billion to more than \$791 billion. The online share of total retail sales grew from 10-14 percent in just those two years. Walmart's sales were up 72.4 percent during this period.

For businesses of any size, the new consumer culture and economic reality can be daunting and invigorating at the same time, especially when you consider that market conditions and consumer priorities have changed, but human nature has not. We are still governed by emotions and attitudes that influence how we think, what we buy, and how we assign loyalty. The availability of affordable technology for crafting and sending messaging personalized to the emotions that trigger behavior among various consumer segments continues to level the playing field.

No matter the nature or size of your business, opportunities are abundant to learn more about your customers and what matters most to them. Staying on top of consumers' preferences and trends is key to success. The more knowledge you have, the faster you'll reach your destination.

Understanding the current marketing environment

With all the channels of communication and technology available today, you can discover just about anything you need to know about your customers' wants, needs, expectations, and much more.

You can also monitor consumers' attitudes, political preferences, and lifestyles on social media and insert your messages into their personal pages and sites they browse. And you have the ability to analyze their past behavior and scientifically

predict their future behavior using real-time data and artificial intelligence that knows few bounds. As a result, consumers expect you to know their specific needs, and engage with them accordingly, if you want their business.

Beyond understanding and communicating with them on an individual level, today's consumers expect you to align with their social, environmental, and even political values. If you don't, many will find a brand that does, no matter how much you've done for them. With all the options available across all business categories, loyalty is becoming harder to secure.

As a marketer today, you don't just have to up your game; you have to play a whole new one if you want to attract and keep customers for the long term, the only way to succeed in a market where barriers to entry are low in many business categories and competitive pressures increase almost daily. You have to change the way you distribute your products and services, how you reach and communicate with your customers and prospects, and how you engage them emotionally, and how to enable them to interact with you. Additionally, you have to offer much more than a great product and value point; you have to offer consumers a fulfilling experience that adds value, happiness, or excitement to their lives.

This book is about doing all the above and more, effectively and affordably, in an up or down economy, for any business in either the B2C or the business-to-business space. It's also for entrepreneurs starting a new business and marketing managers at regional or national businesses wanting to have a big impact on their brand's revenue and competitiveness, and their own careers.

Beyond going through the essentials of building marketing and sales plans, digital engagement, e-commerce programs, promotions, distribution channels, pricing, and many more strategies, this book provides guidance on how to develop emotionally relevant, creative experiences, online and off-line. You discover the power of emotional selling propositions for capturing trial and lifetime value in an increasingly complex consumer culture. I tell you how to analyze marketing campaign data beyond open and click-through rates, measure results, and identify the best ways to spend valuable resources.

Before we get into the how-tos and guidelines for doing these things, you need to focus on the mind-sets and behaviors inherent in a new era of consumerism largely influenced by recent world events, societies divided by misinformation and political agendas, and a volatile economy. No easy task.

Addressing a complex consumer mind-set

Today's consumer mind-set can be summed up in just two words: *distracted* and *demanding*.

Distracted: Levels of distraction from being “present” at any given moment, place, or time just keep growing. A few years ago, adults in the U.S. spent around 11 hours a day looking at a screen. That number is now more than 17 hours a day, according to a study by Vision Direct that projects the average U.S. adult will spend around 44 years of their life staring at a screen. While many of us use screens in our daily work routine, we are relying on screens more and more for our recreational needs, which have gone up substantially since 2020, according to a report by the National Institutes of Health. Other reports show that we can’t be without our phone at our side for more than 2 hours a day. We use our phones to play games, check emails, look for validation on social media, text with friends and even strangers, shop, browse customer reviews, check out locations, and so much more.

Demanding: Consumers are demanding more and more that brands cater to their individual needs and offer multiple options for doing business with them, reward them for their business, and provide experiences worth going back for. Choices are increasingly being made based on a brand’s social values, corporate social responsibility, political positions, and ESG actions. Add to all that consumers’ high expectations for convenience, fair and affordable pricing, service, quality, shopping options, and the overall experience they get from your brand.

Yep. It’s not easy to be in business today, but armed with the right knowledge and tactics, business owners and marketing executives can not only thrive but rise above.

Bridging Generational Gaps

Adding to the complexity of how consumers think is the fact that every generation you target has different expectations and preferences for engaging with brands. Some considerations follow.

Baby boomers, the generation born between 1946 and 1964 represent a strong purchasing power. In 2019 in the U.S., they accounted for \$548 billion in spending. While many of them use digital resources like texting, email, social pages and more for their everyday information and communication needs, they grew up with radio, TV, and newspapers. Many still use traditional media for their news and shopping information.

Generation X, which represents people born between 1965 and 1980, is active on social media channels like Facebook and LinkedIn, and often turns to their social media network for purchasing advice. Their trust in business and brands has waffled for many reasons over the years because they hit their stride as consumers

during an era of social injustice, corporate greed, and much inauthenticity about products, brand values, and more. They tend to align with brands that are transparent and make an effort to understand them and cater to their needs.

Generation Y, also known as millennials, born between 1981 and 1996, had a collective spending power of around \$1.4 trillion as of 2020 and tends to put their money toward brands with strong ESG ratings and practices. They are very adept at using digital channels to research brands before they do business with them. More than 80 percent of millennials seek to purchase from brands with values similar to theirs, and nearly 80 percent want companies to speak out about their positions on current issues. Transparency, authenticity, and reciprocity are key to this generation. Because they grew up largely in a digital-driven world, they use many digital channels, across multiple devices, and are relatively easy to reach. However, millennials do not respond as easily as other generations to targeted marketing campaigns and prefer meaningful, actionable content that aligns with their values and lifestyle, and enables them to make wise decisions.

Generation Z, born between 1997 and 2012, the youngest generation of consumers, has the same drive as the preceding generation to align with brands with values similar to their own. They tend to gravitate toward cause-related marketing as well. This generation is tough to reach through traditional marketing channels because they use ad blockers and apps like DuckDuckGo to prevent brands from tracking their purchasing and social media behavior. The platforms they use most include YouTube, Instagram, Twitter, and other short-form apps such as Snapchat and TikTok. They tend to be persuaded by “influencers,” which has given rise to a whole new marketing genre — *influencer marketing* — and they use social media to validate their own lives.



REMEMBER

The best tool you have when fighting the battle for consumers’ attention is a good marketing plan that directs your messaging, actions, resources, and customer experiences across the channels your targeted customers use most while going about their daily lives and making decisions for the short and long term.

Creating Trust Equity in a Low-Trust Society

Every year, Edelman conducts a trust survey to assess the pulse of trust among consumers for business, government, and media. In 2017, the report was summed up as “Trust in Crisis.” In 2022, the theme of the survey is “The Cycle of Distrust.” Not the direction we want our world to be going.

Looking at the positive side, of all the institutions covered in the Edelman report — business, NGOs, government, and media — business is the most trusted. Edelman’s report shows 61 percent of consumers trust business, and only 52 percent and 50 percent trust government and media, respectively. “Fake news” concerns contribute to the lack of trust among consumers. The cycle of distrust for government and media based on disinformation about social and political issues threatens social stability more than ever because many consumers expect business to solve what government cannot or will not. Large percentages of consumers expect company CEOs to inform and shape conversations around the economy, technology, wage inequality, climate change, prejudice and discrimination, immigration, and education, likely changing the role of business forever.

According to Edelman’s 2022 Trust Barometer, 63 percent of consumers worry that business leaders purposely mislead society with false statements, while 66 percent and 67 percent believe the same about government and media, respectively. That isn’t a great benchmark. And to add more complexity to marketers’ task of building trust, the lower the consumer’s income, the lower their trust, throughout the U.S. and globally. Most troubling in this report is the statement that distrust is the default, or so say 59 percent of respondents representing 24 countries.



TECHNICAL
STUFF

The least trusted sectors are social media first, followed by financial services, fashion, consumer packaged goods, and industry.

Building trust in a less-trusting world

Marketers can restore trust and build sustainable customer relationships. Following are some examples of how:

- » **Stake out your position.** Create and distribute clear, factual information about your brand, your products/services, and the values you support.
- » **Be transparent.** Your product ingredients, materials, sourcing, manufacturing processes, and charitable donations are just a few issues that matter to consumers. Greenwashing, or presenting misleading information about how environmentally sound a product is, does irreparable damage to customer relationships — and ultimately to sales.
- » **Own your mistakes.** You don’t have to adhere to the “customer is always right” mantra at a time when customers cannot always be trusted to be fair to brands. But you do need to admit fault when it’s due and make things right. Domino’s is a great example of this concept. At one point, the brand admitted to producing a low-quality product. They communicated their actions and

commitment to do better. It paid off. Revenue went up nearly 14 percent from 2010 to 2020.

- » **Stand for something bigger than your bottom line.** Communicate your social positions and your charitable contributions, and involve customers in your cause. We tend to trust “those just like us,” and creating bonds around issues that matter to consumers is a great way to build common ground.
- » **Communicate your impact.** Porter Novelli’s Purpose Premium Index for 2021 shows 73 percent of U.S. consumers choose to support companies that explain how they are making positive change in communities and the environment.



REMEMBER

The best competitive advantage is your ability to get consumers to trust you. This is far more important than price, even in a challenging economy. Trust goes beyond honesty and integrity. It encompasses your ESG values and your corresponding actions.

It’s critical to know what customers think of your brand and the level of trust they have in you. Deloitte and Twilio did a joint study in 2021 that found significant discrepancies between the level of trust consumers have for brands and the perceived level of consumer trust those brands’ executives believe they have.

Consider this:

- » 79 percent of B2C leaders believe consumers have a high level of trust in their brands.
- » 52 percent of consumers agree.

Important to note is that 68 percent of respondents to this study said they will spend around 25 percent more on products or services from a brand they trust, and they will give that brand permission to collect personal data for future marketing.

As you read this book and develop your own strategies, messaging, marketing, and engagement programs, keep in mind the power of maintaining transparency, ensuring integrity in your deeds and alliances, and living your values.

A marketing plan isn’t just a road map for how you’ll develop products, build distribution channels, and earn profits; your marketing plan must also define the following:

- » What you stand for
- » Your ESG actions

- » The causes you support and how you'll contribute to their success
- » How you'll build relationships with customers based on common values and causes
- » How you'll transparently communicate good and bad news to all your constituents

Building relationships around a common purpose

Your biggest competitive advantage isn't dependent on how clever your marketing and social campaigns are but rather on your ability to build meaningful and sustainable relationships with customers. The most powerful and lasting relationships are those built on trust, shared value, personal relevance, and a common purpose.

When identifying your brand purpose, choose a cause that's related to your business category. You will be more credible and successful if you bring core competencies to organizations involved in your cause.

Examples of brands and the powerful purposes they support with actions and funds include:

- » Dove, which launched the #SpeakBeautiful campaign to help improve self-esteem among women
- » Starbucks, which started the Ethos Water Fund to supply clean water to people worldwide
- » Savers, a thrift store chain that donates proceeds to programs that help create jobs for people in need, aid at-risk children, and assist people with disabilities
- » Marc Jacobs, a fashion brand that helps rescue and rehome abandoned dogs in Puerto Rico

Beyond just communicating the causes to which your brand donates funds or goods, involve your customers in your charitable activities. Organize community volunteer days that bring your employees and customers together. Bonds created while cleaning up a highway or serving meals at a food pantry are much stronger than those made through sales transactions.

Strong relationships are also centered around sharing information to guide others on their journeys. Brands that provide information that helps consumers make wise decisions beyond product choices tend to get respect, trust, and ultimately sales.

Ask yourself the following questions to help you develop a purpose that brings you together with your customers and other like-minded people:

- » What are some real societal needs we can address that our business model can support?
- » What are the common goals and ideals that we share with our core customer groups?
- » How can we align marketing, community relations programs, and brand values with those common goals?
- » What programs can we execute that bring us together, online and off-line, with our customers to further our common goals and share our enthusiasm for a mutually supported cause?
- » Which needs related to our business category can we fill in our communities?
- » What is the reputation of the retailers that distribute or sell our products, and how can their reputation, positive or negative, potentially impact our reputation with customers and communities?

Improving Customer Journeys for Sustainability

Customer experience is the entirety of interactions between a brand and a customer, beginning with the first purchase and concluding with the end of the purchasing life cycle. Interactions take place during each step of the decision process associated with a given product category. Successful brands map out the journey for taking a prospect from an introduction to their products/services to a lifetime of loyalty.

These journeys start with the steps associated with the decision process (laid out in the nearby bullet list). The success of a brand journey which leads prospects to becoming brand evangelists depends on building the decision process around values like trust, purpose, and meaningful relationships. Communicating to customers with emotional relevance during every phase of a decision or brand

journey is also key. This book helps you set up and execute effective journeys and customer experiences.

The customer journey, which is discussed in detail in Chapter 3, can include the following steps of the decision process research has shown to be associated with purchasing across categories. Note that all consumers do not complete all the steps. As a marketer, your goal should be to assist consumers with their decisions in order to get to the final step listed here, the assignment of loyalty. This process most reflects those associated with complex purchases such as automobiles, expensive household items, and business technology or software. For a simple retail or food purchase, the purchase decision may be limited to simply location, price, or reputation.

- » **Identification of problem or need:** Consumers realize they need to purchase a product to solve a problem or fill a need. For example, they need a good home computer.
- » **Discovery:** Consumers conduct research and explore options for products that fit their need and decide on the functions and features that matter most. For example, should they buy a laptop, notebook, desktop, or tablet?
- » **Evaluation:** After they've found options or product categories they want to purchase, consumers start to evaluate brands.
- » **Trial or purchase:** After researching and engaging with various brand representatives online or in stores, consumers make a purchase.
- » **Confirmation and reassurance:** Consumers gather information after the decision or purchase to reaffirm that their choice was the right one. They read expert and customer reviews, talk to others who chose the same product or brand they did, post their decision on social media to get more validation, and so on.
- » **Assignment of loyalty:** A brand experience doesn't stop after the purchase. It continues as consumers use the product and access the resources available, such as customer service and technical support.

Marketers need to define a customer journey specific to each of their customer segments that encompasses the decision steps as well as additional steps to secure repeat business, referrals, and lifetime value from each customer.

Chapter 3 discusses customer experience strategy and shares insights about touchpoints that keep customers engaged and moving down a path to the behavior you seek to achieve.



REMEMBER

A customer's journey encompasses the steps you must take and deliver upon at every touchpoint.

Examples of actions needed for customers making recent purchases include:

- » How do you thank or recognize customers for their purchases?
- » How do you resolve conflict when you're right or wrong?
- » How do you validate customers' decisions to continue purchasing from you?
- » How do you reward them for loyalty and referrals?
- » How do you engage them in meaningful activities, causes, and so on?

The purpose of a customer journey is to build and maintain emotional bonds with your brand and get customers to refer others. To do this most effectively for your brand, it helps to look at the most powerful affiliations people have in their lives that aren't associated with the purchase of products or services. People hold powerful beliefs that guide them, and they make life-lasting choices and decisions based on these values and beliefs. A person's commitment to their value structures can be so strong that they pledge their time and even money to related organizations that don't give anything in return but intangibles, such as hope, faith, and anticipation of rewards if they stay the course and further the cause. Experiences that are memorable and become part of a routine often include symbolism, sensory appeal, promises, community, and ritual, just like the experiences we have with our religious and political organizations.

Successful brands integrate these same tenets. Think of your favorite brands. Note how they embrace these tenets. Apple is a great example of a brand using the cornerstones of religion to create a faithful following. Here's how:

- » **Symbolism:** The simple Apple icon recognizable by most consumers worldwide represents creativity, innovation, and personal power to communicate, self-express, create, and enjoy music and other forms of entertainment.
- » **Sensory appeal:** Apple's products appeal to people's senses by delivering music and videos with ease and giving them the chance to produce their own creative and media events, which appeal to even more senses.
- » **Promises:** People believe and experience the promise of quality, innovation, and novelty as Apple releases new applications and capabilities.
- » **Community:** Apple has many communities you can join online, including Apple TV, and has become a community itself through market penetration. Many people you know own Apple devices, and you can easily exchange ideas, tips, and enthusiasm.

» **Ritual:** Shopping at an Apple Store is a fun ritual. You have a cool setting to explore products; you're assigned your own personal assistant when you walk in the door; your transactions are done casually via a hand scanner, not at a sterile, divisive counter, so you feel more engaged with your assistant; and you can sign up for the Genius Bar and get one-to-one attention.

This book is full of ideas for building emotional connections around shared values, experiences that bond consumers to brands, and customer journeys that take a lead from introduction to lifetime value. Check out Chapter 9 for digital tools and tactics, Chapter 16 for emotional selling, and Chapter 2 on how to trigger the unconscious mind for unthinkable return on investment.

Making It Real and Keeping It Fun

Customer experiences that are memorable and worth coming back for are those that trigger feelings of satisfaction, self-worth, self-actualization, and plain old fun. When we create experiences that fulfill these needs, we change consumer behavior and, most important, purchasing loyalty. (For more ideas on creating memorable experiences, see Chapter 3.)

One of the best examples of changing behavior by changing up routines comes from Volkswagen, which created The Fun Theory. This program was built around the notion that fun can change behavior for the better, kind of like the discussion in Chapter 8 about the power of using games to build customer engagement.

For The Fun Theory initiative, Volkswagen asked people to create ideas for changing routine behavior for the better. It then tested and executed winning ideas to see whether they would indeed work.

Here are a few attention-grabbing ideas that successfully changed routine behavior by doing something new and fun. As you review these ideas, ponder how you can build on them to create “fun” customer experiences through every touchpoint of your customer journey — from need identification to purchase confirmation.

» **Will fun reduce the amount of speeding in a city?** This project involved setting up signs throughout Stockholm that showed people just how fast they were going. It was really nothing new because speed meters are located in many places these days; however, this program made it more fun to stay at or below the limit. The speed camera would track your speed and light up according to whether you were under or over the speed limit. If you were over, you were sent a ticket. If you were at or under the speed limit, you were

entered into a lottery in which you could win a cash reward funded by the money collected from the speeders. It worked beautifully. In three days, the cameras tracked the speed of nearly 25,000 cars and found that the average speed of traffic went down from 32 kilometers per hour to 25 kph, which is a 22 percent reduction in speed.

- » **Will fun get people to use stairs over escalators?** Another “fun” experiment designed to get people to make healthier choices was to turn a staircase that sits adjacent to an escalator into a keyboard. If people could play music with their feet as they moved up or down the stairs, would they choose the stairs, the healthier option? The answer was yes, as 66 percent more people than normal chose to take the stairs.
- » **Will fun get people to increase their use of recycling centers over trash cans?** The Fun Theory’s bottle bank arcade experiment turned a bottle recycling depository into an arcade. Every time a bottle was placed inside, the depository would light up and make noises like a game at an arcade. It would even add up points for each bottle someone deposited. People flocked to see how many points they could rack up with bottle deposits, even though there was no way to cash in their points for a tangible reward. In just one night, nearly 100 people used the arcade depository compared to 2 people who used the conventional depository, which was routine and void of fun.



REMEMBER

Your marketing plan isn’t just a guidebook for getting your product out to the world and making money; it’s about creating an experience, event, or outcome that makes people’s lives better or more enjoyable and brings people together for the better. When you deliver emotional fulfillment and build a community around the value you deliver, it’s difficult to fail.

IN THIS CHAPTER

- » Marketing in a climate of fear and anxiety
- » Addressing the unconscious mind
- » Understanding psychological triggers that drive sales
- » Making use of social influencers
- » Acknowledging people's need for happiness and purpose
- » Creating ESP profiles

Chapter 2

Triggering the Psychology of Choice for Lifetime Value

Research shows that most behavior is governed by our unconscious minds, which suggests that consumers don't really know why we do what we do or choose what we choose. Understanding some of the basic tenets of human behavior is essential to building product packaging, promotions, and experiences that engage consumers beyond the conscious appeals of price, quality, convenience, and so on.

When studying the conscious and unconscious influencers of choice, we can't ignore the influence of fear and its potentially long hold on the consumer mindset. Marketers need to understand the many elements contributing to fear, or *fear shopping behaviors*, among consumers in both B2B (business-to-business) and B2C (business-to-consumer) categories. Fear shopping was not only a reaction to the supply chain issues associated with survival goods during the COVID-19

pandemic — hand sanitizer, face masks, and even toilet paper — it's also driven by many other factors beyond a given event like a pandemic. Fear shopping is associated with our survival DNA which causes us to do things to preserve our current status, position, resources, and so on. Survival applies to our social and emotional wellbeing as well as physical.

This chapter discusses many of the psychological elements that influence our thoughts, attitudes, and behavior. You might find it surprising that we are more motivated by our desire to avoid loss and minimize our fears than we are by our desire to gain rewards.

Connecting with Customers in Times of Fear and Uncertainty

As expected, major market or world disruption such as a pandemic, war, inflations and so on can change shopping behavior and loyalty. For one, the COVID-19 pandemic led people to shop less for non-necessities and more for necessities. People are now more willing to switch from a preferred brand if product availability and price are better elsewhere, making the loyalty quagmire even more tenuous. Having survived the vast waves of uncertainty in 2020, consumers seem to have an eye toward saving more money just in case it all happens again.

A report by Alter Agents summarized in a July 2020 *Forbes.com* article showed that

- » Consumers operating from a high level of fear were twice as likely to reduce purchases.
- » More than 50 percent of consumers with high fear intended to cut down on shopping frequency, as compared to just 20 percent of consumers identifying with low financial fear.
- » The level of shopping fear was driven more by feelings of stability than by income levels.

Another study, reported in the journal *PLOS ONE* in August 2021, focusing on psychological factors and consumer behavior during the COVID-19 pandemic, showed a 90 percent increase in necessities spending and only a 36 percent increase in non-necessities spending during the pandemic. It also showed consumers have a strong tendency toward self-justification purchases during times of fear, something marketers cannot ignore when creating messaging strategies to appeal to the conscious and unconscious *triggers of choice* (which include hormonal reactions to situations, that is, the real and imagined factors that lead to decisions, such as

price or peace of mind, and emotional responses), which are discussed in detail in this chapter.



TIP

If your product is a non-necessity, how can you help consumers justify purchasing from you if they're in a state of anxiety over uncertainty in the markets or the world in general? One idea is to make purchases feel less risky by lowering prices or offering 2-for-1 incentives. Rewarding shoppers with discounts toward future purchases can also help customers justify those future purchases, because rewards help them save money, which makes it more justifiable to spend money on items they can put off until more certain times.

Studies show humans engage in behaviors to maintain control and certainty. For consumers, this often means saving more, spending less, and cutting back on discretionary spending when times are uncertain. Knowing how to address fear and anxiety associated with purchases in your category is key to succeeding in any market atmosphere.

The following sections explain how you can reach your customers in an anxious market atmosphere.

Address feelings — don't avoid them

Few things are more frustrating than having your feelings dismissed by others, including friends, family, or people trying to sell you something. Yet brands tend to do this all the time with messaging that addresses only what they offer and ignores concerns or fears associated with their category. For example, if a consumer is fearful of investing in cryptocurrency, they aren't likely to invest simply because someone tells them it's the future of all economies and a sure path to wealth.

As a marketer, you need to understand and validate consumers' fears about your product if you want them to listen and engage with you. Going back to the cryptocurrency example, digital money not backed by a gold standard, bank, or central authority can feel scary to consumers who grew up in the nondigital age. If you're trying to sell cryptocurrency, first address the reasons consumers might not want to purchase it. Then explain the upside, use real data to show gains and opportunities, and slowly move your conversations from Why Not to Why. By engaging consumers with the Why Not aspect of a business category or product purchase, you'll gain their attention and trust, which leads to gaining their interest and eventually a sale.

Show consumers how you'll protect them

With purchasing anxiety high in times of uncertainty, brands must take fear out of the decision process by protecting consumers against greater losses. You can do this by

- » **Eliminating long, binding contracts** that don't allow customers to discontinue business with you if their financial situation changes, your products don't meet their expectations, or they aren't happy with your service, and so on. For example, software companies and others that lock customers into contracts lasting several years will likely have a harder time closing new sales than those that don't, because you don't really know what you're getting with software until long after implementation, which typically takes months.
- » **Offering free trials**, especially for subscription-based services. Allowing potential customers to try products and services such as software, food delivery apps, or business data and customer relationship management (CRM) tools relieves choice anxiety and lets customers see what really works for them and what doesn't before they begin making that annual subscription payment.
- » **Offering a generous return policy.** Letting customers try your products with no risk of loss if they aren't happy takes the fear out of many purchases. In retail, one-year return policies are becoming standard and in many cases are the deciding factor for consumers choosing between suppliers. Nordstroms built a legacy reputation by offering high quality goods with a high level of purchasing confidence due to its *no questions asked* return policy.

Reward your customers

We all like rewards, and we tend to respond quickly to offers when we believe we have a strong chance of being rewarded. Look for ways to reward customers for engaging and trying your product over others. Rewards can be added-value benefits, monetary discounts, extended contract terms, and so on.

If you offer a free trial, reward those customers with a discount during their first year for giving you a chance to fill their needs and earn their trust over others in your space.

Be transparent and truthful to a fault

Communicating about your products with customers is a given, but *how* you communicate isn't always as clear. Transparency about the mistakes you make, the flaws in your products you're working to improve, or the issues you haven't yet

addressed is critical. And so is truth about your products, materials sourcing, and environmental and social stances. If you are misleading about your environmental, social, and governance practices, you'll be rebuilding your customer base because of attrition while your honest competitors outpace you for growth.

There's no forgiveness for misleading product claims. If you say your product is toxin-free, make sure it is. At one point, a multilevel marketing home and personal care products company promoted its natural ingredients to the level that customers believed they were ordering totally natural products without the toxins and dangerous substances found in cheaper products. Yet, if savvy customers noticed multiple labels on product packages for its so-called *natural* cleaners, and peeled off the first label, they likely saw the poison warning and fine print, which revealed that only a very small percentage of the ingredients were natural. This kind of deception can cost you customers.

The Universal Influencers of Human Behavior

Traditional thinking has it that consumer choice is based upon price, quality, reputation, brand awareness, convenience, and the like. Although these things are influencers at some level in most decision processes, the most powerful influencer is the unconscious mind. This is because our unconscious drives 90 percent of our thoughts and behavior, according to Gerald Zaltman, a former Harvard Business School professor, widely known as the pioneer of neuromarketing.

Think about that for a minute: If 90 percent of all thoughts are unconscious, why do we market to the other 10 percent? If you're marketing to the conscious mind with messages like "limited time offer," "best customer service," and "our quality is better than their quality," you're targeting only 10 percent of the decision process. That's a lot of waste!

Triggers of the unconscious mind: The real driver of choice

Traditionally, advertising has been all about promoting price, convenience, brand reputation, competitive advantage, and other appeals that the conscious mind processes. Yet people don't always get far enough into advertisements to process the value of a given offer if the ad, content, post, experience — whatever the medium is — doesn't first appeal to their unconscious mind. If the research is true, you're wasting 90 percent of your budget by appealing just to the 10 percent

of the brain that drives people's decisions. That doesn't make for good marketing returns.

The unconscious mind makes rapid judgments about marketing materials and messages and dictates immediately how we should behave. These thoughts and actions are guided by our *schema*, or set of preconceived thoughts and beliefs, that drive what we consider to be true, real, and valuable.

The influence of schemas and the unconscious mind

We all have schemas associated with our political, religious, social, and brand beliefs and choices, and we typically pass off any outliers that don't fit our notions as anomalies, even when evidence proves our schemas wrong, or at least makes us question what we believe.

Pew Research reports that scientists and the public are far apart when it comes to believing evidence or expert opinions about key social issues, such as vaccines, GMOs, and climate change. And no matter what people hear about their favored politicians, religion, and other sources of ideology, they tend to believe what they've chosen to believe and ignore contradictory facts despite the presence of verifiable data. For example, at one time 88 percent of scientists said research showed GMOs to be safe. Only 37 percent of the public believed them.

Think about the things you've believed most of your life. How much would it take for you to change your attitudes and beliefs? Convincing customers to change brands, acknowledge your brand's distinctions and value, and try your product over another isn't that much different. You need to build a powerful case to get consideration and trial. You're best able to do this by applying psychological principles related to choice rather than just marketing messages and personalized promotions triggered by automated CRM systems, data management platforms, and the like which we discuss later in Chapter 11.

Schemas don't just reflect attitudes and perceptions people have developed from their culture, community, and environment; they also reflect how the brain works in general. For example, schemas are unconscious expectations of patterns, rhythms, and such. When you listen to music, your brain has a set perception for how the melody will harmonize, the notes will scale, and the rhythm will flow. We prefer music that fits our schema.

Similarly, we tend to have *brand schemas*, or preset expectations for experiences with brands we trust. Think about how you feel when you go to your favorite store or restaurant. Every time you go back, you have a preset expectation for the product quality and/or how the visit will unfold.

The conscious and unconscious minds often disagree

Young & Rubicam (now VMLY&R) did a study in 2013 involving adults throughout the U.S., South America, and Asia to see how closely people’s conscious values line up with their unconscious ones. What they found, and later published in a report titled *Secrets and Lies*, shows just how far apart the conscious and unconscious thought processes are. Take a look at Table 2-1. Just like psychologists have said for years, people are driven unconsciously to prioritize survival, connect with others in meaningful relationships, and live by the traditions in which they were raised.

TABLE 2-1

Conscious Versus Unconscious Values

Top Conscious Values	Top Unconscious Values
Helpfulness	Maintaining security
Choosing own path	Sexual fulfillment
Meaning in life	Honoring tradition

Now for the secrets:

- » Most interesting is that the unconscious mind results ranked “helpfulness” 16th of the 16 variables tested, while the conscious mind put it as the #1 value.
- » The conscious mind listed “sexual fulfillment” as #14 of the 16 variables, even though it shows up in the #2 spot for the unconscious mind. Perhaps people don’t like to admit consciously that they need others in their lives to be happy? Most people probably like to think they’re independent and fine on their own, but years of psychology studies show that people are generally happier, more fulfilled, and reach their greater potential much more often when they have meaningful relationships with others.



REMEMBER

What you can take from this is that what people say and think often is *not* what they really do. This has huge implications for what marketers need to emphasize in marketing content, communications, and experiences and how they should emphasize it.

B2B PURCHASERS ARE MORE EMOTIONAL THAN B2C BUYERS

Research shows that personal values influence people's choices for consumer goods and even more so for business purchases. In fact, Google/Motista research shows that

- B2B customers are more emotionally connected to their vendors and service providers than B2C consumers.
- When personal values are present in a business choice, purchasers are nearly 50 percent more likely to purchase a product, and eight times more likely to pay a premium price.
- An average B2C brand has emotional connections with 10 percent to 40 percent of consumers, while B2B brands have emotional connections with more than 50 percent of their customers.

This research validates the idea that business choices are influenced by the perception of how purchasing decisions will impact professional status and personal lives. If you're in the B2B space, identifying and addressing the personal values (such as job security, ability to pay mortgage, provide for family, or maintain a lifestyle) that could be impacted by a professional decision is key to gaining a competitive advantage because most marketers in this space don't understand this or how to do it.

Psychological triggers that drive sales

Consciously and unconsciously, all human behavior is based on two emotional premises:

- » The avoidance of pain
- » The pursuit of pleasure

Everything we do, socially, professionally, and personally, is driven by these basic needs. When you understand the pain your customers are consciously and unconsciously avoiding when purchasing your products or services, you can craft highly relevant motivational messaging and experiences.

For example:

- » Are customers trying to avoid the pain of feeling inferior to others by not having the same material status as their peers?

- » Are they trying to avoid the pain of poor health that can come from eating unhealthy foods?
- » Are they seeking the pleasure of knowing they have a fair insurance policy that will protect them from unexpected losses? Or the pleasure of knowing they will improve their job security by making a wise technology investment for their company?

Pleasure covers much more than indulgences. It covers peace of mind, confidence, comfort, and security, which are very strong conscious and unconscious triggers of choice.

Pain and pleasure in marketing terms are simply the fear and joy people experience as life events unfold or as they anticipate something bad or good happening in their lives. For example, purchasing auto insurance minimizes the fear of loss you would have if you weren't insured. When comparing brands, most of us choose the one that makes us feel the most secure or confident during the shopping process.



TIP

Ask your customers about the fears they seek to minimize or pleasure they seek to enhance when making purchases in your category. Do they fear poor customer service, intimidating return policies, or overpaying for what they get? Do they expect to achieve specific goals or successes with your brand's products or services? When you know the answers to these questions, you can create messaging, content, and experiences that are highly relevant and motivating.

Neurotransmitters and how they affect choice

The most powerful forces that affect human actions related to finding joy or avoiding fear and pain are *neurotransmitters*, or the hormones that create strong emotional reactions to the stimuli people encounter daily in all areas of the world. Understanding the impact neurotransmitters have on purchasing behavior will enable you to create compelling messaging and experiences.

Neurotransmitters include

- » **Dopamine:** Dopamine rushes occur when you anticipate a reward, such as a job promotion for doing good work, a great deal on a new car, a pleasurable afterlife due to religious obedience, or reciprocal love. You feel euphoric, infallible, and ready to conquer your goals. This is the rush that makes people become addicted to sensory experiences or products.
- » **Oxytocin:** This hormone is known as the love hormone. It's released when we kiss or cuddle with someone with whom we are in love. Oxytocin helps us feel connected to others through love and sexual attraction. A large part of the

human experience is seeking connections with others via social and professional hives, and when we find people that validate our sense of self, we often become bonded and loyal supporters of one another. Research shows that when people experience an oxytocin rush, the part of their brain that governs judgment and fear is shut off.

- » **Cortisol:** When you feel threatened physically, emotionally, socially, or financially, you experience a rush of confusion, insecurity, doubt, and fear. You respond by either fighting and taking on the challenge or by flying away as fast as you can to avoid the crisis and seek a safety zone. Cortisol is what triggers the fight-or-flight mentality that drives much of what people do.
- » **Serotonin:** This is the hormone that helps stave off depression. It makes you feel calm and upbeat and gives you the ability to face your daily challenges with hope, optimism, and confidence. Listening to music that has the right schematic patterns and tones often creates feelings of love, nostalgia, comfort, or confidence, all of which influence serotonin rushes and your mood.

Music has a powerful influence on our moods and our behavior. Many retailers spend a lot of time researching the kind of music that will create serotonin rushes that make customers feel calm, inspire them to linger longer and buy more goods. Radio jingles, music in ads, and in-store soundtracks are often part of an overall brand strategy.



TECHNICAL
STUFF



REMEMBER

When marketers trigger rushes of neurotransmitters, knowingly or not, they create feelings that compel consumers to engage in certain behavior — either toward or away from the behavior they’re seeking to trigger. The challenge you have as a marketer is to create the rushes that generate excitement for your brand and the experience and products you deliver, and not the ones that send people flying to the competition. Unwittingly, many marketers do both.

Moving from USPs to ESPs

One of the most important things marketers must do today is move away from *unique selling propositions (USPs)* to *emotional selling propositions (ESPs)*. ESPs are the messages that get through because they appeal to emotions, such as those listed in the previous section.

A brand’s ESP is a statement about how it fulfills a given emotion associated with its category. Understanding the emotional value you provide is key to your success in all forms of marketing — direct, social, personalized, mass, and experiences and events.

The first step is to know the emotions associated with the decision process for your category. For example: Most insurance customers don't trust their carriers to deliver on the promises contained in their policies. But they buy insurance anyway because they fear the consequences if they were liable in a car accident, if their house burned down, or if they got really sick and couldn't afford health care. Two emotions that insurance company marketers must address in their marketing, then, are distrust and fear.

If there's one emotion you must address in your brand's ESP, it's the survival ability your product offers to your consumers and your superior ability to deliver survival over your competitors. No, this isn't a bunch of psychobabble. It's critical insight as to how you can craft emotionally relevant messaging, offers, promotions, and more to your customers and prospects and achieve what we call "unthinkable" return on investment.



TIP

If you operate in a category with low trust, such as financial services, you may want to:

- » Use testimonials validating your fulfillment of claims.
- » Cite industry awards from third parties showing that you meet or exceed the industry standards.
- » Identify and address fears related to your category and show consumers that you understand how they feel and why. Use empathy to let them know you're just like them, because people tend to buy from others they deem to be like themselves.

Reward versus loss



REMEMBER

As you contemplate how to appeal to emotions in your marketing, keep in mind that humans are more risk-averse than they are reward seekers. People consciously and unconsciously want to hold on to what they have more than gain a reward, especially if they may lose something in return. It's part of the survival instinct.

Daniel Kahneman, psychologist and author, has conducted a great deal of research about human psychology and how people process information and make choices. His research consistently shows that when people are faced with a choice to risk losing something in order to gain something, they most often choose to avoid the risk rather than take the chance of winning the reward. In other words, he has found that people will pay a high price to get a sure gain and to avoid a sure loss.

WHAT ARE YOU *REALLY* SELLING?

If you're selling luxury apparel, what is the emotional fulfillment your customers seek by wearing something with your label or insignia and by paying much more than a functional alternative would cost? The emotions that drive the choice to buy your product, at a likely elevated price, probably include

- Feelings of glamour or beauty
- Feelings of confidence and personal respect
- Feelings of superiority to others who aren't wearing similarly unique or expensive clothing

The final emotion of superiority often stays in the unconscious because it relates to the most powerful of all emotions: survival. When you know you have something most others don't, and few can afford, you feel superior whether you realize it or not. And when you feel superior, you anticipate your ability to survive over others, and you experience a form of dopamine rush that makes you feel joy about the products or experiences that set you above others. Much of this is unconscious but very real at the same time. That feeling of superiority, and the associated sense of survival, drives some to purchase a \$30,000 to \$60,000 or even higher priced handbag.

So if you're in the business of luxury, what are you really selling? Overpriced goods? Or feelings of security and worth that are hard to put a price on?

Ask yourself the following questions:

- » What potential losses can consumers experience by not buying your product?
- » How can your brand deliver on the promise of avoiding that loss in ways that competitors can't?

Being able to answer these questions and deliver on them is key to differentiating your product from others emotionally, and that's the most critical differentiation of all.



REMEMBER

Brands can imitate and duplicate your product's features, functions, and price point. What they can't do so easily is replicate your emotional experience and fulfillment. This should be the top priority of your marketing program and everything you do based on the tactics and strategies discussed in this book.

Survival instincts

When viewing illusion art that shows either a woman looking in a mirror or a skull, most people see the skull first. This is because the brain is wired to see threats to prevent harm before seeing a reward or joy. We are more motivated to avoid loss more than we are to see rewards.

And we purchase items that give us a sense of survival, consciously and unconsciously. When times are tough, survival gear and food storage sales soar. For example, at the peak of the 2020 COVID-19 lockdowns, household goods, such as toilet paper, were hard to come by.

We also purchase high-end items to feel superior, which is a form of “survival shopping.” Gucci at one point had a \$200,000 crocodile handbag. There’s no functional value in such a bag that you can’t get out of a \$20 bag from Target. Yet people paid this price. By doing so, they weren’t really buying a bag to carry a wallet and small personal items, but were paying a price to feel superior, and in the end that makes us feel more likely to survive challenges others might not. (See the nearby sidebar “What are you *really* selling?”)

Identify the fear that drives your customers and address it directly so you can put them at ease. After you diminish the fear or present a visible solution, you can then communicate better to the unconscious mind and more clearly to the conscious mind.

There are elements of “survival” in just about every business category. For example:

- » **Insurance:** Survive accidents or mishaps that can destroy critical possessions like homes and cars.
- » **Education:** Survive the economic woes of not being able to get good jobs, live a quality life, and provide for children.
- » **Luxury cars:** Survive the perils of not achieving a high social status, which may include exclusion from influential circles, interesting experiences, and respect in business.

Your ESP should encompass the fears and joys sought through your product category, consciously and unconsciously, and should be present in your marketing messages, content marketing, social dialogue, customer experiences, and sales propositions. Crafting your brand’s ESP is as critical as writing a mission statement that guides your operations and values.

BORN TO SURVIVE OR CHASE THRILLS?

Even with all the data and research over the years showing that people are molded by their environment, psychology theories hold true that many people's attitudes and choices are part of their DNA. Psychologists maintain that humans are born with one of two affective systems that drives their emotional reactions to many of their life experiences and the stimuli presented to them on a daily basis. One system is driven by the human need to survive and maintain security; the other by the thrill of the chase, or a desire to take risks and live off the adrenalin of excitement. The "born this way" theory explains why kids from the same family may have different approaches to risk taking and security, even though their environment and parenting is the same.

Knowing how each of these affective systems impacts people's attraction to brands and their promotions is essential to succeed, because these drivers are some of the strongest influences over the choices we make.

Understanding the Basics of Human Psychology

To be an effective marketer in any industry, you need to understand some basics about human psychology. You also need to focus on behavior that results from psychological triggers, such as the neurotransmitters mentioned earlier in this chapter and other psychological processes. From psychologists and their proven theories, old and new, you can discover a great deal about how people think and act.

Following are some insights from two of the most well-known contributors to psychology theories, Sigmund Freud and Carl Jung.

Freud's personality theory

Freud is known for several theories. One of his most popular is his personality theory, which goes beyond determining who has one and who doesn't.

Freudian personality theory suggests that we each have three personalities, or voices, in our head that compete with each other when we're making basic or complex decisions. These personalities are the id, ego, and superego.

» The *id* acts like a compulsive toddler who has to have what they want when they want it and doesn't care about future consequences to self or others.

- » The *ego* wants to please the *id*, but only after thinking through a plan to accomplish it in an appropriate manner.
- » The *superego* is the voice of reason, deciding appropriate actions to take based on social norms and life experiences, what's right, what's wrong, and so on.

Whichever voice wins out most often dictates people's individual personalities and, for marketers, predicts their behavior when it comes to shopping and assigning brand loyalty.

Think about which personality is most involved in making the decision to purchase your category and your brand within it. Imagine you're selling cookies or doughnuts and you want to spark an impulsive drive to buy some. You need to appeal to the *id* in a way that overpowers the consumer's *ego* and *superego*, which might argue cookies or doughnuts aren't on the diet.

If, however, you're marketing fitness and nutrition products, apps, or the like, you may want to first appeal to the *ego* with information about responsible diet and exercise habits and then mention low-calorie cookies that satisfy the *id* without throwing out any plans to stay on track for reaching healthy goals.

Jung's personality theory

Carl Jung, known for his theory of archetypes, believed that the human psyche is nothing more than mass confusion because so much of what people do and think is unconscious. He is widely known for his personality theory, which presents two different attitude types: *introverts*, or people who tend to be withdrawn, and *extroverts*, who are more outgoing and outspoken. He suggests that both attitude types engage in the same mental functions but process them differently. These functions include thinking, feeling, sensation, and intuition.

What marketers should grasp from Jung's theory is that introverts and extroverts can experience the same situations, process them, and respond very differently. If you're selling a product, service, or experience that largely appeals to introverts, you need to understand how introverts think and what type of sensory appeal makes them most comfortable. Using the wrong appeal may put them in fight-or-flight mode.

Another perspective Jung discusses in his book *Modern Man in Search of a Soul* provides great direction for a brand's positioning and messaging strategies:

Faith, hope, love, and insight are the highest achievements of human effort. They are given by experience.

If this is truly what people seek in life, how does your product support the journey to attaining these emotional outcomes?

Ask yourself key questions about the psychological fulfillment your brand helps support. Doing so will help you see your product's value in a much different light.

Tapping into Social Influencers

Along with psychological triggers, social influencers are powerful drivers of people's thoughts, choices, and actions. Following are some examples of social influencers.

Authority

The late Yale psychologist Stanley Milgram did a study in the 1960s to see how the role of authority influences people to do things that go against their values and conscience. He set up an experiment with volunteers playing the role of students and teachers. The student volunteer was fitted with electrodes that would deliver shocks each time the teacher pushed a button, which they were instructed to do each time the student got a question wrong.

As the experiment went on, the student missed more questions, and the shock got stronger. The teacher volunteers started to become upset, even physically ill, hearing the pain and agony of the students, who were sitting on the other side of a screen. But when the leader, someone in a white coat, told the teachers to increase the voltage and push the button to deliver the shock, remarkably, 65 percent of the volunteers kept following the instructions from the person in authority. According to the study's report, subjects were anxious and stressed about inflicting pain, and some were so upset that they were "sweating, trembling, stuttering, biting their lips, groaning, digging their fingernails into their skin, and some were even having nervous laughing fits or seizures."

This shows how powerful authorities are in influencing behavior. It also demonstrates that marketers have to use the influence of authority responsibly.



REMEMBER

Any kind of marketing appeal that influences behavior by tapping into psychological triggers needs to be done so in ways that are in the best interests of all involved, not just the brand's. Marketers have a social, moral, and ethical responsibility to use all the insights provided in this chapter for the greater good, not just their brand's gain.

You can tap into the power of authority by:

- » Aligning with respected brands whose employees are considered to have distinct expertise or knowledge in your industry.
- » Featuring authorities in blogs, inviting them to participate in your events, and so on.
- » Paying respected experts or influencers to be spokespeople for your products.

Social proof

No matter how sophisticated, intelligent, accomplished, or otherwise knowledgeable your customers are, they're still driven by social proof, whether they admit it or not. It aligns with the human need for survival because, unconsciously, people feel weak or disadvantaged when others have something they don't or are achieving something they haven't yet.

Robert Cialdini, a psychologist, professor, and author, has done many experiments to see how this plays out in various settings. He found that when he told people that their neighbors, friends, peers, and so forth were doing something worthwhile, like participating in an environmental program, they were more likely to also do it than if he just told them it was a good thing to do.

This illustrates the role of testimonials and sharing customer satisfaction ratings and *Net Promoter Scores* (which measure a customer's willingness to recommend a product or service) in helping to influence behavior.



REMEMBER

When trying to influence behavior, let consumers know that others are engaged in the desired behavior and watch their response take off. Note that on websites like Amazon.com, there's a list of similar products that other customers reviewed. Most people don't want to miss out on a good thing, so many will review those products, too.

Reciprocity

No matter how much we accept the notion that life isn't fair, we still hope it will be. At least when it comes to how people treat us. We thrive when one good deed creates another and embrace those who treat us reciprocally. This applies to our personal and professional relationships alike. Brands that understand that giving back isn't just about their corporate social responsibility (CSR) efforts but is also about giving back to the customers who are loyal to their business are the ones with the most sustainability in good times and bad.

When people feel recognized and appreciated by businesses they patronize, their satisfaction is higher and so is their repeat business and referrals.

A favorite example of reciprocity for marketers is a campaign conducted by a regional bank called First Bank. It ran a billboard campaign with nothing more than the words *math tutor*, *dog walker*, *wedding singer*, and a name with a phone number below each title. No information about the bank's offerings, advantages, and so on. It was truly running a campaign to help its customers. It really did have customers with those names and jobs, and when the phone rang, they really did refer people to that bank.

This was a brilliant campaign because it showed customers that the bank truly cared about giving back to them, no matter how big or small their accounts were, and instead of just using words to make that point, it used actions and a lot of its advertising budget. According to the VP of marketing at the time, the bank was highly successful in stopping attrition at a time when most banks were losing customers and also in gaining new customers.

Reciprocity is a simple and very affordable marketing tool. It doesn't take a lot to give back to customers through better service, rewards points, free gifts, mentions in your newsletters, content marketing, social posts, and so on. But the payback can be huge.



TIP

When you develop your customer surveys, as discussed in Chapter 5, add a question asking customers to tell you how they would like to be rewarded.

Scarcity

Once upon a time, Hostess Brands got in trouble and had to shut down, discontinuing some of America's favorite snack foods, including the Twinkie, almost overnight. Suddenly, people had to have what they hadn't even wanted in years. Adults who remembered the Twinkie from their youth stormed stores and bought boxes of Twinkies before they could no longer buy even one. Sales went up 31,000 percent (not a typo) in just days.

This is a strong example of the huge power that scarcity has on consumers' thoughts and behavior. It's true. People often don't want or value something until they can't have it anymore. Then they can't get it fast enough or get enough of it.

You see this all the time in marketing: "one seat left at this price," "one left in stock," and so on. Whether it's true or not and whether people believe it or not, they'll often buy it, just in case.

When you craft messaging around emotional and psychological values, you are essentially building ESPs. As you build customer profiles and segments, these

ESPs will change according to the driving values of each segment, and sometimes according to age, geography, and personality type.

For example: If you're a retailer of organic, toxin-free household items, your ESP may read like this:

We deliver *confidence* knowing that your home is free from toxins that affect your health and the *joy* of knowing your children are protected from issues that could affect their quality of life. Families that use our products can *relax* and focus on other life issues, knowing that they are protected at home.

Your ESP now involves creating messaging and positioning around confidence, joy, and relaxing as a result of using a product that delivers all three.

Appealing to Consumers' Happiness and Purpose

Not only is happiness the greatest achievement we seek in life, but it's also a magnet for brands that truly understand its power.

Jonathan Haidt, in his book *The Happiness Hypothesis*, points out that the five fundamentals of human happiness are

- » Feeling connected to others
- » Making a difference
- » Associating with and experiencing "good"
- » Reciprocity
- » Fairness and justice

Whether we realize it or not, these are the things we all seek in our lives, personally and professionally, regardless of our culture, ethnicity, or nationality. And according to research on how people choose the brands they choose, when we find a brand we believe will help us achieve these goals, we tend to choose that brand over others in the same category.

No matter our culture, ethnicity, age, or generation, we were all born with the innate desire for happiness and are driven by our need to find a purpose and live a life that makes a positive impact on the world and others around us.

Doing good matters if you want your business to do well now and in the future.

As indicated by Haidt's list of five happiness factors, we find happiness most when we find a purpose and are engaged in fulfilling it. Consciously and unconsciously, people seek meaning in their lives and the need to actively make a difference and leave a personal legacy of good. Jung addresses this in his *individuation process*, and many studies on human behavior drivers validate that this instinctive need hasn't changed and isn't likely to change.



REMEMBER

This new state of consumerism doesn't just show that people still have a heart and soul; it's a big flag to brands in all industries to integrate CSR, or corporate social responsibility, into their brand fiber, customer experience, and marketing programs. Aligning with "purpose" is also critical to aligning with many consumers' aspirations and values.

So just what is "purpose," and how can you integrate it into your marketing programs, experiences, and messages? *Purpose* is defined as a feeling of "determination to do or achieve something of importance." Identifying a purpose that drives your core customers, and each of your customer segments, should be a top goal of your market research programs. A simple question such as "What moves you most?" can provide some key insights as to how you can gain trust, support, engagement, sales, and more from your customers.

Toby Usnik, a philanthropic advisor and CSR professional with experience at Christie's and American Express, rigorously studies how purpose affects brands and suggests that CSR has moved far beyond writing a check to a cause and then moving on. It's about engaging with that cause in various ways to promote the good it does for the world and devoting your resources and intellectual talent rather than just a small percent of your revenue.

Defining your brand's purpose and corresponding CSR efforts is the first step toward developing emotional and psychological bonds with internal and external customers. When you make your CSR actionable by engaging others in your cause, you can build passion and loyalty that defines not only your brand but also your profitability.

People are drawn to opportunities that create happiness from doing good in the world. TOMS, a shoe company that refers to itself as a movement more than a brand, is a pioneer in philanthropic marketing. Its sales revenue grew from \$9 million to \$21 million in just three years by being a purpose-driven brand that enabled people to help others simply by purchasing a pair of shoes. For every pair purchased, TOMS donated a pair to a child in need in a developing country. This purpose appealed to many people who were willing to pay high prices for low-cost shoes, knowing they were helping others by doing so.



REMEMBER

The key to successful CSR programs and purpose-driven strategies is sincerity. Anything less simply backfires. Brands must be sincere about caring to support worthwhile causes related to their field, and they must be sincere when involving customers in charitable giving.

Sincerity is shown not just by the money you donate but by the way you use your marketing channels, budget, and resources to further causes beyond your own and how you encourage others to join your cause or movement.

Putting It All Together

As you build your business and marketing plans, ask yourself the following questions:

- » What emotions are associated with purchasing in my product category?
- » What roles do these emotions play in consumers' purchasing process and final decisions? Outline specific manifestations for each. For example: *Customers purchase my product with the excitement that they may feel and look more glamorous and increase their social status and invitations.*
- » How do I need to position my brand to appeal to these emotions?
- » What messaging is most critical to get attention?
- » What purpose can I build my brand community around?
- » What promises and offers will be the most credible for gaining attention and inspiring the desired consumer behavior?
- » What experiences can I create to appeal to and build on the emotions that get customers to trust, act, and remain loyal?

Answering these questions will help you build out your ESP and action items for your marketing program. After you gather information about psychological, social, and emotional influencers, your next step is to create ESP profiles, or grids, that enable you to map out and visualize the influencers that are most likely to result in the behavior and relationships you seek to achieve.

Because most brands market to more than one segment, you'll want to personalize elements to create and deliver content that's specific and highly relevant to each of your customer segments. Whether you segment according to generation, emotional needs, life cycle, history, attitudes toward category, or other factors, you can and should adapt your ESP messaging to be more precise with what moves these personas.

Creating an ESP grid can help you see the differences in segment attitudes and the messages you need to deliver.

A grid for a company selling organic, toxin-free household cleaners per the ESP example earlier in this chapter might look like Table 2-2.

TABLE 2-2 **ESP Grid for Organic, Toxin-Free Household Cleaners**

	Millennials	Generation Xers	Baby Boomers
Trust in business	Low	Low to moderate	Moderate to high
Authorities	Low respect for authorities, don't believe many people, form own opinions, right or wrong Driven by peer support and reviews	Respect authorities but don't always follow them Listen to respected groups and peers	Respect authorities, and tend to believe their data and direction when it fits schema and logic Listen to news, groups, and peers
Values	Want health and clean environment for self; hate waste, chemicals; embrace natural products	Interested in environment and health, will try new products but not completely willing to give up old	Okay with products always used, believe health claims but not as driven to change habits
Messaging	Light on EPA evidence and strong on social proof Promises for clean air and health	EPA studies, other research to back it up; third-party testimonials Promises to protect family and environment	EPA studies, testimonials, promises Promises to protect self, family, and preserve environment
Creative	Bold messages, credible claims, social and mobile channels Bold colors around trust, interactive digital, video	News-type messages, educational format, email and direct response Bold colors, mobile access, academic fonts	Educational format, email and direct response and banners Trust colors, traditional fonts, tones

This grid is simplistic for example purposes only. Your grids should include more defining subsets within each generational or demographic group you target.

By conducting market research, as described in Chapter 5, you can identify the emotions and values that influence your core consumers to purchase in your category. After you've outlined the psychological, emotional, and social values for your core customers and segments, following your ESP grids will enable you to create marketing materials and experiences based upon conscious and unconscious relevance.

IN THIS CHAPTER

- » Defining the elements of successful experiences
- » Listening and responding to consumers' expectations
- » Understanding the complexity of customer experiences
- » Executing compelling experiences with today's technology
- » Developing consistent experiences online and off-line
- » Mapping out a touchpoint journey that gets customers to yes

Chapter **3**

Engaging Experiences and Journeys That Drive Sales and Loyalty

In business, and all aspects of life, how you make people feel during interactions is more memorable than the tangible goods you might deliver. We often remember our childhood birthday parties with friends, birthday cakes, and fun games, but you may not remember the gifts. This concept illustrates the importance of integrating meaningful and memorable customer experiences into each step of a customer's journey with your brand.

Customer experience strategy simply refers to how you involve customers and prospects with your brand, how you serve their needs and meet their expectations, and how you deliver emotional fulfillment that leads to sales and loyalty. With or

without all the software applications to help you execute successful journeys, creating and executing customer experiences can be very simple and affordable.

This chapter covers the basics of customer experiences that matter most to consumers across categories and provides actionable insights that allow small businesses to deliver outcomes that are similar those of their large brand counterparts. You'll gain insights about what customers expect from brands beyond the goods or services purchased, the role of artificial intelligence and other technology for identifying best practices for customer experience programs, and how to execute fulfilling touchpoints for every step on a customer journey from introduction to sale.

Moving from Reactive Customer Service to Proactive Customer Experiences

Before marketing technology allowed brands to personalize communications, promotions, and interactions to customers' needs and transactions, brand experiences were simply determined by the quality of products and service, friendliness of staff, and fair market value for goods or services purchased.

Today, and likely for the long-term future, customer experiences are determined by all of that *as well as* the following:

- » Convenience and promptness of filling needs or resolving issues
- » Additional value beyond the products or services offered
- » Customization of pricing and terms
- » Personalization of communications, offers, and promotions
- » Alignment with values and social issues
- » Involvement with developing future products and experiences
- » Emotional fulfillment of each interaction

Another word for experience is *involvement*, which is exactly what customer experiences need to be built upon. Customers want to be involved in defining how they engage with brands, not forced into relationships that seem to be all about selling something to them rather than providing a mutually beneficial relationship.

Successful experiences involve customers in

- » Having conversations about what they need, want, and expect from your business category
- » Defining individual goals and overall outcomes
- » Setting pricing and contract options
- » Selecting products and services they need or don't need
- » Personalizing promotions and communications
- » Developing future product features and ideas
- » Creating communities of like-minded people with similar values

As you can see, the customer experience is far more complex than just monetary transactions for goods and services. Success for any business, large or small, in any category, is dependent on the emotional fulfillment you deliver in addition to products or services that garner high satisfaction ratings.

As you develop customer experiences you and your team can execute, think about how you can involve consumers in your brand and your values, and how you can be more involved in helping them make wise, informed decisions, whether or not those decisions lead them to choosing your business.



REMEMBER

Your customer experience is akin to your customer journey. You need to outline the steps from a lead being introduced to your brand to becoming a loyal customer. Each touchpoint along the customer journey needs to align with relevant communications, calls to action, content, offers, and incentives. As customers engage in or ignore the touchpoints of the journey you define, you're able to identify your hot, warm, and cold leads and assign your resources accordingly.

Creating Experiences Around Personal Relevance

More and more, consumers are holding brands to the same behavior and attributes they expect of their friends and family. Our friendships tend to last longer with people who care about us, listen to us as much as, if not more than, we listen to them, and proactively support our personal goals. Engaging with people who care about and listen to us on good days and bad days is one of the most fulfilling aspects of the human experience. It's also increasingly the most fulfilling aspect of the consumer experience.

Several consumer polls show that as many as 91 percent of consumers across categories say that listening to and understanding their individual goals is the most important attribute of customer service for earning repeat business. But there are other things you can do to make your customers want to come back. According to a report by Genesys, a software company that sells customer experience technology, other attributes of customer service that consumers rank among the most important include:

- » Listening to me and genuinely trying to understand my needs
- » Knowing my account history and current activities with the company
- » Not making me repeat myself by being transferred around the company's support departments
- » Understanding my intentions and proactively offering solutions
- » Understanding and acknowledging my frustrations and other emotions
- » Greeting me by name

With an affordable customer relationship management (CRM) system (for more on CRM systems, see Chapter 11) and a customer communications platform like live chat, small businesses can affordably deliver the same level of customer experiences big brands do. Interactions that spark purchases and long-term loyalty often require nothing more than the human touch, and small gestures of kindness. Consider just how expensive it is to call a customer by name. (It's not.)

Customer experiences can be built upon sophisticated data mapping and artificial intelligence (AI) systems that tell you customers' purchasing intent, shopping patterns, product interest, purchases, and more. Or they can simply be built upon touchpoints designed to deliver the kind of experiences customers ask for, which are really as simple as the attributes listed in the Genesys report.

As you think about how bigger brands may be competing with you for top satisfaction rates, repeat purchases, and lifetime loyalty, consider some further insights from the Genesys *2021 State of Customer Experience* report.

Genesys asked consumers and customer experience leaders at leading consumer brands, "Which of these do you/your company value the most in a customer service interaction?" The gaps between what customers want and what they actually get leave the door wide open for small businesses that may not have all the AI insights or data fields as their big brand competitors.

Voice interaction, email, and live chat, listed by consumers as the most valuable methods of brand interaction, are now more affordable for small and midsize

businesses than you may think. For example, some CRM systems include free live chat functions with your email and data management services. The cost is then determined by what you pay your staff to interact online with customers who visit your website.

Consumers also state that Facebook Messenger and What's App are among the most popular social media apps used for customer service interactions. Again, that's good news for small businesses, because both apps are easy to use and affordable.

Applying Technology for Memorable Customer Experiences

Many large companies use complex technology to monitor just about every behavior and purchasing trend possible among individual consumers and segmented groups. That technology includes predictive analytics, real-time monitoring of consumer purchasing intent, agent-assist programs that spark upsells and cross-sells, and even sentiment analysis. Data mined from multiple systems creates in-depth insights on individual consumers, personas, and segments, generating a lot of data for marketers to sift through, analyze, and act on.

Using artificial intelligence

Artificial intelligence (AI) is the result of merging customer data with machine learning. In marketing terms, it's the automatic analysis of historical consumer data to predict new outputs or behaviors and the actions consumers will take. For e-commerce businesses, this information allows brands to set up automatic prompts to deliver specific and highly relevant content and promotions to online shoppers at the precise moment they are engaged in a decision process activity. All of this results in a highly personalized customer experience.

AI capabilities for marketers include the ability to

- » Automate content for social media posts. Based on data input, AI tools can populate a LinkedIn or Twitter post to communicate business news in a timely manner.
- » Insert *chatbots* (software that simulates human conversations) to "chat" with customers and collect data on their needs, adding to the data pool and providing automated information without using live resources.

- » Integrate dynamic pricing tools that update prices on e-commerce sites to match competitor changes in real time.
- » Identify market and consumer trends with predictive analytics to stay on top of changes in purchasing patterns and criteria.

While it may seem ideal to have these capabilities, it isn't always simple. AI systems are expensive, require staff with specific skills to maintain, often cross privacy thresholds, and depend on mass amounts of customer data that even large businesses have a hard time collecting and managing.

Platforms utilizing AI to create automated marketing experiences are commonly used by large brands, but these expensive and complex systems aren't necessary for customer experience success.

Succeeding without expensive apps and systems

Small businesses can keep up with and actually get ahead of large brands without AI or data points on every thought and action associated with their target consumers' purchasing behavior. As illustrated in Table 3-1, experiences that create loyalty are as simple as showing customers you care and are willing to help them achieve their goals.

TABLE 3-1:

Highlights from Genesys' 2021 State of Customer Experience

<i>First contact resolution</i>	54% of consumers responding value this most 33% of brands do it
<i>Fast response</i>	50% of consumers responding value this most 38% of brands do it
<i>Knowledgeable help</i>	39% of consumers responding value this most 32% of brands do it

Small businesses can document and track customer interactions, needs, emotions, and expectations with a simple CRM system (see Chapter 11). You can also easily set up customer segments that reflect similar lead scores, content opened, business sectors within your service lines, purchasing intentions, and sensitivities such as price and contract flexibility, product features, purchase readiness, and so on.

A key strategy for creating profitable experiences in the business-to-business (B2B) world is *account-based marketing*, or *ABM*.

ABM, in simple terms, is about customizing marketing experiences and offers on an individual account basis. Each account is assigned to an “owner” within the company who is responsible for maintaining the relationship, ensuring customer satisfaction, identifying needs and expectations, assessing risk of attrition, and recognizing opportunities to upsell or cross-sell. Personalized offers and communications are key to a brand experience that keeps accounts happy and feeling valued. These activities can be documented and monitored in a CRM tool such as HubSpot, giving multiple people in the organization a glimpse of how accounts are being optimized or neglected. For more on ABM, flip to Chapter 16.

Taking Customer Experience Beyond Service

Customer involvement with a brand is much more than transactional activities and customer service, and customer experience strategies must be viewed the same way. Successful strategies, no matter how complex or simple, are all built on the same foundation: *personalization*.

Powering results with personalization

Personalization goes beyond merging names and recent transactions into your communications with customers. It’s built on interacting with customers according to their specific expectations, needs, and relationship with you on every level.

Consumers polled in the 2021 Genesys customer experience survey reported the following intentions if a company assured them a personalized experience in every transaction:

- » Purchase additional items from the same company: 82 percent
- » Recommend the company to a friend or colleague: 71 percent
- » Purchase repeat items from the same company: 72 percent
- » Do a great percentage of online shopping with the company: 79 percent

Customer experience strategies that include personalized communications, transactions, offers, promotions, and so on are not just expected by consumers — they also pay off.

Aligning with customers' values

In addition to personalization, consumers expect brands to support their values. The Genesys *2021 State of Customer Experience* report lists the social, ethical, and environmental issues consumers expect brands to support. The top five are

- » Data protection/privacy
- » Animal welfare/cruelty-free products
- » Human rights
- » Health and wellness
- » Sustainable products/packaging

The *2020 Consumer Culture Report* published by 5W Public Relations shows the growing importance of brand alignment with consumer values among all age groups. New data reflects that

- » 71 percent of consumers prefer to buy from brands aligned with their values.
- » 83 percent of millennials say it's important to buy from companies with like values.
- » 73 percent of 35- to 54-year-olds look for companies with like values, while 60 percent of consumers who are 55 or older find like values important.

A startling statistic in the report indicates that 65 percent of millennial shoppers have boycotted a company they previously purchased from because of its stance on an issue, while 66 percent and 55 percent of the respective older generations have done the same.

It's important to note general and generational attitudes toward brands in your category, because there's really no one-size-fits-all approach to establishing common bonds with customers from different generational groups, cultures, and lifestyles. This is where doing your homework can pay off.

Providing options to round out experience

The COVID-19 pandemic and subsequent lockdowns in 2020 and 2021 led to supply chain issues that affected everything from toilet paper to used cars. It also led to major changes in how we shopped. A 2022 Statista report by market and consumer data company Statista shows big swings in consumers' shopping behavior continue even after the height of the COVID crisis. For example, since the pandemic began large percentages of consumers tried a new shopping method. More

people became accustomed to shopping online instead of walking into a store. Many of us waited in our cars for someone to bring us our groceries and other purchases. In 2020, retail sales were largely made through click-and-collect transactions, and market research company eMarketer expects this trend to continue to grow. A May 2021 survey by ShipStation showing that 62 percent of people prefer curbside pickup seems to prove that point. According to a Salesforce Connected Shoppers report from 2021, 74 percent of the 39 percent of retail executives in the U.S. who introduced curbside pickup during the pandemic continue to keep it as a standard convenience moving forward.

The lesson? To retain customers in good times and bad, you must pay attention to changing patterns, needs, and wants; and adapt to assure customers can do business with you on their terms, not just yours.

The following section shares some key tools and technologies for businesses large and small to consider when updating their customer experience strategies.

Updating your toolbox

There's really no better description of the shifting nature of marketing than the cliché *change is the only constant*. Customer experiences today could be quite different from customer experiences in one, five, or ten years, because technology and innovation don't slow down for any brand.

So what are some of the technologies and tools you must use to get or stay current with today's trends?

Digital shopping

Customers want to shop at home on their PCs and smartphones. Small business e-commerce platforms make it easy and affordable for any business to make digital shopping available.



TIP

An online site aptly named Top 10 Best Website Builders (top10best-ecommerce-websitebuilders.com) lists some of the top platforms for website development as Wix eCommerce, Shopify, Squarespace, BigCommerce, and Web.com. You can find more details on how to set up digital shopping for your business in Chapter 15.

Live chat

Calling a customer service phone number and waiting on hold is so 1990s. Customers across categories, B2B and business-to-consumer (B2C), expect to go to a website, instantly engage with a chatbot or live agent to ask questions, and get answers fast. When this happens, they are more likely to purchase from you.

With current CRM systems, small businesses can close the gap with large brands' live chat operations. HubSpot, a leading CRM platform, offers live chat capability in some of its packages. You just need to assign staff to monitor live chat requests and arm them with tools like customer data for individual conversations, product information, promotion details, and informative pieces like links to articles, checklists, white papers, product pieces, and so on. You also need to empower them to resolve issues directly and quickly.

Mobile texts

It's no surprise that consumers everywhere, of all ages, have a hard time putting down their phone. As a result, communicating via mobile phones is an increasingly important channel to have in your toolbox. Mobile allows you to reach customers while they are in the process of shopping so you can spark impulse purchases. Google My Business enables you to have your business pop up on a map with a promotional message in response to searches for your product category. This is just one example of how the mobile channel can work. For more detail about this important tool, turn to Chapter 13.

Text marketing is becoming more acceptable and successful. Customers in both the B2B and the B2C sector want to know about your best deals, and they want to be rewarded for giving you their business. As a result, many will allow you to text them with special announcements, discounts, and time-sensitive sales. You can also use this digital channel to alert them about order status and referral rewards.

Apps

Custom apps make it easy for your customers to engage with your brand and can provide significant value that sets you apart from competitors. Apps aren't very expensive to create and may have a profound impact on your business. Just like Siri can tell you where the closest gas station is when you're driving, a business app can tell your customers about the latest deal, nearest location, or current event that may be of interest to them. It can also simplify the process of placing orders and managing accounts.

Matt Tomory, VP of sales and marketing at Innovatus Imaging, developed an app that allows biomedical professionals to use their mobile phone to immediately get a broken ultrasound probe into a repair queue. As a result, they can start the repair process and reserve loaner piece of equipment with their phone anytime, and from virtually anywhere, saving their company thousands of dollars a day by minimizing lost opportunities when a vital piece of equipment is not working. For health-care providers struggling to keep up with equipment demands this is not just a game changer for simplifying their jobs, but a lifesaver for patients in urgent need of diagnostic services.



REMEMBER

All these tools help you create a personalized customer experience. But customers also want to feel like they're part of a community when they do business with a brand. There are several ways you can develop a community around your brand that brings your customers together.

Creating Customer Experiences Around Brand Communities

Developing online and off-line communities is a critical part of an overall brand experience. Online communities bring people together in digital settings to share ideas, insights, and tips for solving common issues and satisfying individual needs, or just to have conversations. For example, Reddit is a massive online community that supports thousands of smaller communities in which people can connect with others to discuss their hobbies, interests, values, and passions. It has more than 430 million active monthly users among its more than 100,000 active communities.

Communities can exist on Facebook pages, in LinkedIn groups, and other social platforms. Essentially, a community exists when individuals engage with the same content and start chatting about it. You see this with podcasts, blogs, YouTube videos, topic specific Facebook pages that focus on politics, cities and towns, and even true crimes, and such.

Once you start posting content on a channel and start engaging people in conversations about your content, the trick is being able to keep it up. Doing so will bring you more followers and potentially more business leads. Letting it slip and become yet another new program that never gets to a second edition can hurt your credibility and cause people to stop engaging with you on other channels.



TIP

Browse conversations and hot topics on sites like Reddit, social sites, and your own community pages to see what consumers in your space are interested in and to monitor any mentions of your own brand, both positive and negative.

Off-line communities gather people around volunteerism, issues, causes, and movements, just like online communities do. The difference is that followers and supporters actually meet in a physical place and get something done when they meet. Brands can organize a team of volunteers to help with the local food bank, highway cleanup, service trips, and more. Back to TOMS Shoes, not only did they build a brand around a movement, but they also invited people to form communities in their top markets by coming together for a Day Without Shows to celebrate the impact they have on others' lives. Building brand communities in local

communities can take on many different formats. Be creative and find one that works for you.



REMEMBER

If you create a community of caring within your company by empowering employees to provide customers the appropriate care, service, and resolutions they expect, customers are more likely to continue doing business with you and tell others about their positive experiences. When customer service staff makes customers feel like friends, loyalty goes up and so do the positive online posts and comments about your business.

Start a forum and invite the right people

Building an online community is as simple as creating a public page on Facebook or another social media site like Reddit. This enables happy customers to tell others about their positive experiences with your business. But you need to be prepared for negative comments as well. Assigning a staff member to monitor online community pages regularly and reply to both bad and good comments, just like you do with Google My Business and Yelp, is essential.

An empty forum doesn't help anyone. It's critical to get the right people into your community. Having key players who can engage with newcomers and validate their loyalty to you is far more important than securing likes, tweets, and shares on popular social media pages.



TIP

Follower numbers are somewhat meaningless because consumers are wise to how many fake followers exist all over the web. The quality of your members trumps quantity when it comes to building a community. Reach out to your most satisfied customers and invite them to be your inaugural members, ensuring your community is full of positive energy from the get-go.

Spark meaningful conversations and creative opportunities

Note that online communities aren't meant to be lovefests for a brand. Consumers simply don't have the time or desire to care about or participate in such forums. They will visit your community and join in activities often if the discussions with your team members and among customers are meaningful and actionable. You can ensure that positive interactions are happening by

- » Posting questions about your market, category, product development, future projections, and social implications related to your market

- » Getting people to share intelligent ideas based upon their experiences with your product category and brand

Solicit creative ideas from customers by asking them to share how they use your product to overcome challenges or achieve personal fulfillment and how they would improve your product or brand in general. A great example of this is the LEGO Ideas platform, which was developed to allow fans to submit new ideas for LEGO sets. Customers are asked to submit their ideas for new sets, and those that are chosen for development generate 1 percent in royalties for the designer. This community has grown to more than 1 million members and reignited LEGO sales at a time when the company was struggling.



TIP

The key to building successful communities is not using them to advertise to customers you've already secured, but using them to gather insights, intelligence, and ideas on products and services your loyal customers deeply care about. Creating apps for community members is one way to do this.

State Farm has a great app for parents who are teaching their teens how to drive that provides tips for turning this stressful experience into a positive one. The app also includes easy-to-use tools for tracking those behind-the-wheel hours needed to qualify for a driver's license. The positive outcome of apps like this one, and others like those that provide new ideas for cooks, artists, and more, is that consumers experience the kind of emotional fulfillment that generates repeat business, and a sense of partnership with the brand.

Asking your community for input on product development and new product ideas is a smart way to involve contacts and customers in your brand development and make them feel valued at the same time.

Mapping Out a Touchpoint Journey from Introduction to Lifetime Value

Although there's no standard recipe for creating the perfect touchpoints for every step in the customer journey, the ingredients that are essential to a successful outcome include the following:

- » **Relevance:** Communications via email, posts on social media pages, and discussions in online forums must provide relevant information and guidance on the real and actionable needs of customers, not brag sheets about your excellence.

- » **Decision support:** Content marketing should provide guidance, especially for complex decisions associated with purchasing technology, software applications, automobiles, and similar items.
- » **Incentives:** Like you, customers are juggling a lot of different things in their lives. They won't always be able to follow up on new purchases as quickly as they may want to. And some of them get bogged down with hours of product research and need a reason to make a quicker decision. Offer incentives for completing transactions or continuing to do business with you instead of shopping the alternatives.
- » **Decision validation:** The journey doesn't stop once a decision to purchase from you has been made. You need to provide validation to keep the enthusiasm alive during a customer's initial trial with your brand. That enthusiasm can lead to additional purchases, repeat sales, and qualified referrals.
- » **Satisfaction checks:** Periodic customer satisfaction surveys blanketing your entire customer base isn't an effective part of the customer journey. You need to reach out individually and ask customers to rate their experience with you. This helps you identify new opportunities as well as customers at risk.
- » **Rewards/tokens of appreciation:** Offering customers even small tokens of appreciation or rewards for ongoing business goes a long way. Customers that gain rewards are more likely to come back, and those that feel appreciated are more likely to refer others.
- » **Community:** Providing customers an opportunity to engage with a community of like people is key to new and repeat sales. Organized religion is an example of the strength of communities of people with similar goals, values, and needs. A brand community, like a religion, should be designed to provide members hope, service, support, and meaningful connections.

Brand communities build connections that pay off in many ways. According to research by Sprout Social:

- 57 percent of customers who feel connected to a brand will increase their spending.
- 76 percent will continue to choose that brand over a competitor.



REMEMBER

Once you develop events, customer service experiences, marketing content, and other action items that connect with your customers and prospects, you can create a touchpoint journey that keeps contacts on a path to *yes*. Figure 3-1 shows the touchpoints for a customer journey, from introducing a lead to your brand at a trade show or similar event, to qualifying the lead for next steps like maintaining awareness, nudging them toward a proposal, or nurturing them to closure.

The key to building a successful touchpoint journey is to involve all members of your team responsible for any actions inherent in the journey. All team members

need to buy in on the process, understand their responsibilities and your expectations, and commit to executing them consistently.

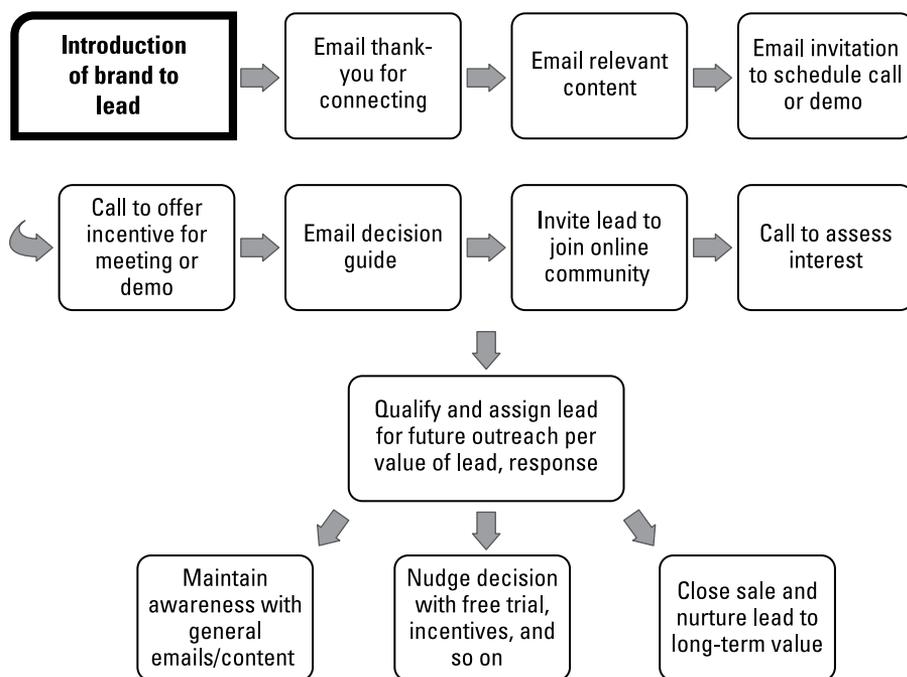


FIGURE 3-1:
A sample of what a customer touchpoint journey from introduction to conversion can look like for a B2B brand.



TIP

There are many ways to map out customer experiences, touchpoint journeys, and the steps and protocols for serving customers' needs, meeting expectations, troubleshooting, and resolving issues and complaints. You can map out your own journeys in a spreadsheet or word processing document you create in a platform like Excel or Word.



REMEMBER

A customer journey is only as good as the content you share and the service you provide. You need to continuously create compelling content that provides value to customers and is more than a promotional message about your features and benefits. Rely on decision guides, industry reports, case studies, customer reviews, information about reward programs, and more. These types of materials help you show what's in it for the customer if they choose to do business with you.

Remember, too, that although you can automate email messages and content to be delivered according to triggered schedules, you need to provide the human touch with phone calls — and, when possible, live interaction — to check in and assess customer satisfaction, needs, and additional opportunities. No matter how sophisticated digital technology becomes, we need to connect with each other beyond the screens of our phones and computers.



Building a Strategy for LTV and ROI

IN THIS PART . . .

Lay down a sustainable path for growth.

Execute easy, affordable, and meaningful market research to find out what matters most to your customers.

Prepare a cross-channel marketing plan to guide your branding, lead generation, customer journeys, and best practices for pricing, promotion, budgeting, and more.

Engage customers with informative, actionable content that instills trust in your brand and drives revenue to your bottom line.

IN THIS CHAPTER

- » Determining your market's growth rate
- » Creating successful go-to-market and profitability strategies
- » Looking at market segmentation opportunities
- » Growing your market share
- » Defining your position and expanding your market presence
- » Operating from a growth vs. a fixed mind-set

Chapter 4

Laying a Foundation for Growth

A mantra from the Native American belief says that elements of nature provide important guiding lessons for life. For one, we're taught that we should live our life like a river, always flowing and moving forward; otherwise, we stop progressing and become stagnant, like a pond that can be compromised by moss, fungus, and other elements that hinder growth.

As a marketer, you need to look at your business from the same perspective. Where are the white-water rapids, or the growth waves, and how can you ride them to grow your business?

To succeed in any business, you need to go where the growth is. You should always be looking for new opportunities and riding the growth waves you find for as long as you can. Doing so will better enable you to operate at a profit so you can capitalize your next round of product development, marketing campaigns, and expansion into new markets.

This chapter helps you determine the growth rate of your market and evaluate opportunities to find the best options for scaling your business.

Measuring the Growth Rate of Your Market

Typically, only a few markets are growing rapidly at any given time in an economy. Some are actually shrinking. In 2022, industries projected to grow the fastest include most types of manufacturing, artificial intelligence, data sciences, and global travel and tourism. It's important to know how quickly or slowly your market is growing because market fluctuations directly impact your sales growth and profits.

Your core market should be experiencing a 5-10 percent overall annual growth. Anything slower than 5 percent makes it difficult for a business to thrive. Monitoring sites like Bloomberg.com and IBISWorld.com can help you understand potential changes in your market and others that impact your industry. You can identify opportunities and threats and determine how and when to reinvent or adapt your brand for current or projected changes.

In contrast to the fastest-growing industries projected for 2022-2023, the fastest-declining industries, projected to shrink between 7 percent and 15 percent, include scrap metal recycling, sign and banner manufacturing, record stores, paper wholesaling, and coffin and casket manufacturing. Paying attention to projections for your market can enable you to plan ahead and stay competitive in any economic climate.

Clearly there are many reasons why markets grow or shrink. For example, technology changes the tools we use to do routine tasks, and consumer attitudes toward environment, cultural and social issues can change what we buy.

If your primary market is shrinking or not growing fast enough to support your business goals, you may need to focus your energy on getting into ancillary markets you can serve, reinventing your business, or adapting your product line.

Monitoring market and economic indicators

As a business owner or marketing manager, you need to monitor market and economic insights on a regular basis. By following the key indicators of growth

and decline in your overall market and the general and local economies, you will be armed with powerful information for managing the expansion of your operations and business.

Market indicators

To assess your market's growth potential, you can use simple indicators such as:

- » Year-over-year trends in industry-wide sales
- » Increases or decreases in the number of customers in your market
- » Changes in the type and size of purchases per customer

Mapping out these growth indicators for the past one to three years can help you see what's happening in your market and what to expect. Although these indicators will provide only rudimentary guidelines that aren't based on statistical formulas or predictive analytics, they'll give you valuable insights nonetheless.



REMEMBER

There are many resources to help you keep your finger on the pulse of the market. In addition to reading business news from *Bloomberg*, *Forbes*, the *Wall Street Journal*, and the like, check out CB Insights (cbinsights.com) and other websites that provide information on where venture capital and private equity firms are putting their money, an indicator of which markets are expected to grow in the near future.

Analyst firms like Deloitte, Forrester, and Gartner, local and state chambers of commerce, and trade associations are also good sources of information on growth trends for regional and national markets.

Also pay attention to the business news in specific cities in which you sell your products. Follow the trends on home sales, new construction, real estate development, job growth or decline, and other similar indicators.

Economic indicators

Many entities, including the federal government and private firms, report regularly on the economic indicators that provide powerful insights on current and future market conditions. The most common economic indicators small businesses need to monitor include:

- » **Gross domestic product (GDP):** This metric reflects the value of goods and services produced in the U.S. As the growth rate of the GDP increases, the overall health of the economy improves.

- » **Unemployment rate:** When more people have jobs, the potential for spending on necessary and discretionary items rises, impacting the growth of businesses.
- » **Consumer confidence:** On the last Tuesday of every month, The Conference Board, a nonprofit research organization, publishes a Consumer Confidence Index report reflecting the current state of confidence in the economy. More confident consumers spend more and drive profits higher for corporations.
- » **Retail sales and durable goods orders:** It goes without saying that the better retail sales are, the better the economy is. The same applies for durable goods orders, which reflect new orders for manufactured goods like cars and large appliances.



REMEMBER

Watching economic indicators on a micro and a macro level can help you take advantage of opportunities, correct your operations, manage inventory, and more to adjust to projected consumer spending changes.

Responding to a flat or shrinking market

When faced with a flat or declining market, consider making the following adjustments:

- » Eliminate low-margin products from your physical store and put them online only. This will help you cut waste from inventory not moving off your shelves while still providing customers with options. Stores like Walmart and Target do this often to maximize revenue per square foot and lower overhead costs.
- » Look for other places to sell your products by exploring new distributors, intermediaries, and online channels. The more products you can move to online sales, the greater your potential reach and profit margins will be.
- » Consider renegotiating your terms with existing partners to help increase your margins. The win for them is that they don't lose a client or have to replace you with another account.

Slow-growth and no-growth markets are brutally competitive. To make sales in either case, you often have to slash prices, ruining your profit margins. Sustainable businesses keep their eyes on growth rates in all their markets to identify potential slowdowns that may indicate a need to move on to new markets and/or product lines.

Reinventing yourself before you have to is critical to staying alive and profitable. Never assume you can't fail. There's no rest for the successful enterprise that seeks sustainable growth.



TIP

Adding services to support your products can result in sustainable new revenue streams. Consider these examples:

- » Utility companies now offer ancillary services such as home delivery of air filters for furnaces and air conditioners, surge protection for appliances and household electronics in case of lightning strikes, and more. These subscription-based services increase customer lifetime value and current revenue.
- » Many software companies have moved to a subscription-based business model. Software as a service, or SaaS, requires customers to pay monthly or annual fees instead of a one-time transaction fee to access cloud-based software products and services. Explore how you can do something similar to set your business up for recurring revenue, which can help you grow faster.

Also, look at the geographic areas you target most to assess their economic health and strength. If your current market isn't growing, search for nearby markets with stronger population growth and economic projections. Research a market's workforce to ensure potential employees have the skills you need at affordable salaries. Markets with a highly educated workforce and a lower cost of living tend to be best for sustainable growth.

Finding Your Best Growth Strategies

Market growth and expansion strategies should center around getting your product to customers as efficiently as possible and securing new customers by expanding your reach demographically and geographically.

Clearly, your marketing strategies will differ if you're new to an established market, an existing brand looking for growth, or launching new products within an established brand. The following sections cover some tactics for achieving success in these and other scenarios.

Develop innovative GTM strategies

Essentially, this entire book is about going to market. A *go-to-market (GTM) strategy* is your blueprint for getting your product to the end customer and achieving a high level of sales and awareness at the same time. Pricing, distribution, and publicity are key to GTM strategies. There are many innovative ways to take a product to market that will get you noticed and help you build your base.

Building a presence

At one time, big brands like Microsoft and Dell expanded their market presence by building their own retail stores, which helped them gain total control of product demos and customer experiences. However, with online sales continuing to outpace in-store sales, most brands have shut down this strategy.

You can build a sustainable presence by exploring a wide range of selling opportunities, including third-party online channels like Amazon or eBay, partnerships with ancillary and complementary brands for reselling each other's products, and so on. (See Chapter 15 for more information on these alternatives.) For business-to-business brands, building a reseller network can be key to growing sales without adding to overhead.

Crowdfunding

Crowdfunding refers to the process of raising funds for a new business, project, or venture from multiple donors, primarily over the internet. While other channels can be used for the same purpose, most crowdfunding today takes place via online sites set up to link borrowers with funders.

Kickstarter and other crowdfunding sites can help you raise money and assist you in creating a strong base of champions to help spread the word about a great new product.

If you create a strong campaign with product demos and great videos and get lots of people talking about your Kickstarter campaign, awareness will skyrocket without you having to pay for most of it. Additionally, if your campaign can create enough emotional enthusiasm to succeed, you'll likely have a lot of excited backers to tell your story and promote your products and brand to their networks.

Beta testing

Also known as user acceptance testing, *beta testing* involves giving a product that is almost ready to go to market to a group of prospective users to test performance and functionality for real-world application.

Beta testing can give you valuable insights about your product and what might need to be fixed and it can aid you in getting sales off the ground. Instead of offering introductory or discounted pricing — which can lock you into low profit margins — invite people to be part of a beta program. Give them discounts in exchange for insights on what's working and what's not, and for sharing their success stories about outcomes and satisfaction with future prospects.

Once your pilot stage is complete, offer participants further incentives to continue doing business with you and serve as evangelists for prospects.

Grow what you have for higher profitability

You can grow your market presence and revenue by introducing more products into the market and using a best seller to draw more customers to your brand.

Offering more products

The more products you sell, the more revenue share you can potentially gain in a given market. However, this approach is not without risk. More products and more sales don't always mean more profitability. You need to weigh the costs of developing innovative products that support or expand your existing product lines, getting those new products into your distribution channels, and, of course, designing marketing programs to create demand. Overextending your resources can backfire in ways you may not be able to overcome.

For example, if you own a restaurant and plan to expand to new locations, be sure you have the capital to cover the full cost of operations for a given period of time while you staff up and build a new following and customer base. If the new location fails, it can send a signal to customers that something is wrong with all your locations, causing you to lose even more revenue.



WARNING

Risks and costs increase when you experiment with new products. Consequently, you should discount your first year's sales projections to reflect the degree of risk. A good general rule is to decrease sales projections by 20–50 percent, depending on how new the product is to your brand.

But you should also consider how launching a new product slowly and on a small scale can tip off the competition to a really good idea they may be better poised to develop and market faster than you can. They'll become the market leader and "innovator" of a new idea, and you'll be the "me too" if you end up launching after they roll ahead with your idea.



TIP

You can introduce new products and services at trade shows or kiosks at airports and other high-traffic public places at a relatively low cost. You can gauge interest in your new offerings by asking for feedback from visitors to your trade show booth or monitoring sales at kiosks. This feedback will help you make improvements and identify winning and losing ideas before scaling them for larger distribution.

Riding a best seller to the top

Some marketing experts define *best sellers* as products that achieve sales at least ten times the norm for the overall category. If you have a best seller — a product that substantially outsells your other products — it may make sense to put most of your resources toward maximizing sales for this product and using the profits to grow other areas of your business.

To use a best seller to help fund new product development, look to expand demand by creating new experiences around your best-selling product, partnering with others to expand distribution, or bundling your best seller with related products. If you sell comfy throw blankets, for example, partner with a company that makes fuzzy slippers or herbal teas to help round out the cozy-at-home experience.



TIP

When one of your products continues to outperform others, refocus your marketing efforts on that product. Make it the heart of sales calls and ads, feature it at the top of your website's home page, talk to the media about it, and offer special promotions to spark interest and trials among new customers. Be sure to cross-sell your other products to any new customers you acquire.

Use some of the profits from a best seller to build your next best seller, because like all good things, your current best seller will eventually lose its momentum. Always be looking for your next top product so you can have it ready and waiting in the wings.

While your products are selling and your customer satisfaction is high, referral marketing and reward programs are critical to maximize your sales and profit potential. Reward customers who continue to buy your products by giving them discounts for repeat purchases. Also consider giving referring customers a financial reward and see what that alone can do for your profits.



REMEMBER

Referrals are essentially free sales. Your cost per lead is only the cost of the rewards you offer customers for bringing friends and family to you. If customers are happy, they'll often bring you new customers without being rewarded, dropping your cost per acquisition down to almost nothing.

Making a hot product even hotter

Another strategy is to influence the supply and demand, and thus sales and pricing, for a product that's showing signs of becoming one of your top sellers. You can do this by releasing a limited number of the promising item to specialty stores so that people have to seek out your product.

Remember Beanie Babies? Those useless but adorable and coveted collectibles are a great example of the influence of supply and demand. Creator Ty Warner

released his Beanie Babies for short periods of time and then retired them, making them collector's items that people wanted even more. And he produced only a few hundred of certain kinds of Babies, turning them into instant and rare collectibles. The value of some of his products at the peak of the Beanie Baby frenzy reached upwards of \$3,000. In 2022, many years after their peak, a rare, mint condition Princess Bear, made in honor of Princess Diana after she died, was getting bids well into the six figures. Scarcity pays off when you have something people really want.

Take a look at your distribution strategies for your top products. Can you produce fewer and make them more valuable? Can you change your access points to make them seem more exclusive? Or do you just want to keep marketing a product until it doesn't sell anymore and pocket the profits while you can?

Whatever your plan for maximizing the growth of your current top-selling products, have an exit strategy in mind, too. Be prepared to answer the following questions:

- » At what point will you cease production before you end up manufacturing more than you can sell if trends and fads change?
- » At what point are you willing to let your product become a commodity, selling at a fixed price?
- » At what point will you replace this product with a new one that's likely to have the same appeal to the same consumers, so you have an opportunity to create another highly profitable product and earning cycle?

Building on a Market Segmentation Strategy

A *market segmentation strategy* is more than just sorting customers into like groups so you can build marketing campaigns around specific personas. It involves building distribution strategies to reach your best segments first and then trickle down to your secondary segments.

If your sales are best among millennials, for example, prioritize sales channels that reach them easily. If your sales do best in states with consistently warm climates, consider dropping out of channels in colder states where sales may only be seasonal even though you're paying for shelf space year-round.



REMEMBER

The advantage of a segmentation strategy is that it allows you to tailor your product and your entire marketing effort to a clearly defined group with specific uniform characteristics. If you find that one segment strongly outperforms all others consistently over time, you may want to consider a *niche marketing strategy*, in which you channel all your resources toward that segment and drop your focus on any other segments (see the nearby sidebar “When to consider niche marketing”).

In a world that’s looking for more customization and personalized service, niche marketing may make the most sense. It helps you better compete with larger businesses because you can specialize and personalize in ways they can’t.

With a strong customer database program and accurate market analysis tools, you can gather information about your current customers and identify hot markets that have look-alike audiences, or more consumers just like them. If you find that a subset of your customers is growing faster than the rest, adjust how you spend your marketing resources to reach more consumers like them instead of trying to reach many groups you may never convert. Look to adjust pricing and distribution to cater to your best consumer groups rather than trying to be everything to everyone, a strategy that fails more often than not.



TIP

If your customer base is shrinking or your current segments aren’t responding as desired, consider targeting a new segment. For example, a consulting firm specializing in coaching health-care executives can decide to start offering a similar service for nonprofit leaders, expanding its market base without having to change core competencies.

WHEN TO CONSIDER NICHE MARKETING

Specializing in a specific market segment can give you the momentum you need to power past your competition, but it may not always be the right approach for your operation. The niche strategy may work well if

- You think your business can be more profitable by specializing in a more narrowly defined segment than you do now.
- You face too many competitors in your broader market and can’t seem to carve out a stable, profitable customer base of your own.
- You’re too small to be one of the leaders in your overall market or industry but have the potential to be a leader for a specialty segment.

Developing a Market Share Strategy

Scaling your business is obviously the best way to improve your ability to compete with larger, more established brands and increase your market share. *Market share* is, very simply, your sales as a percentage of total sales for your product category in your market (or in your market segment if you use a segmentation strategy). If you sell \$2 million worth of widgets and the world market for widgets totals \$20 million per year, then your market share is 10 percent. It's that simple. Or is it?

Following are some insights on understanding and increasing your market share.

Define your metrics

Before you can completely determine your market share, define the metrics that matter most to you. Is it better to determine market share by dollars earned, containers shipped, or units sold? Pick whatever seems to make sense for your product and the information you have access to.

Establish a benchmark

To effectively increase your market share, you must have an accurate picture of where you currently stand. Here's a simple method for estimating market size and share:

1. Estimate the number of customers in your market.

For instance, estimate how many people in your total addressable market are likely to buy products in your category. Using Statista (www.statista.com), a consumer statistics portal, or D&B Hoovers (www.dnb.com), a commercial database of businesses and executives, you can get fairly precise insights on the size, sales, and market leaders for any industry.

2. Estimate how much each customer buys a year, on average.

What's the current and projected annual sales volume per customer in your category? Check your sales records for data or turn to industry research for specific information and year-over-year growth data.

3. Multiply the two figures together to get the total size of the annual market and then divide by your unit sales to get your share.



TIP

You can also look at data compiled by the U.S. Census Bureau (www.census.gov) to get information about population and economic trends to help you with forecasting and growth plans.

For example, if you sell specialty tea, you may estimate that 75 percent of the wholesalers handle lower-quality, inexpensive teas and therefore don't compete directly with you. In that case, you can calculate your market share against the 25 percent of total sales for teas similar to yours. Your resources will likely go further if you try to capture this narrow market share rather than a share of the total category.

To create a market share strategy, you need to know your *product category* — the general grouping of competitive products to which your product belongs (be it merchandise or a service). If you don't know where your product and your brand fit into the market, you can't begin to develop a strategy to build up and increase your existing market share, and you'll likely waste a lot of money and time, making it hard to catch up with brands that are executing better marketing programs.

Do the math

If your goal is to increase your market share by a certain percentage or dollar value, you need to do some calculations to determine what those figures look like.

For example, if you own a tea store in Shanghai, you may have a goal of increasing your share of tea sales by 1.5 percentage points. If each point of market share is worth roughly \$40,000 in annual sales (1 percent of the total sales in the market), then you'll likely need a plan that involves spending, say, an extra \$25,000 to win that 1.5 percent share gain. If it works, you can make an extra \$60,000. These numbers are just examples. You will need to determine costs specific to your business and markets.

To be cautious, you may want to discount this projection of \$60,000 in additional sales by a risk factor of, say, 25 percent, which cuts your projected gain back to \$45,000. If you exceed it, you can enjoy the reward. If not, you avoid setting your business up for missed sales projections.

Be realistic about the time and risks associated with reaching your market share goals. Calculate the extra monthly costs associated with the marketing and distribution changes you'll make to get the share you want using historical promotional spend and sales figures. Then compare these costs with projected increases in monthly sales. This will help you see potential risks and potential gains. You should give a new initiative at least six months before you assess its success or failure.



REMEMBER

Market share gives you a simple way of comparing your progress to your competitors' sales from period to period. If your share drops, you're losing; if your share grows, you're winning. It's that simple.

Base your goals on realistic, actionable items you can measure. For example, if your goal is to increase your market share from 5–7 percent with a product upgrade or new promotion, be sure you have metrics in place that will enable you to attribute any market share growth to those actions so you know what’s working and what isn’t.

Enhancing Your Positioning Strategy

A *positioning strategy* reflects the emotional fulfillment and psychological relevance of building emotional selling propositions (ESPs) over unique selling propositions (USPs), because *unique* isn’t a sustainable strategy (see Chapter 2 for more about ES Ps and US Ps). It’s too easy for a competitor with more resources or a quicker *time to market* (the time it takes from product idea to sales launch) to duplicate your product and take away a “unique” advantage. A successful positioning strategy focuses on getting customers or prospects to see your product by the emotional and functional value it offers, to trust your claims about quality and service, and to try your product before considering competitors’ offerings.



TIP

As you plan for growth, identify new markets where your ESP and positioning strategy will stand out and be appealing to consumers. Do you need to adapt your ESP or how you position it and your other promises for various cultures or demographics you’re trying to penetrate or dominate? The more you know about each market you operate in, the more effective you’ll be.

Defining your position

Good positioning drives *mind share* (share of awareness among your market compared to competitor products’ awareness) among consumers, which will in turn help you gain market share. Your positioning statement should be believable and actionable. It should reflect the core values of what you offer and make a statement about how you differ from competitors and functional alternatives.



TIP

As you do your market analysis, compare your positioning strategy against your competitors’ strategies to see if you’re saying the same things in different words and if your promises will really help your brand stand out. Just as important, do your products and services fulfill the promises you make in your positioning statements?

Aligning your positioning strategy with growth initiatives

After you've defined the emotional value you offer in addition to the product value or competitive difference that sets you apart, you can start building growth plans.

For example, if you produce and sell healthy organic snack foods that replace the abundance of junk food marketed relentlessly to kids, your positioning can reflect the health benefits of your snacks and the emotional relief parents gain by knowing they're not jeopardizing their children's growth by giving into their demands for unhealthy food. With a healthier but tasty snack food for children, you can expand to niche and geographical markets that promise big growth opportunities for health food and fitness products.



TIP

For any given industry, you can find a long list of influencers and organizations with whom you can build alliances for reselling your products or introducing your products to new consumer groups that fit your growth strategy.

Changing Your Mind-set

Mind-set is everything. Are you operating from a growth mind-set or a fixed mind-set? Do you understand the impact of each on business growth?

Carol Dweck, a psychologist at Stanford University, developed the mind-set theory in her book *Mindset: The New Psychology of Success*. Dweck defines growth and fixed mind-sets as follows:

- » A fixed mind-set reflects a belief that your intelligence is static, and no amount of effort will change outcomes that are fixed accordingly.
- » A growth mind-set is one in which you believe that intelligence and talents can be improved through effort and learning, and that you can elevate your innovation and outcomes accordingly.

She also maintains that resilience, a key characteristic of a growth mind-set, is a skill you can develop, not an inherent trait you are born with or without.

The authors of a 2010 article in *Harvard Business Review* analyzed the winners and losers from the 1980, 1990, and 2000 global recessions (see the nearby sidebar "The difference mind-set makes in business"). Their findings showed that

companies with a *we can overcome and grow* attitude substantially outperformed competitors with a *hold tight and hunker down* mind-set. Of the companies reviewed for the article, only 9 percent grew coming out of a downturn, 80 percent failed to achieve their prerecession growth levels within three years, and 17 percent eventually failed altogether.

The 9 percent that thrived operated with a growth mind-set, balancing offensive actions such as improving efficiencies and seizing new opportunities with defensive tactics like cutting back to prepare for the worst. Here are some examples of what they did:

- » Invested in talent instead of cutting staff to offset operating costs
- » Remained committed to marketing to maintain a strong market presence
- » Invested in assets and resources to set themselves up for long-term growth



REMEMBER

Your growth strategy and actions will only be as good as your product and your mind-set. If you don't keep up with changing technology, consumer demands, and market influences, no growth plan will pay off. No amount of imagination or marketing can overcome an outdated product with no value in the current world or a fixed mind-set that can hold you back while others move forward. Your strategic imagination is the only limitation on your growth.

THE DIFFERENCE MIND-SET MAKES IN BUSINESS

An example cited by the *Harvard Business Review* article "Roaring Out of Recession," published in 2010, shows how different mind-sets changed everything for Office Depot and Staples.

During the 2000 recession, Office Depot hunkered down and cut staff by six percent. Staples focused on rising above and coming out of the economic downturn strong by hiring more staff and looking for opportunities to improve efficiencies and set the company up for long-term stability. As the recession came to an end, Staples' sales were double their previous figures and substantially higher than those of Office Depot, which at the onset of the recession had billions more in revenue. In 2021, Staples offered Office Depot \$1 billion for their consumer business.

IN THIS CHAPTER

- » Conducting valid and meaningful research that delivers critical insights
- » Finding relevant market, customer, and competitive information
- » Preparing survey tools that get responses and deliver accurate information
- » Approaching technical stuff like Net Promoter Scores and confidence levels
- » Finding market data to help you identify trends, needs, and emotional drivers (on a budget)
- » Keeping an eye on market demographics

Chapter 5

Researching Your Customers, Competitors, and Industry

One of the biggest mistakes any marketer can make is to assume. Yet assumptions continue to be a common foundation of many business decisions. Avoiding the trap of assuming you know what your customers think, like, or don't like about your brand, products, and category and what inspires their purchasing behavior is critical to growing your business. Just as dangerous is assuming your customers are just like you. Chances are, they're not. Making assumptions about your marketplace, trends, and competition also isn't a good idea.

The foundation of any successful marketing is a solid research plan that helps you understand your customers' needs and expectations, market influences, competition, which offers and messages work, and which do not, and provides insights that guide your strategic business plan and product development. Research you conduct yourself among your customers and prospects, and secondary research from consulting groups, research firms, and academia, can provide in-depth views on changing consumer behavior, attitudes, loyalty trends, and more. With all the technologies and sources available today, it's easier and more affordable than ever to act on market research you do yourself or insights you can access from research and consulting firms, quite often for free.

A learning plan should also include insights about your category, local markets, and competitive landscape. Regularly conducting surveys among your customers and prospects is essential to staying on top of what drives purchases, loyalty, and referrals in your category, all of which are critical to any company's success.

This chapter discusses the kind of information you should look to collect about your customers and market, and the many tools available to help you collect it affordably. You gain an understanding of how to use social media, like Facebook, Pinterest, and LinkedIn, conduct timely and effective surveys, and take advantage of social listening platforms, along with many other channels and options. This chapter also covers how to write objective and actionable surveys to ensure you get nonbiased data, and why knowing your Net Promoter Score matters.

Conducting Research That Delivers Actionable Insights

Research provides valuable insights about your customers, competition, and industry to help you make informed, and thus better, decisions about your brand positioning, messaging, offers, engagement activities, media purchases, and the like. Many tools allow you to test ideas before executing at scale so you see what elements, such as headlines, offers, and calls to action, will perform best, helping you make the most of your budget.

Customer surveys using tools provided by SurveyMonkey, Crowdsignal, Constant Contact, and many other companies have long been the foundation of market research for brands small and large. However, it's getting more and more difficult to secure enough responses to collect meaningful data likely to reflect a population greater than your survey sample.

A report by Delighted, an experience management platform offered by Qualtrics, a customer research company, showed the following response rates from their 2021 data:

- » **Email surveys:** 6 percent
- » **Website surveys:** 8 percent
- » **iOS SDK–mobile app surveys:** 16 percent

Even at times when consumers' interest in completing surveys may be declining, marketers must engage in various methods to stay on top of consumers' attitudes, preferences, purchasing criteria, and more. Because some of the older, more traditional methods of engaging with consumers, like on-site, live focus groups, are hard to execute today and are decreasing in use, it's critically important to find new methods for gathering information.

Following are some guidelines for gathering insights about consumer attitudes, expectations, purchasing criteria, and more that will help you make wise decisions and communicate to all your customer segments with spot-on relevance.

Monitoring social chatter to better understand your customers

In a world where trends seem to change almost daily, so do the demands and interests of consumers. The good news is that with all the social media outlets that capture consumers' thoughts, likes, shares, and other expressed interests, you can continuously monitor the issues, attitudes, ideas, inspirations, and aspirations that are most on your customers' minds. Browsing responses to posts related to your business category on Twitter, Instagram, Facebook, and LinkedIn can present valuable insights for your brand, messaging, and customer experience strategies.

Get started by identifying the social channels your customers use and follow for information, social interaction, and news. And follow them yourself. The most common social media among young and more mature adult audiences include

- » Facebook
- » Twitter
- » Pinterest
- » LinkedIn

- » Instagram
- » TikTok

Note the news, stories, photos, and videos that are trending and the themes that are getting the most likes, comments, and shares. Monitoring and engaging in dialogue with customers and prospects provides some of the best insights you can possibly get. Studying social websites is a bit like studying anthropology, as you will become familiar with the language, values, and culture of the time in which you operate.

Take advantage of your own social media followers. Ask your virtual friends what's on their minds and for opinions, suggestions, and ideas about topics of interest related to your industry. You can also do polls on LinkedIn and Facebook. You're not likely to get enough feedback from social page surveys to have statistical significance for any new idea or recommendation, but you'll gain insights on how some of your customers feel and you may identify trends you want to research further.



WARNING

Keep in mind that the results of these informal polls may be biased because you're polling people connected to you through some common experience or association. You may miss out on diversity of responses and thoughts. It's important to consider that the views, needs, and struggles of people from different backgrounds are not always represented equally, if at all.

Social listening tools enable brands to monitor what customers are saying about them online. You can monitor personas reflecting your customer segments and listen to their collective dialogue through various sites, and you can also track individuals, helping you identify which customers you're at risk of losing, which present new opportunities, and which are spreading ill will about your brand. These tools also give you a unique opportunity to respond to an unhappy customer or misguided consumer in real time, something other generations of marketers only dreamed about. These platforms, which are typically offered as a software as a service (SaaS) model and charge monthly for each license, include the following choices:

- » Brandwatch
- » Mention
- » Falcon.io
- » HubSpot
- » Sprinklr

- » Sprout Social
- » Hootsuite

“Listening” to reviews on Google My Business, Yelp, and other review platforms is also helpful. Make it a regular routine to read reviews on review platforms like Yelp, Google, and so on. Bad reviews for quality or customer service have a serious impact on brand reputations and need to be addressed. You can often respond to posters publicly on review sites, including those that list top product recommendations in given business categories, so all visitors can see a commitment to resolution, or a defense if it’s warranted.

Following relevant blogs

Take the time to monitor blogs by research firms, industry authorities, and influencers. No matter your industry, there are many voices out there, and you need to identify the ones to which your customers listen most. For example, if you’re positioning your products for people who value minimalist living, subscribe to the most popular blogs addressing that topic.

After you identify the influencers in your market, be sure to not only subscribe to their blogs but also work to develop content and story ideas that support your products and encourage these bloggers to write about them. Just like journalists, they’re always looking for new ideas, products, and insights to write about so they can remain relevant and gain more followers. These people should be on your recipient lists for press releases, news bulletins, story ideas, and so on.



REMEMBER

When asking for input and information on websites and in virtual communities, be honest about who you are and why you’re asking for advice. If you tell people you’re in charge of marketing your product and you want to know what they think of your new ad, many will offer their views gladly and freely.

Gathering Information about Market and Consumer Trends

No matter the industry you are in, there are many resources that provide valuable insights about current trends, the impact of social issues, and market projections. Look to think tanks, research firms, trade associations, business news reports, and journals to better understand your current and future marketing climate.

Paying attention to information resources

The big accounting firms and specialty groups conduct regular research on just about every aspect of business, and often provide their findings for free. Groups that publish regular reports on data for specific industries as well as market and consumer trends in general include Nielsen, Deloitte, Accenture, Forrester, Think with Google, and many more. Just google a topic and you'll see a list of new reports from a variety of firms.

You can also find rich data on what other companies are doing to grow their business. For example, if you want to see how other businesses spend their advertising budgets, you can find many associations and research firms like the Winterberry Group that provide annual reports on actual behavior and projected trends. Knowing how similar brands are spending their advertising dollars can provide valuable data on which channels work best in your space. Large brands in both the business-to-business (B2B) and business-to-consumer (B2C) sectors spend thousands on research to determine the best path to a strong return on investment, so pay attention to what they're doing.



TIP

Good sources for information on advertising trends include Forbes, eMarketer, and Statista. These and other groups publish frequent updates on marketing, media usage and expenditures, and commerce across digital and traditional platforms. Return to these sites often to stay on top of trends and identify ways to use your resources wisely as consumers and markets change.

Uncovering what really drives your customers

As Chapter 2 explains, the success of any marketing plan for any business category depends on your ability to identify the emotional selling propositions that best apply to your core customers.

How consumers feel about your brand, your customer service policies, and their experiences determines your short- and long-term success. Conducting regular research can help you identify, understand, and eventually manage consumers' emotional reactions and attitudes so that you can communicate with psychological relevance and stand out in your category. Instead of just asking routine questions related to product or service satisfaction, include questions that help you identify how customers *feel* about their experiences with you.

Here are some ideas for questions to discuss with customers during or after a transaction, during a sales presentation, or in focus groups — if you can get

anyone to participate. Getting some feedback on these issues will help you pinpoint emotional drivers of choice.

- »» What was the emotional or functional fulfillment they sought when making a purchase?
- »» What is their main goal when purchasing in your product category?
- »» After doing business with you, how did they feel? Did they feel valued, appreciated, and excited to do business with you again?
- »» Did you make them feel any different than they felt when they purchased from a competitor?
- »» What attracted them to your brand?
- »» What was the primary reason they chose to purchase from you versus from a competitor?
- »» What are their decision criteria for your product category?
- »» What are the primary expectations they have for the brands they are considering?
- »» What do they like most and least about your brand?
- »» How happy have they been with purchases and experiences from others in your category? What generated their happiness or lack of it?



TIP

Draw a chart to reflect negative and positive feedback and ratings of your product or service. When you do this, chances are, a few elements will stick as notably negative, and others as notably positive, letting you know the weaknesses you need to fix and the strengths you should build on.

Preparing Effective Surveys to Ensure You Get Accurate Insights

How you ask questions matters. If you are vague, you'll get vague answers, which may or may not give you the right guidance. If you simply ask yes-or-no questions, you won't be able to identify the degree of positive or negative thoughts toward a given issue or aspect of your brand experience or be properly prepared to compare and prioritize answers.

Determining the right format for the metrics you need

A good metric to use when asking customers to evaluate their experience with you and your product is a scale of 1 to 5, with 1 being low and 5 being high. Anything more complicated can make it difficult for people to answer and can increase the dropout rate, jeopardizing your opportunity to gain important and verifiable information. For example:

1	2	3	4	5
Very poor	Poor	Average	Good	Very good

You can change the variables to Disagree Strongly, Disagree, Neutral, Agree, and Agree Strongly, or other options.

Your high-rating attributes from a given survey represent the features you should be promoting to consumers and talking about in your social media posts and online sites. The low scores can help you identify your failings and set priorities for improving your customer experience. To clarify which ones are worthy of the most attention, you can ask customers to rank the importance of each listed item so you can focus your improvement efforts on the more important attributes. Many online survey tools allow you to use a wide range of options for answers, such as ratings, rankings, and open or essay responses, all of which give you a different perspective.

Most online survey platforms provide guidance on writing and formatting questions. Articles and tips they offer will help you know how to best use ratings or rankings and multiple-choice or open-ended questions. In many cases, you will be able to adjust a template to reflect your specific questions or view examples of successful survey tools to help you see firsthand what works best. Take your time to browse the tools available to find one that fits your budget and can grow as your needs grow.



TIP

You may want to set up your surveys among demographic groups within your industry to identify different decision processes, emotional needs, price points, purchasing cycles, and so on. You should also sort out groups based on their relationship with you. These groups may include

- » Lapsed customers
- » Current customers
- » Potential customers with prior contact (often referred to as a *warm list*)

- » Prospects with no prior contact (often referred to as a *cold list*)
- » Male versus female shoppers
- » Baby boomers versus millennials



REMEMBER

A survey is only as good as the insights generated and your ability to get people to respond. Take the time to write meaningful questions clearly, format them to provide the most actionable insights for you, and adapt them for various customer segments.

The response rate to surveys is declining across categories, and given how distracted consumers are, largely because of all the marketing communications they get across all channels, 24 hours a day, from marketers like us, that's not likely to change. Use surveys sparingly and be sure to communicate how answers to your questions will benefit participants.

Survey fatigue is a key reason for declining response rates. Fatigue results from asking too many questions and surveying too often. Asking one to three questions tends to work best. Just asking customers to give you a 1- to 5-star review, and nothing else, upon completing an online transaction or customer service interaction can also provide great insight for you without asking too much of your customers.

Defining your objectives

Before you can craft a survey that provides the insights you seek and gets the response you need to act with confidence, you should ask yourself the following questions:

- » What do I need to know about my customers to really be able to serve them better?
- » What is missing in my body of knowledge about my customers in terms of who they are, what goals they seek to fulfill with my products, and how my products simplify or improve their lives?
- » What do I need to know about customers' personality traits, emotional drivers, and feelings toward my category and brand in order to prepare more relevant creative and promotional campaigns?
- » How do I plan to use the information I collect?

After you define your information goals, it's time to start developing your survey. Your questions should be crafted in a way that's clear to respondents and easy for them to answer quickly.

Using clear, concise wording

Here are some guidelines for asking questions that get answered and provide valid results:

- » **Ask only one question in each inquiry.** Avoid questions like *Do you think customer service and product variety are important?* If your response mechanism is yes or no, you really can't determine whether respondents are answering yes to customer service or product variety.
- » **Don't ask about things you don't need to know.** Do you really need to know your customers' income or education level in order to serve them?
- » **Don't get personal.** If you ask questions that go beyond their public activity or presence, customers will feel uncomfortable and may be concerned about how you will use the information.
- » **Ask questions about things you can act on.** This way, your customers will see how answering your questions can impact them in a positive way. For example, asking *Do you agree that the wait time for us to serve you can be improved?* clearly shows that you want to know what you can do better.
- » **Mix up the format of your questions.** Instead of asking all multiple-choice or yes-or-no questions, intersperse all types of questions throughout your survey to keep respondents' minds sharp and give you additional insights.
- » **Always include one open-ended or essay question.** This allows you to hear your customers' voices.

Be careful to use words that are clear, simple, and do not have double meanings. For example, use *exaggeration* instead *hyperbole*, *contradiction* instead of *dichotomy*, and so on, so that your meaning is clear to all participants regardless of their vocabulary skills.



REMEMBER

When you create surveys for customers, not only are you asking them questions about themselves, but you're also sharing information about your brand. Use these tools to communicate key differences about your products or services in an informative manner. For example, you may want to ask, *Did you know that ABC Brand maintains the highest customer satisfaction rates in the quick print industry?* A leading question like this helps you identify how effectively your message is getting across and lets you share something of value at the same time.

USING REPETITION AS A REALITY CHECK

Asking the same question in different ways can help you gain insights into how unconscious emotions may be influencing customer attitudes and behavior. This strategy can help you identify conflicts between what your customers say and what they are most likely to do.

A natural gas company surveyed customers about climate change and found that what people said about their values didn't always match up with their intended or likely actions. For example, those who responded that they highly valued environmental protection as a life goal scored very low on willingness to contribute even \$5 a month to help out. This contradiction between the values customers express and the actions they do or don't take illustrates the proverb "Actions speak louder than words."

Understanding Some of the Technical Stuff

Survey data and analysis can be quite technical. Thankfully, you don't need a degree in analytics to understand what you can and should be doing to get the information you need to run a successful business. This section discusses a couple key technical indicators to help you make sense of some of your data: Net Promoter Scores and confidence levels.

Net Promoter Score

One of the most common benchmarks for how a brand is doing is its *Net Promoter Score*, or *NPS*. This is primarily a score on how high you rate for customer referrals, yet it also serves as a strong indicator of social proof (see Chapter 2) for prospects. In short, NPS is an index ranging from -100 to 100 that shows the likelihood of customers recommending your company's products or services to others. It helps marketers determine the possibility of referrals and loyalty among current customers.

NPS categorizes respondents into three types: promoters, detractors, and passives.

- » *Promoters* are customers that scored their likeliness to recommend your brand as a 9 or 10. These are your happiest customers and the ones you should be nurturing for referrals and case studies.

- » *Detractors* are those that scored their likelihood of recommending you as a 0 – 6. Clearly, these customers are at risk, and you need to explore ways to improve satisfaction and retention among them.
- » *Passives* are the customers giving you a 7 or 8, who tend to be neutral about your brand. Prioritizing relationships with these customers would be a strong action to take to prevent them from becoming detractors or lost customers in the future.

These categories help you understand what your NPS really means for retention, attrition, and likely referrals.

Many marketing platforms include the NPS questions and calculator, which can help you tabulate an accurate NPS. These resources range from online survey platforms to customer relationship management (CRM) systems, and companies like Satmetrix, a leading SaaS platform for NPS systems and findings that provides easy-to-use tools. One example of a free service you can use is www.npscalculator.com.

To give you some perspective, the average NPS for life insurance companies was recently reported to be 31, department/specialty stores averaged 58, and internet service providers scored 2 (yes, 2) on average.

You can calculate your own NPS using these simple steps:

- 1. Subtract the number of detractors from the number of promoters.**
- 2. Divide the number from Step 1 by the total number of responses.**
- 3. Multiply the final number in Step 2 by 100.**

Here is an example that includes 100 total responses:

$$70 \text{ promoters} - 30 \text{ detractors} = 40$$

$$40 \div 100 = .40$$

$$.40 \times 100 = \text{an NPS of } 40$$

A good benchmark is to look up the average NPS for your industry. It's hard to find out specific brands' scores, so focus on beating your category averages and delivering the kind of experiences that keep your score rising rather than declining. For consumers doing research on which brands to buy and which to avoid, and for brands that want to build retention, these scores matter!



REMEMBER

Beyond asking questions to determine consumers' likelihood of purchasing from you and referring your brand to others, your surveys should ask questions to guide you in developing your product line. For example, if you're in charge of a two-year-old software product that small businesses use for their planning and financials, you may want to ask questions that will help you determine the following issues:

- » Should we launch an upgrade or keep selling the current version?
- » What features do you use and gain the most from, and what is missing now that you'd like to see in the future?
- » Does our brand messaging reflect the experience you've had with our product?

Level of confidence

You need to decide what level of statistical significance you're willing to accept and base your actions on. Typically, you should strive for at least a 95 percent confidence level. Many online survey tools have the ability to determine the number of responses needed for a given confidence level. For example, if you want a 95 percent confidence level and a 5 percent margin of error for your survey results, you'll need a sample size of close to 370 among a population size of 10,000.

If you are looking for general feedback to guide your thinking rather than the concrete actions you should take, you may be okay with lower confidence levels for ideas you can test and vet over time.

Qualtrics.com offers a free sample size calculator. This tool also helps you determine the confidence levels you achieved with a past survey based on the number of responses you received. You can see the different confidence levels that occur when you manually adjust the margin of error for your results. For example, if you got 137 responses to a survey, and you adjust the margin of error to 7 percent, you will be at a 90 percent confidence level. If you adjust the margin of error to be lower than 7 percent, that confidence level will surely go down.

To increase the validity of the data you get from survey responses, you need to increase the response rate. Consumers are more willing to answer surveys if you make it about them and not just about you. Ask questions about what type of personalized information would be meaningful to them and add those variables to your customer profiles.



TIP

Don't over survey. Use discretion as to how much information you request and how often you ask for feedback. Keep surveys short and infrequent.

Preface your survey by indicating that you'll use the information to better serve your customers. If you plan to keep their answers confidential, tell them that. Transparency about how you plan to use and share their information is critical to building trust with your customers and getting them to complete your surveys.

Paying Wisely for Market Research

Surveying your customers is simple because it just involves creating a survey and emailing it to your customer database. Surveying look-alike audiences or prospects with whom you've never engaged isn't as simple and can be quite expensive. Thankfully, there are some affordable options for reaching prospects and getting useful feedback, which are discussed in this section.

Getting feedback from prospects without purchasing expensive lists

Getting a list of prospects to survey is the greatest challenge. Purchasing lists can set you up to become a spammer, and lists can be expensive even if that wasn't the case. You can overcome this challenge by looking for opportunities to add questions to a survey being conducted by an industry publication or research firm.

Survey or research panels enable you to pose your questions to a group of people who reflect your target audience and have agreed to take surveys on an ongoing basis. This approach is an affordable solution for getting insights from potential customers you wouldn't likely have access to otherwise, and for a fraction of the cost it can take to identify and reach them.

You can engage research panels multiple times and typically collect responses quickly. Keep in mind that these participants get paid in cash, gift cards, and other rewards to do surveys.

According to GreenBook, a data collection company that offers a directory of business services, leading providers of research panels include Logit, CatalystMR, and OvationMR. You can also look for options at Qualtrics.com and SurveyMonkey. Browse the latest lists of survey panels through a Google search or look at sites like www.surveypolice.com, which ranks polls based on feedback from users.

In most cases, you can purchase survey accounts on a monthly or an annual basis. And in some cases, you can use these online tools for free — if you're willing to accept limited access and data collection. Research panels give you access to national and global consumers so you can determine where it makes sense to expand and when.



TIP

If your website gets a good number of visitors a day, put questions on your home page, one at a time. Your CRM platform can link to surveys on your website to collect data for you in the same way they collect and store information from Contact Us form submissions. A question with general appeal (something everyone's invested in or curious about) may actually boost visitors at the same time it generates useful data for your marketing decisions.



REMEMBER

Don't fall into the trap of doing all your customer research online. Make a point of talking to people face-to-face, in groups and individually. This gets you in the habit of asking salespeople, employees, customers, and strangers on the street for their ideas and suggestions. You never know when a suggestion may prove valuable and lead to another idea.

Using low-cost and free ways to build knowledge

As a marketer, you're never done gathering information. When you think you know all you need to know about your market and customers, that's when you'll start to lose your competitive edge and see profits tumble. You need to build and execute ongoing research and learning plans that help you stay up to date on all aspects of your market, your brand, your products, your customers, and the opportunities and threats you face.

Some of the information your research efforts should help you understand include

- » Who wants what?
- » Which markets and consumer segments are projected to grow and which are not?
- » What societal, political, and other influences drive choice among various customer segments?
- » How do different generations react to different messages, themes, and promises?

- »» What functional alternatives exist to your offers, and how do they impact your goals?
- »» How do your target consumers view your competitors, and which of their promises and distinctions threaten your brand?

Without information, you may be like many businesses and other entities that stagnate by working hard but not working smart to really know how to build a sustainable business.

The following sections cover a lot of ways — some cheap and others free — to boost your marketing intelligence.

Observing your customers

As a marketer, you need to observe customers in as many settings as possible. Off-line, you can observe customers at your place of business and watch them browse your products, merchandising displays, pricing, and so on. Online, you can observe their attitudes, feelings, and potential behavior through the social listening tools mentioned in the earlier section “Monitoring social chatter to better understand your customers.” These tools “observe” what customers are saying, pinning, and posting online, and generate reports about the attitudes that are prevalent among different groups, what people think about your brand, and, most important, what they are saying.

An interesting site to check out is [mention.com](https://www.mention.com), which allows you to search a topic and monitor the interest in that topic. This site gives sentiment scores based on positive, neutral, and negative mentions, and calculates percentages for the passion and strength of mentions and comments about the topic. For example, the day of this writing, a search for *Zelensky*, Ukraine’s president during the 2022 Russian invasion, showed the strength for this search at 42 percent, passion associated with mentions at 84 percent, and a sentiment ratio of 39 positive comments to 0 negative. Using this site to monitor interest and passion for topics related to your category can give you some invaluable and actionable insights.

Search for reviews of social listening platforms, read customer feedback on review sites (not just the supplier sites), and pay attention to reviews and comments about service, value of information, and pricing. Many of these services are offered through SaaS business models, requiring you to commit for a designated period of time. Before signing long-term contracts for any social listening tools, look for services that offer free trials so you know what you’re getting before you commit.



REMEMBER

Whether you're in the B2B or B2C sector, you can discover a great deal about your customers by observing them often in as many settings as possible. Integrating various efforts and technologies will pay off in the short term because you'll get new information about attitudes and intent in real time, and in the long term because you can shape your persona and messaging around the values that don't change with trends.

Observation is often underrated yet highly valuable. For example, when managers at the New England Aquarium in Boston hired a researcher to develop a survey to determine the most popular attractions, the researcher told them not to bother. Instead, he suggested that they examine the floors for wear and for tracks on wet days. The evidence pointed clearly to which attractions were most popular. That was easy!

In B2B marketing, take time to observe what matters most to your clients' job security. Research by Google and Motista shows that when you can tie a sales message and offer to personal value, you're eight times more likely to get a premium price for your product. Find ways to discover what matters most to your clients and link your product/service to those values.

You can find out about customer satisfaction every day by asking for 1- to 5-star reviews at the completion of an online transaction or at the cash register if you sell in-store. These surveys take seconds for customers to complete and provide insight you can act on immediately.

Resolving issues with unhappy customers often helps you retain them — and at a higher sales volume than before. It also shows potential customers you are responsive and will take care of them if something doesn't meet their expectations.

Keeping up with customer opinions is a never-ending race, and continuously asking questions and analyzing the answers is the only way to stay the course.

Doing competitive research

Knowing your competitors' offerings and values is critical for attracting new customers and keeping current customers from straying. Monitor their websites and social media pages to see what emotional and tangible values they promise and deliver, and how you compare. Beyond knowing how your pricing and customer service differ, you need to know how they position themselves in the market so you can position yourself better. Create a grid like the one in Table 5-1 and refer to it often as you craft your own messaging and time your own promotions.

TABLE 5-1

Competitive Research

	You	Competitor A	Competitor B
Slogan			
Promises			
Position			
Special offers			
Industry awards			
Social media followers			
Pricing			
Customer ratings			
Product comparisons (strengths, weaknesses)			
Service comparisons			
Other			

Track competitors' sales, promotions, and special offers, and time yours accordingly. Monitor what their customers like and don't like, and position your brand as the better alternative.

Also, gather information on your competitors' marketing programs, especially how they're getting their marketing messages out. Are they advertising on a fast-growing social network you hadn't considered? You can spy on your competitors' advertising programs with sites like Pathmatics (www.pathmatics.com), which allows you to see where competitors are advertising and analyze your own ad campaigns. Identifying and monitoring the advertising campaigns of your large competitors and *role-model marketers* (bigger companies with more resources) can help you spot new trends and opportunities in a timely manner.

Harnessing the power of one-question surveys

One of the main reasons customers don't complete surveys is because they're too long and no one has more than a minute or two, if even that, to give you. What works in a world where we communicate in sound bites for Twitter, LinkedIn, videos, and more is brevity. One of the most effective ways to get answers is by asking one question at a time. Determine what you need to know most to develop better marketing programs and customer service, and ask only that question.

Delivery mechanisms for one-question surveys include emails, websites, and your social media assets. If you ask one question at a time, you can get away with more surveys. Having a question or a poll on your web page makes your site more interactive and thus engages visitors longer. Just make the questions meaningful to both you and your customers. If people see answering the question as something that will benefit them, they're more likely to respond.

Ask questions that help you understand perceptions and values. For example, if your company focuses on environmental issues and you're trying to reduce plastics in landfills, ask about the values that lead consumers to purchase products that are impeding your progress, such as the following:

Do you think bottled water is healthier than tap water? Yes or No

You can pay news sites to ask your question before allowing access to articles on their site.

Establishing a trend report

Set up a *trend report*, a document that gives you a quick indication of a change in buying patterns, a new competitive move or threat, and any other changes that your marketing may need to respond to. You can compile a trend report by emailing salespeople, distributors, customer service staff, repair staff, or friendly customers once a month, asking them for a quick list of any important trends they see in the market.

Your trend analysis should also include careful tracking of what bigger competitors in your space are doing, because they may be setting marketing or product trends that affect the rest of the industry. Tracking media coverage is easy on Google or other search engines. You can also read competitors' press releases on PR Newswire (www.prnewswire.com) to see what they have to say about themselves.

Track changes on major competitors' websites too, either manually or (if you want to follow several) by using a service such as LXRMarketplace (www.lxrmarketplace.com), Semrush (www.semrush.com), or WatchMyCompetitor (www.watchmycompetitor.com). You can also use these services to monitor competitors' mentions in social media and compare them to mentions of your brand.

Probing data files

Browsing your data files and models is also a good way to stay abreast of your market trends and changes in your customer segments. Sift through your data models and customer profiles to identify trends in demographics, interests,

political affiliations, and lifestyle. You can see which customer segments are growing or declining so you can better align your resources.

If you belong to an association that represents your industry, you will likely have access to market and consumer data that will provide valuable insights on what is happening and projected to happen in your marketplace. Reviewing data from verifiable research studies can guide your future planning.

You can discover a great deal about markets, consumers, incomes, and so on by studying U.S. Census Bureau data for your marketplaces. To get useful data compiled and posted by various agencies of the U.S. government, every few years go to www.census.gov, the main gateway to Census data on households and businesses.

Testing your marketing materials

Before you launch anything publicly, you can easily get affordable insights by sending your email campaign or social media post to a handful of customers and asking for feedback. Ask what made them want to read or ignore the ad. What intrigued them about the offer? How relevant was it to them? Fix any issues you identify and get ready to launch your campaign with more effectiveness.

Most CRM systems have *A/B testing* features you should take advantage of so you can find a champion ad campaign worth repeating. With A/B testing, you create two versions of the same ad and change one or two variables to test against each other. You then run the ads at the same time to see which of the variables perform best. For example, you may be testing a subject line, so that would be the only variable you change. If you send the same email with different subject lines to the same or very similar audiences, in similar market conditions, you can conclude that the only difference in response was the variable tested or, in this example, the subject line.



REMEMBER

Testing email copy and subject lines should be a main component of your market research plan. Testing is a great way to determine which emotions, offers, promotions, and so on really appeal to your mass consumers and your segments. See Chapter 11 on direct marketing strategies for more in-depth insight about testing your marketing programs.

Interviewing lost customers

Losing customers isn't always a bad thing because it gives you an opportunity to discover what you're doing wrong, which is critical if you want to keep getting it right. Following are some ways to find out where you're weak and need to improve:

- » Instead of just providing an opt-out button, ask your customers why they're opting out of your emails. Ask whether it was the content, a customer experience issue, the frequency of emails, or a lack of relevancy.
- » When customers abandon a shopping cart, program your CRM software to send an email to find out why. Was it because they lost interest, found a better price, or simply forgot?
- » Stay in touch with lapsed customers and survey them to find out whether they defected to a competing brand, had a bad experience, or just lost interest in your product.

When you find out why customers no longer want to engage with you or purchase your products and services, you often rekindle relationships that last for years. Customers like to know they're noticed and appreciated, and when you right a wrong, loyalty actually goes up.

Monitoring your web analytics

Make sure to check your web tracking/analytics regularly as they tell you more than traffic counts and sources. Attributes to monitor include the number of viewers that performed desired behavior (your conversion rate), repeat visitors versus new visitors, lead collection, quality of leads (measured by rate of conversion), Contact Us form submissions, and overall revenue and returns from web-based promotions. These numbers tell the story of your marketing successes and failures online and give you something to improve on.

Staying on Top of Social Trends

Monitoring the social influences associated with the demographics of your market, such as your targeted customers' ethnic makeup, average age, spending power, and family structure, provides you with good clues as to how your marketing ought to evolve. If your business caters to women, for example, you'll want to track demographic data that covers the following issues:

- » The pay gap between men and women in general and for fields associated with your category
- » The rate of women earning college degrees in your field

- » Voting patterns and trends for women in your demographic and geographic area
- » Trends relating to marriage and childbirth among women in your customer target groups

You can find current data on social trends by googling topics of interest and browsing through search results that list current reports, white papers, survey results, and so on.



REMEMBER

Knowledge is the foundation for success no matter what type of business you operate. Continuously discovering new information about your customers, market, and competition can often be the difference between success and failure.

IN THIS CHAPTER

- » Recognizing key components of a successful marketing plan
- » Applying pricing strategies and psychological tricks
- » Assessing performance by analyzing KPIs and using a SWOT analysis
- » Collaborating with customers, employees, and other companies
- » Aligning your marketing and business plans and mapping it all out
- » Forecasting for beat-the-odds survival and success

Chapter 6

Creating a Winning Marketing Plan

Rome wasn't built in a day. The Wright brothers didn't build and fly their airplane overnight. Apple, IBM, Kraft Foods, and GE didn't rise to the top of their game in just a matter of weeks. All those companies had a carefully laid out business and marketing plan with goals, action items, timelines, and more to help them launch, scale to mass distribution, establish leadership, and grow as efficiently and profitably as possible.

To succeed, no matter what business you're in, you also need an in-depth plan or guiding blueprint that defines your brand, market position, goals and vision, and target customers. Your blueprint needs to map out how you'll put a competitive

stake in the ground and generate awareness, engagement, and leads; close sales; secure customer loyalty; and grow to reach your goals for profitability, possibly an initial public offering (IPO), and eventually an exit plan.

This chapter focuses on building a strategic road map to get your business moving in the right direction. It also presents suggested actions for getting to your destination as quickly, efficiently, and profitably as possible.

Getting Started on a Launch or Growth Plan

Beyond a plan that outlines marketing activities for finding and communicating with your targeted customers, and inspiring trial, sales, and loyalty, you need a plan that covers the fundamentals of building a successful and sustainable business. Your plan should address product development, market identification and positioning, pricing, capitalization, growth initiatives, distribution, promotion and customer experience, budgets, financial projections and forecasts, and more. That's just the short list! Clearly, a marketing plan is no small project, and it isn't a "do and be done" task. However, marketing is one of the most fulfilling experiences and tasks in business, and this chapter will help make it fun and rewarding.

In the following sections, I cover some of the key elements of a marketing plan for a technology-driven world.

Defining your business

Just like a builder, you need to lay down a strong foundation on which to build your business. Your foundation should start with the basics, such as defining your product, figuring out how it fills tangible and emotional needs and for which consumers, and determining how it fits into the current marketplace. You also need to define what you want to accomplish with your business.

The following sections provide an actionable overview of the elements of a successful marketing plan. While not referred to as the four Ps of marketing, the critical aspects of product, promotion, place and price are addressed from a current perspective.

CORNERSTONES FOR SUSTAINABLE SUCCESS

No plan is complete without end goals in sight. Whatever your ambitions, hopes, or goals for your business are, map out your long-term plan. Doing so will help you be more efficient, avoid wasting resources and money, and doing things that really don't matter in the end. Here are some factors to think about:

- **Growth:** What funds, resources, and plans do you have to grow your company, and how do you intend to reach your one-, three-, and five-year goals?
- **Year-over-year objectives:** Set objectives you can measure. For example, "Increase average annual customer value by 5 to 6 percent," "Shift 25 percent or more of catalog customers to website ordering," or "Achieve 3 to 4 percent of market share in new territories."
- **Marketability:** Set quarterly and yearly goals for market share among the geographies and demographics you serve. Maintaining a strong awareness of and accessibility to your products can help you achieve these goals.
- **Exit strategy:** Are you developing a business you hope to eventually sell to a larger company, maybe a competitor, so you can retire or start a new business? Are you hoping to build an enterprise that you can take public or just a successful business you can pass on to family?

Starting with product

Given that you're reading a book about marketing, it's fair to assume you've prepared a business plan and, as necessary, a product plan. Your marketing plan is an extension of your business plan, outlining the actions necessary to generate revenue so you can continue operating your business and meet your desired revenue, profitability, and growth goals.

Your marketing plan should map out how your product meets a market need, the consumers to target for sales and influence, how you'll get your product to those consumers, how you'll make consumers aware of your product and its direct value to them, and how you'll compete with others for value, price, and customer experience.

So, starting with product: Have you developed a product that's unique to your brand, or do you own a retail outlet or reseller service that sells lots of similar competing products?

If you sell software, for example, you have a clearly defined product with features and customer service distinct to your business. Or if you own a restaurant that offers unique dishes and a dining experience that's about more than just food, your product is good food and good times. Your branding for both types of businesses should focus on positioning your product as having direct value to targeted consumers and as better or more affordable than what your competitors offer. Your focus should also be on how you can make your product stand out so you can attract more buyers.

On the other hand, if you are a reseller of goods that offers many products from many different manufacturers, then you can think of your product as a channel or outlet for a variety of goods. Your focus should be on what makes your outlet better than others. Do you offer more personalized service? Multiple purchasing options? Better pricing or a wider variety? Is your location more convenient or intriguing than competitors' locations, adding to the overall shopping experience?

A starting point is to define the product you're selling and the physical, emotional, and functional needs it fulfills that make it stand out from competing products and functional alternatives.



TIP

Don't just rely on your own assumptions of what makes your product valuable or competitive. Ask your customers, employees, and even prospects what they think of your brand, good and bad, and how they think your product shines above others.

Defining your goals

This is where dreamers and doers sometimes part ways. Dreamers, quite often the CEO or leader of a business or the inventor of a product, tend to believe their product is better than it is. As a result, dreamers tend to set goals based on pipe dreams instead of practical pipelines.

Doers, typically the operations, customer service, sales, and marketing teams, tend to be practical and base goals on attainable market share, data-driven insights on response rates and conversions, and consumer trends.

Discipline is essential to setting realistic goals, because your goals define how you allocate resources and measure success. The most critical aspect of goal setting is that each goal be actionable and measurable.

Increase our customer base by 50 percent is an example of an actionable and measurable goal. The action is increasing the number of customers who purchase from

you. The metric is to add half as many customers to your base as you have at the time you start acting on your goal.

As you set your goals, ask yourself what you hope to achieve in terms of revenue, profit, scalability, growth, and expansion. What are your short- and long-term goals for operating capital and profits? Most marketing plans set forth one-, three-, and five-year goals for product development, distribution, market expansion, and revenue.

Outline the steps you'll need to take to reach your goals and the resources you'll need to invest in. Can you handle marketing activities yourself, or do you need a marketing team that can execute the daily actions needed to reach your goals and maintain a critical market presence?

Your marketing plan should also include a sales plan. Which goals do you need your sales team to achieve in years one, three, and five, and how will you set quotas and accountability for team members collectively and individually? If you need to earn \$1 million in year one, how many salespeople do you realistically need to achieve that goal, and how should you compensate them to maintain motivation and profit margins at the same time? Chapter 16 covers this topic in detail.



REMEMBER

Even if your sales team is separate from your marketing team, marketing is sales. Without the foundation of awareness and lead generation built by your marketing activities, you'll have no potential sales to pursue. Make sure you find a way to work together, sync your teams and efforts, and align your goals and resources toward the same outcomes.

Considering customers

Who are your ideal customers?? If your general demographic is middle-aged women, how can you further segment this group according to lifestyle, interests, geography, and other factors to be able to reach those with the highest propensity to purchase your product? And who and what influences your customers?

Your marketing plan needs to define all your constituents and how you will communicate to each. Constituents encompass more than customer groups and include partners, resellers, investors, employees, community leaders, influencers, and so on. Your marketing plan should identify the influencers of your top customers. For example, if your top customer segment is in the 18–24 age group, you may want to consider YouTube, Instagram, and TikTok stars who post about products in your business category.



TIP

Build your customer profiles based on each segment's demographic, geographic, and emotional triggers. (See Chapter 2 on the psychology of choice.) Your marketing plan should categorize customers by attitude as well as purchasing patterns, lifestyle, and transactional history. For example, if you're marketing to older adults, how many of your customers fit into the emotional categories of Nervous Nellies, Anxious Adams, Empty Nesters, or Road Trippers?

Monitoring the market

Your market refers to your geographic reach as well as your product category within that geographical reach. If you are a retailer of pet supplies, you may have a 30-mile radius for a geographical market. And in that market, you may have a competitive field of 20 businesses and a total addressable market population of 10,000 consumers.

You'll need to address the market challenges in light of the local societal and economic influences of your geography as well as competition from newcomers to your market, functional alternatives such as grocery stores that sell similar supplies, and so on.

Other questions to ask about your market include

- » How saturated is your marketplace?
- » What are your current challenges — a tough economy? Supply chain issues? Or do you face pessimistic consumers?
- » How do you compare to competitors with the same or similar products in terms of access, price, quality, reputation, distribution, features, warranties, and other elements that affect choice?
- » If you have plans to start in one marketplace and expand as you grow, which market will be best suited for your initial go-to-market plan and launch, and which subsequent markets will be most viable?



REMEMBER

Keep in mind that markets aren't just geographical spaces; they're also sectors. If you're a software provider targeting companies that dispatch employees to customer sites, you may start out marketing your product to pest control providers. Once you have traction in that market, you can consider adapting your product and marketing reach to utility repair services, trash collection companies, first responders, and so on.

Before you make a list of ideal markets to pursue, be sure to research the barriers to and costs of entry as well as your competitors' market share. Do the math to determine how much it will cost to gain each percentage of market share you

desire. Look for markets with lower costs for labor, rent, and other operational expenses so you can achieve profitability sooner rather than later.

Configuring channels

You need to have a plan for how to get your products to market. Will you sell them online directly to consumers via your own e-commerce store? Will you sell to retailers via intermediaries and distributors? Will you have your own physical location/storefront? Will your sales team sell your products directly to businesses, and will you look to secure reseller partners that can sell to their networks for you, expanding your market reach and sales revenue? Your business might warrant multiple channels as you grow. If you are just starting out, it's wise to put resources into one or two channels, test out product and marketing efforts, and then expand to new channels, leveraging your learnings. (Chapter 15 has more information about sales channels.)

Map out the pros and cons and costs of each relevant channel for your product so you can see a clear path to scaling distribution that's affordable and profitable. Within each channel category, there are many options. For example, if you intend to sell through online channels, you'll need to weigh the pros and cons of using Amazon over eBay, your own e-commerce store over third-party channels, wholesale and outlet sites, and so on.

Do your homework. The time and money lost if you decide to switch distribution channels is also time your competitors have to get ahead of you. It's difficult and costly to catch up.



TIP

To get started, audit how your competitors distribute their products. Are they online only, or do they use a hybrid of online and off-line channels? Which third-party channels do they use? If your competitors sell on Amazon, note where they rank among sellers in your category. Are they among the Top 20 most popular sellers? Do they qualify for Amazon's Buy Now button on their product pages? (See Chapter 15.)

Planning your pricing

Key to the success of any business is a pricing strategy. You need to set prices that enable you to compete, earn enough money to reinvest in your company, and position your brand quality and experience accordingly. For example, luxury carmakers price their vehicles high, not just because they have nicer interior elements and a better mechanical structure, but because they also deliver above average experiences and services. They tell customers that they're getting something distinct, extraordinary, or of higher overall value. Given the level of luxury car sales, it seems customers agree.

Mapping out your action plans

Your marketing plan should build on your business plan by outlining the product development, marketing, and sales actions needed to accomplish the goals and timeline you've set. Your plan needs to address all audiences and constituents. For example, if you will rely on investors to finance your operations until you become profitable, your communications plan should include investor relations activities and information for both potential investors and future shareholders. Your presentations, letters, and reports will need to include financial data that addresses stock assignments, sales projections, win rates, operational expenses, and so on.



REMEMBER

Investor and shareholder communications must comply with federal law, so you'll need an advisor to ensure you're communicating correctly with your financial backers.

Some of the actions you'll need to define and include in your overall marketing plan are explained in the following sections.

Going to market

Your *go-to-market (GTM) plan*, or your initial product or business launch, should identify the first markets you plan to enter and how you'll gain awareness, sales, and market share. For instance, if you're launching a boutique business that sells natural and organic items, your first opening should be in a geographic market that has a large population of consumers of natural foods and wellness products. You'll need to research demographics in areas of interest to find a place with a significant percentage of your target population.

Once you have a list of key areas for selling your natural and organic products. You'll then want to identify which has the most affordable advertising rates, sales channels, office space, and workforce costs to launch your business so you can spend the least amount to test your concept, pricing, promotions, and so on, learn where to improve, and then expand to a similar area with like consumers and cost points.

The primary goal of a go-to-market plan is to establish how to distribute super goods, competitive pricing, and successful customer experiences that reflect the organization's value proposition in order to rise to the top of your market.



TIP

To get started, ask yourself these questions: How will you launch your product to spark trial? How will you keep consumers who try it coming back? By referring others? What special offers and discounts can you execute without hurting profit margins? How often? What branding campaigns and promotions can help you to get to mass distribution quickly?

Finding funding

Do you intend to grow your business operations and product development from revenue? Or are you in a fast-paced technology environment, like software, in which you need to scale quickly in order to compete and keep up with competitors' innovations and new releases? If you need funding, you must decide if you'll be funded by individual investors or partner with venture capital firms.

You'll have to determine the profit margin you need to break even and reach your growth plan goals. Does your business success, short- or long-term, depend on your ability to conduct research and development for new editions, ancillary offerings, and expanded product lines? How much of your revenue will you allocate to marketing?



TIP

Ask yourself how much control you are willing to give up. Determine the amount of equity you're willing to give away to fund your company and how to preserve equity so that you remain attractive to investors. The more equity you give away, the more control you give up so plan your capitalization efforts carefully.

Promoting your product or business

By reading this book, you are setting yourself up to learn how to promote your product across multiple channels. Doing that will help you achieve brand awareness and trial and loyalty among your core customers. How you promote your product will be a critical factor in determining your success or failure. Generally speaking, a promotion is a campaign aimed at driving short-term or immediate sales. Typically, it's a campaign with a strong call to action or time-sensitive offer, such as 10 percent for all sales in a given month, or *Buy One, Get One Free* offers. Advertising, on the other hand, refers mainly to campaigns that build brand awareness so that promotions are better received. Advertising is the genre that covers billboards, sponsorship signage, magazine ads, and other forms of marketing that may or may not present special offers.

As illustrated by the diverse topics covered throughout this book, your marketing needs to be a concerted, well-crafted plan. It needs to define the channels your target customers use, specify how much you will spend on each channel, determine what your messaging and offers will be to generate leads from each channel, and state how you will measure success. Otherwise, you'll miss opportunities and waste a lot of time and money on fruitless efforts. It's also important to establish priorities and budgets ahead of executing activities or spending money. Those little ad buys or social media spends can add up quickly but deliver minimal results. Planning all aspects of your marketing is key to driving efficiencies and desired outcomes.

Setting a budget

Your marketing plan needs to set forth a budget that's appropriate for your current resources, goals for lead generation, sales and cost per lead. A rule of thumb has been to set a budget based on revenue percentage (you'll find more on calculating a marketing budget later in this section). There are many factors to consider when setting a budget, and the following sections highlight some of the more important ones.

Determining cost per lead

A smart starting point is to determine the cost for every marketing lead you generate. The cost per lead factors for an online or e-commerce business include

- » Costs to maintain/host your website each month, including advertising costs to drive visitors to your website, such as Google Ads, a retargeting platform, banner ads, social media ads and so on
- » Payroll expenses to maintain your marketing, sales and/or call center staff
- » Commission costs for third-party sales, including what you pay Amazon or eBay for products sold on their sites and resellers with whom you may have contracted

When you add up your costs, divide the number of leads by that number, to find your cost per lead (CPL). For example, if you spend \$100,000 in a given month on the above elements, and you generate 1,000 leads in that month, your CPL is \$100. Clearly the more leads you generate against your costs, the lower your CPL will be.



REMEMBER

Target or typical CPLs differ by business industry and brand. Your goal should be to earn more revenue for leads than you spend to acquire them. The bigger gap between revenue and cost, the greater your ROI and profits.

Comparing launch budgets and growth budgets

Like anything in business, there are times when resources and processes need to be increased or decreased. When launching a new business, you need to come out of the starting gates at full speed to gain recognition and trial among consumers who may have established relationships with your competitors or are looking to purchase in your category for the first time. Getting noticed may take an extra percentage — or two — of projected revenues than you intend to spend over a 12-month period. You'll also need to budget for launch-related marketing

expenditures such as space at a trade show, a press conference, sponsorship of a community event, and so on.

Your plan should include accelerated activities so you can get a burst of recognition and leads that may help you fund future marketing activities. Once you establish a presence and secure leads to follow up on, you can taper back to a steady but still strong flow of marketing communications to ensure leads come in at a pace you can handle.

When increasing your marketing spend for launches or specific opportunities, budget carefully. It's not wise to put all your budget toward a given time period or project and then be silent or invisible afterwards. If you are launching a new product in Q3, maybe take 30 percent of your monthly budget for Q4 to elevate your marketing efforts in Q3. This way you have more visibility when you need it but don't go dark, which may give some people the impression you have gone out of business.

Calculating percentage of revenue

Some business organizations suggest setting a marketing budget according to a percentage of your company's gross revenues or your sales revenue. You may want to start with 5 to 7 percent of gross revenue projections or 2 to 5 percent of sales. If you're just getting started, you may set your budget according to projected revenues based upon a market analysis of potential customers, the percentage of market you expect to achieve, and a win rate you anticipate with your current sales team.

It's important to have a realistic expectation for your win rate because it will determine your revenue and corresponding marketing budget. The sales win rate formula below will help you set a benchmark:

$$\text{Sales winrate} = \frac{\text{Closed} - \text{won deals}}{\text{All deals}(\text{closed} - \text{won deals} + \text{nonclosed won deals})}$$

Using this formula, if you have 50 deals in your pipeline, and you close 15 of them, your win rate is 30 percent. Given the market elements you face, market size, and competitors' market share, is this realistic to maintain? How much time do you anticipate it will take to close 30 percent of the deals in your pipeline moving forward? Calculating these numbers will help you determine a timeline for reaching your profitability goals. Knowing your win rate is also important when pitching your business to investors.

Considering Pricing Strategies

As simple as it may seem, pricing is actually one of the most complicated parts of marketing. You need to establish what customers are willing to pay for your category and your brand and develop sound pricing strategies and tactics.

You may have noticed that some stores end prices with \$.99 cents, others \$.98 and so on. These are not random choices. Research shows that these numbers versus whole dollar amounts like \$10.00, increase sales. Something to consider.

Is your best strategy to set a low price so you can grow revenue faster? Or raise prices for higher profits? How do you apply discounts and promotions without minimizing your overall pricing and brand value? This section provides some insights about the role of pricing for long-term growth and profitability.

Pricing opportunities and obstacles

It's easy to think that price is the primary driver for sales and the lowest-priced product gets the most sales. Yet, as I mention in Chapter 2 when I talk about the emotional drivers of choice, being the low-price leader can actually be detrimental to your long-term success. Pricing strategies present both opportunities to attract new sales and boost profits as well as obstacles that can spark short-lived sales but impede profits over time (see Table 6-1).

TABLE 6-1

Examples of Pricing Opportunities and Obstacles

Opportunities	Obstacles
Setting your initial price to be attractive for trial	Pricing to compete with other brands
Increasing price as perceived value grows and so does demand	Underpricing to attract new customers
Providing special offers to spark sales and loyalty	Deep discounting and its impact on existing customers and long-term sales

Your pricing goal should be to see *how much* you can sell your product for, not how little. Keep in mind that if you start out as the low-price leader in your market, you'll have a hard time moving away from that position. To counteract that, you may have to engage in aggressive branding campaigns to justify a new price, which can be expensive and lower your profit margin.

If you want to raise your price *and* sell more, consider the following strategies:

- » **Building brand awareness:** Better-known brands command a premium price. Maintaining consistent customer communications, a social media presence, and publicity campaigns helps drive visibility and pricing stability.
- » **Increasing quality:** Create new and improved versions of your product that give consumers a perceived reason to spend more on it.
- » **Upping your social media dialogue:** Inspire word-of-mouth marketing by encouraging happy customers to post about their experience with your products on social media channels. Word-of-mouth marketing can earn a 5 to 10 percent higher price over competing products.
- » **Using prestige pricing:** Adding a more sophisticated look to your packaging and advertising can help you successfully boost your price 20 to 100 percent.

All these strategies take time, resources, and money, so it's important to weigh the potential returns along with the consequences.



WARNING

Sometimes competitor pricing can force you to lower prices to a point that you barely make any profits. If you find yourself in this situation, you may need to consider changing your distribution model.

Avoiding the dangers of deep discounting

Using deep discounting to entice prospects to try your product may be tempting, but beware. Often, you encounter more perils than payoffs when you use Groupon and other big discount platforms. Here are some facts from a Business Insider survey of businesses that ran Groupon deals:

- » Nearly 80 percent of the Groupon users surveyed discounted their prices between 50 and 75 percent.
- » Many of the businesses earned revenues as low as 25 percent of normal.
- » Restaurants that typically earn 6 to 8 percent profit margins earned 3 percent margins, which doesn't help long-term sustainability.
- » More than 50 percent of the companies retained only a handful of Groupon customers. Some retained about 25 percent, and none retained 50 percent or higher.
- » The majority say they won't use Groupon again, and 50 percent wouldn't refer it to a friend.

In addition to the disappointing income figures, deep discounting for customer acquisition presents other dangers. For example, loyal customers that aren't offered the same deal as new customers can feel unappreciated and lose interest in buying from you. Additionally, you devalue your brand. After you offer low prices, customers may see you as less prestigious or valuable, and that hurts your ability to ever raise your prices in the future.



WARNING

Because of the frequency of the discounts and sales many consumer brands and department stores offer, customers have been conditioned to wait for the next sale. Running too many sales often does more harm than good and has helped usher out the era of department stores ruling the retail sector.



REMEMBER

Lowering prices is easier than raising them. When you lower your price, you may lower people's interest in buying your product again at a higher price, and you may be stuck with a price that hurts your profits even if you increase your sales volume.

Keep in mind that most offers fail to motivate the vast majority of customers, so you need to find ways to add appeal, value, and urgency to any discounts you offer. Here are some tips:

- » **Make the discount worthwhile and convenient.** Coupons are appealing to a large percentage of customers when discounts are higher than 50 cents. Consider offering digital and printed coupons to make them easy to use.
- » **Make your offers reciprocal.** Ask customers to opt in to your marketing list in return for a discount. For the right offer, many consumers will comply.
- » **Set time limits.** Include expiration dates to give customers a sense of urgency to act.

Mastering the Psychology of Pricing

As I note in the previous section, psychology plays a big role in pricing. How high or low you set your prices influences customers' perception of the value of your products and, ultimately, their willingness to buy. Following are some insights about different psychology-based pricing methods.

Pricing to address perceptions

Like marketing campaigns, pricing decisions need to be driven by strategies, not just random choices. You need to research how your price aligns with supply and demand, competitors, perceived value, and so on. You also need to consider some of the psychological implications associated with pricing such, as those explained in this section.

Odd-even pricing

Odd pricing (ending prices with an odd number) substantially outweighs *even pricing* (ending prices with an even number) when consumers have a choice. Many studies back this up. Some show that 70 percent of customers prefer a price of \$9.99 over \$10.00 for the same item. Even though the difference is just one penny, the price is perceived as significantly lower. That's just one example of how our rational and irrational minds work.

Using a strategy of lowering your price by one penny isn't going to hurt you, so there isn't a lot of reason not to do it. Walmart goes a step further and ends many of its prices with 88 or 98 cents rather than 99 to help create the perception that the products it sells are priced substantially lower than those of competitors.



TIP

Rounding down to 99, 98, or even 95 also works for dollars, not just cents — consider \$1.99 or \$199 over \$2.00 or \$200.

Price lining, or price anchoring

The *price lining* method fits your product into a range of alternatives, giving the product a logical spot in customers' minds. Dan Ariely, a psychologist and professor of psychology and behavioral economics at Duke University, has studied this phenomenon in various settings. He finds that people usually pick the price in the middle when given a choice of similar products at a range of different prices. Instead of splurging on the most expensive item available, people often opt for something in the middle because it feels more responsible, and they avoid the lowest-priced item because they feel they deserve more.

The psychological term for this reaction, or cognitive bias, is *mental anchoring*, which refers to how people often frame their choices around the first piece of information they see. This is a common tendency in investing and can be further explored by reading behavioral economics studies.



TECHNICAL
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Price anchoring is common in the restaurant business. You'll often find a very high-priced item on the specials list that few people are willing to buy, but somehow, when they see the lower-priced menu items, those dishes seem reasonable, even if they're also overpriced. Price anchoring is an easy and effective strategy

because it appeals to “rational” thinking by tapping into the irrational drivers that help people justify doing things they may not otherwise do.

Framing prices

How you present or *frame* an offer impacts its perceived value. Studies show that *Buy one, get one free* offers drive more sales than *Two for the price of one* deals. Additionally, stating *You can have this car for just \$600 a month* influences behavior more than stating *Buy it for \$40,000*. It’s all about framing offers and pricing so they align with consumers’ expectations. When you make purchases seem more reasonable than overwhelming, you help create a sense of comfort and take fear out of the purchasing process.

Descriptive pricing

In addition to framing your prices, doing little things like adding adjectives can help a great deal. For example, inserting the word *only* before your actual price can actually increase sales by around 20 percent, according to a study by Carnegie Mellon University.

Competitive pricing

Competitive pricing involves setting your prices relative to those of your competitors. Price your products above theirs if you offer more benefits and overall value; price below them if the opposite applies. If you’re not as well-known as a competitor, lower your price to inspire people to try your product. Remember, pricing is not absolute or a final act. You can adapt your pricing as competition goes up or down, and as you rise above in your marketplace.

Price creates prestige, which is what fuels the luxury industry. If you drop the price, you drop the sense of status that results from higher prices and much of the emotional fulfillment of a product beyond its functional value. This happened to Tiffany & Co. when Avon bought it and then tried to mass-market the Tiffany name by putting it on inexpensive jewelry. Millions of dollars of losses later, Avon sold out, and Tiffany went back to being successful by charging its usual high prices.



TIP

If you’re in a highly competitive market, consider competitive pricing. Decide which competing products customers may view as closest to yours and then make your price sufficiently higher or lower to differentiate your product.

Creating Your Controls or KPIs

The controls section is one of the most important elements of a marketing plan because it allows you and others to track your plan's performance. Identify some performance benchmarks and measurable values, often referred to as *key performance indicators (KPIs)*, and state them clearly in your plan.

You should set KPIs for your overall marketing program and actions, and for each individual line item or business unit. For example, you can define KPIs for the following:

- » Sales activities
- » Marketing spends and action items
- » Web traffic from search activities
- » Customer service and support for resolving conflicts
- » Customer engagement sales from online and off-line chats
- » Distribution channel performance

As you monitor the KPIs and results for various aspects of your business, you'll be better able to see where your resources are needed most, where you can cut back expenses, and where your strong points and weak points are when it comes to profitable operations and ROI.

Conducting a SWOT Analysis

You can't define and improve your position in any market unless you know your

- » Strengths
- » Weaknesses
- » Opportunities
- » Threats

Even though the *SWOT analysis* has been around for years, it won't ever be old-fashioned or outdated. The world, its people, and your markets are dynamic, not static, and if you don't continuously monitor your strengths, weaknesses, opportunities, and threats in real time (rather than in the past), you'll fall behind.

Once you're behind a competitor who adapts regularly to market and customer changes, good luck catching up and ever getting ahead.

One of the most efficient ways to do a SWOT analysis is to map out your strengths, weaknesses, opportunities, and threats and those of your top competitors at the same time. This way, you can more clearly see just how well your assumed strengths compare to theirs. So open a spreadsheet on your computer, or get out a pen and paper, and start mapping out your SWOT.



TIP

Do this analysis frequently to ensure that you're on top of your own market position, focused on the right opportunities and the right challenges to overcome, and aware of what your competition is doing. You only need to be one step ahead of the others in your space to be in a position to dominate market share and mind share — two important goals for any marketing plan.

The following sections lay out some starting points for doing your SWOT analysis.

Finding your strengths

Identify the strong points of your products, brand image, and marketing program so you know what to build on in your plan. Your strengths are the keys to your future success. Strengths can include

- » Product innovation
- » Price for value delivered
- » Customer service policies and practices
- » Location
- » Unique experience beyond your product
- » Brand reputation

Your brand slogan, campaign taglines, positioning statements, value and mission statements, creative presentations, and sales pitches — really, all your communications — need to present and support your strengths. You can do this directly with verifiable claims about your excellence, and more subtly through your word choices, and your marketing content.

As you identify your strengths, outline actions that will help you build on them to strengthen your overall brand.

Addressing your weaknesses

As hard as it might be to face our flaws, it is important to pinpoint the areas in which your products, brand image, and marketing program are relatively weak. For example, perhaps you have several older products that are losing sales, and your plan needs to address how to adapt or cut these products, as well as your overall positioning. Weakness may include

- » Higher prices due to lower *economies of scale* (cost advantages based on production efficiencies) than competitors
- » A shallow product line
- » Fewer features for your product compared to others in your space
- » Fewer distribution points than competitors who have more established channels
- » A reputation for not being able to deliver on promises

As you outline your weaknesses, document strategies for how and where you can improve. Set goals and time frames for fixing the problems you can to ensure they aren't forgotten and prevent them from potentially turning into crises.

Looking for opportunities

Opportunities present themselves in various forms. Some may be obvious, while others aren't. Apparent opportunities, or those that present themselves in most cases, to outline in your SWOT analysis might include

- » New growth markets
- » New communications or distribution channels for reaching customers
- » Potential partners for collaboration or bundling

Other types of opportunities are those that you seek to create for your brand. For example, you may see a void of subject matter experts in your industry. This presents an opportunity for you to position your experienced executives as authorities in the field. Have them participate in, speak at, and author guest columns and blog posts.

Collaborating with organizations and complimentary companies presents another realm of opportunities. Seek out organizations that support your category, values, and your environmental, social, and governance (ESG) standards. Work together

to host events that are meaningful, beyond sales opportunities, so you can tap into each other's networks and add value to each other's businesses.

Other areas in which you can find opportunities for growing your brand awareness, reach and value include:

- » Data: Build a strong database of contacts in your space so you can generate meaningful conversations with prospects others might not have access to.
- » Experts: Hire innovators from different cultures, areas of expertise, generations and so on so you can move faster on product development and niche marketing.
- » Customer Satisfaction: If you have a high customer satisfaction rate, you may have an opportunity to create more case studies, secure customer reviews on public review sites, and generate referrals among qualified prospects.

The key here is to think of opportunities from multiple angles — the ones that exist, the ones you can leverage, and the ones you can create. Then go seize the day!

Focusing on functional alternatives, or threats

A threat is any external force, element, trend, or change that can reduce your sales or profits or make it difficult to achieve your growth goals. Common threats include new technologies that create new competitors, large competitors that can outspend you, and economic or demographic shifts that cut into the size or growth rate of your customer base.

Threats can also include rising operational costs that lead to more mergers and acquisitions in given markets, leaving small companies vulnerable to takeovers as a way to avoid bankruptcy. In an era where big boxes and brands are gaining monopolistic advantages, economies of scale, and labor power over smaller independent companies, you can't turn a blind eye to market consolidations at any level.

Another key analysis involves understanding how your product compares to functional alternatives, products that aren't really the same as yours but perform some or many of the same functions and are designed for the same basic outcomes. Software platforms and applications compete with functional alternatives quite a bit.

For example, digital asset management platforms, content management systems, and marketing resource management systems are all designed to do many of the same things and produce the same outcomes: higher efficiencies in creating new versions of content for cross-channel distribution that can be delivered to consumers with personal relevance. But each system is slightly different, which puts them in different software/technology categories and makes them functional alternatives to each other. A great example of a functional alternative is Uber. Taxis used to dominate transportation for individuals wanting private rides. When Uber came along, travelers suddenly had an attractive alternative, which has totally disrupted the taxi industry.

You need to decide how your products support or compete with functional alternatives and then build action items into your marketing plan. Questions to ask yourself include

- » Which business category best describes where you are now?
- » Which business category best describes where you aspire to be to maximize your long-term profitability?
- » Where do you currently fit in your primary category? If you made it on Gartner's Magic Quadrant — a coveted ranking of best-in-class products within a given industry — would you be considered a leader, challenger, niche player, or visionary?

Mapping out your SWOT grid

Table 6-2 is an example of how you can organize a competitive SWOT analysis for your products. You should also take the time to do a SWOT analysis from a branding, market position, sales, capitalization, and growth perspective.

Creating a SWOT analysis that compares you to your competition is a must if you want to stay ahead in the game or be constantly aware of what you need to do to get ahead if you're not there yet. Today's markets move fast, and you need to be prepared to act fast to clear any hurdles you face and jump on opportunities before they disappear.



TIP

Before completing your SWOT grid, collect information about your competitors' promises, product claims, industry awards or rankings, pricing models, advertising messages, persona, and promotions. The more armed you are with information, the better prepared you are to identify your SWOT high points and low points and how they compare to competitors.

TABLE 6-2

Sample SWOT Analysis

	Your Product	Competitor 1	Competitor 2
Strengths	More features	Strong brand awareness	Lowest price
Weaknesses	Newcomer to market, not proven	Mediocre quality	Undercapitalized and may lack funds for product development
Opportunities	Take market share by communicating value of distinct features Bundle with complementary brand with established channels in place	Completed IPO so can put more money into developing new features that may compete with ours	Opportunity to take market share due to pricing strategy
Threats	Higher price may prevent newcomers to category from trying Low marketing budget Economic slowdown, low consumer confidence levels	Lower quality and lack of similar features can result in consumers switching to new brands like ours	Competing mainly on price, which can be countered with ESP marketing tactics

Some information worth gathering about your competitors includes

- » **Company:** Describe how the market perceives your competitor and their key product.
- » **Key personnel:** Who are the managers, and how many employees do they have?
- » **Financials:** How strong is their *cash position* (do they have spending power, or are they struggling to pay bills)? What were their sales in the last two years?
- » **Sales, distribution, and pricing:** Describe their primary sales channel, discount/pricing structure, and market share estimate.
- » **Product/service:** What are the strengths and weaknesses of their product or service?
- » **Promises and claims:** What promises and claims related to benefit, value, performance, and quality do they make, and how do you compare? Can you position yourself according to what they deliver?

» **Promotions and offers:** Do they offer any promotions that can cut into your sales or tempt your customers to switch to their products? What's the timing and pricing differential of these promotions, and how can you schedule yours to offset any impact?

Armed with this information to add to your competitive SWOT analysis, you'll be ready to succeed more efficiently than you can imagine.

Winning with Collaboration and Corporate Social Responsibility

We live in a sharing society. Businesses that bring people together to share resources, collaborate on getting things done, and help each other with daily living are the ones that have thrived in recent years. We need to feel like we belong to social groups, friend groups, family, work, and professional groups. That sense of belonging to tribes of people *just like me* brings out our confidence and sense of self. When this happens, we feel a strong sense of commitment and loyalty to the other people and our shared cause.

When brands collaborate, it's likely because of this inherent need for belonging. Collaborative programs create emotional bonds while delivering something that often reach far beyond the product.

Collaborative programs are not the same as Corporate Social Responsibility (CSR) Programs. Collaboration is working with other organizations to produce a greater good for customers, communities, or society. CSR refers to the programs your brand executes separately to give back to the communities that support you and the world you live in.

This section showcases a few ways to collaborate for the greater good.

Sharing is caring (and good for business)

In business, you can collaborate with associations, civic groups, and even competitors, to create a more robust product, service, or experience for customers. For example, Microsoft and Toyota teamed up to advance information systems in cars. American Express and FourSquare worked together to introduce how mobile technology can work for restaurants and consumers.

Collaboration inspires sharing of resources to improve the way we live, and as a result has spawned many shared-resources businesses like

- » Uber, where drivers with cars helps travelers that need transportation
- » Airbnb, where homeowners share homes or rooms with travelers looking for alternatives to hotel
- » TaskRabbit, where people with free time do errands or odd jobs for those who are stretching to get it all done



TIP

Look around your marketplace. What common goals do consumers have? What challenges and aspirations do they share? Which businesses or organizations support your value proposition and align with your vision? And then ask yourself the big question: *How can you bring brands and people together to solve a common problem or achieve a common goal?*

Try to build collaborative efforts around your brand's emotional selling proposition, or ESP (see Chapter 2). When you do this, you end up with a movement, not just a product and a brand. Companies that are perceived as moving toward a better world are the ones that are succeeding in this new era of consumerism.

Teaming up on CSR

Your CSR strategies for giving back, nurturing the environment, promoting charitable and community causes, and so on are a good foundation on which to build your collaborative efforts. Map out what you'll do on your own or with other groups as part of your marketing plan. Some action items to consider include the following:

- » Schedule giving back CSR activities regularly to keep your commitment an active part of your company vision and brand identity to the outside community.
- » Involve employees, customers, and community members so that your CSR actions are truly collaborative, and become part of your local narrative.
- » Measure all that you do and communicate your actions and impact so your constituents and potential partners for collaboration can see verifiable, quantifiable results. Ensuring that other organizations become aware of your impact can open some powerful doors for future opportunities to give back more than you imagine you can.

TWO COMPANIES, ONE CAUSE, AND A WORLD OF IMPACT

Ecologic Brands, Inc., is a young business dedicated to reducing the environmental harm of disposable bottles by making them out of recycled (and compostable) cardboard pressed into a thin, smooth bottle shape with a thin recycled (and recyclable) plastic liner. The innovative design needed to be market tested in market to move from design stage to actual packaging for goods on the market. So the company's founder, Julie Corbett, and her team looked for a marketing partner that strongly valued sustainability and had the visibility to introduce the packaging innovation.

Ecologic was able to forge a partnership with Seventh Generation, Inc., a company that makes healthy plant-based household cleaning products. Seventh Generation featured the distinctive Ecologic packaging for its natural laundry detergent. This partnership resulted in helpful sales revenue for Ecologic Brands and valuable visibility and publicity at a critical time in Ecologic's development.

Many brands are actually launched around a purpose associated with the passions and values of their founders. Patagonia and Cotopaxi outdoor wear are two good examples of brands whose roots go back to the values of their founders, who started their companies based on personal experiences that inspired them to serve a needy segment of the world community.



REMEMBER

Developing a CSR strategy is an essential part of a brand's purpose, business goals, and marketing plan. As you build a marketing plan for your business, no matter which sector you serve, define the purpose you want your brand to be known for, take actions toward fulfilling that purpose and involving others, and collaborate with other organizations to increase your impact on your communities.

Leveling Up in More Ways Than One

Beyond your current customers and prospects, you need to engage the influencers in your business category. Some influencers are direct; others not so much. Some are obvious, and others more subtle.

Influencers take on many different personas and attitudes and are often highly trusted sources people turn to when making decisions. According to Nielsen's recent global trust in advertising surveys, 89 percent of consumers trust

completely or somewhat trust recommendations from people they know, the #1 influential source. Another strong influencer is consumer opinions posted online, which 70 percent completely or somewhat trust despite not knowing anything about the people posting. This validates the power of building strong online communities and getting happy consumers talking about their experiences with you.

Table 6-3 presents examples of influencers that can impact sales and loyalty in various industries.

TABLE 6-3

Examples of Influencers

B2B Influencers	B2C Influencers
Industry analysts (Forrester, Gartner, Hoover's)	Peers (family, friends, professional associations)
Media covering innovations, advancements, and business news in your industry	Reviews on sites like Yelp and Amazon
Peer networks such as associations or societies bringing together CMOs, CTOs, sales executives, product developers, graphic designers, architects, and so on	Social media sites such as Twitter, Instagram, and Facebook
Product review sites such as bloggers that put out a Top 10 Widgets in 2022 report and so on	Bloggers on related topics (fashion, cooking blogs, and forums for consumer reviews, advice, and so on)
General print, radio, and TV news	Online news sites for category, general news outlets
End users who can influence department purchasing agents (such as radiology technicians influencing biomed purchasers)	End users who can influence selling channels via requests for products and services
Peer reviews, including testimonials on a brand's site and on review sites	Consumer reviews and posts on shopping sites



TIP

Consumers trust editorial comments by influencers more than the ads they push out. Choose your influencers — and how your messages are delivered across their channel — carefully.

Monitoring and reacting to trends

Studying market trends to determine influences on sales that are out of your control will help you manage your resources most efficiently for the current

conditions. When you do a trends analysis, you should include information about the following:

- » Is the size of your buying population growing or shrinking? Do you need to look to open up new markets?
- » Are the transaction value of each sale and the annual value of each customer going up or down? Should you consider adding complementary products to your offerings?
- » Have functional alternatives been gaining in prominence and sales? Do you need to address comparisons in your messaging?
- » What are the signs from any economic indicators that may impact sales in your category (housing starts, housing sales, unemployment, job growth, wages)? How are they expected to change within a given year or quarter?



TIP

Take note of current and future market indicators so you can plan accordingly. If you see a shrinking population or shifts in discretionary spending, adjust your output so you don't end up with inventory you can't sell.

Developing the customer experience

Your marketing plan needs to encompass the overall experience you plan to deliver. When products and prices are similar to competitors' offerings, it's the experience that elevates one brand over another.

Customers often care more about how they feel when doing business with you than the prices or benefits you offer. Note that posts on Google, Yelp, and other review sites frequently describe the service received, the attention and concern showed by employees, and other experiences with a business instead of the price or product features.

Your customer experience, as detailed in Chapter 3, needs to be built upon meaningful interactions from introduction to lifetime value that put your brand at a higher level than your competitors and give customers something to talk and post about.

Elements of the customer experience you should focus on include

- » **Customer service protocols:** How you respond to missed expectations, product issues, repairs, technical support, troubleshooting needs, and so on
- » **Purpose:** How you involve and engage your customers in your culture, values, and causes

» **Communities:** How you bring your customers and prospects together to form hives that support your brand and create bonds around similar values, product experiences, and causes



TIP

Look for a project management software tool that will enable you to map out action items, costs, timelines, task owners, and results so you have a single point of view on the impact, cost, and return on investment (ROI) of your marketing programs.

Mapping Out Your Action Steps

After you've worked through your goals and identified where you stand in terms of your SWOT analysis, functional alternatives, and who your customers and influencers are, it's time to start putting your plan on paper and assigning actions, timelines, responsibilities, and metrics.

Taking the time to think through and write a marketing plan is essential to your success for many reasons. It helps you and your entire team clearly understand your goals, vision, current knowledge, actions you plan to execute, and your budget for those actions. Essentially, it organizes your knowledge, defines your priorities, sets your tasks and schedules, and gets everyone on the same page.

A successful marketing plan encompasses all the elements discussed in this chapter up to this point and assigns actions to associated goals. Here are some of the justifications for time spent organizing a workable plan:

- » A plan helps you identify the best practices, eliminate the unprofitable ones, and keep everything on schedule and on budget. Many businesses don't have a plan spelled out and just react to opportunities that may or may not pay off. Having a plan helps you work smarter and more efficiently.
- » The planning process helps you think through what needs to be changed to improve your results. Putting things in writing often adds clarity of focus to necessary tasks.
- » Planning helps clarify and control key elements of your marketing program, such as branding, pricing, content, selling strategies, and more.

Another big benefit of planning is that it gets you thinking creatively about your marketing program. As you plan, you find yourself questioning old assumptions and practices, and thinking about new and better ways to boost sales and profits.

The next step is to start mapping out your action items. Following is a solid step-by-step guide for organizing your thoughts and outlining your actions so your document becomes a true action plan, not just a good idea put in writing.

Step 1: Complete a situational analysis/summary

The first step is to outline the circumstances or situation you're facing at the moment. For example, what is your level of brand awareness compared to competitors, and how are you poised to gain market share? What are your constraints on resources, funding, ability to scale, and so on? Explain the current situation as concisely as possible so all team members get an understanding of where you are and where you need to be.

Step 2: Establish your benchmark

When setting your goals, keep in mind what you have achieved and which actions have paid off, and establish a starting point, or *benchmark*, from which you want to build and improve. Review sales, market share, profits, customer satisfaction, web visibility, or other measures of customer attitude and perception from past campaigns. What levels of awareness, customer retention, and acquisition did you achieve? Your benchmark serves as a reality check for where you are and the foundation on which you should build your goals.

Step 3: Define your goals

While you're working on everyday goals for marketing and sales, don't lose sight of your long-term objectives. Learn from the moment to set goals for improvement and additional growth in the short and long term for incremental sales, customer acquisitions, profit margins, market share, and so on. Quantify your goals and assign metrics to all your activities.

Step 4: Take note of lessons learned

Continuously monitor your results, qualifiable and quantifiable, to assess the return on resources spent and impact on sales and revenue. Also include lessons learned from competitors or even dissimilar businesses that have had good (or bad) luck with marketing initiatives you may want to try. Consider any results from A/B testing of ESPs, campaigns, offers, promotions, channels, events, and so on (see Chapter 11).

Step 5: Outline your strategy

Mapping out your strategy and steps for executing every aspect of it is like building a road map with milestones along the way to your destination. Your map outlines action items for growing your revenues and profits.

Your strategy lays out how you'll act on the information you gathered in Steps 1–4. For example, if your primary audience is middle-aged women, one point of your strategy may be to reach and convert young adult women to your products and brand so you can nurture the next generation of customers. Your action items will then outline how you'll reach this goal.

A marketing strategy includes responses to market conditions, opportunities and threats, your positioning, and your messaging. All these elements are what make one brand different from another, and they need to be given appropriate time and attention.

Check out Figure 6-1 for an example of how a marketing strategy leads first to specific marketing objectives and then to marketing tactics.

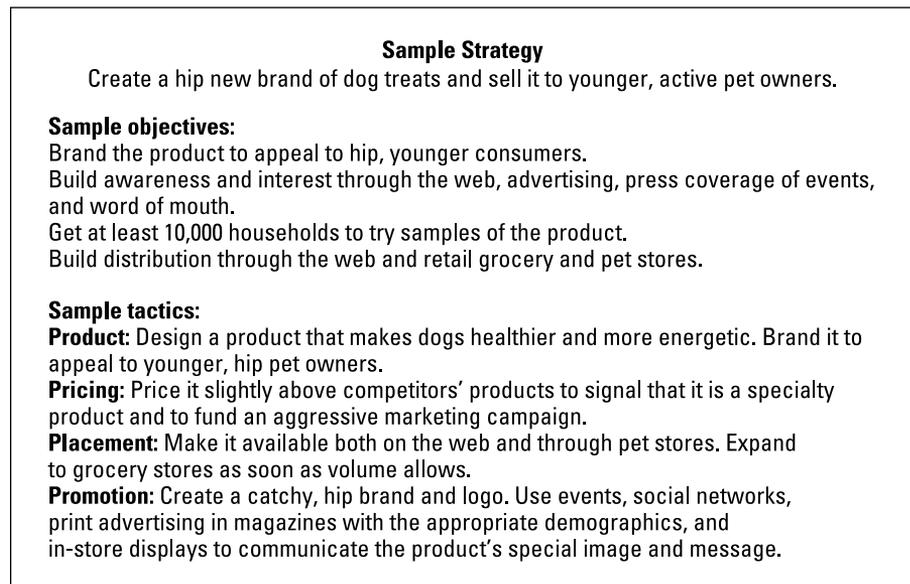


FIGURE 6-1:
How objectives and tactics flow from your marketing strategy.

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Step 6: Commit to action items

You may want to outline the specific actions in your marketing plan and again in a spreadsheet so you can map out the timing of execution, due dates for materials needed, roles and responsibilities, and the status of each action item. Here's an example of what this may look like:

Task	Description	Actions	Due Date	Owner	Status
Influencer outreach	Identify influencers over purchase and brand choice with voice among key constituents	Identify bloggers, analysts, columnists, speakers, and more	Deliver 5/17	Staff 1	Complete
			Approve 5/19	Staff 2	Approval pending
			Execute 5/24		

Step 7: Build learning plans

To know what works best for your brand and budget, and how your marketing efforts will ultimately succeed, everything you do must be measurable and testable. Set up tests for every action to determine how it worked against past efforts or to decide on the best approach.

You may want to include actions like the following in a yearly learning plan:

- » Identify new research projects, such as *Voice of the Customer programs*, which help you identify what matters most, new attitudes, new customer demand expectations, satisfaction rates, and so on.
- » Try out direct marketing campaigns via A/B tests to identify a new champion or validate current champions that will still work in the new year.
- » Test channels for promotions to identify the best response and return.
- » Check new distribution channels to see whether you can identify more efficient and less expensive methods or partners.
- » Examine new market segments to identify secondary customer groups you can nurture for future gains.
- » Test lists to see which providers generate the best-performing lists and the best overall returns.
- » Compare year-over-year response for past and present campaign messaging and offers.
- » Experiment with engagement programs online and off-line to see which ones best build relationships.



REMEMBER

Don't think of your marketing plan as written in stone. In fact, your plan is just a starting point, and it's an evolving process. As you implement it over time, you'll discover that some things work out the way you planned and others don't. Good marketers revisit their plans and adjust them as they go. The idea is to use a plan to help you be an intelligent, flexible marketer and guide your resources while being ready to change as quickly as markets and customers often do.

Projecting Expenses and Revenues

Managing your marketing plan and its execution involves establishing processes, boundaries, timelines, and budgets, which includes

- » Estimating future sales, in units and dollars, for each product in your plan
- » Justifying these estimates, and if they're hard to justify, creating worst-case versions
- » Drawing a timeline showing when your program incurs costs and performs program activities
- » Writing a monthly marketing budget that lists all the estimated costs of your programs for each month of the coming year and breaks down sales by product or territory and by month

As you complete these tasks, keep economic trends and your own sales projections in mind.

Preparing for economic influences

When preparing your marketing plan, you need to factor in economic trends and issues over which you have no control. Watch the leading published economic indicators and regularly monitor the numbers.

To stay on top of economic trends by cities, and especially for the cities in which you do the most business, monitor the Milken Institute's Best Performing Cities annual list at www.best-cities.org.

Coming up with a reasonable budget

Don't budget more than 10 percent of your revenue toward marketing unless you have good reason to believe (from past experience) that the ROI will be there. And

don't commit to a full year of expensive marketing. A first-quarter plan is more cautious and commits you to only a fourth of a year's spending. Take it one step at a time.



TIP

Allocate dollars according to percentage of revenue each sales channel provides. If your online sales are 60 percent of your sales, consider allocating 60 percent of your budget to grow those sales, and 40 percent to the other channels that supplement your primary income. Figure 6-2 shows an overview of how to organize a marketing plan financially.

Overview of Program to Target Retail Store Buyers	
Program Components	Direct Marketing Costs (\$)
<i>Primary influence points:</i>	
– Sales calls	\$450,700
– Telemarketing	276,000
– Ads in trade magazines	1,255,000
– New product line development	171,500
	Subtotal: \$2,153,200
<i>Secondary influence points:</i>	
– Quantity discounts	\$70,000
– Point-of-purchase displays	125,000
– New web page with online catalog	12,600
– Printed catalog	52,000
– Publicity	18,700
– Booth at annual trade show	22,250
– Redesign packaging	9,275
	Subtotal: \$309,825
Projected Sales from This Program	\$23,250,000
Minus Total Program Costs	– 2,463,025
Net Sales from This Marketing Program	\$20,786,975

FIGURE 6-2:
A marketing program budget, prepared on a spreadsheet.

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If you're part of a start-up or small business, consider doing all your projections on a *cash basis*, which shows expenses in full when due versus spread across 12 months.

You should also create forecasts that provide guidance on projecting sales and assigning resources. Several helpful techniques are available for projecting sales, such as buildup forecasts, indicator forecasts, and time-period forecasts, described in the next sections.

Buildup forecasts

Buildup forecasts are predictions that go from the specific to the general, or from the bottom up. If you have sales reps, ask them to project the next period's sales for their territories and to justify their projections based on any anticipated changes in the situation. Then combine all the sales force's projections to get an overall figure.

If you are small enough to project per-customer purchases, build your forecast this way. A good starting point is to come up with estimates for each channel and add them together.

Indicator forecasts

Indicator forecasts link your projections to economic indicators that can cause variations in sales. For example, if you're in the construction business, you'll find that past sales for your industry correlate with the growth of the *gross domestic product*, or the national output of goods and services. You'll want to adjust your sales forecast up or down depending on whether experts expect the economy to grow or decline over a given period of time.

Time-period forecasts

To use the *time-period forecast* method, work by week or by month, estimating the size of sales in each period, and then add these estimates together for the entire year. This approach is helpful for businesses with inconsistent sales periods. Ski resorts use this method because they get certain types of revenues only at certain times of the year. If your business is cyclical, and you market more in specific seasons, this approach will work best.

IN THIS CHAPTER

- » Grabbing attention with content — good, bad, and ugly
- » Checking out content marketing strategies that work
- » Trying user-generated strategies that build sales, not just fun posts
- » Writing content for trust, transparency, and results

Chapter 7

Content Marketing and Marketing Content

Even in a society where many people have grown wary of media bias and opinion-based news over facts, media mentions on air waves, on web pages, in print, and radio still get noticed and still have influence. News media works because of frequency. You may not remember the details of stories you hear, but you will probably remember the names of those involved, or at least recall hearing a name when it pops up again in a subsequent story. Frequency creates familiarity.

According to the familiarity principle, an aspect of psychology that helps to explain human behavior, we align or engage with things we know. The more someone hears a name, the greater the sense of familiarity. Studies show that people will reply to emails and phone calls from salespeople whose names are familiar more often than to those that don't seem familiar.

Getting mentioned on influencer blogs and media websites, in print media, on television and radio shows, on Twitter, Facebook, or LinkedIn — you name it — matters, and it matters a lot, especially because consumers today place less trust in advertising to guide their choices and increasingly rely on what they hear from peers and news sources. As a result, content marketing and developing marketing content are key elements of a successful marketing strategy.

This chapter sets forth some insights on content marketing and marketing content strategies and tactics, and how to build successful marketing plans, no matter the size of your company. I help you put a plan in place for newsworthy, informative communications; prioritize your communications activities; improve your writing; spark dialogues, not just monologues; and more. Chapters 9 and 11 detail the technologies available to help you distribute your content across efficient and affordable channels.

Getting the Gist of Content Marketing

Just what is content marketing? According to the Content Marketing Institute (www.contentmarketinginstitute.com),

Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience — and, ultimately, to drive profitable customer action.

In a sense, content marketing makes us all journalists as we pull together information, ideas, and insights and share them objectively with consumers to position ourselves as leaders and spark dialogue that, down deep in our marketing hearts, we hope will generate sales or leads that our sales teams can convert to sales.

The goals of your content marketing should be to

- » Build awareness of your brand and offerings.
- » Get people and the media talking/posting/texting about your brand.
- » Position your brand as the top choice or authority in your field or market.
- » Get authorities and other influencers to talk, write, and tweet about you.
- » Inspire core consumers to engage with your brand online and off-line.
- » Set new personal records for mentions, shares, tweets, and so forth on social media.

If you achieve these goals, your ultimate goal of selling more and earning more will fall into place. You can accomplish many of them simply by giving your customers and prospects something worth thinking and talking about, and by providing targeted media more news to add to the information hole they have to fill daily.

Separating content marketing from marketing content

Content marketing and marketing content may seem similar, but they aren't one and the same.

Content marketing refers to the campaigns you execute around sharing informative rather than promotional content with customers and prospects. These campaigns typically consist of educational pieces like checklists and guidance that help consumers make informed decisions. A content marketing campaign helps position the leaders of your brand as subject matter experts, industry thought leaders, and authorities in their given field. Content marketing can position a social influencer or celebrity as the most popular source for ideas on a given topic or the best athlete or entertainer to follow, which adds to their social media imprint and career growth.

Marketing content refers to the assets you create to deliver your messaging, offers, and personalized communications. Your marketing content includes email campaigns, blogs, *banner ads* (ads embedded in a web page), digital ads, print ads, social media posts, signage, and so on.

Creating content that engages

Content marketing is instrumental to the success of many marketing initiatives, including the following:

- » **Social media posts:** Having a messaging strategy in place that defines relevant content to share with your followers will help your social media posts get attention and engagement. Without a plan for developing themes that add value for your customers and position your brand as a thought or market leader, your social media efforts become little more than a game of roulette — you never know where they'll land or if they'll pay off.
- » **SEO results:** The content you publish on third-party websites and push out to social media networks will improve your *search engine optimization (SEO)* results and get your website ranked higher on search engines like Google. Additionally, the more consistently you put out content, the better your overall SEO results will be.
- » **Public relations:** Media outlets are always looking for content to add to their websites and print publications. Links to media websites are some of the most powerful drivers for SEO results, brand awareness, and credibility among consumers.

- » **PPC ads:** If you invest in *pay-per-click (PPC)* advertising models and build ads around links to your content, you'll get more *impressions* (ad views) and more chances for clicks, both of which will generate a strong return on investment (ROI).
- » **Inbound marketing:** If you want people to call you or visit your website, you have to give them a reason to do so by delivering content that supports their decision process and provides action items that lead to informed decisions.

Content built around objective and actionable information will better draw people to your brand by establishing your team as the authorities on the topic at hand and your brand as a company to trust. Your “objective” information can become your brand’s truth as long as it’s factual and presented in a way that doesn’t make your content a disguised advertisement.

Formats for educational and actionable content include:

- » White papers
- » Webinars
- » Newsletters and news briefs
- » Industry trend updates and summaries
- » Media releases
- » Blogs
- » LinkedIn posts and articles
- » Feature articles, mentions, and guest columns in print and online magazines

With all forms of marketing, the message, tone, and persona of your content must be personally relevant to the receiver. And so must the channel.

Channeling your content

Many marketers work hard to deliver relevant content — advertising and editorial — for all marketing channels only to deliver it across a channel that isn’t well suited for the audience or the type of information people seek on that channel. For example, posting personal milestones and news on Facebook is relevant to a channel created for personal stories. Posts about your kids or vacations aren’t relevant on business channels like LinkedIn and likely won’t drive your desired results.

Channels to consider for your content include:

- » Third-party online news sites (mainstream and industry news outlets)
- » Broadcast media (TV and radio news outlets)
- » News wire services (like PR Newswire)
- » Blogs written by your team and posted on your website
- » Blogs written by influencers and followed by your target audience
- » Twitter
- » Facebook
- » Informational ideation websites, or sites that people go to for inspiration and ideas or dialogue with others (like Pinterest, Reddit, and Quora)

Leveraging influencer sites

Influencer marketing, or social media marketing by people with a loyal online following due to an interesting lifestyle or area of expertise, is not a passing fad. People get much of their news, information, and lifestyle ideas from people or organizations they like to follow online. This is not going to change as long as we have social media. Monitor influencers followed by your target audiences for ideas on topics of interest. Then, consider building content around those themes and share your content with influencers to get even more visibility.



TIP

Be on the lookout for the newest and hottest online celebrities and influencers. New bloggers with new ideas can rise to prominence quickly due to the low cost of entry for social media journalism. When you find them, send these influencers product ideas to write about.

For example, if you're selling men's high-end fashion and travel accessories, you may want to pursue relationships with bloggers that cover the following topics:

- » **Men's fashion:** Connect with influencers who write about men's clothing, accessories, and total looks.
- » **Travel tips:** Target travel bloggers with tips for traveling light and fashionably.
- » **Minimalism:** Look for fashion bloggers who cover minimalism, and a simplified approach to fashion that appeals to Generation Xers and millennials.

Instead of blasting out your stories and news releases to every blogger you find with a Google search, pinpoint those that run a lot of ads from respected brands on their sites and, of course, have the highest number of followers. For example, The Fashion Spot (www.thefashionspot.com) has many big-brand ads, including spots by Volvo and Nordstrom, that the blog posts almost get lost. But it covers both men's and women's fashion, and its Best Products list is pretty credible and one you'd want your products to be featured on.



REMEMBER

Content is a relationship building tool. To engage customers and spark relationships that lead to sales and loyalty, you need to produce content that is meaningful to their lives beyond the products you sell. If your content is plain old promotional, it's likely that customers won't engage with you.

Creating a Credible Content Marketing Plan

A lack of content is one of the biggest challenges facing marketing professionals today, and it's the thorn in their side when it comes to using marketing technology efficiently. The best content is newsworthy, actionable, clear, consistent, attention-grabbing, persuasive, and accurate, all at the same time — no small undertaking. Once you have a handle on creating and channeling your content, you'll need a plan for getting it out to consumers.

Before embarking on a content marketing program by writing articles, blogs, news releases, white papers, and more, and then pushing them out to consumers via social media channels in hopes that some of your efforts will get noticed, you'll need to put together a plan that you can stick with every single week. A good first step toward an effective content marketing plan is a communications audit of your current programs and campaigns.

Performing a communications audit

To start an audit of your brand's marketing communications, begin by gathering examples of the ways in which you communicate to all your customer groups. Include everything: traditional advertising, mailings, online communications, packaging, signs, radio scripts, podcast interviews, and so forth.

After you've gathered your samples of all the ways you communicate, create a spreadsheet or table with the channels you use printed down the left side as labels

for each row (for example, blogs, social media posts, articles in trade magazines, news releases, advertisements, brochures, emails, and so on). Then create columns for the following elements:

- » **Messaging:** What's the primary message delivered on each channel? Is your messaging brand- or customer-centric?
- » **Purpose:** What's the intended purpose of each piece you push out? To share industry best practices? Engage prospects with compelling case studies? Educate and inform consumers? Establish partnerships? Are you seeking to establish your company leadership as leading authorities in your industry?
- » **Frequency:** How often do you push out content on each channel?
- » **Expense:** How much are you spending per month on channels like Google Ads, *retargeting platforms* (programs that follow your website visitors around the web and serve your ad on subsequent pages they visit) ads on social media pages like LinkedIn and Facebook, and so on?
- » **Response or engagement among target audiences:** Are you engaging 10 percent, 20 percent, or more of the potential audience for a given channel? How many shares, comments, likes, retweets, pins, and so on do you get from your social media contacts?
- » **Usage:** Are you seeing returns from printed handouts you produce for trade shows and live sales presentations or wasting money by producing too much printed material that isn't being used?

Do communications audits periodically to see which topics, themes, stories, and ideas pay off the most. Consumers' interests, attitudes, needs change frequently, and so will the results of your audits. I recommend doing audits twice a year.



REMEMBER

Quantity and quality are equally important in content marketing strategies. The goal of *quantity* or *frequency* is to get your marketing message out repeatedly to the majority of people in your potential market. On the flip side, *quality* reflects the relevance of the communication and its value to consumers in terms of providing them something they're inspired to act on and potentially contact you to discuss further.

It's important to create high-quality communications for your own channels that others will want to include on their channels as well. This will help you build valuable links for your website that will boost your SEO and dramatically increase your reach.

Getting your content read

Getting your content out on a regular basis is *critical to* content marketing success. If you send out valuable information or decision tools frequently, you are more likely to be seen as a partner that can be trusted for support and guidance.

Here are some tips for increasing and managing the frequency of your content distribution:

- » **Create a monthly theme calendar for your content.** Your themes should cover objective topics, like how to select a customer relationship management (CRM) system (see Chapter 11 for more on CRM platforms), how to get the most out of your data analytics, or nutrition tips for your tween who won't eat veggies. Browse editorial calendars for your industry's leading publications to get ideas of current interest to your target customers, and for ideas for articles they may want to publish.
- » **Promote your content across all your social media channels.** Post your content regularly on Facebook, LinkedIn, and other social channels frequented by your customer groups. If you are trying to drive web traffic, post a link to your website on your social page so that interested parties read it on your website. While there, they might browse other pages and ask for further information.
- » **Break up a long post into several quick reads.** Coming up with content ideas is tough, especially if you plan to post weekly. A great solution to this dilemma is to pick sections out of a longer piece of content and post a few paragraphs at a time on your social pages or even your blog page. You can create links to the full report or piece of content so interested readers can get the full story if they're interested.
- » **Seek out new media.** You can place ads on various media websites that drive people to a given piece of content on your web page, and you can do it without spending a lot of money. Identify a range of websites to test and see which get the most traffic. Banner ads are usually low-cost and easy to monitor for clicks to your own site. Google Analytics allows you to monitor clicks and views of each page so you can easily see how many people read your content, and for how long.
- » **Promote your content pages on your website constantly.** URLs for your blog and website should be in all staff members' email signatures, on all digital ads you purchase, and in all content you distribute to third-party publishers, and so on.
- » **Work the news media appropriately.** If you send a press release to news editors every week, you're likely going to lose their interest and respect. News editors want news, not promotional messages disguised as news, which they

are very good at picking out. Sending a press release to media outlets once a month, as long as it fits the topics they cover, is a good way to keep your name front and center for when they need a subject matter expert on your topic and for getting mentions about your brand in news reports.

Press release topics to consider as part of your content marketing mix include

- Business news, such as product expansion, new locations, significant sales growth, and special events
- Personnel news, such as new hires and promotions
- Partnership, merger, and acquisition news
- Information about charitable or volunteer projects that impact local communities
- Information about new studies, research results, consumer trends, and so on

Producing Compelling Marketing Content

Your marketing content needs to add value to a decision process, a job requirement, or one's ability to live a better life. It also needs to align with your overall messaging strategy and reflect the same values and promises in your ads and sales materials.

Popular formats for content marketing material are white papers, reports, articles, and decision-support pieces such as checklists. As these formats are editorial in nature, they need to follow the same rules of writing for a news publication or industry journal.

This section provides some tips and tactics for writing content furthers your marketing strategy and is valuable to your readers at the same time.

Essential elements of content

Following are elements you should weave into your content marketing campaigns and pieces.

- » **Positioning strategy:** Your *positioning strategy* is a reflection of your emotional selling proposition (ESP) and addresses how you want customers to think and feel about your brand, product, or service. It describes how you

want to be positioned in their minds in terms of the value you offer directly and the competitive advantages you offer over your competition.

- » **Emotional triggers:** If you can attach emotional value to your products, even those as non-emotional as a stone driveway or a new ultrasound probe for a health care clinic, your positioning strategy will directly appeal to what drives your customers and your ROI at the same time. (See Chapter 2 for how to identify and develop your ESP and positioning strategy.)
- » **Call to action:** Ads that only present a brand story are just that: a brand story that might get a smile but not likely a sale. Ads with a call to action get action. You need to provide compelling content and then a reason for consumers to contact you for more information or to close a sale. Calls to action include encouragement to
 - Call for more information.
 - Go to a website to download a coupon or get a discount code.
 - Like a Facebook or LinkedIn post for a chance to win a prize.
 - Refer new customers for discounts or cash.
 - Schedule a demo or register to attend a webinar or special event.

Your informative or journalistic content should also have a call to action, just not one that's positioned as a call to engage in the sales process. Calls to action in white papers, industry updates on social media, and so on can be as simple as a prompt to call your team for a more detailed report, schedule a consultation on how the principles apply to your business, to participate in a survey to help with further research, or simply for additional information.

- » **Reasons to engage:** There are many reasons to engage with a brand beyond the products and prices it offers. Research from Cone (a Porter Novelli Company) shows that
 - 89 percent of consumers will buy from a socially/environmentally driven brand.
 - 76 percent will donate to a charity supported by a trusted brand.
 - 72 percent will volunteer for a cause supported by a trusted brand.

If your passion is preventing animal cruelty or advocating for pet rescue, engage customers with stories and calls to action that support pets — theirs and those that are waiting to be rescued. If your team organizes local walks or other events to raise money or awareness for your cause, include an invitation at the bottom of your ad or blog for people to join you.

If 89 percent of customers are looking for brands that do good, give them a reason to choose you by mentioning your causes and inviting them to join you. It's a pretty simple yet very powerful message.

Writing tips for better results

Writing for content marketing needs to follow the same rules as writing for journalism. It's helpful to review some of the rules journalists and news editors use to make sure they get the main message across and inspire readers to finish the entire story. These principles apply to writing informative materials, decision guides, ad copy, web pages, email and printed direct response letters, and more.

Follow the inverted pyramid approach

This is the basic rule for all news and editorial writers. You can never assume that your audience will read your entire article or social media post. So you have to start with the most important message you want them to understand and embrace. This formula is really important for writing press releases you want others to publish or post, because everyone's time is limited, and if people have to read more than a few sentences to get the point of your message, they will check out and move on to something else.

When your writing follows the *inverted pyramid* format, your copy will flow along the following lines:

- »» Headline that states news at hand and teases content
- »» Statement of story lead in a compelling opening paragraph that clearly communicates the news but leaves people wanting to read more
- »» Facts or statistics to back up news claim or story lead
- »» Quote from authority or person of interest endorsing or validating story lead
- »» Reference to news source (one-line statement about company that released news, contact information, or URL for further news stories)



REMEMBER

If the main point you want to get across shows up halfway through the story or after you've shared less substantial information, you have *buried the lead* (hidden the main point behind less relevant information). In a world where people are used to getting news from Facebook pages or photo captions, tweets, YouTube videos, and so on, you need to get to the point more quickly and in fewer words than ever.

Create curiosity

Headlines and titles that spark curiosity work for marketing content as well as editorial content. We act on headlines that make us realize that we may not know something we think we know, or that we don't know something we definitely should know.

A good example of a title that captured the attention and sparked the curiosity of millions is *The 7 Habits of Highly Effective People*. People wanting to be successful eagerly read Stephen Covey's book to find out what the 7 habits are and how many they practiced in their own lives, making the book a best seller for many years.

Without curiosity, we wouldn't explore new ideas, test new concepts, work to invent new solutions, or take other actions that lead to the innovations that change our world. Adding headlines that create curiosity to your marketing copy can clearly help you increase your readership as well as your open and click-through rates.

Examples of headlines that spark curiosity include the following:

- » "What You Don't Know Could Be Destroying Your Business"
- » "10 Ways Your Website Could Actually Be Losing You Money"
- » "Warren Buffett's Best Kept Secret for Investing Revealed"



REMEMBER

You can be sure that your customers are bombarded with thousands of marketing messages besides yours. The high level of noise in the marketing environment means that most efforts go unnoticed by many of the people they target. That's why adding a little *stopping power* — the ability to attract and engage your targeted consumer — to your marketing communications with real and honest clickbait headlines is helpful.

Ask leading questions

The best type of *clickbait* — a headline designed to get people to click on a link — that's actually responsible and ethical is to lead with a timely and meaningful question that not only gets consumers' attention but also sparks some of the emotional responses I talk about in Chapter 2. Asking the right questions can motivate consumers. Consider the following clickbait headlines:

- » Are you one of the business owners losing thousands every day?
- » Is your CRM program working for or against you?
- » Are you tapping into your email program's potential?

If you create comprehensive ESP profiles, which I discuss in Chapter 2, you'll better understand what types of questions or statements will get your customers' attention and inspire them to act. For example, when working with a client that provides marketing services for small businesses, my team and I followed the ESP guide for what's top of mind for small business owners. We crafted a subject line for our message accordingly and got a 49 percent open rate, well above average for email open rates in any industry.

Once you get consumers' attention, you need to draw them into your sales pitch and motivate them to act. Again, you can do this by asking leading questions. Ask yourself, *What's a topic you're an expert on, and how can you make it actionable by assigning steps for success?*



TIP

Your content piece will be more successful if you design it in a way that adds professionalism and visual appeal.

Create digital and printed copies of your content marketing pieces that you can distribute on your website, at trade shows, during customer presentations, and on social media. A relevant theme with actionable steps may become the top page on your website and the most liked post on your social media pages.

Use stats and facts

Going back to the influence of authority in capturing people's attention and motivating their behavior, facts and statistics about issues of interest to consumers tend to pull strong results. Instead of making your own claims about the growth of your product category or associated customer satisfaction trends, let the facts tell the truth for you.

Subscribe to emails and newsletters from research firms and associations that produce reports on your industry and share the findings that support your marketing messages and product claims. Some recommended resources for marketing insights include Nielsen, Edelman, Cone, and Deloitte.

Collect testimonials

Most businesses use testimonials at the end of a brochure or email, or as a secondary message in a marketing campaign. Try leading with testimonials to create a sense of truth, transparency, and quality up front. After you've laid that solid foundation, you're more likely to get consumers to read the rest of your story or marketing message.

Sparking interest with user-generated content

Instead of coming up with new weekly content for your social media sites and constantly tooting your own horn, let customers do the talking and posting. Campaigns that ask customers to share ideas for how to better use a product or how they'd design a new version, or to upload photos and videos of themselves using a product as intended or in creative new ways, produce some of the most powerful results.

Studies show that the majority of millennials and baby boomers actually want options that allow them to generate content for brands they love. According to other research, content created by consumers rather than ad agencies is the most trusted.

User-generated content (UGC) campaigns can be entertaining and profitable, but not always both. Meaningful content that showcases happy customers and encourages others to view their posts pays off the most. Successful UGC campaigns include photos and videos showing customers using a product and commenting on its value and their experience, and brand-sponsored contests that showcase a product.

Here are some examples of UGC campaigns that drive brand awareness and sales:

- » **User Photos:** Popular brands like Wayfair, Dover Saddlery, Burberry, and many others have encouraged customers to share photos of how they used their products. Selected photos are posted on their social media pages and websites. These types of programs get a lot of attention as consumers like to see themselves recognized. For example, Wayfair's Instagram program, #WayfairatHome, had more than 55,000 posts at one point.
- » **Product Challenges:** You can challenge users to come up with new ways to use your product or engage with your brand and hold contests for the most clever ideas. This concept applies to more than just products. Shakira, a popular singer, created a challenge for TikTok users to recreate a dance from her 2020 music video with Black Eyed Peas. It was a brilliant way to get a lot of views for her new song, *Girl Like Me*, and stay relevant in a trendy industry.
- » **Customer Recognition:** You may remember the Share a Coke campaign, in which Coke cans and bottles were printed with people's names or labels like *Best Mom*. Coca-Cola asked customers to post photos of their personalized bottles and cans on Twitter and other social media channels. Sales increased as a result, and the campaign likely helped Coke get to more than 100 million followers on Facebook. While this is similar to user photo campaigns, it actually came off more as a campaign featuring customers for who they are, not just what they use.

LEGO'S BRILLIANT UGC CAMPAIGN

A highly clever and successful UGC campaign called LEGO Ideas invites LEGO enthusiasts to create play sets and enter them in a competition where the winners will be produced and distributed by the company. Each set created for the competition must get 10,000 supporters in order to be reviewed by LEGO staff, who select the winning set to be produced for market. Customers show off fun ways to use the product on many social media channels and promote their designs to masses of people to reach the 10,000-supporter mark. Imagine the impact of 100 customers each promoting your product to 10,000 others for free? Brilliant.

Giving Ad Content Greater Stopping Power

How you present content in your advertising materials is as important as how you present content in your educational and informative materials. You need to focus on compelling themes and apply strong writing skills when you craft your content.

You can break through the marketing clutter and get attention for your ads and action from your targeted consumers by

- » **Being dramatic:** Tell a compelling story, create suspense, or draw your audience into an event in the life of an interesting character to whom they can relate. The principles of good storytelling work well in marketing, and the best stories for the desired response are those that create a powerful new reason for your audience to stop, read, and share.
- » **Creating an emotional response:** Which emotions are most powerful for inspiring attention and action? Again, this is where your ESP profiles are critical. Do people buy your product out of fear of losing something or out of anticipation of a reward? Does your product make people feel more accomplished or self-actualized? Define the most compelling emotion for getting action and present it in a persuasive manner.
- » **Surprising the audience:** A startling headline, an unexpected visual image, an unusual opening in a sales presentation, or a daring display in a store window all have the power to stop people by surprising them. For example, a headline that says, "We run low every day" has more stopping power than a headline that says, "We have everyday low prices," even though both headlines communicate the same marketing message.



In addition to stopping power, you need *sticking power* so that people remember and act upon your ads now *and* later. Remember, facts fade, but stories stick. When you tell a compelling story about your brand, your product, your mission, your history, or your movement to change the world, people remember if it touched them emotionally. Tie your ads to your brand stories to present a company that's real, that's run by people customers can relate to, and that represents products and ideas with which they want to associate.

Be consistent

If you repeat a clear, focused message, people will eventually get it. Make sure you're consistent in how you present your brand's value and competitive advantages across your marketing content and channels.

Even if an individual ad, web page, mailing, sign, or other communication is clear and well-designed, it won't be effective unless it's consistent with your other communications. People remember what you say when you repeat yourself frequently, clearly, and consistently.

Be as persuasive as possible

All forms of marketing content need pull power. *Pull power* may be a limited time offer, a QR code for a mystery deal, a chance for an experience that may not come again, and so on. Pull power includes strong emotional appeals that address the “wannabe” persona of your customers, create a sense of self-actualization, or solve an immediate problem or need.

To be an effective marketer, you need to understand the power of persuasion, which I discuss in Chapter 2. Persuasive skills are key to writing content marketing and marketing content copy with pull power.

Here are some guidelines to ensure all your written materials are persuasive:

- » **Avoid sales clichés.** Don't sound like everyone else out there. As obvious as that seems, it's amazing how hard it is to avoid. Before finalizing your ad copy, review your competitors' ads, websites, and social media. If your message sounds even slightly the same, find another way to say it.
- » **Steer clear of so-called power words from the books and seminars on how to be a winning salesperson or copywriter.** Some examples include *incredible, guaranteed, amazing, unlimited, immediately, proven, limited time, and exclusive*. These power words are so incredibly overused that I can positively

guarantee you'll receive amazingly poor results and be incredibly disappointed by them immediately.

» **Show your evidence through clear, simple language and illustrations.**

The way to be persuasive is to *show* that your product is a success rather than tell people it is. Share the statistics that prove how good your product is. Provide an example of what it can do. Quote a happy customer's testimonial. Show and tell, with an emphasis on the *show* part, and your communications will be naturally persuasive. Just be sure to focus on the facts, not your opinions.

YouTube videos demonstrating product use are a great way to show and tell. Embed them in your Facebook business page, your website, and your blog.

» **Present your brand's persona.** Show consumers that your brand reflects their personality, interests, and lifestyle through your copy, headlines, and stories. Use words and language that suggest a conversation among like-minded people rather than a sales pitch to the masses. Keep your copy and message simple and don't try to be everything to everybody when presenting your persona. You'll just confuse your audience and end up appealing to no one.



TIP

If you do everything right, your communications will be naturally persuasive. Clear, concise, well-written copy is instinctively engaging. Accurate, informative messages are persuasive. Professional, clean graphics and designs are convincing. If you look, sound, and read like a top brand or a leading professional in your field, people will assume you are.

Be professional

If someone has to tell you to trust them, you probably shouldn't. Present trust and transparency through examples, offers, and testimonials, not hyped-up claims. Let the professionalism of your presentation show how good you are. Your people, customer service policies, overall experiences, honesty, core values, community support, and corporate social responsibility efforts say more than your words, so make sure the expectations you create through your writing support your brand's reality. If not, it's time to look at the core of your culture (which is a story for another book).

Here is some advice for maintaining professionalism in your content so people know they can trust your information:

» Sloppy copy is unprofessional. Always have others proof your work. You can't catch mistakes in copy you've written and edited many times over as easily as someone who has never seen your copy.



TIP

You can hire professional proofreaders for a nominal fee, and it's well worth it. They'll fix grammar issues, typos, spacing and layout problems, and other things that can make you look sloppy to customers.

- » Another critical component of professionalism is to always source your sources. Don't state research findings without including the source of the work. You can get in trouble if it appears that you're taking credit for others' work, and you risk your customers' trust in you if they don't see a third-party endorsement to back up a claim in your favor. You don't want people to wonder if you are making up data to serve an agenda. This is an important consideration when you're writing ads, white papers, and social media posts. If possible, include URLs that link to the actual studies you cite.
- » Practice gets you closer to perfect than one attempt at anything. Keep writing and reworking, keep rethinking, keep boiling your words down until you have something that penetrates to your point with startling clarity in the fewest words possible. And then stop writing!

Make sure your copy and content for all channels is conversational, your message inspiring, your promises real, and your offers actionable, and then be patient. Most content marketing is like a personal relationship: It takes time before you build trust and others are willing to commit the time to engage with you.



REMEMBER

It takes at least five touchpoints on average before consumers engage with a brand that is communicating to them. Keep your content and communications flowing as long as they're relevant and meaningful. And whatever you do, don't stop at touchpoint four!

3

Executing Across Channels

IN THIS PART . . .

Inspire response and sales for cross-channel campaigns through engaging, relevant creative strategies and execution.

Get the most out of your social media posts, podcasts, webinars, YouTube channel, and other digital tools with affordable tips that spark conversations, traffic, and engagement.

Drive sales and return on investment in a new era of advertising.

- » Evaluating your approach
- » Developing a compelling creative campaign
- » Building a sustainable brand identity
- » Crafting an actionable creative brief
- » Getting creative with branding

Chapter 8

Creative That Engages the Mind

The human brain processes images 60,000 times faster than it processes text, according to research conducted by 3M. We have far greater recall for images we see than for text we read. This phenomenon is called the *Picture Superiority Effect*. The studies behind this theory show three days after we are given information through images, we are likely to remember 65 percent of the content. If the information is presented to us as text or audio, we'll recall just 10 percent of the content on day three. This concept also applies to social media. Posts with images generated more than the twice the engagement than those without, according to a study by BuzzSumo.

Consciously and unconsciously, images spark emotional reactions and inform our behavior. Scientific studies show we also make unconscious judgments about a brand and other elements based on color. Likewise, the images, fonts, and even the layout of a marketing piece can create emotional reactions. If those elements create anxiety, people may get that cortisol rush discussed in Chapter 2 and end up in flight mode, moving away from your marketing content — and ultimately your brand.

A winning creative plan doesn't just address the layout and photos of your ads and brochures, though. It covers all the design elements of your brand, or your *iconology*, which transcends ads, digital assets like websites and social media pages,

packaging, in-store displays, sales materials, and other marketing content. Every brand needs to define its iconology — the color palettes, fonts, and visuals that represent its values and persona — and then execute consistent creative applications of those design elements across all channels.

This chapter covers the elements of creative strategies that capture consumers' attention, engage and inspire them to act. It also provide tips for executing your creative strategies along with ideas for sparking imagination and creative thinking throughout your organization.

Assessing Your Current Creative

You don't have to be a creative genius to produce compelling creative that captures attention and sparks sales. You just need to know which creative styles and elements appeal to your customers' persona, aspirations, and ideals. The first step is to take a look at your current creative and assess its appeal to the customers you target with your marketing programs.

Conducting a creativity audit

A *creativity audit* can help you see whether you're taking the right creative approach for your audience and for the brand image and persona you want to convey. Respond to each of the statements in Table 8-1 as honestly as you can with a yes or no answer. At the end, if you have more negative responses than positive ones, it may be time to rethink your approach to creative.

As this audit indicates, a brand's creative is always evolving and changing. If you delay making creative plans and appropriate updates, you can actually lose brand appeal while competitors gain appeal, even with no product or pricing changes. Your creative makes big statements about your product value, relevance, quality, and more.

Questioning (almost) everything

Just because something seems to be working doesn't mean it is. You need to continuously come up with new creative, test new copy and visual ideas, and keep repeating your efforts to find new champions for response and results.

TABLE 8-1

Marketing Creativity Audit

Marketing Creativity Actions	Yes/No
We improve the design, packaging, or appearance of our product(s) based on what research tells us about the personality and values of our customers.	Y / N
We integrate fundamentals of color psychology to ensure we are projecting the attributes and values that appeal most to our target consumers.	Y / N
We build iconology and campaign designs around present and wannabe personas of our customers to appeal to our current and future customers.	Y / N
We monitor competitors' creativity to learn what appeals to common customers and determine how we can better distinguish our brand's advantages.	Y / N
We update and improve our brand image and persona to appeal to the energy and interests of our core customers.	Y / N
We experiment with new ways to communicate with customers and prospects.	Y / N
We improve the look and feel of our sales or marketing materials to keep current with new attitudes, trends, and ideals of customers.	Y / N
We test creative designs, subject lines, and copy to see which appeals work best for engagement and conversion.	Y / N
We change our marketing messages frequently enough to keep them fresh and captivating.	Y / N

The first step in developing successful creative is to question everything about your status quo. Start with the following:

- » Why did you choose your current logo and brand colors? Do they convey the right image and mood for today's consumers? Or do they reflect your mood at the time you chose them?
- » What characteristics and values are you presenting with your brand's creative assets? Are they in line with the characteristics of the customers you seek the most?
- » What is the creative energy and appeal projected by your competitors?
- » How old is your creative style and current persona? Do you need a refresh to attract new generations? How can you do so without losing your appeal to older customers?
- » Do your customer experiences reflect the energy and moods of the creative elements you present across channels?



TIP

Take stock of what your competitors are doing. Chances are, they are testing their creative to see what continues to work best for them, and if you're targeting the same consumers, you may discover a few things.

Create a spreadsheet that outlines your creative elements, persona, and messaging and that of your competitors. Comparing your approach to others, especially successful brands that have been in your space for a while, will help you see what type of persona you need to appeal to, which elements seem to draw attention, and how you can be alike but different at the same time.

Defining Your Creative Strategy

Advertising and content marketing cross every channel available, and then some. In most cases, your ads will be surrounded by many other ads competing for the limited attention of the same customers. You need to have a strategy to stand out — whether it's through compelling imagery, clever copy, psychological appeal, or an intriguing call to action.

Think of your creative as a vehicle for building relationships between your brand and your prospects. This vehicle forges common ground around values, interests, and personas, and ultimately creates bonds that lead to sales. You need to fuel your creative vehicle with the elements that help you build a strong identity for your brand, accentuate your differences from competitors, and showcase commonalities with your core customer segments.



TIP

To start building your creative strategy, identify your best sources of creative ideas. Employees? Customers? Fashion trends? Social media? Assess each idea before spending too much time developing it. Can it be executed with your current budget and resources? Does it fit your positioning and messaging strategies? Is it unique? You get the idea. Make a table like the one in Figure 8-1 to identify your own list of sources and constraints.

Sources	Constraints
<ul style="list-style-type: none"> - Metaphors and analogies - Word play - Humor - New trends - New technologies - Unmet needs 	<ul style="list-style-type: none"> - Your brand's personality - Good taste - Your budget - What competitors have already done - Other people's patents, trademarks, and copyrights

FIGURE 8-1: Identifying your creativity sources and constraints.

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Building your creative elements

All aspects of your brand's creative need to reflect the values, personalities, attitudes, and interests of your core audience. Every element must speak to your customers' hearts and minds to capture their attention and get them to engage — two important yet difficult-to-achieve aspects of marketing success.

Your creative strategy is a manifestation of your marketing strategy and plan. If your strategy is to appeal to a specific market segment, your creativity needs to follow suit. For example, if your top consumer segment is millennial males, you may want to develop creative imagery and styles that appeal to the values that research shows matter to this group:

- » **Happiness drivers:** Freedom, self-expression, adventure, innovation, and justice
- » **Values:** Minimalism, friendships, technology, experiences, excitement, and authenticity
- » **Entertainment:** Fast-paced action, dynamism, bold colors, and video blogs



REMEMBER

If your customer profiles (discussed in Chapter 6) include attributes associated with actual customers and segment personas, you will be more prepared to develop compelling creative that appeals to the psychology of choice. Otherwise, your creative may be interesting and clever but not as likely to boost your bottom line.

Coloring your creative psychologically

The fact that color influences people's moods, productivity, and even appetite is nothing new. Researchers have been proving this over and over again for years. The fact that many marketers don't pay more attention to these findings is what's amazing. Here are just a few colorful facts that can change your attitude toward engagement, response, and return on investment:

- » Research conducted by the Color Communications Innovations Institute for Color Research and the University of Winnipeg shows that within 90 seconds most people make an unconscious judgment about something's value and trustworthiness, and between 60 and 90 percent of that judgment is based on color.
- » Studies from the Color Association of the United States have found that blue is a good color to calm people and make them stay longer and hopefully order more when dining out.

- » Red is known to increase heart and respiratory rates and appetite. Some color theorists suggest red décor is a bad choice for restaurants that want customers to linger longer and eat more, but a good choice for fast-food establishments that want to stimulate the energy that triggers appetite while customers are standing in line to order.

The importance of color for brand identity and marketing materials goes far beyond the physiological effect on appetite and food consumption. As a marketer, you should be familiar with how your brand identity (and its corresponding colors) influences your customers.

Impacting moods and perceptions

The big question is, how does color impact attitudes toward brands and shopping behavior? Does using red rather than blue as your dominant brand color — logo, retail environment, and online shopping background — make a difference? According to some in-depth research conducted by professors Rajesh Bagchi and Amar Cheema, it does. And it matters a lot.

Bagchi and Cheema conducted a study to compare the sales influence of blue versus red. They looked at sales in predominantly red settings online and off-line compared to those in predominantly blue settings. Their research found that the likelihood of a purchase is lower when the background is red and higher when it's blue.

Can it be that too much red creates too much brain energy, making people more easily distracted or anxious to leave, while blue makes people relax and linger longer, as suggested by the restaurant studies? Think about shopping online or in store at Target and Walmart, with their respective red and blue environments. Where do you spend the most time and money?

Colors also influence how people perceive a brand's attributes, which in turn determines their judgment about its value, integrity, and alignment with their own goals and needs. Every color triggers a different mood or value judgment, and most of those reactions are unconscious. Do an online search for "color wheel meanings" and see for yourself the diverse range of moods created by colors.

Here are just a few of the moods that seem to be associated with specific colors:

- » Blue is the color of trust, intelligence, respect, purification, honor, security, and faith.
- » Purple reflects wisdom, maturity, dignity, virtue, and long life.
- » Red generates energy, courage, glory, inner strength, and passion.

- » Orange triggers energy, joy, creativity, excitement, and enthusiasm.
- » Yellow inspires enlightenment, awareness, consciousness, optimism, and warmth.
- » Green represents healing, awakening, learning, independence, and change.



Be aware that color meanings can change across countries and cultures. For example, in the United States, yellow is often a sign of caution. Yet in Malaysia, it's the color of royalty, power, and wealth.

Setting your brand's (color) tone

Instead of choosing colors on a whim or because they're your favorites, take some time to study consumers' conscious and unconscious responses to different colors and choose those that reflect the image you want to project to your targeted customers.

For example, if you're in financial services, a blue brand palette is a solid choice, because various hues of blue communicate trust, intelligence, and honor to the unconscious mind and align your brand with the values customers seek in financial services partners.

Consumers' perceptions of colors and value

Backing up the color wheel meanings derived by psychologists is some research by Faber Birren, a pioneer in color research and author of *Color Psychology and Color Therapy* (Citadel). He conducted a survey asking people to assign colors to a list of words. Here's a summary of what he got:

- » **Trust:** Blue
- » **Security:** Blue
- » **Speed:** Red
- » **Cheapness:** Orange, with yellow a close second
- » **High quality:** Black
- » **High tech:** Black followed by blue and gray
- » **Reliability:** Blue
- » **Courage:** Purple and red
- » **Fear/Terror:** Red
- » **Fun:** Orange, with yellow a close second



REMEMBER

Studying the impact and influence of colors on how people eat and sleep (supposedly, people sleep better in blue rooms) and their productivity levels can be fun. However, aligning with colors that present the desired attributes for your brand needs to be the goal when you choose your color palette. Are your colors projecting the values, lifestyle, and interests that attract customers to you, and do those attributes support your mission and business practices? Your color palette is something you shouldn't change often, so take time to get it right the first time.

Using brand iconology

Dictionary.com defines *iconology* as “the historical analysis and interpretive study of symbols and images.” For marketers, iconology refers to the colors, symbols, and persona that define your brand. Your choices need to reflect the images and colors that best fit the persona, lifestyle, and attitudes of your core customers.

Leading brands spend a great deal of energy finding specific hues to represent their brand. Because colors have many shades, invest time to find the hues that best align with your customers and the energy you need to create to attract notice and engagement.

Most brands choose a primary color and secondary colors that complement it. Many also select the gray and black tones they want associated with their brand. To see which colors top global brands use, visit www.brandcolors.net. You can view the specific color codes for the logos you know best, including Microsoft, Delta, and Coca-Cola.

Beyond colors, your brand standards need to include the fonts you want to convey your brand. Do you prefer serif fonts or sans serif? Serif fonts, like Times New Roman, have been found to produce better recall and comprehension.

Fonts, like colors, should be consistent across all signage, imagery, ads, promotions, and channels. They represent a tone and persona just like your colors do and need to be defined. Some fonts increase readership and message recall more than others when used for body text. For your logo, you can be more creative. Just keep it simple, readable, and aligned with your strategy.



REMEMBER

Fonts are more of an art form than you may realize. For a small fee, you can access many unique and artistic fonts beyond those available in your word processing program. Make sure you talk to your designer about font choices and pay for the rights to a font if necessary.

Readability is the main criteria when choosing fonts for your graphic standards across advertising and marketing materials, online and off-line. Too fancy or too faint of a font makes reading your material more difficult, which can cause readers to check out.

Check out Figure 8-2 to see some free fonts from Microsoft Word that spark creativity for logos, iconology in ads, and digital assets.

Apple Chancery: If you want to be fancy but contemporary

American Typewriter: For a retro yet cool look

Avenir Heavy: If you want to be bold and simple

Comic Sans: For a lighter, more playful tone

Chalkboard: A fun choice for an informal mood

FIGURE 8-2:
A small sample
of fun fonts.

HERCULANUM: IF YOU WANT TO STAND OUT



TIP

Before building your marketing campaigns to sell products or increase awareness, establish graphic standards for your brand and all your products and communications channels to ensure consistency for the images you present and the moods and attitudes you create.

Writing words that work

A few proven words like *Free* and *Top Quality* or statements like *Endorsed by Moms* used to be all you needed to get attention, response, and sales. Case in point: Trident, the top selling chewing gum in the U.S. in 2013 according to Statista, was long known as the sugarless chewing gum “four out of five dentists surveyed recommend.”

With the average person seeing thousands of ads daily, your marketing content needs words that stir up so much interest, need, or curiosity that readers are compelled to dig deeper on your website or click from your banner ad, to your web page, all the way through to the shopping cart and checkout page.

The best way to capture attention and inspire engagement is to ask leading questions that your brand can answer or resolve, or make statements that present direct value. Examples include:

- » Would you like to increase sales by 20 percent without spending more money?
- » Are you struggling to increase web traffic?
- » 3 questions to ask customers that will increase their loyalty for life



WARNING

Many marketers have resorted to misleading headlines in ads and on social media pages that bait people to click and read more about an interesting topic, only to make them sort through dozens of ads to get to the lackluster information behind the headline. We see these online bait-and-switch tactics all the time: “You won’t believe what happens next,” “These child actors died before 21,” or “You’ll never recognize her now.” Clickbait that serves up ads instead of substantial content does little more than set your brand up to lose consumers’ trust and respect. However, sparking curiosity and then delivering honest, actionable content that helps consumers get information they need or make wise choices is not only acceptable; it’s also highly effective.

The best marketing copy uses words to create feelings that move people to act. If you want to ease someone’s mind, you can say, “Relax. With our help, you’ve got this.” These words aren’t likely to top a list of best advertising words, yet they engage people’s emotions and set their minds at ease.

THE POWER OF “FREE”

In 2000, social psychology researchers Nicolas Guéguen and Alexandre Pascual conducted a study to see which words resulted in the greatest compliance for doing a simple task. They asked subjects on a city street to give money to a cause and were able to get only 10 percent of those asked to comply. When they added the phrase “but you are free to accept or refuse,” nearly 48 percent of the subjects complied, and in many cases, people donated more money than before. Subsequent research found that by using these same words to get people to take a survey, the compliance rate was also substantially higher.

Although the implications of the “but you are free” approach may be clearer for selling techniques, you can take some important insights from this study for your creative as well. Think about how much research consumers do before buying just about anything. Synchrony Bank’s Fifth Annual Major Purchase Consumer Study shows that 85 percent of consumers research products online before going to stores, 70 percent do in-store research, and 38 percent check online reviews. On average, consumers spend 63 days gathering information before making major purchases like automobiles, large appliances, mattresses, home improvement supplies, and so on.

A single ad isn’t likely to replace 63 days of research and spark an imminent sale; however, a campaign that provides information and decision support and recognizes consumers’ ability to make good decisions may.

The most powerful words known to more than double consumer response are *but you are free* (see the nearby sidebar “The power of “free”). Why? These four simple words empower consumers to make their own informed choices and minimize the sales pressure, and when brands make that happen, they build trust, which often leads to engagement, sales, and loyalty.

Involving, informing, and inspiring people to make their own choices works because consumers have been oversold with hype for years. Most people no longer believe the fine print that states, “Only one left in stock” or “One seat left at this price,” because they find the same price offered the next day — and the next. And Black Friday deals are no longer as strong a motivator as in the past because everyone knows that there’ll be another sale in a matter of days or weeks. When people feel happy and confident about their brand choices, they transfer those good feelings to those brands. As a result, the brands’ logos, colors, slogans, and so on become symbols of trust and good energy.

The driving goal of your creative strategy should be to tap into the psychology of color and imagery in ways that make your logo and graphics, beacons of trust, belonging, and happiness. The words you use need to be carefully chosen to support the trust you project visually.



REMEMBER

Bottom line: Your creative has to appeal to the intellect, self-confidence, aspirations, and wannabe personas of your target customers. That’s no small task, but if you follow the guidelines in this chapter (and book), you can master the right message and emotional appeal, and boost your ability to grow your business.

Crafting a Sustainable Brand Identity

Creativity gets you noticed — or not — and reflects the values for which your brand stands. As a result, you need to develop your logo and iconology around a clearly defined branding goal and a sustainable market position. When doing this, keep the following guidelines in mind:

- » **Start with a clear, simple, strong logo.** Logos are supposed to symbolize a brand’s product and persona, so keep your logo clear and simple and use it consistently until it becomes highly recognizable.
- » **Establish your logo as a symbol of the quality and experiences you deliver.** You earn brand equity by living up to the expectations of the images you project. If you want to be known for being innovative, create a symbol that is uniquely you. The Nike swoosh is a good example of this. They created a simple, yet distinct image that connotes movement, and built a definition for

what that image means for consumers through the products they created to support active lifestyles.

- » **Set guidelines for the use of colors and fonts for your logo and other iconology.** Consistency is critical to avoid confusion and assure consumers nothing has changed with your brand or products. Most brands have color as well as black and white standards for their logos.

Creating a logo with just one or two colors will make your execution of marketing programs down the road easier and more affordable. Keep your logo and iconology simple enough for others to understand and recognize, but have fun creating experiences around the identity you build.



TIP

Artists don't paint legacy murals the first time they stroke paint on a canvas. And chances are, you won't come up with the right design the first time you experiment with your graphics software. Give yourself time to explore ideas and presentations.

To spark your own ideas, seek out inspiration. Collect stories of creative marketing content, browse logos of companies around the world, create a bulletin board of your favorite designs on Pinterest, and discuss feedback with others inside and outside your company and space.

When you have some concepts for your brand's identity, share them with friends, associates, and customers in person or in an online survey. Ask them to view each concept quickly and note the first thought that comes to mind. Then ask yourself

- » Is that first thought the attribute you want associated with your brand?
- » Are the characteristics or values expressed in their feedback aligned with what will appeal to your core customers?



REMEMBER

As you sketch out ideas for your brand's logo and iconology or review concepts with your designer, keep in mind that your goal is to create an identity that represents the persona and value of your brand, not to win awards. You're not in a competition for the cleverest logo or web design. Most often, graphic design that wins awards and graphic design that wins attention and sales are not one and the same.

Your brand's visual identity needs to appeal to your customers' personas and reflect your brand experience and values. Your logo is the first impression most consumers will have of your brand, so it needs to be relevant. But it also needs to be sustainable. It's not something you can change often without confusing your customers and jeopardizing sales if people don't recognize your products. Change is also expensive because you have to update your product packaging, signage, displays, printed materials, and digital assets.

Writing a Creative Brief

Any and all marketing materials — ads, brochures, websites, trade show booths, and packaging — benefit from the use of a *creative brief*, a document that lays out goals, strategic elements like messaging and offers, target audiences and their associated characteristics, basic purpose of marketing pieces, executional guidelines, and so on. Whoever designs your materials — someone on your team, a freelance designer, an agency, or you — needs to follow this brief to make sure your end results support your strategy and emotional selling proposition (ESP).

Successful creative briefs include elements like those discussed in the following sections.

Goals

Define what you want to accomplish with your creative strategy and every piece you create for your marketing programs. If you don't have a destination in mind, you can't map out the journey. List the goals you hope to accomplish and make them measurable and real. Assigning one strong and spot-on objective for each piece you create is more effective than assigning multiple goals, which can confuse consumers and weaken offers.

Your goals will vary. For example, not all ads should be about driving imminent sales. You also need to set and achieve goals around building awareness for your brand's positioning, identity and long-term value so that you can be more successful in both your acquisition and your retention efforts.

Offers and promises

What is the *promise* you're making about your product or your brand? What is the *offer* for each specific campaign? Your promise and offer are not the same thing. Offers change often and promises not so much, yet they need to support each other.

For example, your offer may be "Buy One, Get One Free," and your promise may be personalized care, a money-back guarantee, and extraordinary service. Each marketing piece you create needs to include a relevant offer backed up by your brand's overall promise.

Supporting statements

Your brand's promise needs to be backed up by supporting evidence. If you are in retail and your promise is customer satisfaction, use testimonials or cite your *Net Promoter Score* (a measure of customer experience discussed in Chapter 5) to

validate your promise that customers give your products and overall experience high ratings.

Another validation of customer satisfaction is your return customer rate. If you have data that shows a large percentage of your customers are repeat customers, share that information as well.

Tone or persona

Every brand reflects a personality, energy, and tone that consumers identify with — or don't. These qualities are part of your brand persona, which also should reflect your values, interests, and attitudes as well as those of your core customer.

For example, Apple appeals to a specific personality that embraces innovation, self-expression, freedom, spunk, creativity, and individuality. These values largely appeal to consumers between the ages of 15 and 50. At one point, Apple ads featured silhouettes of people jumping, dancing, and doing other happy activities. These ads created a mood that people wanted to experience.

Emotional drivers



REMEMBER

If you haven't already created ESP profiles for your customers, consider bookmarking this page and flipping to Chapter 2 to do it now. Having ESPs handy as you read this section will help you get the most out of it.

Review the top emotions that influence choices in your category for your core customers and include key insights in your creative brief, such as the following:

- » Which emotions are associated with purchases in your product category?
- » Do you need to minimize customers' fear and anxiety or build on their expectations for joy and security?
- » What promises can you make about the emotional fulfillment your product and brand can deliver?
- » Do consumers easily trust your category? How can you get around industry trust issues?
- » What are some of the influencers of choice among your customers? Social proof? Authorities? List these influencers as specifically as possible and include ideas for addressing them in your marketing copy and imagery.

- » What are the disconnects around your product category or brand? Do you sell life insurance and need to make people face the reality that they will someday die and may leave their family compromised as a result? Do you sell weight-loss programs and want people to accept that they may need professional help?

Wannabe profiles

Appealing to the current identity of your customers isn't enough; you also have to appeal to their *wannabe* identity. All young adults have a vision of who they want to be in the near and long-term future. This vision usually projects their future self doing something on their bucket list that's out of the norm, or working in a successful career or owning their own business and living their dream. On the flip side, many middle-aged and older adults have an image of what they once were or wish they had been when they were young and had more agility and freedom.

Tap into these visions of wannabe personas in your marketing campaigns to attract and capture the attention and interest of your targeted consumers. Large brands with large research teams do a great job of staying on top of multiple wannabe personas and creating graphics, imagery, and customer experiences accordingly.

Color palette

Browse the Pantone Matching System (PMS) codes for colors that fit the creative strategy you are developing for your brand. The PMS codes provide a universal approach to identifying and communicating colors for printing. PMS color codes are also used to ensure consistency across your digital channels.

Be sure to list all the PMS codes for your logo and supporting iconology in your graphic standards documentation so that anyone helping create designs, marketing materials for any format and channels can do so with consistency and accuracy.

Golden triangle pattern

When it comes to print materials, people's eye-flow patterns aren't that much different from their eye flow on digital screens. People tend to first glance in the upper-left corner, move to the upper-right corner, take a sharp diagonal to the left margin, and then glance downward. This pattern is called the *golden triangle*. Whatever format your marketing campaign takes — digital or print — direct your designer to place the key messages, offers, and calls to action in the golden triangle for higher visibility, recall, and response. Chapter 12 has more information about how people view website pages.

Constraints

Perhaps you face budgetary constraints or need to avoid certain terms, concepts, or images that your competitors have already used. Be sure to give your constraints careful thought and list them as clearly as possible. These constraints should be documented in a brand style guide to ensure that designers you hire, and team members across your organization, adhere to consistent presentation of your brand.

Constraints can address your branding guidelines as well as apply to an individual campaign. A good place to start when crafting a single campaign or company-wide guidelines is to ask yourself the following questions:

- » Are there actions a designer can't take with your logo, like change the color?
- » Are you trying to avoid looking like a particular competitor?
- » Do you have to have *vector art* (art based on mathematical equations) so that all images can be scaled up for big posters and scaled down for a blog or web page?
- » Is it important to produce work that can be shown both in full color and in black and white, depending on the medium and variations in your budget, or can be adapted easily from a still image to an animated one?
- » Do you have the rights to use all the images, fonts, and trademarks you've selected?



TIP

Prepare a graphics standards guide that sets forth your color palette, fonts, logo usage, and other elements to ensure that all team members preparing creative for any channel adhere to the same guidelines for a strong and consistent brand presentation.

Execution

Your creative brief needs to cover execution across all channels as well. Given all the online and off-line marketing formats brands use today that need to be adapted for each targeted customer segment, repurposing content quickly and affordably for various channels is key.

Many *digital asset management* software platforms enable automatic customization of marketing and promotional materials for use across various channels. These tools allow marketers to create a template for a given campaign and very quickly and easily adapt the content — message, visuals, languages, and so on — for various formats across print and digital channels. Look for software that

enables you to adapt quickly for all the channels you use, including digital, social media, point of sale, and print (ads, posters, bus boards, and so on). To find current offerings in this space, enter “digital asset management software” into your web browser and research the best options for your price and budget.

If you are marketing to populations using different languages or to global markets, it’s important to include marketing asset management and content adaptation in your creative plan to allow you to get campaigns to market quickly and to save you a lot of money. Manually adapting each format for each campaign will require a lot of hours, which can delay getting a campaign to market. And if you’re paying an agency or a freelance designer to adapt your promotional material for print, Facebook ads, banner ads, bus boards, and so on, the changes can be expensive.

Don’t assume that you can’t afford automated creative technology. Many systems and many price points are available, and in most cases, you can access this type of technology on a subscription or per-user, per-month basis, making it affordable to access the same kind of services your bigger competitors use to improve their efficiencies.



REMEMBER

Knowing in advance which channels you’ll use for your marketing pieces gives structure to your ideas and sets a framework for execution. Planning ahead to adapt for various channels ensures consistency for customers who see your ads in print or online.

Applying Creativity to Branding and Much More

The creative brief gives you a clear focus for projecting your brand value and competitive advantages in a given marketing campaign, but creative thinking shouldn’t stop there. Creative processes can and should also be used to guide your product development and branding.

Creativity and product development

It goes without saying that new products must be innovative to stand out. And it often takes a team over an individual to identify successful new products. A product development team brings together experts with diverse perspectives and functions, like sales and marketing paired with manufacturing and engineering.



TIP

Involving diverse team members and even outside partners, suppliers, or customers in product development from the beginning helps you fine-tune ideas and secures ownership throughout the organization, which can lead to faster and smoother approval processes.

When you're discussing ideas for new products, it's important to keep in mind the needs of your target consumers and potential voids in your market you can fill. For example:

- »» What problem are you trying to solve?
- »» Which past products are you trying to improve?
- »» What's missing in your product category that can make lives easier?



WARNING

If you let creativity overrule practicality, you may create a new product that's fun to imagine but not something consumers think is worth spending money on — like battery-operated marshmallow-roasting sticks, Cheetos-flavored lip balm, or Harley-Davidson perfume. You don't want a product that ends up in the cemetery of products with short life spans.

Additional examples of product flops include Colgate's frozen entrees, Clairol's Touch of Yogurt shampoo, and Heinz's colored ketchup (yes, these were real products). Perhaps we just can't wrap our heads around the thought of eating meals that taste like toothpaste, rubbing food into our hair, or eating blue ketchup with fries.



REMEMBER

Be creative and think of new ways to solve real problems. But don't wander too far outside your core product areas, because consumers often fail to connect with products that seem too distant from the expertise they perceive for your brand.

Simple ways to spark new ideas

Creativity isn't a science. It's the product of our imagination, individuality, and ability to look at a routine situation differently and then communicate a new idea for addressing it in a meaningful manner. Many times, new ideas come from soaking up information, researching what others are doing, questioning the problem, looking at issues from an emotional angle rather than a functional one, tossing ideas back and forth with an associate, and then experimenting until something relevant sticks.

Here are some ideas that can help you engage your imagination to come up with new ways to tell your brand story and enhance your product appeal.

Seek ways to simplify

Can you come up with a simpler way to explain your products or your business's value proposition? Can you reduce the amount of copy you use in an ad or a section of your website without compromising your message? In most cases, you can, and in most cases, shorter copy works better, especially given the diminishing attention span of most consumers today.

Apply a celebrity's persona

Think of a celebrity who reflects your brand persona and imagine that they are your spokesperson. How would Malala, Taylor Swift, Elton John, Lady Gaga, or Oprah, for example, change your packaging, advertising, and website, and what words would they use to describe your brand value? Silly idea, yes, but silly ideas lead to some pretty successful ones.

Make fun of yourself

How would your favorite late-night talk show host describe your product or brand experience in their opening monologue? What stories would they tell about your brand, and what jokes would they crack to describe its value to consumers? You never know what you may come up with for a fun, attention-grabbing marketing campaign or even just a headline.

Go big, then small

Try communicating your message in a really small format. This constraint forces you to clarify and codify your message in interesting ways. Try communicating your brand's value in one sentence or on a sticky note. You'll be surprised at the powerful outcome this exercise often generates.

On the flip side, think of statements for really big formats like billboards or bus boards. Forcing yourself to change the scale of your thinking can set hidden creative ideas free. How would you present your ESP on a billboard, moving truck ad, scoreboard, or banner at a local sports arena?

Be your own customer

Are you marketing to young males? Spend time at a nightclub, an outdoor concert, a recreation center, or a restaurant that attracts your customer. Observe behavior, language, clothing, and attitudes. Start conversations. And take notes.

Go home and look at your brand from this new perspective. Do your colors, words, language, and even the layout and information flow of your materials fit your targeted consumer's energy and attention span and project the key values you discovered?

Engage in wishful thinking

Wishful thinking is a technique that the late Hanley Norins of ad agency Young & Rubicam used to train employees in his Traveling Creative Workshop. The technique follows the basic rules of brainstorming but with the requirement that all statements start with the words *I wish*.

The sorts of statements you get from this activity often prove useful for developing advertising or other marketing communications. If you need to bring some focus to the list to make it more relevant to your marketing, just state a topic for people to make wishes about.

Think in analogies and metaphors

Analogies and *metaphors* are great creativity-inspiring devices. Gerald Zaltman, a pioneer in neuromarketing, wrote an entire book about the power of metaphors, *Marketing Metaphoria: What Deep Metaphors Reveal about the Minds of Consumers* (Harvard Business Review Press). He explains how consumers think in metaphors about most of life's issues and how you can use them in your marketing copy. What metaphors are associated with your category?

For example:

- » Insurance is peace of mind.
- » Smartphones are tracking devices to see where your teenagers are.
- » Healthy eating is a ticket to healthy aging.

While metaphors are simple expressions of speech that reveal similarities between different things, analogies are more complex comparisons based upon abstract ideas rather than elements of speech to draw connections between two different things. An example of an analogy is that we are all like caterpillars: We must be patient, sit tight, and allow ourselves to transform into the beautiful people we have the potential to become.

Metaphors can be fun, quick ways to get attention for your content or ad copy. Analogies can help customers understand your product's true value for helping them achieve long-term goals.

For example, if you are selling software systems to help marketers work faster and better, you can communicate the analogy that all marketers are tasked with completing a big obstacle course. Whoever has the tools to overcome the hurdles and cross the deep chasms most efficiently will ultimately win the prize of competitive advantage.



WARNING

Analogies can also backfire, so be careful. For example, a classic ad from the 1950s introduced DuPont's then-new miracle plastic, cellophane, by showing a stork delivering a baby wrapped in a clear plastic bag. Apparently, nobody at the ad agency noticed that it looked like the baby was about to suffocate. And watch out especially for tasteless, biased, or offensive analogies, such as a 2015 print ad for Mercedes-Benz S-Class sedans that boasted about their high safety level by comparing their air bag system to a woman with eight breasts.

Another example: Jaguar's "Good to Be Bad" campaign, launched in a very expensive Super Bowl ad in 2014, positioned its F-TYPE Coupe as the car of villains. As most people don't see themselves as cold-hearted villains, the ad actually lost substantially on purchase intent scores tallied that year. And it was banned by the Advertising Standards Authority in the United Kingdom for promoting irresponsible driving.

Play pass-along with your team

Pass-along is a simple game that helps a group break through its mental barriers to reach free association and collaborative thinking. You can read the instructions here, in case you've never heard of the game:

- » One person writes something about the topic at hand on the top line of a sheet of paper and passes it to the next person, who writes a second line beneath the first.
- » Go around the table or group as many times as you think necessary.

If people get into the spirit of the game, a line of thought emerges and dances on the page. Each previous phrase suggests something new until you have a lot of good ideas and many ways of thinking about your problem. Players keep revealing new aspects of the subject as they build on or add new dimensions to the preceding lines.

If you're doing this exercise for a bank, the game may develop as follows:

Subject: How can we make our customers' personal finances run better?

- » Help them win the lottery.
- » Help them save money by putting aside 1% percent of their earnings each month.
- » Help them save for their children's college tuition.
- » Help them keep track of their finances.

- » Give them a checkbook that balances itself.
- » Notify them in advance of financial problems, like bouncing checks, so they can prevent those problems.



TIP

Here's another idea: Ask people to help you find 20 words that rhyme with your company or brand name in the hope that this list may lead you to a clever idea for a new radio jingle, YouTube video, or banner ad. Sound silly? Research shows that prose or text that rhymes has a higher recall rate. So drop your guard and dare to be silly. It can pay off.

Creativity is key to standing out among the numerous ads, messages, and content to which consumers are exposed daily. But creativity has to be relevant for your consumers at all touchpoints of the brand experience — from products to promotions, content, advertising, and sales and service. Use creativity to capture attention and engage with customers in ways that are memorable, not just different.



REMEMBER

Your marketing themes can change from campaign to campaign, or product to product, but your brand value and positioning statements remain the same. You don't change your slogan with each new campaign, but you need to make sure any new themes you introduce support and complement your slogan and overall value statements.

IN THIS CHAPTER

- » Getting familiar with Facebook, Twitter, Instagram, LinkedIn, and Pinterest
- » Building your brand presence and growth with podcasts, webinars, and videos
- » Working smart with content management systems

Chapter 9

Optimizing Digital and Social Tools and Tactics

Marketing with digital channels is somewhat like trying to hit a moving target — the tools, tactics, and trends change more quickly than you can imagine. And because nearly all marketing today is connected to a digital channel, platform, analytics tool, or device, the term *digital marketing* is somewhat redundant.

No matter what business you're in, the role you play, or the size and scope of your market, you need to understand and stay on top of digital marketing tools to succeed on any level. This chapter provides some insights on several digital channels that drive customer engagement and sales as well as some tips for how you can integrate them into your marketing plan.

Getting Familiar with the Channels Customers Use Most

Although digital technology introduces exciting opportunities to open new markets and engage with customers like never before, it also comes with the following challenges:

- » Digital tools are constantly changing. As soon as you master one, another pops up.
- » Customers have come to expect the highly personalized communications that digital technology offers, making traditional marketing methods less effective and putting more pressure on marketers to keep up with rapidly changing technological developments that enhance customers' overall experience.
- » Managing the breadth and depth that digital channels offer for communicating with customers anytime and anyplace is time consuming and takes a concerted effort and deep commitment.

In the old days of marketing, brand managers just had to worry about developing a clever campaign with a good offer and getting a media buyer to negotiate ad buys with magazines, newspapers, radio and TV stations, and outdoor sign companies. Now, we have to identify the best opportunities for several customer segments within numerous digital channels and then customize and personalize versions of each campaign for every customer segment or persona, adapt the format for every channel we plan to use, and then deploy our campaigns quickly and frequently. Oh, and then we have to monitor social media dialogue and online review sites, and respond quickly to avoid losing consumer interest, our reputation, or sales.

Mind-boggling, but thankfully manageable. The trick is to map out a detailed plan based on how your customers use and respond to digital channels to guide how you spend your time and resources communicating, placing ads, and creating meaningful experiences online. Otherwise, you can keep yourself busy and not really go anywhere.

After you have a plan in place for which channels to use and how to use them, you need to decide which technology investments make the most sense for your desired reach, outcomes, and budget. If resources are slim, pick a few digital channels to start with and then expand as you're able.



TIP

If you want more in-depth information on the channels discussed here, check out *Social Media Marketing All-in-One For Dummies*, 5th Edition, by Michelle Krasniak (Wiley).

Table 9-1 lists current digital channels and tools you should embrace, manage, and at least begin to master as you build your marketing plan and allocate your time and money. To execute a sustainable marketing program and maintain a competitive business, you'll need at least a basic understanding of the channels and tools your customers (and competitors) use. Chapter 10 covers how to advertise on these channels. This chapter focuses on how to manage content and engage customers and prospects.

TABLE 9-1

Digital Channels

Social Channels	Digital Tools
Facebook	Podcasts
Twitter	Videos
LinkedIn	Webinars
Pinterest	Giveaways
Instagram	Content management systems

Because Facebook has more monthly active users (MAUs) than Twitter, Instagram, and the others combined, we'll start there.

Using Facebook for engagement that builds sales

Given its 3 billion MAUs and the time people spend each day on Facebook, you need to prioritize building a content marketing plan specific to this ever-growing platform. Your plan should be centered around creating and posting content that's relevant and actionable to your followers.



REMEMBER

When it comes to posting on any social media site, you shouldn't post just because you can. Constant posting may actually do more harm than good, because if your communications aren't meaningful, you'll lose likes, follows, and readership, which are hard to get back.

The following sections offer some guidance for putting together a content plan for Facebook. They apply to all the social media channels covered in this chapter, so use them as your guide for building a presence and communicating with your customers on Twitter, Instagram, LinkedIn, and other sites.

Developing a successful marketing plan

Facebook is where many people document their life story and share their best moments. It's also a great place for brands to tell their story in ways that support the values of their core customers. As you build a plan to tell your story and engage in dialogue with core customers, keep in mind that Facebook is for stories, not sales pitches. Using this channel the way consumers use it will help you achieve more success and return on the time you spend posting, sharing, liking, and more.

Here are some key elements to establish as you work on your Facebook marketing plan:

- » **Define your purpose.** Do you want your Facebook page to be a place where you have meaningful dialogues with your customers? Or a site that promotes your products, provides promotional codes and discount coupons, announces your sales, and the like? Or is your page a place to share stories about your people and business to humanize your brand? When you answer and prioritize these questions and others like them, you're better poised to make your Facebook efforts pay off.
- » **Set your goals.** Facebook offers many different opportunities and outcomes for businesses in all areas. The trick is to set specific goals and have a plan to help you measure your progress toward achieving them while using your time wisely.

Some goals you can achieve through Facebook include

- Finding out which trends, attitudes, and needs are important to your customers at a given time
- Interacting with customers to discover what they like about your products and brand and what else you can be doing
- Attracting more prospects by posting about relevant topics
- Driving customers and prospects to your website, where you can better direct them toward a transaction
- Growing your email permissions database through Facebook promotions
- Communicating with customers and prospects for whom you don't have an email address
- Building your social media presence and prospect base through likes, comments, and shares of your current followers
- Creating a stronger brand image
- Putting together a community, or hive, around your brand



TIP

Remember that you can't achieve any of these goals unless your page has followers and friends. Use all your social media channels to invite people to connect with you on Facebook (and other sites like LinkedIn) and post content that's worth sharing with their friends to build your base. Always include links for your Facebook page on your website, in your emails, and in your marketing materials.

Consider doing an email campaign for the sole purpose of getting people to follow you on Facebook and other channels. Let consumers know what they'll gain in terms of insights and interaction if they choose to follow or connect with you.

Determining your metrics

As with any marketing program, make sure you have a mechanism to measure the effect of your efforts so you can see whether you need more resources to keep up with the opportunities you're creating or if you should make some changes to improve the impact and return on the time you're investing.

Facebook's *Ads Manager* — a dashboard with tips, metrics, and analytics available on business pages — provides valuable insights to help you see what your followers liked and didn't like; measure the engagement level per post, including which posts got the most likes; determine whether you got likes from searches, shares, or Facebook advertisements; and more. It's important to pay attention to trends and comments on your page so you can discover what matters most and identify problems before they escalate.

Using your page to understand your customers

Opportunities to gain valuable and actionable insights on Facebook are not in short supply. For example, you can find out what matters most to your followers and what drives their behavior from the dialogue you create, the questions you post, the comments you get back, the posts your followers like or don't like, and the games they play. You can also keep an eye on what your competitors are doing on the platform.



TIP

Ask questions. Most people like to comment on Facebook posts and have their voice heard. Posting questions for your followers can provide some great insights from their answers and comments. Make your question or poll open-ended and thought-provoking rather than a yes-or-no query. Instead of *Do you like watching soccer?* you can ask, *What do you like most about watching women's soccer matches?* Those types of questions will help you discover your customers' values and motivators.

For example, if you're a life coach, here are some questions you may want to ask:

- »» When considering a life coach, what are you most hoping to accomplish?
- »» Do you want to discover how to live a more balanced life?
- »» Are you looking to optimize relationships at work and within your family?
- »» Do you want to be more productive personally and financially?

People often respond to questions if they like you, if they feel compelled to voice their opinion, or if you offer an incentive. Facebook has a poll application you can use to create, post, and monitor results, making your polls easy to analyze (find it at www.facebook.com/simple.polls). Or you can just post a question and see what kind of dialogue it inspires. With Facebook's poll app, you can share your poll by email, which helps increase traffic to your page.



If you have a small following, be careful about using the poll app instead of just posting questions to spark dialogue. If few people respond to your poll, it can send a signal that you aren't worth following on Facebook.

Building relationships

You can interact with customers in many ways on Facebook; you're really just limited by your time and imagination. For a great example of how to use Facebook, look at Patagonia, Inc. While Patagonia might not be rivaling Real Madrid for the most followers (1.8 million versus 112 million), it has a solid following of nearly 2 million people. Its posts are not crass promotions or attempts to sell anything. Instead, their posts consist of beautiful photos of people enjoying nature and doing good to the earth. One of their most popular posts for the summer of 2021 was about a Flyathon in Colorado, a competition involving trail running and fly fishing. Another was of two young women hauling stones from a field to use in a women's building course. These, and others, are stories that interest many of their followers.

Even though Patagonia stands for issues some might consider controversial, like anti-consumerism and climate change, you don't readily find negative posters on their page. Perhaps that's because their stories about their people, customers, and nature lovers worldwide are so compelling and beautiful that you forget what you don't like about the company.

The key to building relationships on Facebook is twofold:

- »» **Post content worth reading and commenting on.** If you want shares to help build your reach, the most effective way is to post things that are fun,

engaging, humorous, or just really cool. Cool photos, funny videos, and inspirational stories seem to get the most shares.

- » **Respond to the good, the bad, the funny, and the serious.** If consumers feel ignored or invisible on your page, you'll lose them.



REMEMBER

The best content isn't always about driving a sale — it's more about engaging your followers and creating rapport, trust, and dialogue. When you achieve this connection, sales will follow. The best content strategy is to post fun, positive, inspiring, and relatable content that tells a story in which your customers can see themselves.

Creating content that generates responses, dialogue, and leads

Telling a story in which people can easily see themselves is the best way to spark interaction, dialogue, and new leads. But simply posting a well-written status update isn't likely to fill up your in-box with new prospects waiting to be sold something. If you post content that invites responses and interactions that include others' thoughts, feedback, and expertise, you'll be more likely to start a conversation that can get you the right kinds of leads for your business.



REMEMBER

You need to monitor your page and control the content instead of letting others control it for you. You don't want people to go to your Facebook page and see customer complaints no one has addressed. When this happens, newcomers to your site see a good reason not to do business with you — and no explanation or resolution that may inspire them to give you a chance.

Here are some tips for lead-generating content on Facebook:

- » **Be brief.** Remember, people typically have short attention spans. To increase engagement, keep your content short. If you want to provide more information about a topic in a post, provide a link to a full article.
- » **Direct visitors to your website.** Directing people to your website for more information on a post you shared is always a good idea. Be sure to follow up by asking for their email address. Offer white papers, links to columns, links to news coverage of your brand, and so on. You can also post about special sales and discounts available on your website.
- » **Invite a response.** Don't just post a point, an opinion, or a fact. Spark dialogue by asking fans what they think. Share your stories and encourage followers to do the same. One comment often inspires another, which makes your page more interesting and sends people the message that their voice matters.

- » **Provide tips.** People like how-to tips and will often follow a site just to get more. If you have information that's actionable and helps others, post it. If you can, break up your list of how-to tips into a series so you have content that inspires people to come back for more.
- » **Use hashtags.** *Hashtags* (keywords or phrases preceded by the # symbol) simply give your post more chances of getting seen, on Facebook and on other channels. Include at least one hashtag in your posts but don't use too many; some research says that two work best.

Prepare a content plan and stick with it. It's easy to spend all day posting and reading comments on your page and others' pages and accomplish little, if anything, else. To avoid wasting your time and that of your followers and friends, make your content meaningful and actionable.



REMEMBER

Facebook is best used for interacting and building relationships. If you use it too much to promote sales and offers, you risk losing credibility and fans.

Building your Twitter presence

Although Twitter can be frustrating for the long-winded because you have to keep your posts to 280 characters or less, it does help you build your brand's presence. For one thing, Twitter helps you start conversations with followers and can be used to post links to more in-depth content on LinkedIn, Facebook, and, of course, your website.

A key advantage of Twitter is that it helps you find people with similar interests by suggesting people you can follow. And if you post enough interesting content on a given topic, Twitter encourages others to follow you, too.

You can build your Twitter base by doing the following:

- » Search a keyword related to your brand and then click on people associated with that term. For example, searching "consumer behavior" on Twitter results in dozens upon dozens of people to follow.
- » Include hashtags for your tweets so that people can find your posts.
- » Post your Twitter handle in your email signature, on your web page, and on handouts for trade shows and live events. Encourage followers on your other social channels to follow you on Twitter as well.
- » Create an interesting profile page and tweet regularly about things that are relevant to consumers interested in your product and brand.

- » Tweet about something more than just your latest offer or white paper. Start conversations on objective themes to attract like-minded people.
- » Link your Twitter account to your Facebook account so that your tweets show up on Facebook, too.

Igniting your social media presence with Instagram

Instagram is a social media network that lets you tell your story through photos and videos. It's popular among younger audiences and omits a lot of the chatter, good and bad, that other social media sites have. In 2022, Instagram had around 1.39 billion monthly active users making it another must-use site for reaching today's consumers.

Because a picture can be worth a thousand words, Instagram is a great way to communicate quickly about brand events or happenings and to tell your story through the power of images. Most people access the app via their smartphone, which limits your reach, but it helps you boost your mobile strategy and share your brand stories.

The best way to be successful on Instagram is to use high-quality photos that are interesting, inspiring, and engaging. You can upload your Instagram photos to other sites, including Facebook, Twitter, Flickr, and Foursquare.

Expanding your network through LinkedIn

Although many people use LinkedIn to advance their careers and build far-reaching professional networks, the platform also serves a valuable role for businesses. Because it's different from other social media channels, it needs to be treated differently or it can backfire on you.

For one thing, LinkedIn is *not* for promoting products and attracting leads; it's for promoting your industry expertise, knowledge, insights, and business happenings and for posting your job openings. LinkedIn is widely used by business-to-business (B2B) brands to identify decision makers at companies with whom they'd like a relationship and to strike up a meaningful conversation. Many companies in the business-to-consumer (B2C) space use it to promote their workplace culture and attract new employees because it has a popular job center, which attracts job seekers and employers.

As of this writing, LinkedIn has 828 million members, making it another must-use channel for businesses, especially in the B2B sector. IBM's page is a great example of how businesses can use LinkedIn. It has more than 14.2 million followers, and IBM keeps the content on target and worth reading.

Here's a brief overview of the fundamental elements of a LinkedIn page for businesses:

- » **About Us:** Like personal profiles on LinkedIn, your page starts with a summary of your business. You can state whatever you want to about your company and change it as often as you want to.
- » **Connections:** LinkedIn shows visitors to your page any common connections you have so they can see who else values your page and who they can reach out to for an introduction or conversation. Having a big network makes you and your brand more valuable to others and sends a signal that you're successful at what you do because people want to follow your insights.
- » **Updates:** Your updates are your posts, articles, links to articles, insights you want to share, and other information that helps define your brand. For a business, these may include inspirational quotes from your CEO, financial results, announcements about live events on other channels, such as Facebook, insights about your product, and development of your corporate social responsibility initiatives.

The following sections explore some of the best features on LinkedIn for businesses and marketers alike.

Groups

A good use of LinkedIn is to create your own group. Find a topic of interest in which you're a thought leader and start a group to share insights and exchange ideas. If you start a group, your role is to set the rules, monitor and manage posts, initiate conversations, and keep them going. Every time a new post is made on your group page, all members get an email notification, which helps keep your topic and expertise on members' minds. A group is tough to keep up with if you're stretched for time, so make sure you have a plan for ensuring your group stays active and inspired.

Here are some tips for getting a group going:

- » **Define the purpose.** Is this group for exchanging ideas about innovations, solutions, trends, breakthroughs, and case studies on a given topic?

- » **Set the rules.** Put your purpose and rules on your site for all to see. If your rules are no job posts or promotions of any kind, follow through. Eliminate violators.
- » **Invite members of your network to join and promote your group on your individual page as well as other social media channels.** The bigger the group, the greater your network and reach.
- » **Monitor all activity.** Open groups get a lot of fake accounts and spam posts. If you don't delete these, you may lose the members you value.
- » **Post often.** Post articles, insights, links, videos, research findings, event coverage, and personnel news. Keep your content business-oriented and actionable.

Engagement

Topics that get the most engagement include articles you've written, news coverage of your brand, events, personnel news, how-to guides, and such.

Here are some tips for driving engagement:

- » Include a link to a landing page on your website in your posts; by doing so, you can double your engagement.
- » Post thoughtful questions and encourage others to share their insights.
- » Add an image. LinkedIn claims that images can result in a 98 percent higher comment rate.
- » Post a video to play directly in your LinkedIn feed. Doing this can increase your share rate by 75 percent.



TIP

For every post, LinkedIn provides analytics, such as the number of impressions, clicks, interactions, and percentage of engagement, to help you see which topics do best. You can pay to sponsor an update for more money and more exposure.

Promoting your brand with Pinterest

With an average MAU number of around 459 million, more than three times what it was just five years ago, Pinterest can't be ignored, especially by B2C businesses that want their products and creative uses of their products to go viral. Pinterest is widely used as a bookmark or idea board for recipes, home decorating, crafts, holiday décor and goodies, fashion, and do-it-yourself projects.

Pinterest is a viable channel for reaching people who spend money on household goods, projects, cooking tools and ingredients, fashion, and crafts, and like to stay on top of related trends. Many of the idea boards segue into ads with instant discounts for shoppers coming from Pinterest, helping to monetize Pinterest for e-commerce brands.

If you cater to people who like to make, bake, follow fashion trends, and the like, Pinterest just might be for you. If users like your post, they can really increase your exposure by sharing it on other social media pages.



REMEMBER

Pinterest is an idea board. You pin what you like, and your pins get communicated via other social media channels, giving the creators of those ideas added exposure. The better the images and the cleverer the ideas, the more pins you'll receive.

You can create boards of images and ideas that interest you and include images from others on your boards. If people click on these images, they can be directed away from your page, so be careful about sending viewers to other pages or sites.

Pinterest can also be a good place to sell your products. You can promote your pins (like on other sites) and even set up a shopping cart so people can purchase from you without leaving Pinterest. The shopping cart works much like those on Amazon and eBay — you're buying from a seller using Pinterest's platform. If you use Pinterest for business, make sure you set up a business account so you can get analytics about your most popular pins, shares, repins, and likes, as well as demographic information about those visiting your Pinterest page.



TIP

Overwhelmed by all the social media channels? Try posting your content on multiple channels simultaneously. Hootsuite, a software as a service (SaaS) platform, is a digital dashboard that allows you to create and share content across multiple social media platforms. Having a single tool to create and push out content makes it easier to get it out faster and reach a broader audience. It'll also keep your brand at the top of people's minds and pages.

Developing Digital Tools That Drive Brands

Beyond understanding the basics for using popular social media channels, you need to discover how to use popular digital tools for building your brand presence, network, customer base, and, of course, sales. When choosing digital tools and activities, you should focus on those that can best help you build your visibility, expand your social networks, and, most important, grow your in-house email list. Building your email list is truly one of the most important outcomes of all digital

activities because email drives some of the best return on investment (ROI) you can get from any marketing activity today.

Some of the most visible and affordable digital tools appropriate for any business include podcasts, webinars, videos, and games, which I discuss in the following sections.

Podcasts

According to business intelligence platform (Demandsage.com), the estimated number of people globally listening to podcasts in 2022 was roughly 390 million. This number is expected to grow. And for good reason. Podcasts play right into our mobile and digital lifestyle. You can listen in the car, at the gym, at the spa, while grocery shopping, while walking, while riding the metro — anywhere you can take your phone or tablet.

For marketers, podcasts are a great way to achieve many of the goals discussed in this book, which include

- » Educating your target consumer groups to provide objective decision assistance while positioning your team as trusted advisors and sources for key information
- » Establishing you and your leadership team as authorities in your space
- » Building your email list and social networks
- » Increasing your SEO results
- » Adding value to your website through more useful content
- » Monetizing your knowledge, expertise, and content

Doing a podcast gives you access to key businesspeople who wouldn't otherwise take your call. Instead of calling to sell them something, you're calling to invite them to get exposure by appearing on your show. This can help you establish relationships with influencers in your space and get them talking about you and your products. Whenever you interview guests, encourage them to email their networks to tell them to listen to the podcast, introducing you, your content, your podcast, your leadership, and your brand to a network to which you otherwise wouldn't have access.



REMEMBER

Before starting a podcast, you need to be sure you're fully committed. It doesn't do any brand any good to spend time and resources to launch a new program and then not stick with it. Podcasts take planning, time, and effort, but when done right, they can deliver a strong return.

Here are some tips from various podcasters to help you get started:

- » **Target a niche group.** If you start a podcast on a broad topic trying to reach a broad audience, you'll likely be broadly disappointed. You'll be more effective if you specialize with a niche topic to build momentum and get noticed.
- » **Decide on a format.** Most podcasts are between 20 and 30 minutes long. Formats include interview-type shows as well as how-to tips, tutorials, and such. Choose a format that you can keep up with and that keeps your listeners tuned in.
- » **Keep it brief.** Our society suffers from attention deficit due to all the information overload we experience daily, so treat your podcast accordingly. Get your main message across early on to avoid disconnects and don't ramble on just to fill the time.
- » **Commit to frequency.** Some successful podcasters claim they podcast three times a week to get started; however, a good frequency to maintain is once a week.
- » **Build a library.** Before you promote and launch your podcast, record several sessions so you can air content consistently and build your base.
- » **Invest in quality.** Make sure you have a good microphone and deliver good quality sound without background noise, which can be distracting and cause people to stop listening.
- » **Link to your digital assets.** Post your archived podcasts on your website and link them to your Twitter account and your blog. Make them easily available for people to find and, of course, share with others.
- » **Promote it everywhere.** Invite people to listen to your podcast through email campaigns, LinkedIn announcements, Facebook posts, and so on. Post links to your podcast on bookmark sites, like Reddit and Quibb, and YouTube channels.

You can use your podcast to grow your email database by encouraging listeners to go to one of your social media sites to download a paper, a coupon, and so on in exchange for registering their email with your website and opting in for announcements about your podcast and promotions.

If you get enough downloads and listeners, you can even monetize your podcast through sponsorships. Some popular podcasts, like *Entrepreneurs On Fire*, get thousands of dollars a month in sponsorships.

The most popular platforms for podcasts as of 2022 were Spotify, Apple, Google, Pandora, the websites of podcast hosts, Audible, and NPR One. With more than 2.4 million podcasts representing more than 66 million episodes in 2022, current

research shows 177 million podcast listeners in the U.S., and 424 million worldwide, with continued growth expected (Edison Research's *The Infinite Dial* report for 2022), it's time to start thinking about how you can join the fray but be better and more interesting than the rest.

Interestingly enough, if you search online for “top podcasts,” you'll get a different list from every site you open. Some of the best podcasts take a humorous view of everyday life, others are about true crime, and others, such as *This American Life*, *The Daily*, hosted by the *New York Times*, and *Stuff You Should Know* from iHeartRadio, educate their listeners.



TIP

Listen to a wide variety of podcasts and take note of their style, the energy and pace of their discussions and interviews, and which topics get the most downloads. Then go out and make your podcast fun, a bit disruptive, and borderline irreverent, or informative, thought-provoking, and intriguing. People like listening to content that has an element of surprise, not just what they expect to hear.

If you're looking to monetize a podcast, you'll need a lot of listeners to attract advertisers. If you just want to discuss topics you're interested in, like murder mysteries or ghost sightings, it may take a long time to draw listeners. An easier path is to build a podcast around your expertise and the products you offer.

If you don't do your own podcast, consider advertising on others' podcasts. Here are some research numbers from Nielsen's podcast ad effectiveness study that show why podcast advertising is a good idea:

- » Recall for ads in podcasts is stronger than for more traditional advertisements, with a 71 percent recall rate.
- » Longer ads, 60 seconds or more, have even more lift among consumers, with purchase intent and recommendation 40 percent higher than for short ads.
- » 75 percent of listeners were able to recall the brand associated with longer ads.

Webinars

Although podcasts work well for both B2C and B2B brands, webinars are a powerful tool mainly for helping B2B brands generate leads, build relationships, and cement a position of authority in any given industry. In many ways, webinars are easier to pull off than podcasts because you don't have to commit to a weekly schedule or produce a series before you launch your program.

HOW ONE BUSINESS EXECUTIVE GREW A PODCAST IN MONTHS

Toby Usnik, a successful public relations executive and consultant, started a podcast about his professional passion, corporate social responsibility (CSR). The podcast centers on topics covered in a book he wrote on the same theme, *The Caring Economy: How to Win with Corporate Social Responsibility*, which is about the role of business in society. Following are some insights he shared with me on how he built a successful program around a meaningful purpose.

What is the vision around which you built a new podcast? In my writing, public speaking, and podcast, *The Caring Economy*, I look into the role of business in society. I do this through in-depth, one-on-one conversations with leaders from different backgrounds, geographies, and sectors. By looking at their career journeys and the ways they are helping steward their brands through contemporary times, I give listeners both inspiration and actionable ways to do the same in their own careers and organizations.

How did you get started? After building the CSR program at Christie's, I launched a social impact consultancy called Philanthropic Impact, and wrote a book about my experience, titled *The Caring Economy: How to Win with CSR*. When the [COVID] pandemic hit, one of the silver linings was time and technology that allowed me to launch a podcast by the same name. I am fortunate to have worked with countless interesting leaders and personalities, so I simply engage one of them each week on my show.

What did you do to get followers? First and foremost, I've delivered consistent, quality content each week to my listeners. My focus on great leaders and brands makes the show appealing. Secondly, I promote it each week via my 30,000 contacts on LinkedIn. Third, I continue to experiment with promotion, from placing regular stories in Boxscorenews.com, to sharing with relevant LinkedIn groups. Since inception two years ago, I have grown to a weekly listenership of 2K–5K on average, 50:50 male/female, and centered on the 25–60 age group globally.

What is the commitment new podcasters need to succeed? Quality and consistency first off. Weekly podcasting has served me well, and I'd like to do more if and when I can find the bandwidth. I think monthly is too infrequent to build a following.

What tips and tactics do you have for beginners? Address a need, stay current on all the issues and dialogue around that need, and address it consistently with quality content. Leverage free technologies such as Anchor/Spotify. Don't overthink it; just get started. Follow the news and tie into current affairs. Diversify your guests/programming/audience — it's where the world is headed.

The benefits of webinars are many. Here are just a few:

» **Affordability:** You can use free or low-cost apps like Zoom, GoTo Webinar, or ReadyTalk. Skype also provides a free service for group voice and video calls and screen sharing, but you're limited to 25 people.

You can subscribe to services that can handle up to 100 callers for around \$50 to \$100 a month. Your fees will depend on the features you want and your attendee number limits. Check out various webinar platforms to find what works for your budget.

» **Authority:** When you share knowledge that enhances a customer's life, you become a valued advisor and authority, and quite often, that positioning can take price out of the equation for purchase decisions.

» **Awareness:** Even if you get only 20 people to attend your webinar, you'll likely get a lot more visibility than that. If you promote your webinar on your social networks and to your email list, news channels for your industry, and elsewhere, you can get literally thousands of impressions for your expertise and position as an authority on the topic you're presenting. This is worth the price alone because most of this visibility is free.



TIP

As you consider platforms to subscribe to, look for one that will grow with your needs. If you want to do small-group events or weekly webinars with client teams, you can keep your numbers small and use a free platform.

Following are some tips for organizing and pulling off a successful webinar, or two:

» **Be free.** Consumers are used to getting good content for free these days and are more and more reluctant to pay for it. So even though you may charge for strategic advice or in-depth training courses, you should create a free webinar that has substance.

» **Be smart.** A webinar should help tease your bigger offering — be it consulting, training, software services, or some other product or service. You need to position your webinar as valuable on its own while subtly getting people more interested in your programs that aren't free.

» **Be relevant.** Pick a topic that's meaningful and current and provides realistic action items for attendees. Purchasers will invest their time if they believe they'll gain something they can put to use toward achieving their business goals.

» **Be professional.** If you use an app and decide to use a webcam and your screen for the webinar, keep it professional. Nothing is quite as distracting as seeing a speaker talking from their bedroom with a messy bed in the background. True story.

- » **Be giving.** Provide takeaways that are actually useful. Many presenters offer their slides as a bonus for attending the webinar. Others offer discounts on products, services, or further training programs that aren't free.
- » **Be present.** Market your webinar everywhere. Post invitations on all your social media channels. Send notices to trade associations, chambers of commerce, and business alliances. Email invitations to prospects, customers, and channel partners. Post on LinkedIn groups as well as your own page. Get it out there that you're an authority sharing your secrets to success. After you're done, record your session, create a PDF, and send links to anyone who didn't attend. Archive it on your website, too.



REMEMBER

A big reason to do webinars is to build your contacts database. You're giving people knowledge for free, so make sure you get their email address in return. Require contact information to register for the event and to access any archived files.

No-shows to webinars are quite common. I've had around 1,000 people register for a webinar and only 600 actually show up. That's okay and even expected. The attrition rate is fairly high for free events because other things come up, and if you haven't paid for it, you're not losing anything. If you get emails for all registrants, you can offer the archive link to those who attended and those who didn't.

Online courses

You don't have to be an instructor on Masterclass to teach a course online. You just have to create a course and publish it with a leading online course platform like Udemy. Once you get your course completed and publish it for sale, it becomes *passive income*, or money you earn while you sleep.

There are millions of people looking for online courses on many topics, including hobbies, lifestyle, health, and business, just to name a few. In 2022, Udemy had 49 million students using its platform to take courses in more than 75 languages.

Online platforms host your course and promote it to users, giving you a ready-made marketing story for your content. They also provide step-by-step instructions for creating a course that meets their platform's and customers' expectations.

Other leading online learning platforms include:

- » Skillshare
- » Udacity
- » Coursera

- » edX
- » LinkedIn Learning

Online courses are a great way to establish yourself as a leading authority in your area and stand out from competitors. You can give discounts on your courses to prospects and customers to introduce them to what you're all about and give them a reason to engage with you. And you can create promotions around your course giveaways to create more buzz and build your network.

Even if you don't make millions off selling your courses, this is a powerful digital tool for building your presence online, establishing those valuable earned links, and much more. (Flip to Chapter 13 for more on earned links and SEO.)

Videos

You've likely noticed that videos have been overtaking photos in your Facebook and LinkedIn feeds and are popping up more often in your email in-boxes. Videos are an important part of a marketing plan, and a critical digital tool to master and use frequently.

HubSpot shares some powerful statistics to validate why this is happening and why you need to jump on the video bandwagon, too. Here are just a few:

- » Videos in email lead to a jump in click-through rates of between 200 and 300 percent.
- » Videos on a landing page can help your conversions increase by 80 percent.
- » Videos can increase the likelihood of purchase by 64 percent among online shoppers.
- » Videos inspire 65 percent of executives to visit a marketer's website and 39 percent to call a vendor.
- » Most important, 90 percent of viewers say that videos help them make purchase decisions, and 92 percent of those viewing videos on mobile devices share them with others.

The following sections explore ways to create effective videos for any business as well as specifics for B2C and B2B marketers.

Creating effective videos

One of the challenges of using videos is setting yourself apart from the competition. In fact, on average, people are exposed to dozens of videos a month. So how do you create videos that build your business and use them effectively in your marketing mix? Check out these tips:

- » **Create an emotional reaction that drives people to contact you for more information.** This is where it gets fun. Like all things you do in any medium — print, digital, or mobile — your content needs to have actionable value, such as improving people’s circumstances, inspiring them to live a fuller life, or guiding them to do their job better so they achieve their goals and advance their career.
- » **Keep your video short and to the point.** This isn’t your chance to produce a Hollywood blockbuster. It’s simply a way to tell your story with a medium that appeals to the senses and makes your brand come to life. Keep your videos around two to three minutes long.
- » **Before you debut your videos publicly, test them.** Ask nonemployees and even noncustomers to sit through your videos and give you feedback about the length, ability to keep their interest, and how likely they were to consider purchasing the product.
- » **Always include a call to action and a response mechanism.** Stay away from promotions because they’ll expire before you’re ready to stop using the video. Make it clear how to contact you for more information through your email, website, phone numbers, and social media channels.

Looking at B2C and B2B considerations

For B2C videos, you can add a little more fun and focus on life messages, not just brand messages. Coca-Cola did a great job of this a few years past when they started making videos about enjoying the journey of life in the real world. Coke’s “Happiness Truck” and “Happiness Machine” videos show vending machines and delivery trucks dispensing gifts to people around the world. These were part of their Happiness marketing campaign which helped attach an emotional value to their beverage products.

Consumers like to see brand stories in which they can picture themselves. They want to be the proud parents being thanked by their Olympian child as shown in Procter & Gamble’s “Thank You, Mom” ad series, which makes many parents cry no matter how many times they watch it. They want to be the vacationer on the beach, the newly engaged couple, the happy family, or the thriving executive.

Here are some tips for using videos in the B2B world:

- » Create product demo videos to showcase the features that set your products apart.
- » Include statements from your company leaders to show their vision and help tell your brand story.
- » Include customers talking about their experience with your product and your team. Video testimonials are powerful because viewers can see happy customers' body language, smiles, and looks of relief, and hear the excitement in their voices that written testimonials don't convey.

Find ways to associate your brand with what matters most to your consumers and then get creative and start writing video scripts that tell your story in conjunction with the goals they have for their lives and their businesses.

Online review sites

Another digital tool you can't ignore is online review sites, like Yelp and Google. Although you don't populate content directly on these sites, you can influence it.

When you have a happy customer, ask them to write a review on Yelp, Google, and other sites you know your customers use. Research by Nielsen shows that more than 70 percent of consumers trust online reviews, even though they don't know the reviewers. If people read a bad review about your business, you can lose their interest right away.



TIP

Continuously monitor all review sites to look for comments about your brand. Respond immediately to negative comments and offer a solution. You can turn an angry customer into a happy one if you resolve their concerns quickly and appropriately. And you're showing prospects that you're willing to do what it takes to keep customers happy.

Many of the complaints on these sites are petty, but the one-star review from a customer who had to wait five minutes more than expected can take your ratings average down and make you look bad in comparison with competitors.

Monitoring reviews will also help you determine whether you're being sabotaged by competitors posting fake reviews to ruin your reputation. If this is the case, you can report it to the review site and try to get it resolved.



REMEMBER

You can't repair your reputation if you don't know it's damaged. Monitor review sites regularly and always respond. Thank happy reviewers for their time and kind words and offer to work with those who weren't so happy with you. Research shows that when you resolve customer issues, you regain and often increase their loyalty to you.

Giving to get more

Marketing is often built around fun and games and contests. We humans are wired to enjoy the thrill of playing a game to possibly win prizes, or entering a sweepstakes to get something for free. And this thrill of winning has sparked a new genre of marketing: giveaway marketing.

Giveaway or contest marketing — using promotional contests and prizes to market your business — is a simple yet powerful way to attract new consumers to your website, spark engagement, and build your email database. A big reason for the success of giveaway marketing is that it provides a means for interacting with consumers who may not otherwise interact with your brands.

Giveaway contests help brands gain fans, followers, and email addresses. In fact, research by Bitly shows that Instagram accounts that hold contests increase their followers 70 percent faster than those that don't. Giveaways are smart marketing for many reasons:

- » They get people to engage with your brand on your website and give you their email address in a permissioned transaction.
- » When you give a product away, you're likely introducing your products and your brand to people who may not have previously engaged with you. As a result, they may come back and purchase from you, even if they don't win your contest.
- » Because more than 60 percent of contest participants share links to contests with friends, not only are you being introduced to another group of leads you wouldn't otherwise have, but you get a big boost in SEO from the link sharing. (For more on SEO, turn to Chapter 13.)

Contests and games often trigger our dopamine drivers, which make us feel good about an event or activity and our chances to thrive and survive in the world. These feelings, whether a consumer wins or not, can translate into positive feelings toward your brand. All in all, giveaways are just good for business.



TIP

Need some help organizing your giveaway? Online software platforms can help you design and execute sweepstakes and other interactive content across your digital assets — your website and social media pages. Consider Outgrow (www.outgrow.co), an interactive content platform that helps brands create personalized content for individual visitors through pop-ups, live chats, calculators, polls, forms, surveys, assessments, quizzes, and contests.

Another contest/giveaway platform, RafflePress (www.rafflepress.com), suggests inviting participants to further engage with you while they're completing your giveaway form. Suggestions include asking them to follow you on social media, sign up for a newsletter or follow a blog, or complete a survey. You can also flip the script and automatically enroll people who take one of those actions in your current contest.

Giveaways are also a great way to promote a new product or get new followers for your business. In a blog post, RafflePress shared an example of a promotion by KnivesShipFree, which ran a regular monthly contest to give away a knife set. In just three months, they added 5,000 new email addresses to their database and more than \$10,000 to their revenue.



WARNING

Although giveaways can build your email lists, SEO, and sales, they can also build up a lot of legal trouble if you don't do them correctly. In some states, if a contest doesn't comply with the law, it can be considered an illegal lottery, which may result in legal action against the participating brand. Elements of a contest that may constitute a lottery include chance and consideration, and if a participant is being asked to do something they are already legally required to do. Laws vary by state, so be sure to check into your state's laws addressing contests and lotteries before moving forward with a contest management platform and promoting any contests.



REMEMBER

Rewards aren't always tangible. A good reward can be just knowing you beat your own score or reached a level of play you didn't think you could. It's not always about the end reward; sometimes, it's more about how you felt during the experience. Brands that spark dopamine responses are more likely to spark greater customer satisfaction and loyalty.

Consumers like to win experiences, not just “stuff.” Think about offering unique content, special access to VIP services or offers, or a chance to do something people wouldn't normally get a chance to do.

GAMES BEYOND GIVEAWAYS DRIVE ENGAGEMENT

In a world that seems to thrive on instant gratification, games can be very rewarding. They tap into people's most powerful drivers of choice — the neurotransmitters that trigger the hormonal rushes that make people feel happy, excited, and energized, or fearful and threatened. Those feelings dictate behavior, and when something makes people feel confident and powerful, they go back for more. Games do this! And when the games that do this are associated with brands, people assign those good feelings accordingly and often go back for more.

Games may reward certain behavior, like making a purchase, sharing a post on social media, referring a friend, and so on. Brands win by getting results relatively quickly when they deliver a game that has a reward attached to it. For example, if consumers complete a behavior, such as registering for your newsletter, you can send them a game with a reward attached to it as a token of your appreciation. They play the game and get the reward, which triggers positive feelings and a higher likelihood that they'll reengage with your brand down the road.

You can create games in various formats, such as digital scratch cards, slot machines, trivia, puzzles, and polls. You can even create skill-based games that present a little more challenge but may increase engagement as consumers keep trying to win.

While the nature and creativity of the games we play may change over time, human nature never will. People like the thrill of the chase and the chance to win something. And the more you can tap into that for your brand and provide a “winning” experience, the greater your loyalty will be.

Using Automated Customization to Work Smarter and Faster

With the advent of all the digital channels and data-driven insights we have today, we face a new challenge of how to manage, produce, and effectively deploy content to get the results we need.

You need to customize content to individuals and personas to gain attention, influence behavior, and capture sales. But if you market to thousands of customers, sorted into various customer segments, with different needs, different cultures, different locations, and different generational attitudes, you have a lot of repurposing to do for each campaign you execute. Being able to do this quickly and

efficiently is often the difference between a brand's success or failure. No small task or amount of pressure here.

Consider this scenario: You want to promote a new product that supplements an existing one. You want to communicate this to each of your target segments and your current customers in all the markets in which you operate. And you want to use email, Facebook, mobile, web banner ads, and printed point of sale (POS) displays at all the retail outlets that sell your products. You need to customize each element for each persona targeted, and maybe even each geographic location targeted. Oh, and you want to target Spanish-speaking and English-speaking customers at the same time. On top of all that, you're offering an introductory price for a limited time only so it's critical that all pieces are in market at the same time for all markets you serve. And you have to get it out in a matter of weeks to take advantage of seasonable buying cycles.

Thankfully, marketing technology has evolved to include robust systems that enable mass multi-channel customization, which provides an affordable and quick solution to this scenario.

Platforms that help you design and deploy content across channels and formats include:

- » Hootsuite, Sprout Social, and Sprinklr for social media management
- » Drupal, Contentful, and Adobe Experience Manager for multi-format/multichannel content management

A successful marketing plan can and should embrace all channels without worrying about the cost and time to produce and deploy, no matter how big or small your business is. Technology exists to make it actionable and affordable to execute omni-channel campaigns and communications to thousands, even millions, of customers and prospects efficiently.



TIP

When looking for a content management system, look for a cloud-based system that has templates for various formats that can automatically be resized for various device and production needs, and robust analytics so you can monitor which elements work best and deliver the best ROI.



REMEMBER

Digital technology changes constantly as do the tools in the marketing technology stack. It is easy to use something because everyone else is, but that does not mean it will work for you. Consider the time and resources it takes to learn, develop and execute content against each digital platform, and determine what you can realistically do well and do consistently. Map out your goals, the tools, and the channels that best reach your target customers, then set a budget and timeline to your plan. Paying attention to new innovations in marketing technology and tools will help you stay on top of your game.

IN THIS CHAPTER

- » Identifying new advertising channels and good fits for your brand
- » Using sponsored content to build credibility, traffic, and SEO
- » Putting up digital banners to get even more attention
- » Making the most of print and broadcast advertising
- » Applying messaging and strategy to get the most out of your budget

Chapter **10**

Embracing the New Age of Advertising

Consumers are exposed to more than 10,000 ads per day! That adds up to a lot of messages across *a lot* of channels, every waking hour of the day. Thankfully, advertisers haven't found a way to tap into our dreams. At least not yet!

Not only is advertising overwhelming for consumers at times, but it's often quite overwhelming for marketers to choose the best channels and formats for driving engagement and sales.

This chapter discusses new marketing channels and formats, takes another look at some tried-and-true channels, and offers tips for getting the most out of each. You will be introduced to better ways to use existing channels, and to new

channels you might not have even thought about yet. All the options for communicating with customers and constituents of all types present exciting opportunities for anyone that owns, operates a business, or manages the marketing function for any organization.

Advertising on Social Media

With about 3 billion monthly active users on Facebook and 67 million on LinkedIn, social media is clearly the most used channel among today's consumers worldwide. And our time on these channels backs this up. Statista in 2022 reported the average daily time spent on social networks by U.S. adults as follows:

- » Facebook: 33 minutes
- » TikTok: 31 minutes
- » Twitter: 31 minutes
- » Instagram: 29 minutes
- » Snapchat: 28 minutes

Posting randomly on these pages may create some buzz, but the impact you will have will likely be miniscule compared to the response you can generate with carefully crafted ad campaigns. Following are some general tips for how to advertise on some of the most popular channels reaching consumers among all generations.



REMEMBER

Because social media popularity and usage changes frequently, it's important to stay on top of trends, response rates, and other changes within each channel by searching for new data regularly.

Harnessing the Power of Facebook, Instagram, and Messenger Ads

It's likely no surprise that Facebook holds the #1 position for the world's most active social media platform and most minutes spent on a site per day. Despite all the information about privacy issues impacting its billions of users, it seems it's just too hard to break away from viewing all the posts about people you know, barely know, or don't know at all, and monitoring the likes and shares of your posts that seem to validate your humanness.

The question to ask yourself about advertising on Facebook, whether you're a business-to-business (B2B) or business-to-consumer (B2C) brand, is not if, but how much? You can build a page, but no one will come if you don't alert targeted audiences that your page exists and what they can gain by following it and viewing it regularly.

With more than 60 million active business pages on Facebook, getting noticed and followed isn't always easy, which is why paying to get noticed matters. The good news is, nearly 2 billion people are connected to a small business page on Facebook.



TECHNICAL
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Meta is the parent company for Facebook, Instagram, and Messenger. As a result, when you create an ad for one of Meta's platforms, you can easily populate it across the others.

Fortunately, creating and placing ads on Facebook is as easy as posting about your pet, vacation, or fun night out with friends. Following is an overview of the steps Facebook will walk you through to set up your ads.

Getting started

Setting up Facebook ads is simple. You just need to follow the prompts on facebook.com/business/ads. The best approach is to start small, monitor the impact of your messages and offers, test new headlines, copy, and promotions to see what generates the most impact, and then build bigger budgets around those elements.

Crafting your objective

Your first step is to decide what you want to achieve. Do you want your ads to generate brand awareness by reaching people within your target audience so your other marketing activities have more familiarity? Or do you need to drive traffic to your website for further engagement and conversion to sales or another action? Desired actions may be making a purchase, registering for an event, downloading content, and so on.

With Facebook, you can drive people to engage with your posts via comments, likes, shares, and even one-to-one conversations with the Messenger app, allowing you to start personal conversations and relationships. Facebook offers retargeting and lead generation forms to capture interest and information you can follow up on.

Defining your audience

Chances are, Facebook's 3 billion or so users are not all your target customers. For a small regional business, likely just a few thousand Facebook users will be potential customers. Being able to pinpoint your audience and pay to reach only those relevant to your goals is a big plus for advertising on social media platforms.

Facebook offers three audience selection tools:

- » *Core audiences* reflect the age, geography, interests, behaviors, and other attributes of your most valuable customers and targets.
- » *Custom audiences* include people with whom you've had prior engagement.
- » *Lookalike audiences* are built around the profiles of your best customers.

Facebook allows you to use your customer relationship management (CRM) platform (for example, HubSpot) or email lists (for example, your Mailchimp list) when creating an audience on Facebook. You can also use a *Facebook pixel* to automatically create a custom audience of people who visited your website and completed an action like filling out a demo request form or downloading content, so you can retarget them with relevant information.

Choosing your placements

You can program your ads to be placed automatically across all the platforms owned by Meta — Facebook, Instagram, Audience Network, and Messenger — or you can choose to have all your ads appear on just one of these platforms at a time. Setting automatic placements for your ads can help you reach more people across the diverse channels they use. When people see your ads more often, your results improve.

Options you can choose across Meta platforms include:

- » **Facebook mobile feeds:** Ads appear when users access Facebook with their mobile devices.
- » **Instagram feeds:** Ads appear when users access Instagram with their mobile devices.
- » **Facebook Marketplace:** Users can post items for sale on the Marketplace page.
- » **Facebook video-only feeds:** Video ads run between video content on Facebook.

- » **Facebook column or sidebar ads:** Ads appear on either side of users' news feeds.
- » **Instagram Explore:** Ads show up when users click on a photo or video.
- » **Instagram Shopping: You can use this service to set up a storefront for your brand.**
- » **Messenger ads:** Ads show up on the home tab of users' Messenger accounts.

You can also choose to have your ads appear in people's stories, as banners or stickers above video reels, in instant articles, on apps as part of the Audience Network option, and so much more. The list is long and just keeps growing as technology offers more ways to engage with people as they play games, shop, and interact with others online.

Setting your budget

You can choose a daily, weekly, monthly, or campaign lifetime budget for your ads. Again, start small to ensure that your message is relevant and engaging, and attracts new consumers to your brand. Setting your budget and a start and end date for your ads gives you complete control of what you spend. If possible, run a few ads a time, measure their impact against your goals and objectives, and then spend more around the current champion.



TIP

Monitor and test your ads often so you can replace ads that show diminishing returns and keep your advertising fresh for your audience.

Choosing your format

Your ad can appear in the form of a photo, video, or story, or a direct ad in Messenger. You can choose a *carousel ad*, consisting of up to ten images or videos in a single ad. You can also select a *rotating slide show* of your products and options, or a *playable ad*, which is like a preview of a game or an app you are promoting.

There's no textbook answer for which format is best for your business. You simply need to test the ones you believe are most relevant for your audience, measure and compare the response, engagement, and return on investment (ROI) per conversions, and then build around the formats and messages that work best.

Be sure you create ads that appeal to the specific audience for each social media page. Your Facebook audience may react to different photos and headlines than your Instagram audience responds to. So take the time to create relevant ads around specific personas and lifestyles for each platform on which your ads appear.



REMEMBER

Creating ads for social media platforms is simple and doesn't usually warrant outside production costs. If you find something isn't working, you can change the headline, body copy, or imagery quickly and easily yourself. So always test and monitor your ads.

Setting up on the YouTube stage

As videos become more and more a mainstream part of our social media experiences, advertising on YouTube becomes more relevant for just about any brand. Statistics provided by YouTube show that viewers engage with brand messages on the site and make purchases as a result. Consider:

- » Viewers say they are twice as likely to buy something as a result of seeing it on YouTube.
- » More than 70 percent of YouTube viewers claim they are more aware of new brands from watching videos.

Building a presence on YouTube includes setting up a YouTube channel to host your videos and creating and publishing ads. You can set up your ads to drive people to your channel to view more of your video content or direct them to your website, where you can promote further content, engage in live chats, and more.

To set up a YouTube ad to drive traffic to your website, you will need to set up a YouTube account and channel for your brand. The channel is where you house your videos. You can invite people to subscribe to your channel to improve your chances of viewership.

Your YouTube ads can direct people to your channel or to your website. You can also choose the country or location you want your ad to target and the characteristics of your target audience. As you select your variables, you will get estimates for reach, views, and cost per view (CPV). For example, if you set up an ad to promote a software company's new platform, you may get an estimated weekly impression count of 10,000 to 20,000, and actual views of 6,000 to 13,000 from among that audience. Your YouTube CPV may be between \$0.01 and \$0.03. These variables will change with each audience you set up.

Additionally, you can sort for specific interests among the audiences YouTube will target. A software company that provides fleet management or dispatch applications may sort for technophiles and viewers with an interest in transportation. As you select more variables, YouTube will update the estimates for reach, views, and CPV so you can see how you can best reach your goals and desired ROI.

MATCHMAKING WITH KEYWORDS ON YOUTUBE

YouTube makes it possible to reach relevant audiences with precision by matching ads with viewers' browsing history. In addition, it will find and serve up videos that reference keywords, topics, locations, and other variables related to your ad.

For example, YouTube played VRBO ads before a speech on intergenerational relationships by teenage twins that was part of TEDx Breckenridge. The title of the video, in which the siblings spoke about the life lessons of forging relationships with senior citizens while they were seniors in high school, included a reference to Breckenridge, Colorado. The VRBO ads likely played with this video because "Breckenridge" was related to keywords associated with the VRBO account.

When creating and programming your ads, keep in mind all the topics, themes, and keywords related to your ad. Try to set ads up to associate with brands and themes that build your credibility and avoid those that may have negative or harmful associations for your brand. For example, during an era of growing gun violence and mass shootings, you may want to avoid any association with videos or organizations on either side of the gun debate.

After selecting audience variables, you will be prompted to set your daily budget like you do for ads on Facebook and other social media channels. (See "Harnessing the Power of Facebook, Instagram, and Messenger Ads" earlier in this chapter for more about advertising on Facebook.) You can program your budget for *awareness* or *consideration*. For awareness, you can use a bidding approach that charges you for every thousand views of your ad. For consideration, or to get viewers to fulfill a call to action, you can pay per single view. You can also set up a targeted cost per action or conversion if you want to pay only for the conversions from viewers to engaged visitors to your website or some other site.



TECHNICAL
STUFF

Your ad will then be submitted for your review before it starts to appear on YouTube. Like the process for approving Google ads, the review process may take 24 hours or more, so plan accordingly.

Your ad on YouTube will be a video. It will either be placed in the video menu feed consumers see when they go to YouTube.com, or it will play before, during, or after a third-party video they choose to view.

To get the most out of your YouTube videos, you need to create professional, interesting, and highly relevant ads. Your ad will be most successful if it's short (30 to 60 seconds) and fast-paced to keep viewers' attention, and has a call to

action to get more engagement or spark a transaction. To preserve your brand reputation and keep viewers from hitting the Skip Ad button, maintain a high level of professional quality for all your videos.

Advertising on LinkedIn

LinkedIn provides B2B brands with a platform to engage with customers and prospects in a non-sales environment, building awareness for business news, personnel updates, and thought leadership. The goal is to spark dialogue about business topics or industry issues that can lead to one-on-one conversations about a brand, and ultimately turn contacts into leads and prospects. The key is to use LinkedIn pages to post content that inspires viewers to click through to your website for further engagement.

Like all social media, the competition for followers and to get your posts noticed among targeted LinkedIn members is fierce. The workaround to increase visibility for your posts is to advertise on LinkedIn, which is like advertising on Facebook.

Instead of selecting for consumer behavior and interests like you would on Facebook, you select targeted followers for your LinkedIn ads by the industries in which they work and the positions they hold. For example, if you want to reach people responsible for choosing manufacturing partners for aerospace parts, you would select *aerospace* as your industry and target profiles of people that have job functions related to manufacturing, including quality assurance, engineering design, product management, and so on. You can also sort your audience to reach people by their job titles, such as directors, VPs of operations, engineering, manufacturing, or product development, chief manufacturing officers, and so on.

As you sort your audience, LinkedIn will calculate the forecasted results. It will show you a breakdown of the functions represented by the audience you select, and the projected reach, cost, and frequency of ads over a 30-day period.

Think back to the aerospace manufacturing search. If you're selecting an audience based on engineering, operations, quality assurance, and project and product management, LinkedIn may show you an audience size of 30,000-plus with a function breakdown that shows 70 percent of your audience working in operations, 23 percent in engineering, and just 9 percent in program and product management. Forecasted results give you a glimpse of whom you will be paying to reach. If you really only care to reach program and product development managers, you may want to change the sort terms for your audience profile so your reach is more than 9 percent of those you're paying to target.

Choosing a format on LinkedIn

The most common ad formats on LinkedIn include single images, carousel images, videos, and texts that create links back to your home page or website. You can choose to have your ad appear in someone's news feed or in a sidebar.

The most credible place to have your ad appear is in the news feeds with news about the companies LinkedIn members have chosen to follow. Your ad appears like any organic post in their feed, with the only apparent difference being the word *Promoted* in small type at the top of the post just below your logo or profile image.

You can create posts specifically as ads, or you can promote an organic post you made on your page by clicking the boost button and setting up an audience profile and budget. Either way, your ads will appear on the pages of LinkedIn members who are among the audience you've selected.

Writing posts that engage, not repel

LinkedIn is meant to be a page for sharing business and professional information, industry insights and news, job postings, and the like, not promotional or personal content. The copy you use in your LinkedIn ads focus on information, not sales pitches. As noted in Chapter 7, your posts should add value for your audience by providing actionable insights on current industry trends, business updates and offerings, and decision support.



TIP

Always tag your posts with terms that relate to search queries on LinkedIn and outside search engines to help your posts show up for more people.

Advertising with Mobile Apps

In addition to sending text messages to customers who have opted into this form of communication from you, you can advertise on many of the mobile apps that consumers use daily. Consider that in a given day, your target consumers might use 9 mobile apps, and in a month, close to 30 apps, according to www.buildfire.com's 2022 app usage statistics. This data validates mobile as an important marketing channel. Following are some tips and insights on in-app advertising to help you make the most of consumers' reliance on mobile apps.

In-app advertising

Research conducted by data.ai in 2021 showed that Americans on average spend one more hour a day browsing around on their mobile devices than watching

TV. It's not just our social media pages we overconsume; it's also the dozens of apps on our smartphones that keep us connected, entertained, informed, and healthy that we simply can't seem to do without. We have game, entertainment, food, finance, fitness, and many other apps helping us live our best lives in the real world, despite the amount of time we spend in the cyber world (which most people don't consider to be actual "living").

With so many of us apping to find our happy places in our "real" lives, apps have become a formidable channel for advertisers. Globally, in 2021, according to data.ai, app users spent 3.8 trillion hours conducting 230 billion downloads and dropped \$170 billion on apps. That's a lot! Just for fun, the most apps are used by people in China, India, and the U.S., in that order.



WARNING

Advertising in apps needs to be carefully planned. Think about playing your favorite game, like Scrabble, Solitaire, Angry Birds, Marvel Future Revolution, or Candy Crush, or reviewing exercise or finance tips and constantly getting interrupted by videos you can't click out of. Sometimes you have to wait a full minute or more to get back to your game, or recipe, or fitness app, while a video about something you have no interest in drones on. As an app user this can be very annoying and can cause resentment toward the brand interrupting your experience. As a marketer, you don't want to be that annoying brand. Instead of gaining customers, you may end up missing opportunities.

App advertising platforms

You can place your ads in a wide variety of apps: health, finance, shopping, travel, entertainment, and other apps your target consumers may be using. In-app ads can show up as a banner above or below a game, in the information feed of the app, or even as a video that can be used to reward viewers. If a user watches a video ad, they can earn more time, extra plays, or other incentives as they play games or stay engaged with the app.

If you choose to run in-app ads, you'll need to work with an advertising platform that sets up and serves your ads to targeted audiences. For example, AppsFlyer serves ads across a wide variety of apps and provides tools for ad development, analytics, audience segmentation, predictive analytics, and much more. Pricing ranges from a free package, to paying for each conversion, to custom prices depending on your target audience and budget.

Alternatives to AppsFlyer suggested by G2.com, a business software and services review site, include

» Kochava

» Adjust

- » CleverTap
- » Branch
- » Singular
- » Google Analytics (or Google Analytics 360)
- » Mixpanel

Be sure to compare app advertising platforms' reach, service, and pricing in order to find the one that best meets your target audience and budget needs. Advertising platforms change often, so visit review sites like G2.com and pay attention to what customers say and how they rate ease of use, support, analytics, and more.



REMEMBER

As with any advertising platform, it's best to start small with app advertising. Test your ad designs, messaging, copy, tone, and offers frequently.

Winning with Sponsored Content

Instead of waiting for editors to decide to use your press releases, feature stories, and other editorial content, you can opt to publish it as *sponsored content*. This is the content that appears in editorial sections of online magazines, e-newsletters, and so on, scattered in between actual editorial articles, and usually with a small tag that says *Sponsored*. It's designed to look like a staff article, although it's actually most often written by a marketing team.

The most common formats for sponsored content are editorial pages in online magazines and on media sites, and e-newsletters sent out to thousands of subscribers each month. Even though sponsored content is paid for like an advertisement, it's written to be educational rather than promotional, with the intent of providing something of value that readers will want to know more about. In fact, according to HubSpot, sponsored content placements drive three times more leads than paid search advertising.



TECHNICAL
STUFF

Topics that typically work well for informational content present actions the target audience can easily act upon, such as “3 Steps for Losing Weight After 50” or “The single most important thing to do to succeed as a freelancer.”

Following are some tips for various formats that work for distributing your informative content over credible channels.

Editorializing your content page placements

Sponsored content on editorial pages can be in the form of an article, a checklist, a decision guide brief, or even a video. Whatever format you choose, the publisher you are using for distribution will run it among the editorial pieces so it fits in naturally.

Using e-newsletter placements

Placing editorial-type content in newsletters produced and distributed by media organizations covering your industry or consumer newsletters about your product category is a strong way to get exposure for your content and credibility as thought leaders.

Your article will be labeled as sponsored content. When readers click on the visual that represents your article, they will be directed to a content page with your full piece. Depending on the publication you are working with, this content page could be on your website or their website.



WARNING

Don't add commercial messages or offers to your educational content. That type of language can come off as gimmicky and may make readers feel they've been baited, jeopardizing trust for the sponsoring brand. Keep your article educational.

Often, the publisher will provide the email addresses of readers who clicked through to the paid article. You then have permission to use this email list for future marketing and sales follow-up, giving you even more value for your investment.

Sponsoring third-party content

Another form of sponsored content is a paid mention in someone else's content. Podcasts and webinars are great examples of this. There are numerous opportunities to sponsor informational programs that focus on your industry. Some media outlets will host webinars that are promoted to hundreds or thousands of followers they have permission to email. They sell sponsorships for these webinars to companies whose products or services are related to the webinar's theme.

For example, an advertising media site may host a webinar on how to use CRM platforms to nurture customer relationships and secure lifetime value. A logical company to ask to sponsor that program would be HubSpot, Act-On, or any other CRM platform. Sponsors often get their logo on all marketing and program

materials and are usually able to post articles or participate in presentations during the podcast or webinar.

There are numerous opportunities to sponsor programs produced by third-party experts or media sites. Before agreeing to spend your valuable resources on sponsorship, be sure you know the following:



TIP

- » Who is the audience? Are they direct purchasers, influencers, or decision makers?
- » What is the anticipated audience reach? Does the program usually attract 200 audience members per episode, or 2,000?
- » How many leads have past sponsors generated?

Divide your sponsorship cost by the average anticipated number of leads to calculate your estimated cost per lead (CPL). Then compare your sponsorship CPL with other marketing programs to determine which channels and formats deliver the most for your dollars.

- » Will you get a list of contacts who participated in the event so you can follow up with a program summary or offer? This will clearly add to the overall value and return of your sponsorship.

Exploring Digital Banner Advertising

In addition to social media, in-app, and sponsored content advertising, you may choose to market your products online with digital banner advertising. Banner ads are effective because you can place them on third-party websites that are visited by your target audience, expanding your reach to consumers with whom you have not previously engaged.

Getting attention with banner and pop-up ads

Placing *digital banner ads* (clickable image-based ads) on websites that your target audience visits is a great way to get exposure despite a low return on clicks to your own website. A good *click-through rate (CTR)* for banner ads is 2 percent, but the average, according to WordStream, is closer to 0.25 percent. However, sometimes the awareness alone can pay off, especially if you're an emerging brand in an established field.



TECHNICAL
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For comparison, take a look at CTRs for other types of digital advertising:

- » Email newsletters: 10 – 20 percent
- » Facebook: 0.05 – 0.10 percent
- » Google Ads: 2 – 5 percent

To ensure banner ads drive traffic to your website, be imaginative and clever. Essentially, regardless of the shape and size of your banner ad, you'll have space for only a single visual accompanied by a compelling headline. You need to create curiosity, intrigue, and value in that small space that's meaningful with a single glance.

Here are some examples of compelling headlines:

- » "Looking to save thousands on your mortgage?"
- » "Ready to write your first book?"
- » "Top brand outdoor gear at warehouse prices"
- » "Free website grader — no strings attached!"

Your banner ads should always have a button that clicks directly to your website. For best results, link the button to a special landing page you've created to specifically address the topic or offer teased in the banner ad. Sending people to your home page can be confusing, because they're looking for an article that directly supports the banner ad copy, and if they don't find it, they'll likely leave.

You can also purchase *lighthouse ads*, which are pop-ups that cover the majority of the web page. Viewers can click on the ad to go to the advertiser's website, or click on the X to close the ad and continue browsing the site the ad appears on.

Banner ads can be purchased in different sizes and at varying price points. The horizontal banner ad at the top of a website is often more expensive than a square ad in a sidebar in the right- or left-hand column. Pricing is also dependent on the number of visitors to the site you're advertising on. A site with 100,000 visitors a month will clearly be less expensive than a site with 200,000 visitors.



TIP

Ad rates for banners on websites change as traffic to the site increases or decreases. Download media kits to see what the circulation and audience demographics are for sites you're considering. Also download the editorial calendars for news sites you want to advertise on, so you can place ads during the months that focus on topics most relevant to your brand and product.

Retargeting consumers with banner ads

A great way to boost the impact of your digital advertising is to *retarget* consumers with banner ads. When you do this, you may improve your CTR to 0.7 percent, which is above the average CTR for banner ads in general.

Retargeting is simply serving your ads up on third-party websites to consumers who recently visited your site. You encode a JavaScript pixel in your website that tracks who came and left, connects with a platform or service that follows the visitor to other sites, and then populates your ad on those sites for that specific viewer.

Retargeting is most effective for e-commerce sites because it can follow visitors who abandoned their shopping cart, serve up ads specific to the abandoned products, and encourage consumers to come back and finish their transaction. Some retargeting platforms will actually rebuild the consumer's abandoned shopping cart if they click on the ad, making it easier for them to pick up where they left off.

Retargeting platform subscriptions

You can subscribe to a platform that will automatically retarget your ads to visitors. Subscribing to a retargeting service that allows you to follow visitors can be very effective for e-commerce brands because 97 percent of customers don't make a purchase on their first visit to a shopping website, or so says the research at the time of this writing. Ads that remind consumers of the products, offerings, and added values on your site are a relatively inexpensive way to recapture attention and ultimately sales.

One of the more popular retargeting platforms is AdRoll. Leading retargeting platforms will create responsive ads for mobile and desktop, and serve them over hundreds of ad networks, including Google, Yahoo, Facebook, and Instagram. Gartner, a technology research and consulting firm, lists the following alternatives to AdRoll:

- » Mediaocean
- » Meta for Business
- » Google Campaign Manager 360



REMEMBER

Digital banners might not have huge rates for click-throughs, but they still create awareness for your brand among those that don't click. This awareness can help boost response for other marketing programs. You can measure the impact of awareness generated by tracking impressions and clicks for each site you advertise on.

DIY retargeting

If you don't want to spend money on a retargeting service, you can do some simple coding yourself. You just need to find your retargeting pixels, or codes, and connect your various ad accounts to their designated platforms so you can track visitors. For example, you'll locate your Google retargeting pixel and connect it to your Google Ads account, your Facebook retargeting codes so you can connect your Instagram ads with your Facebook ads, and so on.

Once you've connected pixels with your accounts, you can set up retargeting campaigns on Google, Facebook, and elsewhere online. Because this is a complex process that can change regularly, be sure to follow current directions provided by Google and Facebook when setting up your retargeting efforts.



WARNING

Doing it yourself can be complicated because you have to master new tricks and tactics, and it can take a lot of time to get all the elements set up so you can analyze your data and see what's working and what isn't. The time-consuming nature of the DIY option makes the subscription option more attractive for many businesses.

Elements of successful retargeting

Regardless of whether you use a subscription service or code your ad retargeting yourself, the same tips for successful banner ads apply. These include:

- » Come up with compelling content that is of direct value to the consumers you're retargeting. This can include offers that are activated when they complete their shopping cart transactions, step-by-step guides for achieving goals and desired outcomes, and so on.
- » Promote giveaways, discounts, or special offers in your retargeted ads for first-time customers, as many you reach may not be active customers when they see your ad. For example, "Take 10 percent off when you complete your shopping cart or make your first purchase." If you offer first-time customer discounts, be sure to make this offer available to existing customers too.
- » Create a sense of urgency with limited-time offers. This can work for both B2B and B2C brands.
- » Write clearly, concisely, and imaginatively. Dull, lifeless copy is just that, and consumers don't tend to get excited about mundane stories or tepid teasers.

Making the Most of Print Advertising in a Digital World

Even though print advertising has declined drastically over the last decade, and is projected to decline even further, there's still a place for it in most marketing plans. Many consumers continue to engage with print materials, and research shows that despite the amount of screen time we log each day, print readers spend 20 minutes or more browsing through a publication.

It's surprising to most marketers that the response rate for direct mail marketing has often been higher than the email response rate. Print, in the form of catalogs, tends to be around longer than fleeting digital experiences, which can help with response rates over time.



REMEMBER

The digital world is growing, but print is still a widely used channel for communications about communities, cities, and industries.

Community channels for print advertising

For small businesses serving local and regional markets, print advertising plays a strong role in establishing your presence as a community partner and resource. Many small towns still have daily or weekly newspapers or magazines that report on business news, community events and issues, and the citizens that make their community whole. These publications are read daily by both locals and visitors, and provide a valuable tool for building awareness of your brand and timely promotions.

Community newspapers are great for promotions that appeal to tourists and locals, and for introducing the people behind your brand, adding to your community partnership profile.

Industry publications

Another good option for print advertising is your industry's trade journals and magazines. Most industries have a handful of publishing companies that print monthly magazines, buyers' guides, event editions, and so on that feature articles on industry news, regulatory issues, best practices, and case studies. As a marketer, you can purchase full-page ads, partial-page ads, and sponsored content or editorials (see the "Winning with Sponsored Content" section earlier in this chapter). Some magazines allow you to purchase monthly columns in which you can feature your staff members as subject matter experts in your industry.

As with any advertising environment, you need to craft an emotionally appealing and relevant ad to stand out among your competitors and other advertisers. Many trade magazines have more ads than articles — or at least it seems that way — so producing a quality, professional ad is key. Your print ad should contain the following elements:

- » High quality images of your product, leaders, or concepts related to your promise or value
- » A clear call to action directing consumers to call, email, go to your website, or register for an event
- » A reason to go to your website — for example, to download a paper, read case studies, browse product specifications or inventory, and so on
- » Your contact information, including your URL, email address, and phone number
- » Copy that shows how you can solve a real and immediate need or problem

Beyond those elements, your ad needs to appeal to readers' curiosity and emotional triggers. In many cases, customers know what your products look like, so choosing images or content that appeals to their most pressing needs can get more attention than an image or ad theme based on what they already know.

Consider the Innovatus Imaging ad shown in Figure 10-1, which was published in an ultrasound imaging technology journal. Instead of using a photo of an ultrasound probe or a machine imaging professionals see and use every day, VP of Sales and Marketing Matt Tomory chose to focus on a pain point they feel every day: Pressure. The ad shows a sports car with a flat tire, which reflects the fast pace of their jobs and how debilitating it is to be sidelined when your equipment isn't working. The ad highlights how Innovatus Imaging can relieve on-the-job pressure by repairing medical devices in a way that keeps them running when patients need them most. This approach helped Innovatus Imaging stand out in a magazine full of ads with product photos that made similar promises and claims.



REMEMBER

Print magazines for specific industries tend to have high readership numbers and highly engaged readers. These magazines are also often posted online with the ads intact, giving your ad more visibility and your ROI a bigger boost.

**UNDER
PRESSURE
OR OUT OF
GAS?**  **PREVENT FAILURES WITH EARLY WARNING SIGNS**

Thankfully your car warns you when tire pressure and gas tanks get low, protecting us from potential catastrophes on the road. Unfortunately our imaging devices don't do the same..

Innovatus Imaging's repair processes for hundreds of makes and models of ultrasound probes and MRI coils include preventive assessments to check for early warning signs of issues that could become big drains on cost and performance, and repair them before you get stranded with non-performing devices.

We Call It Preventive Repair. You Can Call It Life.

To set up a repair or arrange for a loaner to keep you up and running, call for 844 687 5100. Browse our capabilities and loaner inventory at innovatusimaging.com.

CUSTOMERCARE@INNOVATUSIMAGING.COM
844.687.5100
INNOVATUSIMAGING.COM
PITTSBURGH | TULSA | DENVER

INNOVATUS
imaging
SEE BEYOND



FIGURE 10-1:
A creative and attention-getting ad for Innovatus Imaging.

Design by Leif Cedar

Elevating Your Brand with Broadcast Advertising

Even with all the time we spend on personal devices that deliver advertising messages across email, texts, websites, and other channels, there's still a place for *broadcast advertising*, or television and radio ads, in your marketing plan. Despite the high costs often associated with TV and radio advertising, you may find many affordable options that can pay off.

Following are some insights on how small and midsize businesses can use both mediums affordably.

Television advertising

With the cost of airing a 30-second ad on NBC during Super Bowl LVI in 2022 being upwards of \$6 million, TV advertising may seem out of reach for most small and medium-size businesses. However, the different options now available for TV viewing are making it more affordable than you may think. These options include

- » **Linear TV:** The traditional way of watching TV, where viewers watch a program on a certain channel at its scheduled time
- » **Connected TV:** A newer way of watching TV, where viewers connect to the internet through a subscription or free streaming service and watch a show live or on demand

The content used and costs for advertising on both formats varies significantly.

Linear TV advertising

Linear TV advertising involves paying to air a 30- to 60-second ad *in-program* (during a show), or before and after a show airs. Your cost for each spot depends on the audience reach and time slot of the show. Prime time, which in the U.S. is typically 8 to 11 p.m. eastern and Pacific time, and 7 to 9 p.m. central and mountain time, is the most expensive advertising time slot because most adults are home from work and watching TV during the middle evening hours.

For example, a 30-second ad during a prime-time network TV show can cost \$100,000 or more. During the daytime, when soap operas and talk shows air mainly for an audience of older adults with more discretionary time, ads can cost anywhere from \$4 to \$500 a second, depending on market size and audience reach.

Audience reach for linear TV advertising is influenced by *designated market area (DMA)* or *area of dominant influence (ADI)*. DMA and ADI rankings refer to a geographical area served by a given TV market. For example, the ten most populous DMAs in the U.S. in 2021–22 according to Nielsen’s DMA rankings were

- » New York
- » Los Angeles
- » Chicago
- » Philadelphia
- » Dallas/Fort Worth
- » San Francisco/Oakland/San Jose
- » Atlanta
- » Houston
- » Washington, DC
- » Boston

Because of audience reach, ads in these markets will clearly be more expensive than ads in Salt Lake City (#30) or New Orleans (#50). Likewise, cable TV ads tend to be far less expensive than network TV ads, which is why you often see local restaurants, law firms, medical clinics, and other local businesses advertising on CNN, MSNBC, and so on.

Connected TV advertising

Some of the most popular connected TV platforms are Hulu, Tubi TV, Peacock, and Sling TV. Ad choices include traditional in-program ads like those that run on linear TV as well as *shoppable TV ads*, an interactive ad format that allows viewers to scan a QR code and visit a brand’s website to find out more about a product or make a purchase. (Note that advertisers also run interactive ads containing QR codes or text codes on linear TV. Cryptocurrency company Coinbase ran a bouncing QR code ad during Super Bowl LVI in 2022 that was so successful, it crashed the app.)

When you advertise on connected TV, you pay for the viewers, not the program or time slot. So if you want to reach adults between the ages of 30 and 54, you’d probably consider paying for viewers that download cooking, sports, or original TV shows. You pay for viewers on a cost per mile (CPM) basis, which refers to the price per 1,000 people reached. As of this writing, the CPM price range for ads on connected TV is between \$10 and \$15.

Radio advertising

If television killed the radio show way back when, you may assume that digital killed the radio show. But not totally.

In truth, radio consumption has declined quite a bit over the years. A 2021 survey by Statista found that only 20 percent of U.S. adults listen to news on the radio daily. Music consumption has dropped rapidly as well. From 2017 to 2021, radio went from being the most popular platform for listening to music in the U.S. to capturing the attention of only about 31 percent of U.S. listeners. The new normal for music listening is online streaming.

The decline in listenership is due not just to technology but to lifestyle changes. The car was the most common place for listening to news or music on the radio because it provided entertainment for drivers during daily commutes and long road trips. With more people working from home and more audio options in Bluetooth-connected cars, people are tuning in to a much wider array of listening platforms, including Spotify, Pandora, Apple Music, and more, in their cars and elsewhere.

However, radio can still be an effective means for reaching and building brand awareness among key audiences. Some studies claim it's one of the top channels for building trust as well. The key is to really do your research to know if your audience listens to radio programs, and if so, what type? Talk radio, sports radio, news? Music, and if so, what kind? Easy listening, classic rock, contemporary? When you know what your audience is listening to, you can decide if this channel is good for you and how to best use it.

Radio provides various formats for advertising including

- » **Live read spots:** A *live read spot* involves a radio host reading your ad in a way that makes it seem like it's part of the programming. Often, the host uses your product and then talks about their experience with it. This type of advertising is very credible and builds the trust radio is known for, because people tend to listen to talk show hosts they trust and admire, so hearing them endorse health, fitness, finance, home improvement, and other products gets attention, and quite often, action.
- » **Sponsorships:** Sponsorships can be purchased for prime radio programs like weather reports, up-to-the-minute traffic reports, and sports matchups. These sponsorships can be very effective for raising brand awareness, because people tend to listen to radio on the road in order to miss traffic jams, plan ahead for unexpected delays due to snow or other weather conditions that affect drive time, and monitor scores for their favorite teams.

» **Produced spots:** A *produced spot* is just that: a 15- to 60-second recorded ad the station runs multiple times a week during the time slots you designate, such as prime time (usually 6 a.m. to 10 a.m.), daytime (10 a.m. to 3 p.m.), afternoon prime time (3 p.m. to 7 p.m.), and evenings.

Pricing for radio advertising varies depending on the time slot in which you choose to air your ads or live reads and the market in which the radio station operates and maintains listenership. Just like TV, the bigger the population, the greater the reach and the higher the ad cost. As a rule, you can plan on prices ranging from \$200 a week for 20 spots in a small market with maybe 250,000 or fewer listeners, and up to \$8,000 for the same number of spots in top U.S. markets with millions of listeners.

For a small business in a small market, radio can be very effective for targeting consumers who tune in for community news and updates.

Tips for producing TV and radio spots

Production costs are the fixed cost aspect of broadcast advertising that can really make a dent in your budget. You may be able to cut back on the number of spots you purchase to save money during your slow times, but you can't cut back on the quality of your production without hurting your overall ROI and even your brand reputation. Hiring professionals to help produce your ads isn't optional; it's mandatory.

Following are some things to think about before embarking on a broadcast advertising program.

Know the brand image you want to convey

Do you want to position your brand as the trusted authority or partner in your field and community? Local furniture stores, auto dealerships, and home repair companies often feature their owner or a spokesperson talking about their business being the one “your friends and neighbors go to” when they need a new sofa, car, or siding for their home. This seems to be effective for building person-to-person appeal and trust for the brand.

Set a purpose for your campaign

Are you using radio or TV campaigns to liquidate extra inventory with *Everything must go!* ads? Are you trying to capitalize on seasonal factors that drive consumer purchases, like the warmer weather of spring and summer that boosts attendance at water parks or amusement parks? Defining your purpose and goals for a given

campaign informs the creative you need to achieve your objectives. It also helps you set your budget because you know how long the ad will run (during a given season versus long-term if your ad is evergreen).

Figure out the best way to communicate your message

Many ads in small and medium markets feature business owners showing off products on a showroom floor, or an outdoor lot, or telling consumers what their services can do to improve their lives. Other ads focus on clients praising the business, like people who hired personal injury attorneys talking about how much money the law firm got for them.

These personal appeals are effective and can be affordable for most businesses to produce, because they're usually recorded in one shot in a single location. The key is to stay focused on the message, not the technology or special effects, and work with a professional who can guide you on production options.

Integrate your key messaging

Every brand should come up with a statement that defines who they are, be it the leader in price, quality, or trust in their market. Ads for TV and radio must effectively convey your key message in a few seconds, not a few minutes. Develop a positioning tagline for your brand that aligns with the emotional outcomes or tangible values you deliver and mention it at least once during your ad to help you define what you deliver and set you apart from your competitors. For example, if you sponsor a radio program, the host may state, "This traffic report brought to you by ABC Plumbing, the one businesses and homeowners trust most."



REMEMBER

Having a strong tagline is important. Chances are, viewers and listeners won't remember the offer mentioned in your ad, but they will recall the promise associated with your brand. The tagline *We get you more* at the end of each ad for a personal injury law firm is more likely to be remembered than the dollar amount mentioned by a client in a fast-paced 30-second ad.

Know the audience reach you can expect

Do your homework to see if your target audience listens to the radio or watches the TV stations in your market enough that your ads will achieve a strong ROI. For example, if you're thinking of advertising on radio and your target is younger consumers, you should know that only 13 percent of 18- to 34-year-olds listen to the radio but 61 percent listen to streamed programming. Maybe Spotify or Pandora are better channels than your local radio stations.



TIP

You can find listenership data by asking for media kits from the stations you're considering for your ads and doing some research on key markets.

Work with professionals

This is where you put down your DIY tools, like smartphone cameras or audio recorders, and call a professional. A low-quality ad won't cut it on either TV or radio. For one thing, a station won't run an amateurish spot because it reflects poorly on them, and for another thing, a low-quality presentation of your brand is a low-quality presentation of your products and service.

Most TV stations have production teams that can bring cameras to your place of business and shoot commercial footage of your storefront, interior, products, and spokespeople. Radio stations have studios for recording commercials and can use stock sound effects to add life to your ads.

Before you get to the production stage for a TV or radio ad, however, you need to have a well-crafted script. Again, the stations you choose to advertise with have creative talent on staff who will help you script and storyboard your TV ad or write your radio spot. In some cases the cost of production is complimentary, depending on the size of your advertising purchase.



REMEMBER

You have to factor in production costs along with the costs to purchase time on air. If you find your ad appeal needs to be improved, you'll have to spend more money producing new ads. That isn't as simple as taking more photos or creating a new graphic for a social media post or website banner ad. Before deciding to run broadcast ads, you need to weigh the costs of initial production as well as any future edits.

Whenever you're purchasing ads on any channel — broadcast, digital, print, or otherwise — do the math to see which channel presents the best CPL and ROI for your precious marketing dollars. And before you spend time researching TV or radio stations, map out an entire plan based upon the factors presented in this chapter. You may find that the cost for the reach indicates a strong potential ROI, or maybe it doesn't. Listenership and consumer behavior change frequently, so research the data regularly.



WARNING

Once your broadcast ads run, they're gone, and your chance to get more exposure for the cost of an ad at a specific time vanished. Listeners and viewers cannot take screenshots or go back to your ads for more details when they're ready to make a purchase. This is one of the potential "why nots" of broadcast advertising over other channels, and illustrates why you need your ads to appear across many channels.

Investing in the Basics behind Successful Advertising

No matter which channel you use for advertising, it will only be as effective as the messaging you use. Your ads need to be aligned with the emotional triggers that influence behavior and choice among your target audiences. (Chapter 2 tells you more about the psychology of marketing.)

Before producing an ad, take the time to write a creative brief. (Chapter 8 walks you through this process.) Then have the discipline to follow your brief, hit your strategic messaging points, and integrate solutions that apply to the emotions driving consumer choice, such as fear of missing out, fear of loss, anxiety over pressure, or anticipation of rewards.

If you aren't a copywriter, don't practice on your ads. You have one chance to make a first impression, and if your copy falls short on clarity, compelling language, and inspirational tone, you likely won't get a second chance to win attention, engagement, and response. Search for professional copywriters, view their portfolios and read their copy, and ask about the response and conversion rates of the ads they've written.

Investing in graphic designers is also critical. Just because you can use Canva or Adobe doesn't mean you should. Designers think outside the box on a daily basis and come up with ideas that capture attention, create a professional image, and get noticed.

Sloppy, amateur design and clunky, confusing copy send a signal about the quality of your products, service, and innovation. Using templates that come with your design tools and software platforms telegraphs the message that you're a low-budget brand with a low level of imagination.



REMEMBER

It takes money to make money. Investing in your brand's image, presence, and professionalism is one of the most important steps you can take.

4

**Powerful Ways
to Build Sales
through Email,
Websites,
and SEO**

IN THIS PART . . .

Elevate relationships and customer value with direct marketing and mass personalization.

Make your website more than a digital brochure and actually increase page views, session duration, and sales.

Win the SEO game with smart execution of Google Ads, keywords, tags, links, blogging, and more.

IN THIS CHAPTER

- » Getting the gist of direct marketing
- » Understanding what makes direct marketing campaigns work
- » Creating direct marketing campaigns for direct results
- » Building successful email campaigns
- » Making direct mail work for engagement and sales
- » Testing your direct marketing
- » Considerations for telemarketing

Chapter **11**

Building Individual Value with Mass Personalization

In a world where brands and consumers can communicate with chatbots, text messages, and email, pretty much all marketing is direct marketing. The term *direct marketing* encompasses much more than the “junk” mail in your postal box. It is the process and methodology of marketing to your customers on an individual basis with personalized information instead of through mass advertising campaigns that reach large audiences with general messages on TV and radio or in print publications. More than ever, consumers demand personalized communication from the brands they choose. Direct marketing technology today provides many effective and affordable methods for meeting this growing expectation.

This chapter discusses the tactics and technology behind successful direct marketing programs. It takes you through the steps necessary to execute campaigns that build meaningful relationships with customers by communicating with high levels of personalization. You'll also learn the basics of customer segmentation and how to build campaigns around the important elements of recency, frequency, monetary value, and so much more. Additionally, this chapter provides insight on developing copy, graphics, calls to action, and other elements that drive engagement and conversion. You will also gain an understanding of how to use customer relationship management systems to send highly personal messages to thousands of customers in one mass email, creating individual value with the click of one button!

Grasping the Basics of Direct Marketing

The key to successful direct marketing is to send the right messaging to the right audience at the right time through the right channel, as trite as that may sound.

Email and mobile/SMS texts are the primary channels most businesses use to reach large groups of customers individually. Yet printed direct mail delivered to residences and P.O. boxes performs much better than many people think.

Following are some 2021 statistics on the most common direct marketing channels:

» Email

- 102.6 trillion emails are sent each year. (OptinMonster)
- 49 percent of all emails are opened on mobile devices. (IBM)
- Personalized emails get 6 times the transaction rates of non-personalized emails, but only 30 percent of brands use personalization. (Experian Marketing)
- 60 percent of consumers subscribe to a brand's list to get promotional offers. (MarketingSherpa)
- 64 percent of small businesses use email for marketing (Campaign Monitor)

» Mobile marketing

- 95 percent of all people in the U.S. own a mobile phone, making smartphones a channel businesses can't ignore. (Pew Research)
- 51 percent of shoppers have completed an online purchase via their smartphone. (Pew Research)

- 60 percent of customers read texts within 1 to 5 minutes of reading them. (SimpleTexting)
- Open rates for text marketing are much higher than those for email marketing, with nearly 100 percent of text recipients likely to open a text offer contrasted with only 20 percent of email recipients. (MobileMonkey)

» **Print direct marketing**

- 70 percent of consumers prefer traditional mail for cold, unsolicited offers. (ANA/DMA 2018)
- 70 percent of consumers say direct mail is more personal than online interactions. (Fundera)
- 54 percent of USPS survey respondents tried a new product or business over a 6-month period in 2020 because of direct mail. (USPS)

The statistics are impressive, but none of them will apply to your direct marketing programs if you don't have a solid plan, execute it with accuracy and frequency, and deliver compelling messages that address the psyche and personas of your customers and corresponding segments. With all the clutter and competition among channels, you can't cut corners on messaging, relevancy, and emotional appeal if you want to achieve a strong marketing return on investment (ROI) and drive both short-term and long-term sales.

Understanding the Elements of Successful Direct Marketing

The essence of direct marketing is gathering and managing customer data centered on individual needs, life cycle, values, transaction history, and more, and then using that data to craft and send highly personal communications that contain a clear call-to-action or offer. The foundation of direct marketing is to organize customers according to the data you gather, build campaigns that appeal to segments of like customers, and then use a solid customer relationship management (CRM) system to fuel “personalized” campaigns sent to many customers at once. Your CRM system will help you document customer transaction volume and value, recency of purchases, tasks for follow-up, and monitor sales among segments, and more, allowing you to identify the customers and groups that represent the most revenue and warrant more of your resources and time.

Components of a successful direct marketing campaign include:

- » Database of current customers, prospects, and leads
- » Customer segments that consist of contacts with like purchasing preferences, needs, lifestyle, locations, readiness to buy, and so on
- » CRM platform to deploy emails, document response, track customer history, manage communications per customer, and document a lead's engagement from introduction to sale
- » Messaging with personalization, relevant offers, and calls to action
- » Testing capabilities to identify the messages, offers, copy, subject lines or envelope teasers, graphics, and so on that drive the most opens, clicks, responses, and, ultimately, sales
- » Metrics to help you determine not just open rates, which don't matter if no one buys, but the actual impact of each campaign and customer segment on your company's short-term and long-term growth

Data really is “king” when it comes to direct marketing. Collecting and organizing customer and prospect data should be an ongoing priority no matter what space you operate in, or the size of your business.

Data matters

With an up-to-date database and a robust CRM platform, you can personalize mass emails quickly and efficiently, and affordably test different combinations of messages and graphics, emotional appeals, and offers to find the perfect mix for building engagement and revenue.

Your customer database will also help you identify high-quality prospects and enable you to build look-alike lists for prospecting that pays off. An effective database for successful direct marketing consists of much more than name, title, company, email address, and so on. It includes key information that allows you to segment your customers into like groups so you can send mass emails with personalized appeal, and monitor response and engagement for the various messages, offers, and content you send in general and to select segments. It also helps you identify the most profitable marketing channels, your best customers and leads, and those that aren't worthy of your time and resources.

In addition to data that shares details about customers and contacts, you need information that helps you find qualified leads, engage with timely offers and relevance, and communicate in ways that build connections between your brand and your prospects and customers. This information can be used to generate

customer profiles that guide your messaging, *creative* (the words and images in your ad campaigns), offers, and channel selection.

Customer profiles can include information such as:

- » **Who your customers are:** demographic, generation, ethnic and social groups, and so on
- » **Where your customers shop:** online, in-store, direct brand sites, or reseller sites
- » **How they shop for your category:** the recency and frequency of their purchases, and what offers they respond to most, such as discounts, reward points, or free gifts
- » **What they have purchased from you in the past:** products, services, packages
- » **What relationship they have with your brand:** prospect, lead, customer, repeat customers, evangelist
- » **Which channels they engage with and respond to the most:** social media, email, or text, and open rates for each segment

Your database will not start out with all these data points, but you can build the fields that are most relevant to your business over time.

A direct marketing campaign is only as good as the list you use. The quality of your list impacts your *sender score*, which reflects the number of bounces, unsubscribes, and spam reports you receive from email recipients. If you continue to have high percentages of those types of rejections, your score will be lower and you can get blocked by your email or CRM service and be unable to send messages for a specified length of time. A good way to avoid this is to weed out contacts that haven't engaged with your campaigns for a year or more, and remove any email address you know is no longer associated with the contact you have on record.



TIP

Ask your email service about sender scores so you can be sure to maintain a healthy brand reputation and sustain your email frequency.

You can improve and grow your lists in many ways, including the following:

- » Include in product shipments a warranty registration card that requires an email address.
- » Offer a discount on an order in process, or a future one, in exchange for providing an email address and permission to be put on a marketing list.

- » Add a registration option for accessing and downloading content on your website or a newsletter.
- » Reach out to your LinkedIn connections and ask permission to send them information or surveys, or just exchange email addresses.
- » Offer incentives for your Facebook, Pinterest, and Twitter followers to send you their email addresses and give you permission to contact them directly.
- » If you're in the business-to-business (B2B) sector, consider purchasing a service like RocketReach or Seamless.AI that enables you to search contacts by title, industry, seniority, company, and location, and get email addresses and phone numbers in order to connect and spark conversations.
- » If you choose to purchase lists, be sure to do so from a qualified data provider that builds lists around permissions and consumer profiles.



TIP

Data cooperatives tend to have well-vetted lists for business-to-business (B2C) companies and retailers. Before choosing a list and data provider, be sure to talk to some of their clients to see how the provider's lists performed for them in terms of generating new customers and contacts, and overall return.

Your customer data falls into the following categories.

- » **First Party Data:** This is the data you collect with consent directly from your customers and includes email address, phone number, history, loyalty program information and so on. Other elements of first party data include preferences for communications, shopping channels, products, and/or specific account information.
- » **Second Party Data:** This is data that comes from a trusted partner and covers information such as social media profile, and responses to customer surveys.
- » **Third Party Data:** This is information about contacts in your database that you get from data providers such as income, age, education.

Your data strategy should include collecting and organizing the data you need from customers directly, and third-party providers that can help you expand your database in order to reach customer acquisition goals. As necessary, find a reputable third-party data provider that can help you scale your marketing efforts with quality data and applications. You want a data provider that can build a model that reflects the analytics of your in-house data lists (for example, similar attributes, characteristics, and purchasing propensities). Data cooperatives typically have good data and lists that perform without spurring unsubscribes or spam reports.

Assemble, organize, and understand your own first-party data, that you collect directly from your own customers instead of partners or purchases lists. Ensure that the right tools are in place to utilize it effectively.



TIP

Managing your in-house data effectively with a CRM system can save you a great deal of money in the long run. Your *cost per acquisition*, or *CPA* (which measures the total marketing cost to get a new customer or individual order), is substantially lower with a house list versus a purchased prospect list. Reports from marketing associations over the years have showed that these differences can range as much as 40 to 64 percent or even higher.

If you're in retail, you can amass valuable data about customers every day through transaction records, loyalty programs, social media interactions, and credit card applications if you offer your own private label cards. This first-party data is yours to use freely — and hopefully successfully — as you work toward securing lifetime value from your core customers.

Keep in mind, the goal of all marketing is to achieve lifetime value — the revenue and referral value a single customer represents over the years that they purchase within your category. If you can secure lifetime value for even a few of your customers, you will save exponentially on customer acquisition, and maintain a steady revenue over time, both of which are critical to the success of any business.



REMEMBER

No matter what business you're in, your first step is to look at your in-house database and find ways to effectively organize it so you can deploy direct marketing campaigns in real shopping time. Knowing what you have will also help you know what type of CRM system to invest in. Having your data in one location will enable you to see what is useful and what you need to improve your insights and personalized communications.

As you build your lists and execute campaigns, you need to factor in multiple touchpoints to get customers to *yes*. To close a customer, you may need to email, call, send a letter, and call again to get the sale or meeting you seek. Research from various sources shows it takes upwards of seven touchpoints to actually engage a prospect in conversation or get them to purchase from you.

CRM matters



WARNING

Setting up a robust CRM platform is an important step for organizing, categorizing, prioritizing, and managing customer data and documenting conversations and engagement. Most systems store key data about customers and monitor their transactions, frequency of purchase, rate of engagement, and overall relationship with your brand, allowing you to communicate with high levels of personalization.

Nearly all CRM systems enable you to customize the properties, or *data fields*, you want to record and manage for your customers. For B2B businesses, these data fields might include

- »» Date of the lead acquisition, or when your company was first introduced to the contact
- »» Lead source, or whether you met the contact at a trade show or online webinar, or through social media, a referral, sponsored content placement, a media feature, a digital banner ad, and so on
- »» Information from a Contact Us form on your website
- »» Emails received, emails opened, click-throughs, and responses
- »» Size of the potential business opportunity
- »» Specific needs and product interests
- »» Opportunities identified in initial conversations
- »» Demo completion and date
- »» Proposal date and details
- »» Targeted close time
- »» Probability of closing, and so on

CRM systems also provide critical insights through analytical functions so you can work smarter and more efficiently than ever. These may include

- »» A comprehensive view of the customer across channels, campaigns, and online communities; behavior such as store visits, online/off-line purchases, blog comments, partner site visits, emotional triggers, and purchasing trends so you can sort customers by behavior, price sensitivity, campaign response, and more.
- »» Engagement levels that tell you which campaigns, blogs, social media posts, offers, and campaigns were of the most interest to which individuals and customer groups.
- »» Lifetime value, which is critical to sustainable growth. Many CRM systems let you analyze the overall value of each customer so you can identify the customers who cost you a lot to serve and result in lower profit margins, and those who are lower-maintenance and generate higher returns per transaction.

- » A/B testing of emails (see “Testing Your Direct Marketing” later in this chapter), which enables to verifiably determine which messages, offers, calls to action, copy, subject lines, and even graphics drive the greatest response among customer segments, is an important feature to have in your CRM platform. With testing capabilities, you can also test variables like day of the week sent and time of day sent, which can impact open and click rates.

CRM systems

Choosing a CRM system doesn't have to be a complicated or stressful process. The key is to find one that will grow as your database, communications, and sales management needs grow. Once you upload your customer data, leads, and create a sales pipeline, and so on, it can be expensive and time-consuming to switch, so do your homework up front to find something that meets your current and anticipated needs as you build your marketing program and database.

Things to look for in a CRM system:

- » **Ease of use:** Inputting, editing, managing, and analyzing your customer profile, campaign, and sales data needs to be simple and fast. If it's hard to use the platform and find the data you're looking for, it will be hard to get your team members to use it. Often, the most challenging aspect of a CRM system is to get team members to upload data frequently. You can overcome this challenge if you ensure that using your system is simple and fast.
- » **Features and functions:** Some of the basic features to look for in a CRM system include how it stores and manages contact and lead information and data, deploys and tracks emails, and organizes and reports on your sales pipeline activity and progress.
- » **Integration:** It's essential that your CRM platform integrate seamlessly with other platforms you use. Your *marketing stack*, or all the marketing technology you use, must be able to communicate and share data automatically. When reviewing CRM options, check to see which ones will easily integrate with your accounting, product management, contact database service, and other platforms.
- » **Customer service:** No matter how many tutorials you complete or how long you use a system, you'll need ongoing support to help you manage your lists, filter data to exclude segments or contacts for specific campaigns, automate changes to data fields, pull contacts into segments, lists, or pipelines, and so on. Check to see how quickly customer service responds to chat requests and phone calls, and if they charge extra for help. Also find out when they work. Is live chat or phone support available 24/7 or only a few hours a day? Do you get to chat with live people or just bots?

» **Automation:** How robust are the automation features? You'll want to review automation for triggered marketing sequences, sales reminders, and updates to key data fields per new transactions or account details. How easy is it to prepare and send personalized automation sequences from various owners among your team?

Some of the most recommended systems for businesses of all sizes include the following which represent the top 3 choices from Top10.com, a review site that researches many products and services and provides in-depth recommendations and reviews.

- » HubSpot stands out for integrating marketing and sales functions.
- » Pipedrive is known for its artificial intelligence (AI) powered solutions.
- » Monday is known for its intuitive interface and flexibility.

CRM systems are designed to help you grow sales and customer communications. As your business grows, your need for data management will too. Purchase a system that will enable you to scale your programs effectively for tracking more transactions, performing more analytics, and adding more names to your lists.



REMEMBER

Direct marketing, no matter which channels you use or the depth of your customer data, is only as good as the emotional appeal of your content, message, and offer.

Before you can optimize your ROI, you need to develop your emotional selling proposition (ESP) messaging for each customer segment, so you can build campaigns around triggers that capture attention and inspire engagement. (See Chapter 2 for more on ESP profiles.) Your communications should create a sense of urgency and include a strong call to action (CTA). The longer it takes someone to act on your message, the greater the chances they won't.

Messaging matters

Messaging is what makes one brand stand out from another, and it's what makes one direct marketing campaign better than another. Your messaging must be part of an overall strategy reflected in all your communications.

If your brand positioning is that you are the quality leader in your category, your messaging must communicate what that means from a product perspective and what it means for customers. Does your quality advantage result in longer durability or better business returns, greater satisfaction, higher value, or savings for customers?

Your messaging must also appeal to the decision triggers of the customers receiving your campaigns. What most influences your target audiences? Price? Exclusivity? Scarcity? Social proof? Fear of missing out (FOMO)? Keep in mind that each customer segment requires specific messaging. If you have created customer segments around generational segments such as millennials versus baby boomers, your messaging to that group should reflect the usage, desired outcomes, lifestyle implications, and other information specific to that age group.

The quality of the copy you use to convey your message is key. You must be able to communicate with clarity and brevity. No one wants to read a dissertation. They want to find what they were looking for and move on to the next item on their to-do list. Most important, many people don't read past the first line or even the subject line of an email. Your words need to be meaningful and powerful to engage and put your customers on a journey to *yes*. This isn't as easy as you may think and often requires a savvy, experienced copywriter.



TIP

Start a paragraph of copy with quantifiable results your customers can potentially gain from doing business with you. This will get you a higher response rate. Copy that starts off with claims about your excellence and other egocentric statements usually just adds to your email unsubscribe rates.

All these strategies may seem overwhelming, but think of it this way: The more campaigns you develop and deploy to communicate your key messaging, the greater your return.

It really is quite simple! The more you send and the more you test, the better your results and the more you'll understand what works and what doesn't. If you test and track your campaigns closely, you can tell when a change, even as slight as the envelope teaser or color, or one word in the subject line, improves response rates. Even if you have little or no experience in direct marketing, know that a small effort can generate enough information to help you execute better the next time and on a larger scale.



WARNING

Don't overdo your frequency in order to learn more about the effectiveness of your messaging. There's a fine line of frequency you can't cross if you don't want to get unsubscribes and lose potential customers.

Testing messages, offers, copy, subject lines, and even graphics is easy and inexpensive with email and mobile marketing channels, because there are no production costs, just the cost of your email and wireless phone service. Take the time to do A/B testing to understand which channels and messages and emotional appeals drive the best response and conversion rates. CRM systems offer similar functionalities with a few distinctions.

SOME FACTS ABOUT THE IMPACT OF EMOTIONAL TRIGGERS

Interestingly, consumer response to certain emotional appeals has been tested to help marketers determine which emotions best drive which customer groups to act. Some interesting facts about the impact of social proof, trust, and FOMO follow:

Insight about social proof and trust

- 90 percent of people recalling online reviews state that those reviews influenced their buying decisions. (Dimensional Research)
- Product reviews are 12 times more trusted than sales copy. (eMarketer)
- Nearly 70 percent of online shoppers look at product reviews before making a purchase. (OptinMonster)
- 85 percent of shoppers trust online reviews written by other consumers as much as they trust recommendations from their personal contacts. (BrightLocal)

It's human nature to act on the fear of missing out. Consumers respond to FOMO appeals at substantial rates.

- Social media pages that host content that contributes most to acting on FOMO are Facebook at (72 percent), Instagram (14 percent), Twitter (11 percent), and Pinterest (8 percent). (Strategy Analytics)
- Millennials experience FOMO more than any other age group, with 69 percent acting on this emotion (OptinMonster).
- 60 percent of millennials make reactive purchases due to the influence of FOMO, and most are within 24 hours of seeing something that triggered this reaction (OptinMonster).

Creating Direct Campaigns for Direct Profitability

The concept and practice of direct marketing has been around for years and has always been a core component for any business's success. No matter your industry or customer segment, successful direct marketing campaigns have the following common elements:

- » **Relevance:** Content, visuals, and offers should be directly aligned with the needs and characteristics of targeted customers.
- » **Personalization:** Including references to their name, past transactions, or relationship with your brand makes recipients feel more valued and understood.
- » **Problem and resolution:** Copy that presents a problem that recipients understand or want to overcome, and then offers an actionable and acceptable solution, is likely to secure higher open rates, engagement, and, ultimately, conversions.
- » **Offer:** Beyond the products or services you offer, what will your customers get from you that perhaps they can't get from someone else? Quality, customer service, rewards? Give contacts a reason to purchase from you instead of an alternative provider of the same or similar products/services.
- » **Call to action:** Tell your customers how to act — for example, email, call, or visit a website for more information or to redeem a coupon, earn rewards, and so on. A CTA inspires behavior and often leads to a sale.

Your success lies in how you present each of these elements, and recipients' readiness to act on your message and offer.

Encouraging customers to take action

Every email or letter you send must have a CTA, or you're not likely to get much of a response from recipients. Look at your CTA as the climax to your campaign's story. The action is what leads to the engagement you need to get customers started toward a sales process or transaction and the metric that will help you determine response rates and ROI. Here are some examples:

- » Call a toll-free number to process an order/sale.
- » Register for your subscription program via an online form.
- » Email for more information on a product or to schedule a free consultation.
- » Sign up for coupons/discounts.
- » Take an online survey (which enables you to get feedback and capture email addresses).
- » Return a form in an enclosed postage-paid envelope to process a sale, subscription, or donation (if you're in fundraising).
- » Schedule a demo or free consultation.

You must be able to track the source of responses to your CTA and marketing campaign in general. If you have multiple campaigns in play at the same time, be sure to code each campaign separately, so if you use the same CTA — say, a call to a toll-free number — you can track calls back to each specific campaign, mailing list, or customer segment. A simple method is to use a different phone number for every creative you send, a different landing page for every campaign directing consumers to your web page, and so on. If you're testing different lists with the same creative, be sure to send each list to a different response mechanism — that is, landing page or phone number — so you can determine which one pulls best.

In direct marketing, the offer often refers to the call to action and defines the benefit of acting. For example, the offer might say, “if you call now, or redeem a coupon before a specific date, here is what you will get in return.”

Directing consumers to a Contact Us form on your website will help you capture data and get permission for further communications, so never leave these out of your contact options or sources for more information listed in your print material. A hot link to a Contact Us form should become a standard part of all your email campaigns.



TIP

A coupon offer often improves response rates and can help you track sales easily. Give each coupon a unique code so you can track the sale to a specific campaign, mailing, and individual customer.

When it comes to mailing marketing letters, you have options: standard bulk mail, first-class mail, or overnight packages. Traditionally, overnight packages get opened the most, but the open rate may not justify the cost unless each sale is substantial and can easily pay for the cost of the campaign. First-class mail tends to do better, as do personalized envelopes with messages about a direct consumer benefit on the outside.

Following is an example of how a successful direct marketing campaign evolved to increase sales and loyalty. System Pavers (www.systempavers.com), a leading designer and installer of interlocking paving stone outdoor living systems, was using a traditional direct marketing piece that had worked well but was reaching a point of diminishing returns. The company wanted to create a direct marketing campaign around the psychological values discussed in Chapter 2 to test against its control. By using all the principles covered in this book and executing them through a direct marketing channel, we were able to achieve a 3,100 percent ROI and generate at least 200 percent more revenue than the control. Here's a summary of the processes used to achieve those results:

- » **Messaging:** We needed to find an emotional value that would resonate with potential customers. System Pavers creates beautiful paving stone driveways, walkways, BBQ stations, outdoor kitchens, water features, and so much more. None are necessary for daily functions, and outdoor living upgrades can be expensive, so we had to assign an emotional value to this non-emotional product.
- » **Survey and research:** To find the right emotional value that would spur a high-end home improvement project, we surveyed existing customers to find out how they “felt” about their new outdoor living systems. We then reviewed those results along with testimonials gathered over the years to identify and build ESP. We discovered that many customers felt their home was like part of their family, so we built our ESP messaging around family values and rekindling sparks, like when you first moved into your house or when Mom and Dad first fell in love.
- » **Format:** Because the decision to upgrade and remodel your home’s outdoor living space is a complex decision, we decided we needed more than a self-mailer with product photos and limited-time-offer copy. So we created a newsletter — a four-page large-format mailer that included a lot of content around our ESP and the customer decision process. Our copy centered on the theme “Love Your Home Again,” because, as with relationships or a new home, we see no flaws at the beginning, but over time we notice a lot of little things we want to change. We also included statements about our business owners and customer satisfaction results to build trust and confidence in our brand.
- » **Testing:** We then tested our new “Love Your Home Again” theme and format against the control, another large-format self-mailer, in select markets. We chose test cells in two regions where System Pavers operates and compared like cells in each region against each other to weed out any geographical influences. We assigned the test and control pieces to similar homes in each cell so we could test messaging rather than economic or social variances. We sent three mailings to our test cells to ensure that no anomalies existed in our process.

We also tested results among past customers or prospects we’d already mailed marketing materials to and cold prospects with no prior contact with our brand. And we tested email against printed direct mail.

Our results were very telling. Our ESP approach achieved more than 3,000 percent ROI and outperformed the control for revenue generated. Interestingly, the print version outperformed email, reflecting that we still like to hold onto things that are important to us, and when we’re making big changes to an emotional part of our life, tactile marketing material matters.

Figure 11-1 shows a visual of the first edition of “Love Your Home Again.”



The Perfect Summer is Just Days Away

Tips to help you unwind, relax and escape in your own backyard.

You don't have to travel to an exotic expensive resort to relax this summer. According to AAA, a family vacation to common destinations such as Hawaii can top \$10,000. And with that comes the stress of airport travel, heavy road traffic, long lines at amusement parks and restaurants, packing and unpacking, again and again.

With advances in outdoor living systems, you can spend less money, experience less stress, and enjoy elegant and relaxing days and nights in your own backyard year round. The key to a successful staycation that lasts far beyond the precious time off work, is to create a peaceful outdoor environment that reflects your personality and lifestyle. Doing this is more simple, affordable, and faster than you might think.

And unlike a high priced vacation, outdoor home improvements with System Pavers can be interest free for 36 months.

The first step is to ask yourself: *how do you currently use your outdoor spaces, and how would you like to better use them?*

- If you like cooking and eating outdoors, consider an outdoor kitchen center and grill area. These not only add functionality to your home but property value as well.
- Like unwinding under the stars at night? Add a fire pit to create that "vacation" ambiance and added warmth year round.
- If you like to entertain, explore outdoor lighting possibilities. The right system not only protects your home, it creates a safe, upscale ambiance that lets you party all night long.
- If you put off entertaining because of embarrassing cracked concrete, brown, patchy lawns, or lack of privacy, consider a custom stone pavers patio with planters and a retaining wall. The complete change in ambiance is beyond imagination.
- Need a peaceful place to unwind after a day of playing or working hard? Install a maintenance free stone patio, and a water feature. With stone instead of wood decks, your peace of mind won't be interrupted by nagging scratches, dents or damage you need to repair in your "spare time." By adding a built in water feature or pond to a retaining wall or patio, you will add a sense of calm and tranquility, and, according to Feng Shui experts, increase your property's harmony.

These are just a few ideas for how you can enjoy relaxing "summer days" all year every year. **Call System Pavers today at 877-728.3165 for a consultation and get a design and rendering valued at \$300 for free.**



FIGURE 11-1:
Direct marketing
from System
Pavers.



Browse our photo gallery of outdoor living systems to start planning your personal escape. Register for a free no-obligation custom design, valued at \$300. Get started at www.systempavers.com/gallery or call 877-728-3165.

Image courtesy of System Pavers

Building effective email lists

As evidenced by many studies over time, direct marketing tends to generate higher results from in-house customer and prospect lists. Yet purchasing prospect lists is critical to customer acquisition and to building your own lists of qualified leads.

List purchasing options are many, including

- » **One-time rental of prospect lists based on attributes you designate:** If a consumer replies, you own that name and can add it to your in-house list.
- » **Census-based lists that provide information about households in demographic areas:** These are less expensive than modeled data lists that come from in-depth analytics of customer groups, past transactions and behavior, and other attributes. However, they can also generate higher unsubscribes and spam reports that impact Sender Scores.
- » **Modeled lists from data companies that create, manage, and sell lists they compile from tens of millions of households:** These lists may be built upon household data they compile from various sources or from surveys they conduct to sort consumers in multiple segments according to preferences and needs, life events, and so on.
- » **Lifestyle change lists:** These lists may include names of people moving to new markets (new movers), obtaining recent marriage licenses, and parents associated with new birth certificates, and so on.

You can also participate in a *cooperative database*, (explained in the earlier section, “Data matters”), which is a compilation of your mailing lists combined with those of other companies targeting the same customers. Each contributor to the database has access to the full database, which is duplicated and often enhanced to make it more valuable. These lists can be highly effective because they consist of customers who have been vetted in a sense by other brands and are interested in products or services represented by cooperating brands that know their purchasing behavior. However, you have to be willing to share your lists to participate.

Create your ESP customer profiles, run analytics to find the common emotional, demographic, and functional trends, and then purchase lists that support those trends.

Take time to browse analytics you receive from your list supplier instead of just reading the report it generates. You may find insights about your prospects that didn’t show up in the summary report.

For example, I was working with a client in the utility space and looking to buy lists to expand our lead generation for an ancillary service. We hired a data firm to run analytics on our households and show us purchasing, lifestyle, demographic, and even political trends. One thing we noticed that didn’t show up on the data firm’s report of strong attributes was that most customers paid off their credit cards regularly and carried little credit card debt. This showed a trend toward responsible spending, which we added to our messaging and our profiling for future data models.

Test various data models against each other as well. As you get results and reports from your data provider, you can even test the top percentile from one segment against the top or middle percentile from another to help you more precisely identify who you need to be targeting for optimum returns.



REMEMBER

If you intend to make direct marketing a core component of your marketing plan — and to succeed today, you must — it's important that you build a clean database of highly targeted contacts.

To supplement your current contacts and those from carefully purchased lists, find a platform like RocketReach or Seamless.AI that allows you to find highly targeted contacts one by one or many at a time. Take time to learn how these contact research platforms gather email addresses and phone numbers to ensure they are sourced ethically and in line with privacy and spam guidelines.



WARNING

Avoid brokers that use ISP browsing to find email addresses to sell to you because these methods violate consumers' privacy and are actually illegal in many countries. To be clear, ISP browsing takes place when an internet service provider (ISP) tracks the websites you visit, the duration of your visit, the content you watch or browse, the device you use and your location. Due to a U.S. senate vote in 2017, it is now legal for ISPs to sell this information to list providers in the U.S., although still illegal in many other countries to protect privacy.

Prepping Your Email Campaigns for Success

Email is one of the most cost-efficient and highest-producing methods of direct marketing, especially among existing customers and warm leads. You'll be hard-pressed to find a better return on any other advertising or communications channel.

In addition to being fast, easy, and inexpensive, a core advantage of email is that you can measure it in ways you can't measure anything else. With printed direct mail, you never really know how many recipients opened your letter and saw your offer before choosing not to respond. With email, you can know how many actually

- » Opened your email
- » Clicked through to a website or another asset to read more information about your offer or message
- » Engaged with your sales team via phone or email, or another response
- » Purchased or performed another desired behavior

- » Unsubscribed or opted out of your email campaigns
- » Reported your email as spam to your email server

You can also discover with precision which message, offer, subject line, day of send, time of send, frequency of send, list, and so much more drove sales, down to the individual level.



TIP

Keep it short and sweet. Short emails with bullet points get more attention. Emails with questions such as *Are you available for a short demo to see how we can save you 20%?* tend to get better response rates. Including hot links to key pages on your website is critical to driving website traffic, a key metric for any email campaign. If you use specific landing pages for a given campaign as links instead of your home page, you can better measure the impact of specific calls to action and offers.

Be sure to drive traffic to your website and not third-party sites. For example, if you are sharing a story about your company on a media website, embed a copy of the story on your News page or blog to keep people engaged with your brand and set them up to see more of your messaging on your website.

Reblasting emails three to five days after the original send helps lift your response and engagement rates; however, it can also add to your list of unsubscribes. Test the impact of reblasting emails to your database before making this a regular practice.



REMEMBER

The key to successful email campaigns is, again, personalization and relevance as well as how up-to-date and clean your database is, the intrigue of your subject line, and the quality of your copywriting.

Setting up triggered emails

Triggered emails are those that your CRM system sends automatically in direct response to customers' browsing or shopping behavior, an event, a customer action, a missed opportunity, or a change in customer behavior or status. According to a report by GetResponse in 2021, triggered emails achieved an average open rate of 38 percent. Compare that with the average open rate of 20 percent, and it's easy to see how important triggered emails are for any business, B2B or B2C.

One of the most effective uses of triggered emails is to get people to go back to abandoned online shopping carts, a critical part of an email (and overall) marketing strategy if you're in the e-commerce space. Triggering emails to remind shoppers to complete the checkout process can pay big dividends. Various studies show that shopping cart reminder emails have high open rates — 30 to 45 percent higher than other emails in many cases — and that around 50 percent of recipients go back and complete the process. And yet, less than 21 percent of retailers, which likely includes your competitors, are sending reminders (Return Path).

Automated marketing campaigns are an effective tool for keeping messages alive. HubSpot offers automated sequences that allow you to craft emails, schedule them to auto send in intervals you choose, and add phone call reminders to your sales team in between. These sequences work best with contacts that have already had an interaction with you, such as someone you met at a trade show or who responded to an ad or prior email and tend to get higher open and engagement rates than general email campaigns.

A sequence of at least three emails seems to do better than sending just one email reminder. As you experiment with different sequence messaging, schedule intervals, and phone calling, you'll quickly identify your best message/offer combinations and timing patterns.

Implementing personalized emails

Like printed direct mail, email works best when it's personalized. HubSpot's research shows that when the recipient's first name is in the subject line, the click-through rate goes up. Other research from Statista shows that the open rate for a personalized email is upwards of 17 percent, and closer to 11 percent when it's not personalized.

Personalization is key to success today, and that isn't likely to change anytime soon. It's dependent on having strong CRM and content management systems that enable you to customize your content for various personas, cultures, languages, segments, and even channels (see Chapter 7 for more on content marketing).



TIP

Printed direct mail or email needs to be viewed as a series of communications. Although the first piece is designed to get a sale, it typically takes multiple touchpoints to achieve the desired behavior. Creating a series of touchpoints helps you increase your return and conversion rates. You can mix up your channels too. Maybe send a first touchpoint by letter, reinforce it with a corresponding email, and then try to close the deal with another letter that's highly personalized and follow up with a phone call.

Improving Print Open Rates

Just like a subject line is critical for email open rates, the *envelope teaser* (a short slogan or sentence on the outside of an envelope) is essential for getting direct mail opened and read. Following are some techniques to make your envelope enticing enough to open:

- » **The stealth approach envelope:** Use an envelope that looks like a bill or personal letter. Customers will open the envelope just to find out what's inside, especially if it looks like a utility or credit card bill.
- » **The teaser envelope:** Craft a statement that sparks curiosity about the offer or message inside. A teaser about the offer, such as *You can save thousands with this offer* or *See what our free gift can do for you*, helps get your envelope opened by people who are actually interested in an offer from you.
- » **The special offer envelope:** Promote your CTA on the envelope, whether it's to enter a sweepstakes to win a million dollars, get free samples or a first month of service free, or find valuable coupons. Like the teaser, this envelope inspires the customer to open it and learn more.
- » **The creative envelope:** If your teaser and creative are strong and unusual, you'll get people opening it out of curiosity. Tests from various groups show that dimensional mail, such as small boxes, and oversized formats, like big postcards or brochures, perform better than traditional formats, like #10 business envelopes.

In general, a letter combined with an insert, like a one-page flyer or a small brochure, pulls better than a letter alone. This is another element worth testing, because adding inserts increases the cost of production and mailing.



REMEMBER

Your envelope and subject lines are the first strategic messages your customers see, so you have to master these to get action. Never underestimate the value of a good copywriter.

Testing Your Direct Marketing

Test various messages and channels to see which work most effectively and efficiently for your industry, your customer database, and your offers. You can test messages and offers with email before utilizing more expensive channels to save money and time. Your tests should cover multiple variables to find the perfect combination of channels, messages, and offers for your brand and customer base.

One of the prime advantages of direct marketing is the ease and affordability it provides for testing. Truthfully, there's no reason you shouldn't be testing your campaigns, and if you're not, you're likely wasting a lot of money and walking away from huge opportunities to find out what works and what doesn't, your customers' preferences, and how to optimize efficiencies.

The list of testing variables is extensive, as shown in Table 11-1. What matters is not just that you test, but how you set up your test so you know precisely what you're finding out and can glean actual truths rather than assumptions.

TABLE 11-1

Variables to Test in Print and Email

Print	Email
Database lists and segments	Email lists and segments
Responses based on CTA	Open rates and click-through rates
Inserts versus no inserts	Google sponsored ads (email ads at top of in-box)
Offers	Offers
Reply cards versus phone calls	Landing page views
Free gift versus no free gift	Free gift versus no free gift
Coupon for free lunch versus discount	Coupon for free lunch versus discount
Response mechanism	Response mechanism
Creative and layout	Creative design or text-only format
Envelope teaser	Subject line
CTA	CTA
Envelope color and return address	From line
Arrival time to household — time of week	Send time — day of week, time of day

Following are some guidelines for conducting a test that delivers clean results you can have confidence in:

» **Goals:** Before executing your tests, have a plan or goal in mind. Outline what you want to discover, when you need this new knowledge, and when and how you'll execute the test. In addition to seeing which creative and offer combination sells the most product or generates the most leads, establish learning goals about your customers. What information can you gain from each test to better segment customers according to purchase cycles, lifestyle, preferences, and so on to increase your level of personalization and effectiveness in the future?

» **Variables:** Test only a few variables at one time. If you have too many variables in play for a single test, sorting out the actual influence of each is difficult. For example, if you're testing two creative design options, keep the

offer the same so you know precisely what pulled response: the creative design or the offer.

- » **Metrics:** Have in place clear metrics so you can document actual response and sales from each direct campaign you execute. Code your response cards for the offer, incentive, and time of your campaign. For example, if you're sending a letter package to customers and prospects in May 2022 and offering a 10 percent discount, your code for new customers may look like this:

DM0522NC10 – Direct Mail May 2022 New Customer 10 percent off

Also use different URLs and phone numbers on different print packages you send out to discover what works best for response and conversion.

- » **A/B tests:** Straight *A/B testing* is simple to execute. You send out two versions of the same campaign at the same time to the same test cells and see which one, A or B, pulls the most response. After you identify a winner or a champion, keep testing that piece against new ideas and offers. This is a simple yet powerful way to find out how small elements change results. You learn quickly and thus can adapt quickly.

A/B testing can be as simple as testing the colors you use in your creative, the size and placement of your CTA graphics, the photos you use, and which incentive, headline, or subject line works best.

- » **Documentation:** As you test offers, formats, creative, and so on among your customer lists, keep track of which customers responded to which offers at which time. This will help you know how to segment customers according to when they're most likely to purchase and what they're most likely to purchase.

Telemarketing: To Call or Not

Direct-response phone efforts worked well in the past and generated a good response because people participating in live calls tend to say *yes* more than they do with other direct marketing channels. However, with all the regulations, privacy concerns, and Do Not Call lists in play today, this is an increasingly difficult channel to use. Add the popularity of online chat versus customer service calls, and you have even more reasons not to make direct calls.

Here are some tips if you choose to include phone calls in your direct-response mix:

- » **Call only consumers with whom you have a relationship.** Cold calls produce cold results, waste a lot of time, and can be a big turnoff for

consumers who feel you've invaded their privacy. Many businesses today call people who have engaged with them through social media or who initiated a relationship by requesting information about their business or the industry in general. If your content marketing plan offers customers a free white paper, research report, checklist, or how-to guide, it's acceptable to many if you call them shortly after they've downloaded it to see whether they have any questions or would like a product demo. If you make such calls, be sure to tell customers why you're calling and make the call about their questions first and your desired next steps, such as a product demo or free consultation, second.

- » **Staff your call center with trained, competent salespeople.** You want people who can represent your company in a professional and engaging manner. Don't just let them wing difficult calls. Anticipate customer issues, comments, and complaints. Prepare a response script and train each employee how to deliver the messages in that script so your team responds professionally and consistently.
- » **Prepare a good call script and adapt it for various scenarios.** Craft messaging for when customers call you, when you call customers, and how to respond to various concerns, complaints, and issues. If you've defined your ESP, your call scripts should address this as much as possible.
- » **Call to follow up.** No matter what business you're in, or how big you are, assigning a team member to call each customer after a service visit or product purchase is a great way to build rapport and loyalty.
- » **Consider closing each call with a survey-type question.** Your calls to customers can include a one-question survey. You can ask if clients patronize just your business or your competitors as well, what their satisfaction rating is on a scale of 1 to 5, and if they plan to purchase from you again. You can change the survey question weekly, monthly, or however often you want to. Doing so lets you gather information from customers so you can better define your ESP and messaging.

While telemarketing is losing its effectiveness, partially due to the overuse of robocalls and other impersonalized approaches, you may find that it still works for you. Like all aspects of your marketing, document sales generation, revenue generated from each sale and collectively, and the cost for making calls. Calculate your CPL and compare against other forms of marketing to see if it makes sense to include it in your marketing plan.



REMEMBER

Direct marketing allows for powerful, affordable, and measurable marketing efforts. One of the biggest mistakes you can make is to get complacent about your high-performing campaigns. Email and printed direct mail messaging, content, and offers need to be updated and refreshed — and even replaced — frequently, so your recipients start to look forward to your emails and mailers rather than ignoring them.

IN THIS CHAPTER

- » Understanding what goes into a winning website
- » Attracting prospects and building relationships with a strong web identity
- » Using your website to boost business
- » Driving traffic with engaging content
- » Building a great website that serves your business

Chapter **12**

Building an Engaging and Winning Website

With the average session duration on the web's 2 billion sites hovering around 2 or 3 minutes, building a website that actually keeps visitors' attention long enough to start a conversation or sales transaction can seem a bit intimidating. However, if you organize your website around a strong marketing strategy (flip to Chapter 6 for more on marketing plans) and incorporate key elements designed to engage and convert visitors, you can be more successful than you may imagine.

In this chapter, you will read about the basics of building and maintaining a successful website to ensure you get the traffic you need to boost your sales and competitiveness. This chapter also outlines strategies and tactics for improving your website in ways that create value for your visitors and engagement and conversion for you.

Building Out the Elements of a Successful Website

Your website isn't just an introduction to your brand; it's the trailhead for a customer journey to lifetime value. The online path from introduction to loyalty is laden with critical strategic elements, including creative, design, interaction, decision support, calls to action, incentives, and more. Essential elements of business-building websites include the following:

- » Clearly defined goals and calls to action
- » Easy-to-follow navigation
- » Clean and inviting design
- » Meaningful content that adds value to customer relationships
- » Interaction that pulls visitors into your brand story
- » Direct relevance

Additionally, syncing your site for *search engine optimization* (SEO) — increasing your visibility in online searches for products or services related to your business — is a basic aspect of all successful websites. (For more information on SEO, turn to Chapter 13.)

As you develop these essential elements, keep in mind that your website often establishes the first impression consumers will have of your brand and provides credibility for everything you say, promise, and offer online or off-line. The tone, style, design, navigation, and content of your website make a statement about how contemporary or out of touch your brand or products are. If your website is stale, unengaging, and infrequently refreshed, consumers will consciously or unconsciously — likely both — come to the same conclusion about your products, service, and overall experience.



WARNING

Don't be sloppy! If your website has typos, broken links, misaligned paragraphs, confusing or inaccurate text, expired offers, and so on, you're signaling to customers that you produce poor quality for the products or services you offer.

Clearly defined goals and calls to action

The driving goal behind all the pages of carefully crafted content and creative you develop for your website should be to engage visitors in your message and move them from your *landing page* (the page that appears when they click on a search

result that leads them to your site) to fulfilling a specific *call to action*. Your call to action may be for visitors to request a demo, call your sales team, download a paper, register for an event, or fulfill an online transaction.

The first step in building a website, then, is to define the goals or purpose of your web page and the actions you want visitors to take.

Goals

What's the primary goal you need your website to achieve to build sales and grow your business? Do you want to spark conversations with potential customers? Communicate details about your offerings? Drive visitors to retailers or distributors? Or do you want them to complete a purchase on your e-commerce page or contact you to set up a product demo or consultation?

Define your goals and stay laser-focused on them as you build out calls to action along with every other element of your page. This will help you avoid wasting time and money on elements that don't support your goals.



REMEMBER

Just because a technology or plug-in exists doesn't mean you need to use it. Consider how each element of your website drives visitors toward your end goal. Using tools that don't relate to the journey you need customers to take can be distracting to users and waste a lot of time and money.

Calls to action

Your call to action is exactly that: the action you're calling out for your visitors to take that will add value to their lives and profit to your bottom line. A call to action may ask consumers to

- » Complete a Contact Us form or schedule a demo online.
- » Download a white paper.
- » Register for your newsletter, webinar, or special event.
- » Purchase a product or schedule an appointment.

Building your website's navigation and content flow around these actions will keep visitors focused on your end goal and increase your chances of conversion.

Easy-to-follow navigation

Easy-to-follow navigation is a critical component of a successful website. With countless template options available across many website builder platforms, it's fairly simple to ensure your website is easy to navigate.

Website builders help you set up categories and tabs for your information, create a logical and an easy-to-follow flow, and organize your site's content. Although it seems like a no-brainer to just follow the template's directions to build your website, it isn't always easy to organize your content in ways that keep visitors on a journey to closing a sale or completing another action, and enable them to quickly find what they want.

When building your navigation paths, keep in mind *why* visitors come to your site. Do they come to find product information, make a transaction, or compare you to competitors? Or download content that can help them make informed decisions about your category and brand?

Your navigation needs to make it easy for your visitors to find the trailhead to the path they want to take immediately upon landing on your site. Label your tabs according to the most traveled paths on your site and provide buttons and hot links throughout the site so visitors can find what they want no matter which page they're on at any given time.

IS YOUR WEBSITE POLITE OR DOWN-RIGHT RUDE?

Bryce Tanner, owner of Upside Down Digital, a small business that provides website strategies, design, and development for other small business owners, warns against executing a "rude" or annoying website experience: "You wouldn't hire a rude receptionist to be the first impression for your brand, so why would you maintain a 'rude' or offensive website?" Tanner defines online rudeness as:

- Slowly loading sites or pages
- Bad or pixelated graphics that are hard to decipher
- Poor design and content flow that's hard to follow
- Too much copy, which makes it difficult for visitors to find what they need quickly
- Inadequate mobile interface for your site, forcing visitors to open up laptops or tablets to navigate your site

Tanner also believes poor website navigation makes a huge statement about your attitude toward customer care and overall customer experience. If you don't care that customers have to struggle through a sloppy or confusing website, you may not care about ensuring that they are happy with your products, can easily and comfortably return or exchange items, and so on.

You should also make it easy for visitors to find

- » An email address for your customer service, sales, and support staff
- » General and department phone numbers
- » Contact Us and demo request forms
- » Live chat links

Clean and inviting design

Your website design is critical to the image you project about your brand, products, or services. As I note when I talk about creative strategy in Chapter 8, your website is where you need to use the colors, iconology, fonts, and images you've identified as relevant to the personas, lifestyles, and values of your target customers. All the elements and sections of your website should consistently adhere to your creative strategy. These include:

- » Landing pages, such as your home page and blog
- » Copy blocks
- » Testimonial and case study pages
- » Contact Us forms and e-commerce pages
- » Resources pages (for example, video and content link pages)



TIP

One of the most important elements of design is white space. Websites crammed full of copy and photos take too much time and effort to read and understand. Visitors don't want to have to work that hard to follow your message and discover your offers and value to them. Maintaining white space throughout your site makes it easy for visitors to scan your content and quickly find what they're there to find. Both outcomes are critical to maintaining a healthy session duration and *bounce rate* (the percentage of visitors who leave your site without taking action), and avoiding "rudeness" (see the nearby sidebar "Is your website polite or downright rude?").

Meaningful content that adds value

The first headline on your website is far more important than you may realize. According to digital marketing analysts, your website has less than a second to project relevance to visitors, and your supporting copy has 15 seconds to capture their attention and inspire further reading.

To achieve longer dwell time, or longer session durations that can lead to conversions, you need to keep your content focused on what matters most to consumers.

Give consumers what they want up front

Adding dwell time to the visits your website gets is really as simple as showing customers something valuable right away.

Here's a little exercise to help you identify and develop website content that delivers what customers are looking for and drives desired outcomes:

- » List the top reasons people come to your website. For example:
 - To get information about your product
 - To check out your prices
 - To read about your return policies
 - To look for sales
 - To assess your leadership
 - To find out more about your products and capabilities
 - To compare your products or systems, results, capabilities, features, and so on to competitors' offerings
 - To make a purchase
- » List the top content themes or topics of interest for which you can provide information. Some of these may include the following:
 - **Product comparisons:** Be brave. Show how your product's features and prices compare to others. This level of transparency builds trust and most often takes price out of the equation for consumers.
 - **Purchasing guides:** These are popular with both business-to-business (B2B) and business-to-consumer (B2C) customers because no one wants to experience decision regret. Purchasing guides can include info on how not to overbuy technology or insurance, or purchase too much house for your income.
 - **How-to guides:** Customers tend to bond better with brands that show them how to do things for themselves, like fix a leaky faucet. They often realize that they're not an expert or don't have time for the project, so they call you to take care of it for them.
 - **White papers on topics related to your category:** These informative papers don't have to be long, just meaningful and actionable.

- **Research findings:** Every marketer loves consumer and market research and trends that can impact their business. Nielson, a leading media and consumer research firm, and other firms like Forrester and HubSpot provide many reports for free. You can summarize findings of value to your customers from various sources and post them on your website so customers have one place to go, your site, for key information that matters to them.

If you don't know the answers to complete this exercise, you just found a new question or two to ask in your customer surveys. You can read about crafting successful surveys in Chapter 5.

Vary your formats to add greater appeal

Content is more than the headlines and copy throughout your site. It's the information and resources you share that add value to your brand relationship and website experience. Content that engages and keeps visitors on your site often sits on a Resources page and contains the following:

- » **Blogs:** Your regular updates and commentaries on brand, industry, market, and social issues
- » **Decision support:** Checklists, guidelines, how-to tips, and other resources to help consumers make wise decisions
- » **News:** Press releases and media mentions for your brand
- » **Videos:** Product videos, testimonials, leadership statements, educational assets, and so on
- » **Case studies and testimonials:** Stories and recommendations your customers share about your product or service, and their positive experiences with your brand

Building a Resources page that houses key content on your site makes it easy for users to find what they want and increases the chances of their reading your carefully crafted content.



TIP

Tagging thumbnail photos of each piece of content will help elevate your SEO results. You can tag your photos, blog pages, and more in the administrative areas of your website. More on how to tag elements of your website is covered in Chapter 13.



REMEMBER

Videos are an important engagement tool that should be used on your landing pages to capture interest and deliver an interactive story about your brand. Key sections like testimonials, product pages, and brand pages can be more memorable with short videos focused on the messaging that matters most to your customers. Not only do videos add energy, but video content has a 95 percent retention rate compared to 10 percent for text content.

Interaction that pulls visitors into your brand story

The NTL Institute has long studied retention from various styles of learning. They've found that a lecture-based, classroom atmosphere results in around 5 percent retention of the content presented, while activity-based learning achieves a 75 percent retention rate. The same principle applies to website engagement.

The longer you are actively engaged on a website doing something you deem to be of value to you, the more you're likely to view additional pages, recall the information you browsed, and convert to the desired call to action. Consider:

- » More than 95 percent of participants in a Demand Metric study stated that interactive content impacts buyers' behavior along the decision journey.
- » Between 60 percent and 75 percent of marketers participating in a survey by the Content Marketing Institute rated website elements such as assessments, calculators, contests, quizzes, and even games as highly effective during the discovery stage of a consumer's decision process.



REMEMBER

While technology is making it more affordable to incorporate interactivity into your website, you shouldn't do something just because you can. If you're going to put a game or quiz on your site, it needs to be highly relevant to your brand or category, and the experience most likely to convert visitors to customers.

Many forms of interactivity are simple and affordable yet powerful for keeping people engaged on your website and increasing their page views. Here's list of some effective and easy-to-use interactive elements, tools, and strategies:

- » **Slide shows featuring hot topics and news.** Putting a slide show at the top of your landing page that auto rotates slides featuring hot topics, current news, and business updates is a great way to get people engaged in your content without having to begin scrolling. Slide shows are most effective when kept to 3 or 4 slides that rotate every 2 to 3 seconds.

- » **Videos that tell compelling stories.** Video is a highly effective way to increase stickiness, sometimes called *dwell time*, which in turn improves SEO results and customer conversion. The key is to make sure the content is relevant to the decision process, energetic enough to keep visitors' attention, and just 30 to 60 seconds in length. Brief, fast-paced testimonial videos are a good example of videos with watching power.
- » **Tools that help visitors with calculations and decision planning.** If you are in the financial services field, calculators to help customers compute mortgage, car loan, home equity, and other payments are highly effective. These tools keep people on your site as they calculate various scenarios and get them to come back every time they want to calculate something new.
- » **Live chat that answers visitors' burning questions.** A study by eMarketer showed that 63 percent of customers are more likely to return to a website that offers live chat. Another study by Forrester reported that people who engage in live chat are nearly three times more likely to convert to the desired action. Live chat plays to our need for instant gratification and our growing preference to communicate by typing instead of talking. Many providers of customer relationship management systems, like HubSpot, offer live chat platforms for your website that you can staff with employees who can talk about your brand and serve your customers.
- » **Brand communities that bring customers together.** Online communities like Reddit have gained a lot of traction among social media users and likely will continue to be popular for a long time. We seek tribes of people like ourselves, online and off-line, and we often ask our tribes for shopping advice or validation for decisions we have just made, opinions we hold, and so on. Creating a community chat forum on your site that allows customers and prospects to mingle and discuss usage stories for your product can help convert visitors and increase loyalty for existing users. Encouraging user-generated content from your community members can create fun engagement as well.



WARNING

Brand communities can backfire when users post negative comments and stories, and they require constant monitoring so you can respond to comments and provide your brand's view. If you allow user-generated content, you will need someone to vet the content before it's posted to weed out inappropriate posts, comments, and images.

Direct relevance

Users leave a website within 10 to 20 seconds if they don't find something of direct relevance to the need they're looking to fill. Adding information that's intuitive to users' reasons for visiting your site can ease the decision process and keep them dwelling on your pages longer, increasing your chances of deeper engagement and conversion.

Consider the intuitive nature of websites for ski resorts during ski season. You log on and immediately see widgets that show snow totals, current and forecasted weather, and even wait times for ski lifts. You easily find links to lift ticket sales, restaurants, and things to do at the resort. And, of course, you see a beautiful visual of an amazing skier doing just what you want to be doing in all that powder and sunshine. All this information allows you to see yourself in the brand's story and inspires you to stay on the site planning your dream ski vacation.

All brand communication must present something of real and direct value to consumers. Otherwise, they will not stay on your website, browse through your pages, open your emails, and move toward completing a sales transaction. Your mission is to assure your website uses words and images that relate to the customer's needs, not yours. Showing a photo of your product in its packaging is not as compelling as showing the joy someone might receive from the product or service you offer.

Creating and Managing a Web Identity

In addition to being the hub of your consumer engagement online, your website is the mother ship of your brand identity. Your digital assets, such as posts and ads on Facebook, Twitter, and other sites you've chosen to appear on point your customers back to the hub, where they can engage with your messaging, find out more about your brand story and products, and choose to embark on a journey with your brand. Or not.

Your *web identity* is the sum of your messaging and persona across digital channels like your web page, blogs, social media sites, search engine listings, product review sites, and other third-party pages. Maintaining consistent value statements, personas, iconology, colors, and content is essential to building a brand that people believe in, understand, and trust. Otherwise, consumers can be confused about who you are, which diminishes their trust and interest in doing business with you.

The following sections discuss how to build a web identity that projects a valuable and powerful presence for your brand while meeting customer expectations. Managing and controlling this identity is a continuous process that should always be at the top of your to-do list.

MANAGING YOUR WEB IDENTITY BY ASSOCIATION

Part of managing your web identity involves being choosy about the company you keep. Just like people often judge you by the friends you associate with in the real world, they will judge your brand by the websites on which your logo, messaging, and promotions appear. If you don't want to be seen as a brand that supports unhealthy living, don't advertise on a site that promotes unhealthy lifestyles.

Just appearing on a website implies that your values are the same. Don't take your web identity lightly unless you want to take on the daunting task of reputation management. The same principle applies to having logos of brands on your website that may contradict the values and promises you communicate about your brand. Beyond advertising only on sites that support your identity, you should link only to sites that support your values and commitments.

Aligning with what customers expect to see

Just like perception is everything when it comes to your web identity, expectations are everything when it comes to keeping people engaged on your website. Across categories, consumers expect to find certain elements on websites that help them quickly get information about products, offers, pricing, values, and a brand's credibility.

To meet expectations and increase dwell time, adhere to the following guidelines:

- » **Lead with clarity about your offerings and value.** It's amazing how many times I scroll through a website and leave wondering what the business actually does. A headline that clearly states what you offer and what your offerings mean for customers is a critical element for keeping people on your site.



TIP

Ask people in your personal and professional circles to visit your site and tell you how they interpret what you do, what you offer, and how you add value for customers. Consider the various feedback you get and use it to improve your messaging.

- » **Include sufficient product detail.** Your product information needs to be very detailed so visitors know precisely what to expect from each product and how your product's specifications compare to others. When shopping online, people want to get the information they need quickly. If they can't find the details they're looking for, they will go to another site.



TIP

Posting simple, outcome-oriented bullets is better than writing long sentences or paragraphs. Create a bullet list of specifications, materials, services included, ancillary offerings, and other relevant information to give visitors a comprehensive view of your product.

» **Present your company leadership team.** Many purchasers, especially in the B2B sector, want to know about the leadership of a business. If they're buying IT or a software application they'll need to live with for a few years, they want to know how stable and experienced your leaders are so they can determine your staying power or the likelihood that you'll be acquired by another company, which can often mean compromised service for acquired customers. They may even want to know who some of your investors are for added assurance that you have the ability to fund your growth and maintain their account. Include short bios for executive team members on your About Us page to showcase the minds driving your company.

» **Include testimonials from satisfied customers.** Consumers want to know what others are saying about their experience with your products and service. Even though it's a given that brands feature only positive reviews, it still helps prospects see who your customers are, who they can call to ask questions, and what kind of outcomes they can expect if they choose your brand.



WARNING

Prospects not only read your testimonials but may call customers you list on your site. Update your list of testimonials to remove any customers no longer working with you or any that may have had a negative experience since posting their story. Even a small complaint can send a prospect to your competitors.

» **Communicate your corporate social responsibility (CSR) efforts.**

Consumers care what brands are doing to give back to communities and make the world a better place. They want to support movements that align with their values, not just help shareholders advance their goals.

The 2021 Porter Novelli Purpose Premium Index showed that 73 percent of consumers say that to win their support, a brand must show how they are supporting communities and the environment. Not having a comprehensive statement about your CSR commitments and contributions on your website is akin to inviting visitors to go elsewhere.

» **List your policies, FAQs, and terms.** Consumers want easy access to your return policy, shipping methods and costs, customer service processes, sizing guides, and so on. If they can't find this information quickly on your site, they're more likely to go to another site that makes it faster and easier to find the details that create a high level of confidence in their purchasing choices.

» **Showcase transaction efficiency.** People expect to be able to find what they want quickly on e-commerce sites and check out as easily as possible. The longer it takes to check out, the more likely they are to leave. Amazon caters to this with its Buy Now button, which allows customers to skip many of the time-consuming checkout steps. Make it easy to find the Add to Cart buttons, and make it fast and easy to check out.



REMEMBER

The quicker people find what they want, the longer they'll stay on your site and the greater your chances of closing the sale. *Dwell time*, or how long a person stays on your site before bouncing off to another, is a key metric for the success of your website and something you can easily measure with web analytics.

Expanding your web imprint

Identifying a list of URL names that define what you do and purchasing them for your website will help you expand your digital footprint. For example, if your business is a pet boarding facility called Five Star Lodging for Pets, you should not only get the URL for your name but also consider purchasing a categorical URL such as www.petlodging.com, www.luxuryhotelfordogs.com, or www.safeboardingforpets.com.

If another brand has a categorical name that also reflects what you do, consider adding a word like *best*, *leading*, or *popular* to the beginning of your URL to tap into traffic that may be going to a competitor.

Take the time to register all possible URLs and nicknames for your brand before someone else does and then tries to sell them to you at an inflated price. If you're a consultant, register your personal name and your brand name. URLs can be purchased affordably in most cases. A good site for browsing what's available, and prices, is Godaddy (www.godaddy.com).

Register all possible suffixes and brand references as well. For example, Intermountain Healthcare, which owns hospitals and clinics in a tristate area, owns the domains www.intermountainhealthcare.org and www.ihc.org. It also owns the www.ihc.com and even the www.ihc.biz versions of those domain names. Purchasing and redirecting all potential URLs drives more people to your site while also protecting your identity. If you own the www.ihc.com version of your URL and someone else owns the www.ihc.biz version, you can easily get caught up in a case of mistaken identity.



REMEMBER

You need to ensure that your domain name doesn't violate another company's trademark. Check website addresses against a database of trademarks (in the U.S. by going to www.uspto.gov, clicking on the Trademarks link at the top of the page, and clicking on Searching Trademarks). For more complex trademark issues, you can hire a lawyer to do a detailed analysis.

When purchasing your domain URL and registering your website, you will likely be offered additional options and bundles. These may include email packages, domain protection (covers you from others buying your name if you forget to renew on time), and the .org, .net, .biz and so on version of your URL. Again, there are domain name brokers that buy up a lot of URLs so they can resell them, as well as people are out there just waiting for a site to expire so they can quickly purchase it and sell it back to you.

Crafting a Website That Drives Engagement and Sales

This is where it gets fun . . . and complicated. Fun, because you have a blank storyboard in front of you and many tools at your fingertips for crafting and telling your brand story. Complicated, because at the time of this writing, there are more than 2 billion registered websites, and the competition for views and engagement will just continue to go up.

For perspective, if you're searching for "furniture stores in Colorado," you're likely to get more than 63 million results to sort through, up from 3 million when the fifth edition of this book was written in 2017. Businesses lucky enough to get clicks have the added challenge of keeping visitors on their site. This is where the design and messaging of your landing pages matters a lot.

Integrating key design elements



REMEMBER

Your images and headlines create the first impression visitors get of your website and let them know within a second or less if your business is relevant to their needs and personality. Much of this first impression is unconsciously created by the moods and persona created by the style and words of your page. These topics were covered in Chapter 8. After you've assured your visitors' unconscious mind that your site reflects their persona with your initial colors and style, you need to immediately engage their conscious mind by providing resources beyond just products for sale. These resources include interactive tools, decision support, and educational content that helps visitors make informed decisions.

Organizing your site for optimizing clicks on key buttons that take visitors to pages furthers engagement and ultimately transactions. But that is another strategy altogether.

Here are some elements to keep in mind when you're designing your site that will help you create a memorable first impression and maximize visitors' dwell time and engagement.

Designing around the golden triangle

Website features and design trends seem to change as often as, if not more than, politicians change their positions. Instead of keeping up with the trends, the most important design strategy follows how the conscious and unconscious mind views and processes information. For web browsing, that process is referred to as the *golden triangle*.

Google researched how people view search results and found that most people start on the left side of the *masthead*, or top of the page, browse right, and then read the top three results and choose one. Studies by research groups like MarketingSherpa show that people follow a similar browsing pattern on web pages: They start at the left, shoot over to the upper-right corner, and then browse down the left side of the page.

You need to put your core messages, calls to action, and links to your most compelling content in this triangle. This is appropriately named the *golden triangle* because this is where most clicks to subsequent pages take place. If your call-to-action buttons and offers are outside the triangle, you may be losing some golden opportunities for new business.



TIP

Instead of designing your website around current trends, design it around how websites are browsed. According to the golden triangle theory, the top inch of your page, the masthead, is really critical because it's where the eye stops first. This is the place on your website where you need to hammer home a consistent, memorable, clear brand identity, tease a current promotion, broadcast breaking news, and so on.

Defining a style that fits your brand persona

Your website's style should reflect not only your persona but also that of your target audience. Your website builder platform will include literally hundreds of design templates to choose from. Ask yourself the following questions to help you choose one with optimum appeal:

- » What's your brand's personality? Spunky, traditional, reserved, outgoing, daring, rebellious, or trendsetting?
- » Which characters, celebrities, or types of people embody that personality?
- » What do these people wear every day? To a formal event? Would they show up at a black-tie event in a tux and red high-top sneakers? Would they get married in a black dress?
- » What are the status levels your characters or personas seek? What are their aspirations and goals?

- »» What books do they read? What television shows do they watch? Which Instagram and Twitter accounts do they follow?
- »» What are the values and causes that matter most to them?

Now take a step back and start thinking of creative elements that embody your answers. How can you use some of them to appeal to your customers? How can you create this appeal quickly with graphics, words, headlines, and images? What do you need to do to ensure that visitors know, consciously and unconsciously, that they've found a brand that understands and celebrates them and their personality?

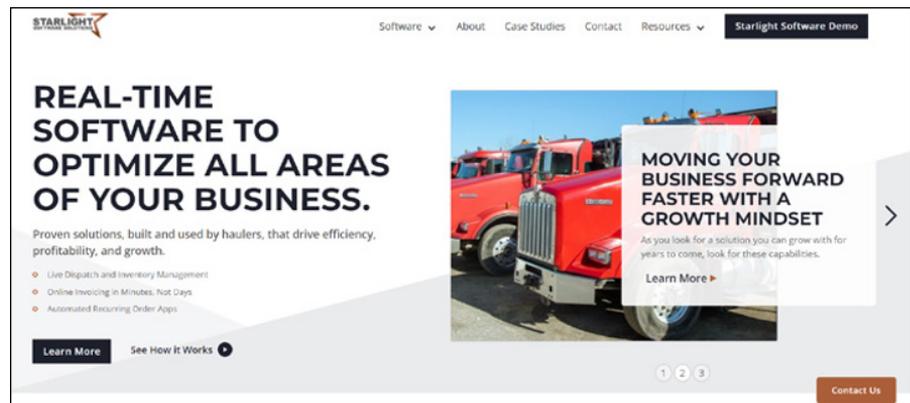


REMEMBER

Dwell time and engagement are heavily influenced by the color, fonts, and layout of your page. (Chapter 8 has more details about creative strategies.) If you want people to feel excited and energized by your site, be sure to use energetic colors, fonts, images, and layouts. For example, fun fonts like Chalkboard create a playful, whimsical feeling, while traditional fonts like Times New Roman project an academic, authoritative, or informative tone.

Figure 12-1 showcases a website design that successfully engages visitors and inspires them to dwell longer. The layout presents hot topics relevant to purchasers of software for the waste management industry via a *slider* (slide show) at the top of the site and lists product features and outcomes before the scroll. This design increased session durations and lowered bounce rates substantially over the prior design.

FIGURE 12-1:
Example of a landing page presenting key information before visitors need to scroll.



Starlight Software Solutions (Designed by Bryce Tanner of Upside Down Digital)



TIP

Wix, a leading website builder platform, has a blog page that lists design ideas for small businesses using their tools. For examples and ideas that you can easily incorporate into your own design, visit www.wix.com/blog/creative.

As you work on the design elements that enhance visitors' dwell time and engagement on your website, you also need to establish the metrics that matter most for your success. Make sure you take note of some of the following key performance indicators (KPIs) for your website.

Minding your KPIs

Clearly, your first goal in creating a web page is to drive traffic and keep visitors engaged and going deeper into your site. But that's just the beginning. You need to know what people are doing once they get to your site, which information captures their attention, and how long they stay on your page.

Another KPI many don't think about is the exit page. Where are customers leaving your site? Is it your product page? Your blog? Your About Us page? You can get that information on your Google Analytics dashboard. Monitor it often to identify content that's causing visitors to look elsewhere.

Without this information, you really don't know if your site is relevant to searches for your category and to consumers in general, and whether it's set up to spark customer journeys that end in a sale or another desired action. The following sections present some KPIs to monitor continuously to ensure your website is optimized for lead generation, retention, and sales.



TIP

Google Analytics, a free tool in your Google account, provides a dashboard for all your KPIs and other metrics. Setting it up for your website is as easy as following step-by-step instructions on the Google Analytics home page. Monitoring your site's traffic and performance should be part of your daily routine.

Bounce rate

A website's bounce rate is the percentage of visitors that don't go past the first page they land on. On average, according to reports from many different analysts, bounce rates range from 20 to 90 percent of visitors, depending on the industry and the quality of the site. On average, 50 percent of visitors leave after viewing just one page of a website.

Note the average bounce rates by industry from Siege Media's 2021 bounce rate study, which set a benchmark for your own site.

- » Travel: 82.58 percent
- » B2B: 65.17 percent
- » Lifestyle: 64.26 percent

- » Business and finance: 63.51 percent
- » Health care: 59.50 percent
- » E-commerce: 54.54 percent
- » Insurance: 45.96 percent
- » Real estate: 40.78 percent

A good bounce rate goal is pretty much any number under 50 percent. For e-commerce sites, the average bounce rate in 2022 was 20 – 45 percent, with the best sites hovering around 36 percent.



TECHNICAL
STUFF

If your bounce rate falls below 10 percent, don't get too excited. It's typically an indication that the Google Analytics code has been inserted into your site more than once. If you're using a template website, the code may be inserted into the template infrastructure and your SEO plug-in. Analytics tags can duplicate each other and create a false positive when it comes to bounce rates.

Here are some ways to keep your bounce rate low:

- » Give visitors a reason to stay engaged, like a limited-time promotional offer.
- » Present something inspirational and relevant, such as a video on proven solutions to challenges your customers face or educational insights that will help them succeed at their goals.
- » Don't offer links to outside pages because once visitors leave, they likely won't come back, and you get a ding on your bounce rate percentage. Instead, embed in your own content any information you want to share from other organizations.
- » Implement a more intuitive design and content flow, and make sure visitors have easy access to desirable information.
- » Build a slider at the top of your landing page so people can quickly view your hot topics, business news, and educational tools, and then click through to the relevant page. Slides are an easy way to get visitors to go deeper into a site without having to scroll.



TIP

If you refresh the messaging on your landing page frequently, you can test which words, offers, images, videos, and other content is most relevant by comparing bounce rates and session durations.

Navigation patterns

A *heatmap* provides a visual view of how people navigate around your website. This tool shows you what visitors do on your page, where they click, how far they scroll down on a given page, which images, buttons, and links they click on, and which ones they ignore.

A variety of software services offer heatmaps that you can use to assess visitors' navigation of your website. Some top-rated platforms are Hotjar, Mouseflow, and Smartlook.

Session duration

It goes without saying that the longer people stay on your website, the stronger your chances of converting them to customers. The Google Analytics metric for this KPI is *session duration*, which measures the average time a visitor is on your site, from their arrival on the landing page to their exit. It's calculated by dividing the total time spent across all sessions by the total number of sessions.

A good session duration benchmark for websites is generally 2 – 4 minutes per visit. Average session duration varies by industry and the quality of the site.



A session is not the same as a visitor. You may have 100 visitors and 200 sessions on your site in one hour, meaning that 100 unique visitors landed on your site for two sessions in that hour.

Another Google Analytics metric is *time on page*, which refers to the average time visitors spend on a specific page on your website, not on the site in general. Measuring time on page helps you determine which content is most relevant and what kind of content you should continue to develop and post.

If your average session duration and time on page numbers decrease, it's time to think about changing your site to give visitors a new experience that offers greater value and more personal engagement. Following are some ways to do this:

- » **Include a brief emotionally relevant video on your home page.** Video is one of the most engaging mediums because it usually takes less effort than reading. According to Wyzowl's 2019 report on video marketing statistics, 83 percent of marketers claim video has produced a good ROI, and 84 percent say it has helped them increase traffic to their website. It also helps increase dwell time because it keeps people on a site as they watch a point of engagement.



TIP

When integrating video on your website, it's best to host videos on a YouTube channel so their size doesn't affect your website's load time. You can embed captures on your page so they play within your site instead of redirecting viewers to YouTube. Videos can substantially increase your session duration as well.

- » **Add one-question surveys to you landing page.** Leading questions like *What do you believe is the most important marketing activity for lead generation?* can make visitors wonder if they're doing the right thing and how they compare to others. Showing participants others' results is also key to engagement. Platforms like HubSpot offer simple surveys you can add to your website. (See Chapter 5 for more tips on surveying consumers.)
- » **Set up a live webcam and stream the video.** If you run a kennel, you can livestream dogs frolicking together during group play. If you have a home improvement business or sell recreational equipment, you can show your employees installing a new kitchen in a client's home or landscaping a public playground — or even someone using one of your kayaks to rescue a puppy from a river. With eye-catching live videos, you're likely to achieve more time on page and a great average session duration.

Pages per session

If you have an engaging website that's meaningful to your audience and provides the information or products they seek, they'll view more pages while they're on your site. It's that simple. To see how you're doing, you can review your *page view counts* and *unique page views* on your Google Analytics dashboard.

Page view counts tally more than one view of the same page by an individual visitor to your site. Unique page views count only one view per individual so you don't get skewed data if one person continues to go back to the same page during a session, giving you the impression that a particular page is more popular than it actually is.

Page view averages bounce all over the place just like bounce rate averages, but if you can achieve two pages per session and around two minutes per session, you're doing well.

Measuring the impact of your website content and designs is as easy as opening up your dashboard on Google Analytics. You should monitor your KPIs often to identify where you have the most traction and those that need to be reworked or replaced.

Driving Traffic and Conversion with Content

To build traffic and engagement on your site, you need to think and act like a publisher, not an advertiser. Publishers present content that covers multiple stories of relevance to their readers. Advertisers just cut to the chase and hope you'll take bait. To get the most out of your website, include content that covers multiple facets of your category or business to provide information visitors can act on. For B2B, this might be including industry updates, survey results, and such. For B2C, it might include user generated content about your product, new usage ideas, and fun stories about complementary products that enhance the value of your own.

Here are some suggestions for getting visitors to your website and engaging with them in ways that will convert them to customers.

Keeping content fresh and timely

Publishers regularly produce new stories based on different ideas and topics. Change up your stories and links on your landing page to give visitors a variety of hot topics to browse. For your blog, include content from more than one writer so visitors are exposed to different voices within your brand.

Keep content newsworthy to attract and engage visitors and keep it in line with your sales goals to make sure you're not providing a free news site but one that will pay off for you as well. Craft stories, reports, insights, and guides that are meaningful and subtly drive people back to you to help them achieve related goals.

Making claims verifiable

Your website content should be built around verifiable facts. The best way to build trust and credibility with consumers is to tell stories you can back up with data that can be proven through sound research methods. Your data should come from sources that can be verified as legitimate.

Reposting articles from authorities in your field and interviewing thought leaders for original content on your page are good ways to source meaningful content. However, you need to assure their claims are verifiable and accurate.

Data is often conveyed in charts and graphs. But data visuals can be very misleading. Pay attention to the scales used in each data presentation to make sure you understand the true story. It's easy to mislead people by using a graph in one section of an article that shows a bar chart with a scale of 1 – 10, and then another in the same article with a scale of 1 – 100 that looks very similar in scope. Make sure to point changes in scale in reports as needed to avoid being seen as a data manipulator.

Asking engaging questions

A great way to engage customers when they land on your website is to ask them to take a one- to three-question survey to help you better understand what matters most to them. A lot of people like to take surveys so they can see how their peers voted or answered and compare the responses. Ask questions that spark curiosity and help visitors validate their own challenges and needs.

If you're a B2B site selling marketing services, you may want to ask questions along the following lines:

- »» What is your #1 marketing challenge?
- »» On which mediums or channels do you spend most of your marketing resources?
- »» What do you believe is the most powerful marketing technology for the coming year?

If you're a B2C or retail site, consider asking questions such as:

- »» Are you shopping for yourself or for a gift for a friend or family member?
- »» How often do you shop for items in this category?
- »» What is your #1 criterion when shopping for items in this category?

Try to get more than just answers out of your surveys. Get email addresses, permission for further communications, and increased dwell time. Here are some ways to do that:

- »» Ask respondents for their email address so you can send them more information about the topic.
- »» Offer to direct participants to your archived questions so they can see the results of past surveys, increasing their engagement and time on your site.

- » When possible, have the answers to your questions direct visitors to related content on your site. If you ask a question about marketing tools, point participants toward a white paper or competitive analysis on the marketing tools or services you provide.

Maintaining critical content categories

In addition to populating your website with pages about your products and their advantages, you need to maintain some basic content consumers expect to find. This includes the following:

- » **Compatible or complementary products:** This is especially important if you're a technology company. Purchasers may want to know what other products and platforms you integrate with so they can assess your products' compatibility and ability to interface with other programs they may have purchased. Linking to pages of products you support helps build valuable SEO links and credibility for your products. Just do so in a way that doesn't end your visitor session like embedding links for pop-up pages within your blog.
- » **Resources:** Even though you may have a Resources page with blogs, videos, news, case studies, and more, you should incorporate links to this page throughout your site for easy access. These internal links also elevate SEO.
- » **Career opportunities:** Including a page about your job openings will help you attract new employees while boosting your SEO with additional tags and keywords.
- » **Company background:** Add content about your values, experience, passion, and team. This is a critical component of your site because it influences your company's growth and competencies.
- » **Contact Information:** Make it easy for visitors to find your phone number, link to live chat, and physical locations.



REMEMBER

Your content is either static or dynamic. *Static content* is content that you don't change much, like your leadership profiles, contact information, mission statement/values, and so on. *Dynamic content* refers to the content you change often, such as promotions, white papers or case studies, news stories, product highlights, customer highlights and testimonials, and so on.

Putting It All Together for the Perfect Website

After you have some ideas for your website content and layout, start sketching out storyboards for your home page and other pages. Then start designing your site, either by yourself or with a designer who can do it for you quickly. If you prefer the DIY route, there are numerous website builders you can subscribe to on a monthly basis, all of which offer hundreds of templates to choose from. You can use a template outright or modify it to fit your style and needs.



REMEMBER

Because consumers browse websites on many different devices — smartphones, tablets, and desktop and laptop computers — you need to make sure your website automatically adjusts to each format. Today, most website builders have *responsive website design* capabilities that adjust images and text for screen size so you don't really need to worry about this. Still, it's a good idea to check your site on all your devices once in a while to make sure no glitches occur.

Using website builders

It goes without saying that you need a platform on which to build your website, and tools for designing and executing it. But choosing a provider may be difficult. When choosing a website builder, look at how users rate the following:

- » **Price for value provided:** What do you pay for bandwidth, technical support, design options, and other key components?
- » **Ease of use:** A drag-and-drop editor is a key indicator of simplicity.
- » **Support:** Hours and responsiveness of the platform's technical support and live chat staff should be key to your decision.
- » **E-commerce options:** Do they offer e-commerce templates, and do they charge anything besides credit card fees for consumers' completed transactions?

Browse review sites that list Top 10 website builders (or however many the site reviewed). The top recommendations vary according to review site, so it's important to look at the features of each platform you're considering and compare them on your own.

Forbes Advisor reviewed thousands of data points, plan options, and customer feedback for various website builders and came up with the following Top 10 website builders for small businesses in 2022:

- » Weebly
- » GoDaddy
- » IONOS
- » Squarespace
- » HostGator
- » Wix
- » Shopify
- » Zyro
- » WordPress
- » Duda

Like anything technological, the features, offerings, and service ratings for these companies will change frequently. Some will keep up with new features better than others, and customer service can go from good to great, and great to bad, in a blink. Check out several website builder review sites and demo the platforms that seem best for your business today, and for the growth you expect in one to five years.



TIP

Create your own Top 10 list after reviewing several platforms' features, prices for storage capacity, technical support, design ease, and e-commerce functionality and support. Research each website builder and then start crossing options off your list until you find the best fit for you.

Finding quality imagery

As you build your site, keep in mind not just the quality of the design and overall experience offered by each template but also the quality of your images. If you use your own photos, make sure the resolution of each image is as good as the artistry, so you look professional, not haphazard.

Beyond the resolution of your photos, use images that show attention to detail. Don't use a photo of your products in a cluttered environment or pictures of your people covered in shadows or surrounded by crowds not material to the image.

As you map out the pages of your site, list the photos that make sense for the content. Then take the time to shoot clear photos of your people, products, and places of business with good lighting and a clean background. Following are some tips:

- » Smartphones have high-quality cameras that provide high enough pixel counts for digital and even print assets. You can also edit photos for proper lighting, shadows, color saturation, size, special effects, and much more directly on your phone. Make sure you do some editing before posting or publishing photos.
- » Purchase a small light you can attach to your smartphone to help you take quality photos.
- » Consider an ancillary lens for your smartphone so you can zoom in tighter on product details, speakers at events, crowd or landscape shots, and so on without losing quality. Both lights and lenses for smartphones are easy to find at very affordable price points.

You can also buy images fairly inexpensively from many sources, especially if you need them only for your website, because you can purchase low-resolution photos at a lower cost. You can purchase one image at a time or sign up for a package that provides a set number of images per month. Often, the price will vary by the resolution you purchase. Resolution suitable for print is higher than what you need for digital materials, so plan your budget accordingly.



TIP

Check out stock photography sources such as Adobe Stock (www.stock.adobe.com), Getty Images (www.gettyimages.com), iStock (www.istockphoto.com), or Shutterstock (www.shutterstock.com). Also look for inspiration on Flickr (www.flickr.com), where photographers set up pages to share their work.

Building websites is fun and gives you many opportunities to release your inner creative. Just remember, the layout, content, words, and designs impact your engagement and business goals much more than just the look and feel presented. Plan your website around the expected experience of your target audiences, your desired outcome for visitors on your site, and the KPIs you define.

IN THIS CHAPTER

- » Understanding the basics of both organic and paid SEO
- » Using Google Ads to optimize your SEO results
- » Setting up a Google My Business page to drive traffic and immediate sales
- » Maintaining a strong SEO presence that maintains your brand's relevance and rankings

Chapter **13**

Succeeding with Affordable SEO Strategies and Tactics

No matter how great your website is, it will not help you reach your business goals if no one knows about it. And you won't get the growth you need unless you are able to introduce your site to prospects and contacts who are shopping for the kind of services or products you provide. This is where SEO comes in, and why it is a critical component for your marketing plan.

In this chapter you will discover the differences in paid and organic SEO tactics, how to execute on both these approaches, tactics for improving your rankings, how to use Google Ads for SEO, and more. You'll also learn how to "spy" on your competitors to find the keywords they use in their sites, and which search queries — search terms used by people trying to find sites like yours — are driving consumers to your competitor's sites.

Understanding the Basics of SEO

Without a strong search engine optimization (SEO) strategy and ongoing updates, that great website you just built may be your best-kept secret. The key to succeeding is to make SEO an ongoing task that you monitor and manage frequently, meaning at least weekly.

An SEO strategy or program involves much more than tagging your website with keywords and using those keywords multiple times in your website copy. It involves carefully concerted planning, and regular updates to your web's backend tags, keyword lists for your search ads, website content, and the like. If you stay on top of these elements, you can manage your SEO yourself instead of engaging an expensive search agency to do it for you.

Not surprisingly, Google is the leading search engine in the world, with more than 91 percent of the market. Bing, a distance second, has just over 3 percent. As a result, this section focuses mainly on how to set your site up to be at the top of Google's search engine results pages (SERPs).

Figuring out how Google searches the internet

The first step to winning at SEO is to understand how internet searches work. Here's an introductory overview.

When someone goes to Google.com and searches for “best marketing books for small business,” Google gets working. It looks for websites that are tagged with the entire phrase or search query term *best marketing books for small business* and the keywords *marketing*, *books*, and *small business*.

In addition, Google looks for sites associated with brands that have paid Google Ads to show up under that phrase and those keywords. It also looks for web links to content related to the keywords that give sites a vote of confidence, and it looks for sites and pages that are tagged with all or some of the search terms.

Your job is to ensure that when someone searches for terms or words related to your business, your site shows up by aligning with the above process. Given the 2 billion websites that exist on the internet as of 2022, that can seem overwhelming. However, if you remain committed to building links through organic marketing activities, tagging your website and web pages, and monitoring search queries, keywords, clicks, and impressions on your Google Analytics dashboard (see Chapter 12 for more about Google Analytics), you can affordably rank above your competitors on the top page of related SERPs.

The following sections tell you how to get high rankings on SERPs through organic and paid efforts and manage your keywords and website tags. I'll also tell you how to get valuable links to credible third-party websites and share other important SEO tidbits.

Growing organic and paid SEO

There are two main approaches to SEO: organic and paid.

Organic SEO refers to no-cost tactics that push your rankings higher on SERPs. Examples include blogging with keyword-laden content, media mentions that link your website with media sites that have thousands of monthly visitors, and tagging your site and individual pages with keywords and *long-tail keywords*, or phrases consisting of three or more keywords (more about keywords later in this section).

Paid SEO refers to campaigns with Google Ads and retargeting platforms that serve up your listings or ads to searchers looking for sites related to your keywords. Your rankings are influenced by the ads you create with your keywords and, of course, by the money you spend to compete with others vying for the top SEO results.

To maximize your hits within each category, you can employ certain tactics and actions as part of your regular marketing routines and website maintenance. The most critical elements of SEO you should regularly monitor and maintain are keywords, links, and tags. The next sections give you more information on each of these elements.

Curating keywords

Your *keywords* are any words and phrases that describe your product, brand, and value proposition. You need to align your keywords with both your organic and paid SEO programs, as well as the search query terms your customers use when they're looking for options in your industry.

For your paid SEO, you should list in your Google Ads platform all the possible terms that describe what you offer and also align with what people are looking for in your category. If you're selling a marketing book for small business owners, for example, you'll want to associate your website and SEO ads with as many keywords as you can brainstorm that align with search query terms used by your target audience. The topics of most interest to them may be SEO, digital advertising, social media, and blogging. So you should consider using phrases that include those topics in your keyword listings.

You can set your keywords up on Google Ads as an exact match, a broad match, or a phrase match. These settings impact your Google optimization score and impressions, so it's important to note the difference. Your optimization score reflects the effectiveness of your spend of your ads and budget for driving impressions and clicks. Impressions is how many people see your ad, not to be confused with how many people click on it and go to your website.

If you choose the *exact match* setting, your search ads will appear in searches that contain the words or phrases you've set as your keywords, but you'll also show up in searches that use words with the same meaning as your keywords. For example, Google points out on its help pages that *grass cutting* and *lawn mowing* are considered exact matches, and searches containing either term will get results for both. If you're using the exact match setting, you'll want to know the specific terms consumers searching for your product or service use.



TIP

Always include your business name as an exact match keyword, especially if it contains a word that may appear in searches for very different things. For example, if your business's name is Starlight Software Solutions, you'd set those words up as an exact match phrase because the word *starlight* on its own may serve up your Google ads or listing to people looking for astrology classes or boutique shops selling tarot cards, clothing brands, boutiques, theatres, music release, anything that uses the term, Starlight.

The *broad match* setting loosely matches up your listing and ads with search queries that are related to your keywords. For example, if you're a lawn mowing service, your Google ads may show up in searches for aeration and mulching. Google recommends that you use the broad match setting so your ads will show up more often and get more impressions. However, you can get a lot of unrelated impressions with broad match, so think it over carefully before you choose this setting.

With the *phrase match* setting, your ads and listing may show up in searches that include the meaning of your keywords. Again, using Google's example, if your long-tail keyword is *lawn mowing service*, your ad may show up in searches for landscaping services. *Google Analytics*, a web analytics tool that helps you track your website's performance, and *Google Search Console*, an SEO tool that helps you monitor your Google search results will share search query terms that relate to your category. Your Analytics page shows the impressions for your ads and keywords. Your Search Console page shows the search terms consumers use when searching within your category. Review their suggestions and include relevant search terms in your keyword listings and throughout your content to ensure your website aligns with current search trends among your target audience.

Keywords that reflect broad categories can generate millions or even billions of results, which makes it hard for you to rise to the top of a SERP. Using long-tail keywords — those phrases consisting of three or more words — can help you rise to the top of a given search containing terms with less competition.

Table 13-1 uses a furniture store in Breckenridge, Colorado, as an example of the results a consumer would get using different search terms on Google. As the marketer for the store, you want to compete for hits on the long-tail keywords that include your specific location. Long-tail keywords that contain Breckenridge, not just Colorado, will significantly narrow down the other URLs you have to compete with to be at the top of the SERP. You can reach the top of the list by including the phrase *log furniture in Breckenridge, CO* in your website's first 100 words, on each of your web pages, in your site's title and meta tags (explained in the "Playing tag" section of this chapter), in your blogs, and in your copy for your search ads.

TABLE 13-1

Search Results Examples: How Keywords and Phrases Change Outcomes on Search Engine Results Pages

Keywords	Same-Day Results on Google
Log furniture	2,790,000,000
Log furniture in Colorado	29,700,000
Log furniture in Breckenridge, CO	488,000



TIP

Use your competitors' names in your keywords so your listing appears in searches related to their products and brand. Monitor the words they use on their landing pages and social media pages and tag your site accordingly so you can share in the impressions they may be generating for themselves.

SpyFu and Semrush are online platforms that allow you to gather information about your competitors' search results. You can discover what your competitors are using as keywords, how much of their traffic is organic or paid, and how much they're spending on SEO. SpyFu gives you a free look at a short list of the keywords and phrases your competitors use and charges a fee for a full list, making it a great starting point for discovering what others in your space are doing.



REMEMBER

If you can spy on your competitors' keywords and SEO buys, they can spy on yours. You should always stay a step ahead of where you think your competition may be and where you think you should be at any given time.

Making links

The more links there are between your website and other websites related to your industry and keywords, the higher your SEO ranking will be. You don't get quality links by paying for them; you get links by earning them.

As Ryan Deiss and Russ Henneberry note in *Digital Marketing for Dummies*, 2nd Edition (Wiley), “Links are the Internet equivalent of positive word of mouth.” If a research site or blogger inserts a link to a web page, representing it an authority on a given topic, they are, in a sense, endorsing that authority, which tells Google the site must be worthy of a high ranking in related search term queries.

A link inserted in another website is referred to as an *earned link*. You earn links every time an outside website points to your website, and you earn more points for links on credible pages that have a high volume of regular traffic over pages that have a low volume of traffic.

So a marketing strategy that centers around identifying your company as an authority in a given field not only boosts credibility and trust for your brand’s experience and products, but also boosts your SEO via earned links without the expense of paying an agency or a platform to increase your results.

Here are some ways to earn links:

- » **Write and post press releases.** Send out press releases about your personnel, business, partnerships, new products, and events. When a media site publishes your story with a hot link to your page, you score more than just the impressions for your story. You get web traffic from a credible site.
- » **Share content with your partners.** Ask business partners and happy customers to include some of your content on their site in exchange for you doing the same thing. Posting case studies and papers that link back to a credible brand can help your SEO.



WARNING

Be careful how you execute this strategy, because links that take people off your site too early in their navigation will affect your bounce rate, dwell time, and session duration (see Chapter 12), and your ability to keep engaging and selling to interested visitors.

- » **Cross-link your own content.** Link your blog to pages on your own site. If you write a blog about product specifications customers should look for, link that blog to your page about your own product specifications. Search engines pick up internal and external links and boost your chances of ranking high on SERPs.
- » **Create content worth sharing.** Content that presents original research findings from surveys you conduct yourself, big ideas, or decision support that you push out on social media often gets shared by journalists and bloggers who list your site as a reference. These mentions earn quality links for your content.

» **Ask your community to share links.** Ask your partners and suppliers if you can link to each other's websites. This is a win-win, because the more links you have, the better off you both will be.



TIP

You can monitor the links that come and go from your marketing efforts and brand recognition on sites like Moz (www.moz.com/link-explorer) and SpyFu (www.spyfu.com). Google Analytics also shares referral sites to help you see all the ways people get to your page.

Playing tag

Tagging refers to keywords you input into the programming end of your website. You need to have admin rights for editing your website, creating new pages, and so on. With these rights you can access a page on your site that has fields for tags that reflect the entire site, and tags for the content of specific pages.

When setting up your website, you have options for tagging your home page and the other pages on your site. Be sure to use concise and compelling language for your tags because these are the words that will show up on search pages with your URL. Google looks for tags when it's finding websites to rank for search queries, so tagging is important to your SEO.

You need to craft a *title tag* (the title of the SEO link for your website that appears on a search page) that relates specifically to the search queries you want to fill. If your business is a nail salon in Utah, you'll want key terms in your site's title tags that align with how people search. For example, *best manicures in Ogden, Utah; 5-star customer service for pedicures and manicures; most affordable, highest rated manis and pedis in Utah*; and so on.

You also need to craft a *meta tag* for your site: a brief, one-sentence statement about your value proposition. The meta tag is what shows up below your title tag on SEO links. Typically limited to 60 words, it sums up your brand value. An effective meta tag for a software as a service company targeting small restaurants may be "The highest rated software service for optimizing all areas of your business, earning 5-star ratings from owners of delis, cafes, and full-scale restaurants."

You can also tag each web page and your blog with keywords that will result in SEO rankings for them. Website builders provide tagging fields for your website and for each page.



REMEMBER

Website tagging is something you need to continually refresh to sync up with current search terms for your industry. Pay attention to the search terms that come up on your Google Analytics page and update your tags as necessary, keeping the wording fresh and compelling to get clicks for the impressions you earn.

Landing pages and blogs

Websites have many entry points besides their home page. Creating secondary entry points, also known as *landing pages*, is a common tactic to get people to your site at the highest point of relevance for them. Landing pages also enable you to track the effectiveness of an email, mobile, social media, or print campaign. Google Analytics easily identifies the entry page for your visitors, so monitoring your landing pages is an easy and inexpensive way to test your marketing campaigns.

Creating secondary landing pages

Landing pages are pages for specific content, promotions, or other information. They include the same navigation menu and buttons as your other pages do and need to continue the same look and feel as the rest of your site. They can be accessed by navigating through your website or by links you create and use in promotional materials.

Some reasons you may want to create a landing page include

- » Testing the response to a new campaign, promotion, or offer
- » Driving people to a page to register for a free gift, white paper, or discount code to use when purchasing products on your main page
- » Getting people to take a survey to initiate dialogue
- » Launching a new product or service

If you have a complex business and product offering, you may want to create landing pages for each category you offer. For big companies with complex offerings, each product may have its own landing pages. An example is Oracle. Its primary page URL is www.oracle.com. The landing page for its financial management tool is <https://www.oracle.com/erp/project-portfolio-management-cloud/>.



REMEMBER

Regardless of the type of landing page you create, be sure to track visitor traffic and conversion rates for each page. Getting a lot of people to your website isn't going to build your business and generate sustainable sales and profitability if they don't do anything but browse.

Your *conversion rate* is simply the percentage of visitors who fulfill your call to action or some other desired goal, like signing up for your email list, accepting your special offer, registering for your newsletter or discount code, or making a purchase. Ultimately, you want to optimize conversion rates for all calls to action throughout your website.

Experiment with the content, copy, layout, design, and offers on your landing pages. The more you experiment, the more you'll discover how to convert visitors to customers at a good rate.

Blogging for SEO

Simply put, a *blog* is like an editorial column that gives you a voice in your industry or social circles. In business, a blog can help you secure a position of authority as the leader or visionary in your field. A blog can also instill a sense of trust, because people tend to believe top experts in a field in which they seek products, services, information, or help.

Blogs serve many purposes for businesses of all types. Some use them as landing pages to get prospects to their main website in hopes of inspiring them to go deeper and engage in a sales transaction. Others use them to build their voice and credibility in their space. Still others use them as a source of income by getting a lot of followers that advertisers want to reach.

A blog can build your position of authority in your space, attract partners and customers, and increase your SEO. The keywords on your blog and links to third-party sites add to the chances of your site being found by Google and other search engines.

Regardless of your purpose, having a blog on your site is an important element in your web strategy and your overall marketing program.

SUCCESSFUL BLOGS HAVE A LIFE OF THEIR OWN

Your blog can be a hub for written articles, visual storytelling, or photo essays and stories. Blogs that use images and even videos tend to do better than those that don't.

In 2022, YouTube vlogger Casey Neistat had 12.4 million subscribers and more than 3 billion total views for his vlog, with many posts getting well over a million views. And they're simply vignettes of his interesting and adventurous life. In 2017, Neistat had nearly 30 million total views, showing you just how quickly things change in our web-oriented world.

Creating a YouTube channel for your vlogs is a great way to increase views, which makes it easier to monetize your vlog. Don't forget to link your YouTube channel to your website.



TIP

The trick to making blogs successful is to write simple, relevant, and actionable articles and tag each blog post to help drive your SEO. Post frequently enough to stay top of mind as a leading resource for your business category and at the top of SEO rankings.



TECHNICAL
STUFF

According to research reported by HubSpot, businesses that use blogs as part of their web strategy receive 67 percent more leads than those that don't.

Optimizing SEO with Google Ads

Google Ads, Google's online advertising platform, is an essential component to SEO for any business, whether it's in the business-to-consumer (B2C) or the business-to-business (B2B) sector. The vast majority of searches for any topic or product, are done on Google, which lists URLs associated with the highest paid ads first and then lists those associated with organic algorithms that result from blogging, linking, and aligning keywords with search queries, and such.

Creating and maintaining a presence on Google Ads is necessary, but it doesn't have to drain a small business's marketing budget. You determine your budget by setting a daily rate you're willing to spend. Google serves your ads to relevant visitors according to that budget.

Following are some tips and tactics for getting started with Google Ads.

Setting up your Google Ads account

Setting up a Google Ads account requires an email address and a URL if you want to drive traffic to a website. Having a Gmail account makes it easier to get started and manage your ads down the road.

To set up your account, go to <https://ads.google.com>. You will be prompted to set up an account name, a payment method, and so on. Google Ads offers two types of accounts: Smart Mode and Expert Mode. *Smart Mode*, the default setting, is easy to use no matter your skill level and experience. *Expert Mode* is more complex and something you can switch to when you understand how the platform works. Google Ads prompts you through your account setup by allowing you to choose your marketing objectives from options like Sales, Leads, Website traffic, and more. After you've selected a goal, or created one of your own, you select a campaign type. Options include Search text ads, Display ads that show up across the web, Shopping ads, Discovery and Video ads on YouTube and Gmail, and more.

When you set up your account, you have to create an ad campaign, so have a list of keywords and a goal for your first ad in mind when you get started. For help with keywords, turn to the “Curating keywords” section.

Creating your first Google Ads campaign

Setting up Google Ads campaigns is easy! The platform walks you through each step of the process and gives suggestions to optimize your search results. You can create campaigns that have multiple ads, and only pay for what you activate. You can pause or delete campaigns at any time, helping you execute affordable testing and save your budget for ads that work.

To set up your first Google Ads campaign, you need to have the following elements:

- » A goal for your campaign, such as to drive web traffic or generate inquiries
- » A business name and website
- » Copy for your ad, including a headline, description, and phone numbers
- » Keyword themes that include keywords, search terms, and long-tail phrases
- » Locations in which you want your ad served
- » A budget that you can spend daily toward reaching your goals

Google Ads offers various formats to help you best achieve your goals. The most common formats include:

- » **Text Ads:** This is the most common format that consists of a text block that includes your URL.
- » **Image Ads:** This format allows you to include an image in your ad and appears on Google’s display network, which consists of over two million websites that reach more than 90 percent of internet users worldwide.
- » **Display Ads:** These are ads with images that look like banner ads and are served throughout Google’s Display network.
- » **Responsive ads:** These are ads that automatically resize to fit the devices upon which they are being used. Google will rotate headlines and copy you provide to create various ad combinations of your content.

Even though Google Ads will still look like text ads, they are no longer managed as extended text ads, which Google retired in June 2022. All ads now have to be formatted as Responsive Search Ads, which involve multiple headlines and

descriptions which Google combines into multiple ads. This format has been proven to achieve higher results, which prompted the change.

Setting up a campaign

The first step you're asked to do is set up a campaign, which will consist of several ads you create. You can create campaigns around a time period, a product, a promotion, and so on. Including the time and purpose of your campaign in the name you select will help you easily identify and compare your campaigns.

The next prompt will ask you to enter your keywords. You should focus your keywords on one product or service per ad to be most effective. Google will give you some suggestions based on the words found in your website copy and the tags you set up (see the earlier "Playing tag" section). You can also get suggestions by entering the products or services you offer. It's important that you review and manage Google's suggestions because some may be irrelevant. You'll also be prompted to enter keywords.



TIP

Remember to use keywords that match the search query terms associated with your category. For example, if you're selling log furniture, you'll want to include product categories and special features in your keywords like beds, tables, desks, nightstands, picture frames, handcrafted, rustic, and so on.

Establishing your bidding and cost per click (CPC) parameters

You can set up your campaign to focus on clicks, impressions, views, engagements, or conversions. For example, your conversion goal may be to get a percentage of your visitors to complete a Contact Us or a Request a Demo form. Setting up your initial campaign for clicks is a good starting point because you'll get some indication of the efficacy of your keywords.

When you set up for clicks, you'll be asked to establish a bid limit for your *cost per click* (CPC). You need to decide what each click to your website is worth. The value can range from a few cents to several dollars. Once you set a bid limit, Google will not serve up your ads to more people than the cost of your budget allows. For example, if you set \$10 as the limit you want to pay for each click, Google will adjust how it serves your ads accordingly.

Setting your location

Google Ads will prompt you to set a location for your ads. If you sell only to consumers in the U.S., you'll want to select United States. If you sell only to consumers in a given state, city, region, or postal code, you'll want to fine-tune your selection for location.

For example, the total addressable market for a veterinary clinic may be consumers within a 30-mile radius of its physical location. Having your ad served up by Google to consumers searching for “dog dental care” throughout the U.S. would be a waste of money. Fine-tuning your search to a city or zip code will target people searching for related terms in your immediate service area.

Choosing your audience segments

Google Ads will allow you to choose segments within the broader target audience you define as you set up your campaigns. If you sell a software product, you can choose audiences looking for software related to your business category, be it marketing, transportation, business services, accounting, and so on. You can adjust your CPC bids per segment as well.

Writing your ad copy

You will craft 15 headlines for your ad copy, which Google Ads will rotate with the descriptions you create. Be sure to use your keywords in your headlines as much as possible to optimize your results. Each headline can be only 30 characters, so you need to choose your words wisely.

A good headline if you’re selling log furniture may be “Top handcrafted log furniture.” This headline uses the maximum 30 characters. If you’ve set your location to focus on your state — say, Colorado — you don’t need to worry that you haven’t mentioned Colorado in your headline. You’ll be able to write 14 more headlines, which may include the following:

- » Best Colorado log furniture (27 characters)
- » Handcrafted log beds all sizes (30 characters)
- » Log furniture Colorado-style (29 characters)



TIP

Using words like *best*, *top-rated*, *leading*, or *Top 10* will help your URL align with common searches.

After writing your headlines, you’ll write four description blocks of 90 characters each. These descriptions can vary in style and should include phrases that align with searches. Many searches use phrases like “Apple vs. Dell” or “Are Macs better than PCs?” If these are common for your industry, use similar phrases in your ad copy. Google will randomly match your headlines with your descriptions to create multiple ads for your campaign, enabling you to discover what headlines work best with what copy.

Be as descriptive as possible about what makes your product stand out. Going back to log furniture, your 90-character description may look something like this:

- » Top-selling handmade log beds, tables, dining sets at best-in-Breckenridge prices.
- » One-of-a-kind handcrafted log furniture for every room in downtown Breckenridge CO.



TIP

Google Ads will serve up suggestions for your headlines and descriptions. You can click on suggestions for keywords and see how many times a given term or phrase was searched in the last 30 days. Paying attention to this information will help you ensure your ad headlines and description copy are relevant and your campaign is successful.

Google will allow you to review your campaign before you publish it. You will be alerted when terms or keywords have a low response rate so you can refine your ads with insights from real data. You can edit and delete your ads after you publish them and change the dollar amount of your bids and daily budgets at any time.

Driving Traffic and Sales with Google My Business

In addition to Google Ads, Google offers *Google My Business*, which is a free feature you can use to manage your SEO appearance for queries in your location related to your product, service, or business. Google My Business also allows you to manage your presence on *Google Maps*, the utility that shows your location, and often customer reviews, when someone searches for your product or service and uses the term “near me.”

If you're a coffee shop in a resort town that specializes in lavender lattes, your business would show up on a map when someone searches Google Maps for “lavender lattes near me” or a related term like “specialty coffee near me”. The information about your company and others that show up from the search query might include location, your customer review rating, pricing code (\$ versus \$\$), and your distance from the searcher's current location. If you're in retail of any kind, and want to capture traffic from impromptu shoppers, executing and maintaining a Google My Business account is mission-critical.

The following sections tell you what you need to know about getting your Google My Business account up and running.

Setting up your Google Business Profile

When you create a Google My Business account, the first step is to set up your Business Profile. Your Business Profile may already exist. You just need to claim it so you can manage it.

To start, go to www.google.com/business/ or use Google to search for “Business Profile Manager”. This will bring you to a Google page that walks you through setting up your Business Profile. Type your business name into the search bar and find your business. If your business doesn’t show up, Google will prompt you to create a profile with your business name.

After you find or add your business, you’ll enter your Business Profile information, including your company name and category, locations in which you serve customers, contact information, and hours. You can set up your profile so that customers can message your company from your profile page.

Once you create your Business Profile, you can start advertising it in a Google Ads account. Google will gladly prompt you on how to do this. You can respond to reviews, receive direct messages, take calls and orders, and more.

Creating a profile that stands out

Setting up a Google Business Profile is a solid step toward driving local traffic and sales to your business by aligning with real-time searches in your location. However, having a profile and showing up on Google Maps isn’t enough. Your location will appear among a handful of others, and consumers will likely choose the one that has the best reviews and the most engaging images and descriptions.

Like any aspect of marketing and branding, your message is key when you describe your company in your Business Profile. Don’t just state what you do. State what you do with descriptions that explain what makes you different, better, and more fulfilling than others.

Consider a profile statement like

ABC Donuts is Small Town USA's highest-rated donut and coffee shop, with all products made fresh every morning, never frozen. Give your day a sweet start in our spacious store in the heart of downtown, or order a dozen to go. Our 5-star products include warm, fluffy sugar-glazed donuts, rich chocolate cake donuts, and maple bars with fresh bacon.

This description references customers' 5-star ratings, which provides social proof as described in Chapter 2, lists products with appetizing descriptions that create impulsive triggers, and references status with an inviting location statement, "the heart of downtown." Choose your words carefully and be sure to use descriptors that set you apart from competitors but also mention any unique experiences you deliver.

Product details can be listed in your Business Profile as well. Google allows most small and medium-size businesses to showcase their products by posting photos, pricing, details, and so on with its Product Editor tool. You can also include videos in your profile.

Managing your results

As with Google Ads, Google provides you with detailed insights about the impact of your Business Profile and your Google My Business results. Google's Business Profile data will help you understand things like how customers find your profile and what actions they take, including the number of requests for directions and phone calls they make through your profile listing. You'll get key insights, such as how many customers found you through Google Search or Google Maps, which days and product listings show the most results for your listing, and so on.

One of the most important insights that can help inform your other marketing activities is discovering what customers do once they find your profile. Do they visit your website, request directions, call you, view photos? Where on your profile do viewers click the most? These actions can tell you what captures attention and inspires engagement among your target customers.



TIP

You can add a Call Business button to your profile. If you do include this feature, be sure you list a phone number that's monitored by a live person who can answer customers' questions. People engaging with businesses through Google My Business are typically in the middle of the shopping process and are likely to make quick decisions. If no one is available to answer their questions, they will head to the next listing on the map.

Remaining Relevant and Current in SEO Rankings

Marketing technology changes at the speed of light, or so it seems. Just reflect on what marketing tools and strategies you used just a few years ago. Some of the programs you use now weren't even invented then.

SEO technology, tactics, and platforms are likely to continue to evolve at a rapid pace. It's important that you stay on top of new developments if you want to stay on top of SERPs.

Online resources with updated insights

You can keep up with advances in SEO without hiring an expensive agency to execute, update, and manage your keywords, ads, budgets, and other aspects of your Google Ads campaigns. But there are some DIY alternatives. Here are some resources you should check regularly to stay on top of new features, tools, and strategies for optimizing your SEO:

- » **Google's SEO Starter Guide:** Google has a comprehensive guide for helping you determine what their tools do and how to use them.
- » **Moz:** A robust site with free insights about managing and optimizing your SEO programs, how to get started, and tools you can access for free or through moderately priced packages
- » **Search Engine Journal:** An online forum offering articles, checklists, guides, and webinars covering all areas of SEO as well as industry updates
- » **Semrush:** An industry-leading SEO backlink checker and competitor research tool that provides limited insights for free or ongoing insights and tools through a moderately priced package, as well as blogs and articles about starting and managing your SEO programs
- » **Backlinko:** A site set up by an SEO consultant that offers guidelines, training, and newsletters to help you stay on top of tactics and tools



TIP

You can also get your website's SEO and related functionality graded for free. Search for "website grader" on Google, and you will likely get a lot of options for services that will give you free insights on your site's overall SEO performance, mobile responsiveness, and security. You'll get grades for your tag descriptions, page speed, page requests, SEO plug-ins, and more. Some website graders will

give you access to a grade just for submitting your URL and email address, while others require you to set up a free account. Search online for “website graders” to see which ones make the most sense for you.

Additional tactics for more SEO results

SEO is a science and an art. As you strengthen your skills, use new tactics to get better results. The following list shares a few ways to up your SEO game.

- » **Establish and maintain a strong presence across the web.** Your web presence encompasses your pages on third-party sites that bear your name and drive people to your URL. Maintaining a presence on sites like YouTube, Facebook, LinkedIn, Twitter, Instagram, and Flickr can help your website come up more often and higher in search rankings (see Chapter 9 for more about getting noticed on these sites).
- » **Provide a site map.** A well-designed site map makes it easier for search engines to find your website when they’re navigating through URLs relevant to a specific search.
- » **Execute retargeting campaigns.** Use a retargeting platform like AdRoll to serve up ads to people who have visited your site as they browse the web. This creates visibility for search engines and helps drive repeat traffic as well as higher search rankings.



REMEMBER

Your website is often the first impression people have of your brand, so it needs to be found easily on SERPs and be everything they expect to get them to engage and embark on a journey to lifetime value. Do some research to find out what consumers in your space want when they’re browsing brand and product websites, and craft keywords and Google ads accordingly.

5 Setting Your Brand Up for Sustainable Sales

IN THIS PART . . .

Use online and off-line events to build your network, brand value, and qualified leads.

Expand your reach and sales opportunities by utilizing diverse channels, including your own e-commerce store, resellers, Amazon, and eBay, and more.

Up your sales with spot-on prospecting tactics, account-based marketing, and the right sales organization for highly effective individual and team efforts.

IN THIS CHAPTER

- » Generating some buzz with social hives
- » Hosting or sponsoring events that build your network, brand loyalty, and sales
- » Launching your own successful customer or cause-related event
- » Putting together a successful trade show strategy and event

Chapter **14**

Leveraging Networks and Events

Regardless of your industry or the size of your business, your network is one of your most valuable assets. Your ability to leverage your network and those of your customers is one of the most critical skills to develop.

This chapter shares insights on how you can leverage your network to spark dialogue and interest in your brand, tap into others' networks, and build new networks through meaningful events.

Harnessing the Power of Social Hives

Most people belong to several formal or casual organizations comprised of people just like them. We seek out hives that reflect our own values and needs, and form tribes with those we trust and enjoy. These groups, formed around religion, politics, hobbies, causes, social segments, and other shared interests or attributes, provide support systems, structure, and opportunities to collaborate with others on common causes or to just have fun. Most important, they provide emotional bonds and loyalty to people and causes that are hard to break.

Brands also can form hives, and a way to gain new prospects, from their existing customers. Doing so is a must because the most powerful form of marketing is *consumer-to-consumer* marketing, which applies to both live and digital worlds.

Despite all the time we spend on social media, we thrive being around people, meeting face-to-face rather than just screen-to-screen. Events that bring customers together are powerful for delivering messages, introducing new products, and building enthusiasm, further validating a brand's promises and products. Customer relationships built around hives also help decrease customer attrition because leaving one brand for another means you'll lose the professional friends or tribe associated with a given brand and risk being embarrassed among those you referred to the brand.

Growing your network with customer referrals

The power of word of mouth will never fade away. As you build stronger relationships with your customers, and establish trust and confidence, ask them to refer their friends. This is the ultimate measure of success. If a customer recommends a brand to a friend or associate, they are putting their own credibility on the line. Once they refer a brand, they tend to be more loyal to reinforce the value of their referral. This increased loyalty adds to the importance of what I call "referral marketing," which is a proven method for generating qualified leads at a very low cost of acquisition and works effectively for business-to-business (B2B) and business-to-consumer (B2C) brands.

LEVERAGING NETWORKS TO SPARK A MOVEMENT

Our networks of social and professional associates are also powerful for calling on others to help with important causes. In his book *The Power of Habit* (Random House), Charles Duhigg explains how Rosa Parks became the face of the American civil rights movement. Parks wasn't the first black person to refuse to give up her seat, but she was a person with many circles of friends and associates in church, sewing, charity, and social groups. By tapping these networks and asking members of each group to tap their own networks, a small group of civil rights leaders was able to organize the Montgomery bus boycott around Parks's arrest and thus spark the beginning of the U.S. civil rights movement of the 1950s and '60s in a matter of days. All without the connections and instantaneous power of social media.

Asking for referrals can be done in many ways.

- » Email campaigns offering incentives or rewards for customers referred
- » LinkedIn messaging asking to be introduced to people within a customer's network
- » Company-sponsored events to which you invite customers and ask them to bring a guest
- » Sales presentations and contract negotiation meetings

You can offer customers a reward for referring friends and family to you, which will increase your chances of success. Rewards might be a discount on their next purchase, a cash reward with no purchase needed, or free gifts that complement their past purchases from you.

Hosting events to show appreciation and also encourage referrals are often considered rewards as well if the event is something of value or an experience that is not easily duplicated.

Hosting customer events that inspire engagement, loyalty, and referrals

Although you can use many tools to automatically communicate with large networks online, you can never underestimate the power of engaging face-to-face. People still like to shop at retail stores, meet friends for coffee and conversation, and touch products before they buy them.

The possibilities for face-to-face events are many, but no matter what you do, be sure your plans focus on providing meaningful experiences that are relevant to customers and highlight the role you play in enhancing their lives.

Well-planned and carefully executed events can foster strong relationships that will add to your partnership value for customers and your position as a subject matter expert. The key is to focus on events that are relevant to your category, reinforce your brand position, and are meaningful to customers.

Here are some ideas for online and off-line marketing events that can help you build and strengthen customer bonds.

Online events

Online events have surged since the COVID-19 pandemic began in early 2020. Even trade shows were taken to the web, and attendees browsed expo halls with avatars and instant messaging. Webinars and online conferences via Zoom Meetings, Microsoft Teams, or Google Meet still draw strong attendance and build customer value as we travel less for business and enjoy the convenience of learning from home or our workplace offices.

Because online events are inexpensive to produce and host, you can do more of them more often. Online events are good for quarterly user meetings to update customers on new features or offers for your products or services, introduce new product generations, share business news and shareholder information, and so on.

In the finance world, large brands often hold shareholder meetings online and invite investors to ask questions in a controlled setting. This approach can work for just about any industry and allows you to communicate news and get feedback in real time.

Proformex, an end-to-end digital software solution for the life insurance industry, hosts online customer forums regularly to help customers learn more about how to elevate the impact of the technology and features they can or should be using. They also provide holistic industry updates and technology projections to help customers assess their own state of the union and determine what they need to do to maximize their success and outcomes for their clients. According to David Morris, CMO for Proformex, these events, which are invitation, only help foster confidence in their leadership, technical expertise, and competitive position. Plenty of time for questions and answers are factored into each event agenda, which helps to build bonds between team members and customers. Proformex draws hundreds of customers to each event and enjoys a very low attrition rate.

Off-line events

Off-line events are those that bring people together in person for meaningful experiences or interaction in the real world instead of behind a screen. Off-line events can be user forums, customer appreciation dinners, facility tours, open houses, or anything else you can get people to attend. The key is to create value for your event beyond what people can get online. You must justify the time it takes to participate and to create ways for them to share stories about your brand while having fun.

Consider the Harley Owners Group, or H.O.G., which was formed in 1983 and, as of 2019, had more than one million members. H.O.G. members get together for scenic rides as well as charitable rides that raise money for groups like the

Muscular Dystrophy Association, and to have amazing adventures with others “just like them.” These organized events take place all over the U.S. and bring together a wide spectrum of Harley-Davidson customers, from the Fortune 100 CEO to the rebel leader of a biker club.

Economically and professionally, many members have little in common, but when they ride together, they bond over their Harley stories and passion for what Harleys do for them. The H.O.G. program is largely credited with turning flagging sales around and making Harleys one of the most popular bikes in the U.S., even at a time when owners joked that you had to buy two at a time — one to ride and one for parts.

Trade shows

Trade shows are great for building visibility and presence among customer and partner prospects within your industry. You can get a lot of value from exhibiting and putting yourself in front of prospects or just attending for some informal networking. In some cases, after you register, you’ll have access to a communications platform specific to the show, which may allow you to invite other registrants to connect with you via the online platform and in person at the event.



TIP

Setting up meetings at trade shows with key prospects or influencers is often more valuable than exhibiting because you can select who you want to meet instead of waiting for attendees to come to you. If you do exhibit, it’s worth buying the attendee list in advance if the host offers this option, so you can send attendees an incentive to stop by your booth. Read more about trade show tactics in the section “Maximizing Trade Show ROI,” later in this chapter.

Customer appreciation events

A party for entertaining and recognizing your customers can be a great way to strengthen relationships and secure repeat sales. Lexus hosts classic events like wine tastings and concerts, reflecting the luxury nature of their cars and customer experience. Many dealers offer informal experiences onsite which bring customers together to discuss their auto experience, and dealerships make shopping at their locations an event in itself. Lexus of North Miami offers a fitness center with showers and lockers, a business center, concierge services, massage chairs, a Zen room, a coffee bar, a putting green, manicures and pedicures, facials, and make-up consultation, taking customer appreciation to a new stratosphere.

Big-brand events for business-to-business (B2B) customers pull in big numbers as well. A good example is Microsoft Ignite, an annual conference that brings the tech community together. Microsoft launched the event as TechEd in 1993 and renamed it Ignite in 2015. That year, the event was held in Chicago, and it sold out (even though it was free) when it reached 20,000 attendees.

Community fundraisers

Supporting worthwhile causes is critical to gaining trust, support, and loyalty among your customers. Hosting an event that unites your customers and employees for a common cause is a powerful way to create emotional bonds and friendships that take price out of the equation. A construction company in Vail, Colorado, hosts an annual kickball tournament, bringing businesses and the community together for fun and to raise money for local charities. The popularity of this event draws dozens of participants and resulted in many stories in the local news, which has raised visibility and community value for the hosting company.

Fun family events

Not everything has to be business-oriented. If you have the resources, consider organizing a fun social event that enables you to mingle with your customers and build friendships. Try a pumpkin festival, a community talent show, or an educational event for families — something relevant that's worth attending.

Educational workshops

Consider hosting a workshop in which you share your expertise in your field. For example, if you own a pet store, you can bring in an expert on dog nutrition or host a talk on how to blend cats and dogs in one family, and invite the public to attend for free. Collecting RSVPs in advance and names at the door will help you build your database as well.

Expanding your imprint with client advisory boards

Customers are the best source for insights and ideas on how you can improve your products and services in order to expand your reach and revenue. If you have strong relationships with your customers, consider organizing an advisory board consisting of clients who can give feedback on new ideas, offer advice on market voids you can fill, and critique your products or services.

Bringing professionals and peers together to share their expertise opens new networks to you while building loyalty among your participating customers. You can also gain an inside edge over competitors because you'll have access to critical information and market needs others don't have.

Launching Your Own Public Event

In a world that's more about creating great customer experiences than clever advertising campaigns, hosting your own event is key to building relationships on your terms and elevating the value of your brand beyond the products or services you sell.

First rule of success: Make the event about your attendees, not you. If you disguise a sales pitch as a customer appreciation, thought leadership, or charitable event, you'll destroy the trust you have among your customers and harm your chances of sparking new relationships with others.

Second rule of success: Don't do an event just because you can. Host an event only because it's meaningful and offers something of value to your network.

The whole reason for doing events is to build relationships, people to people, and leverage your network to introduce your company to others. People don't build relationships with brands; they build connections with people within the brand, and when they feel fulfilled, they bring others to you.

In the following sections, you'll find different ideas for hosting events with meaning, for funding and monetizing your event, and for getting help managing your event.

Hosting events with meaning

Relevance, just like anything you do in marketing, is important to the success of your events. If the theme, purpose, activity, or benefit gained from participating doesn't provide a direct value to your customer base, you'll likely be disappointed in the turnout and thus your ability to build relationships with prospects and customers. Successful events have direct meaning or impact on customers' quality of life, community, or a cause about which they feel strongly, and are relevant to your business and the role you play in your customers' lives. Examples of meaningful events include

- » Host a volunteer highway cleanup day. Invite customers to an after-party and hand out "road trip" swag as a thank-you gift.
- » Host a dinner event at your business or a nearby park, pack it with games and contests, and make admission donated food items.
- » If you own a retail clothing store, set up an after-hours party to collect business clothes that customers no longer need. Offer appetizers, cocktails, and light entertainment. Donate the clothes to a local shelter or a program that helps place needy adults in jobs so they can show up dressed for success.

Funding and monetizing your event

Events aren't cheap, and footing the entire bill with the hope of generating sales and acquiring new customers may sometimes be more than you can afford. Here are some ideas for how to get others to cover some of your expenses:

- » Partner with local restaurants or catering companies. Ask them to donate refreshments in exchange for signage and mentions in publicity material.
- » Ask the owners of new local venues to let you host your event for free in exchange for sponsorship mentions.
- » Find local musicians and artists who need exposure and will perform or design promotional materials for free.



TIP

If you're in the B2B sector and choose to host a conference or thought leadership workshop involving speakers beyond just your team, you can better justify charging an admission fee. The trick is that your content needs to be different and more actionable than the many other events competing for attendees. It can be done. An added bonus is that hosting your own conference or professional summit positions you as the authority, and authorities are naturally perceived as pioneers, leaders, and experts with a higher likelihood of success.

Some ways to help you monetize a conference include

- » List a price for your event to give it value. Then invite customers to attend for free and give a substantial discount to any friends they choose to bring.
- » Invite companies that provide complementary services to yours and target the same customers to underwrite any speakers you need to pay to participate.
- » Seek sponsors for special workshops or receptions, or as underwriters for entertainment.
- » Record sessions and sell online access to the video for a nominal fee.

Getting help managing your event

If you're like most small and medium-size businesses or marketing departments, you likely don't have time to do your day job and pull off a full-scale event. Luckily, you can hire event planning consultants and firms to do this for you if your budget allows.

Event managers can help you design and manage all aspects of your event, including shows, speeches or activities, meals, conference and hotel room

reservations, security, transportation, and all the other details you have to get right when staging a major event. A good place to look for a proven planner is the Event Planners Association (www.eventplannersassociation.com).

Supporting Third-Party Events

A great way to create face-to-face marketing opportunities without all the liability is to sponsor a special event. Doing so is kind of like piggybacking on others' investments and efforts because you get visibility without the responsibility and all the costs. Choose events that not only cater to your customer groups but are also well-publicized.

Sports events get the biggest share of sponsorship spending (about 70 percent), but lots of other options exist, including entertainment, tours, local attractions, festivals, fairs, and art shows. Ask your customers to help guide you in choosing the right events to sponsor. Maybe put a one-question poll on your website, at your cash register, or another highly visible place. If you run a local business, ask customers whether they plan to attend any specific events you're considering.

The next sections break down the actions you should take if you're thinking about sponsoring a special event.



REMEMBER

Whatever special event you decide to sponsor, make sure you get a clear, detailed written agreement about where, how, and how often the event will identify your brand name. That identification is the return on your sponsorship investment.

Getting behind cause-related campaigns and events

You've heard the saying *If you don't stand for something, you'll fall for anything*. Today, standing for something takes on a new meaning for businesses, because a majority of consumers seek to align with brands that engage in responsible social and environmental causes. Research shows that consumers are much more likely to align with companies that promote a purpose greater than profits.

Hosting or sponsoring cause-related events will help position you as a company that stands for more than just profits. One of the first cause-related campaigns was American Express's Charge Against Hunger, which started in the early 1990s. The campaign raised more than \$21 million in four years and benefited more than 600 antihunger groups throughout the United States. It helped raise awareness about hunger throughout America and generated community support to ease the

suffering of those affected. Not only did this campaign help launch the genre of cause-related marketing, but it also helped American Express improve relationships with its restaurant customers and added value to aligning with the brand.

To identify the worthy events that align with your brand and values, first decide what you stand for. Which societal needs matter most to you and your team and line up with your product category and brand? Which causes are your customers also likely to support? Do you operate in an area with a high population of at-risk youth or homelessness? Do you have a personal connection to autism, cancer, hunger or another cause you and your team can rally behind?

Ideally, you want to align with programs that are meaningful to your customers and your brand. Common causes bring customers and brands together in ways that are more powerful for relationships, loyalty, the greater good, and profitability than most other things you can do. Consider launching a campaign that donates proceeds to a certain charity for a sales period and then host an event to invite customers, donors, and others involved in the campaign to celebrate its success. Imagine the emotional bonds of an event celebrating a successful mission you and your customers accomplished together.



REMEMBER

Aligning with causes is a great way to build your network and strengthen relationships with partners, customers, and communities. If you tap your existing network to support a cause or come to an event you sponsor or host, invite them to tap their own networks. That way, you have more impact on your cause and add new like-minded people to your network. Encourage them to sign up in advance so you can collect contact information for future communications.

Sponsoring fundraising events

You can attract a lot of positive attention from the media and the community by sponsoring an existing fundraising event for a charity rather than hosting your own. You'll generate valuable goodwill through cause sponsorship, especially if the cause and event are relevant to your target market, and relieve yourself of the planning and execution details.



WARNING

You don't want to support a charity that turns out to be poorly or dishonestly run. Make sure to carefully examine a charity's books and tax-exempt status before sponsoring it or running an event to benefit it. Make sure it has full charitable status — defined as a 501(c)(3) corporation in the United States, for example — and its audited financial statements show that it has relatively low overhead and moderate executive salaries. A charity's records and financials should be available for public inspection, so all you have to do is ask. If an organization hesitates to share this information, move on.

Beyond sponsoring events, consider joining a local charity's board or advisory committee. This shows your ongoing commitment to the cause — and that you're not supporting it just for business exposure — and sends a signal of sincerity to your customers. Transparency and sincerity matter a great deal to all customer groups, so don't try to disguise your marketing as charitable acts. This will always backfire.

Finding a good fit

Finding a good event or cause that fits your organization's purpose and business offering is important to your overall branding efforts and your ability to truly make a difference. The following sources can help you discover what type of events are available in your market area:

- » **IEG:** International Events Group, or IEG, publishes a list of many special event options, including just about every large-scale event. Check out www.sponsorship.com for more info.
- » **Local chambers of commerce:** Chambers of commerce offer lists of local events and can often provide insights on what to expect from each.
- » **Organizations that align with your category and cause:** Certain groups may know about or put on special events that are appropriate for your sponsorship. For example, if you market sports equipment, educational games, or other products for kids, you may want to call a local YMCA or recreation center to see whether you can participate in one of its many events geared toward children.
- » **Schools and colleges:** Educational institutions usually have a strong base of support in their communities, and some add a broader reach through their alumni, sports teams, prominent faculty, and the like. Call their public relations offices to get a list of events.
- » **Online sources:** A number of websites can help you locate good sponsorship matches. For example, check out www.eventcrazy.com for hundreds of possibilities in everything from sports and the arts, to reenactments and museum shows.
- » **Local television stations:** Call your local television stations and ask them about the local events they expect to cover in the coming year. These events are ideal for your sponsorship because television coverage makes the potential audience bigger.



TIP

Like any marketing program, an event sponsorship needs to deliver reach at a reasonable cost. So ask yourself how many people will come to the event or be exposed to your brand name. Then ask yourself what percentage of this total is likely to be in your target market. That's your *reach*. Divide your cost by this figure, multiply it by 1,000, and you have the cost of generating 1,000 impressions. You can compare this cost with cost figures for other kinds of reach, such as a print or radio ad or a direct mailing.

Sometimes going beyond direct relevance is okay, especially for community-based businesses, but always consider the pros and cons first. For example, an area savings and loan institution may sponsor a youth soccer team, contribute to a campaign for the nearby homeless shelter, and help fund land conservation or historic building preservation efforts, purely because these are good local causes and the managers of the savings and loan institution care about them.

Of course, you don't always have to have a business reason to sponsor an event. Doing good for the sake of doing good is enough. And when you invest in charities and causes, the return usually comes back in ways that you can't always measure on a spreadsheet.

Maximizing Trade Show ROI

Trade shows are one of the most traditional yet effective ways to mingle face-to-face with prospects and nurture your existing network. But you can't just show up and expect people to come to your booth. You must have a message and a plan, just like you do with a given marketing campaign. Components of your plan should include

- » **Messaging that's relevant to the attendees:** If the show attracts millennials, use messages in your display and promotions that are meaningful to this group. These may include statements about your social impact and promises that relate to their goals of promoting equality and justice.
- » **Visuals that reflect the persona of the consumers attending to create an immediate common ground:** Upon entering the exhibit hall, attendees are bombarded with lots of visual stimuli trying to capture their attention. Yours will stand out if you reflect the colors, fonts, images, and energy that appeal most to the core audience attending.
- » **A relevant experience:** Like your overall marketing plan, you need to provide a relevant experience for your attendees. Just talking to sales reps who want to scan a name tag isn't the kind of experience that inspires intrigue or sales. Offer something of interest or fun to draw people out of the aisles and into

your booth. Some things that work well include magician performances, bistros or happy hour events, free gifts, chair massages, and games with prizes.

Once you lay out your trade show message and plan, you're ready to start implementing them in ways that ensure you get the most return on investment (ROI) out of your experience.

Locating trade shows

Your most reliable source for trade show info is your customers. The whole point of exhibiting at a trade show is to reach customers, so why not just ask them which shows you should attend? Email your best customers and ask them for advice on where and when to exhibit. They know what's hot right now and what's not.

Some other sources that have the scoop on trade shows are

- » **Exhibit & Event Marketers Association (E2MA):** This association can provide you with information about shows in your industry. E2MA is also a great source of information and training for trade show booth designers and exhibitors.
- » **Trade Show News Network (TSNN):** This organization is a useful clearing-house of listings for vendors and companies in the trade show industry. Check out TSNN's list of top 250 U.S. trade shows for venues that may be good fits for you.

Here are some tips to help you decide which trade shows to attend and make sure you get the most out of your trade show investment:

- » **If you belong to associations, get a list of all the events they host throughout the year.** Get information on attendance, expo hall activities, and how organizers plan to drive traffic to exhibitors.
- » **Get a list of last year's exhibitors and find out how satisfied they were with traffic and the quality of leads generated.** Just because a lot of people walk by your booth doesn't mean they're qualified leads you should spend your time trying to close.
- » **Ask for a preview of other companies signed up to exhibit to assess competitor presence.** If your competitors are there, you may not want to miss out.

- » **Look for potential partners on the exhibitor list.** Reach out for potential alliances and joint presentations to add interest and value to each other's booths.

Building the foundation for a good booth

Marketers traditionally focus on the booth when they think about how to handle a trade show. But you should consider the booth just a part of your overall marketing strategy for the show. Develop a full-blown trade show strategy by answering each of these questions:

- » How do we attract the right attendees to our booth?
- » What do we want visitors to our booth to do at the show and in our booth?
- » How can we communicate with and motivate visitors when they get to our booth?
- » How can we capture information about them, their interests, and their needs?
- » What can we send visitors away with that will maximize the chances of them engaging with us after the show?
- » How can we follow up to build or maintain our relationship with our booth visitors?

Booths can take on many different formats that enable you to interact with visitors in various ways. Consider the following setups to encourage meaningful engagement that generates quality leads:

- » A small panel display on a tabletop and maybe a couple of chairs to chat with visitors in a 10-x-10-foot booth
- » A 10-x-10 panel exhibit with kiosks for computer displays and handouts. Adding a small table and stools for chats works well in this size of space.
- » A much bigger space with multiple interactive digital displays, sitting areas for groups to listen to mini presentations, and private spaces for one-to-one meetings

Experts can help you design and build your booth or other displays, manage your trade show program, and handle the sales leads that result from it. Many firms design and make trade show booths, kiosks, and tabletop displays. They will also ship and assemble your booth at the event venue. However, this comes at a high price. Keep in mind that not only do you have to pay high shipping costs for large

displays, you have to pay high fees for event staff to set it up for you. You need to budget accordingly to ensure you can afford to use the booth you create.

Decide which format fits your marketing program and budget best and then go online to search for vendors in your area. Many firms will also manage your entire trade show program, including the leads you generate.

Be sure to get opinions and quotes from multiple vendors, as well as credit and client references, before choosing a company for your job. Also, share your budget constraints up front to find out whether the company you're talking to is appropriate for you.



REMEMBER

Your strategy should be built around your budget and the type of interaction with prospects that's most likely to spark a long-term relationship. You need to attract and engage high numbers of your target customers; otherwise, the show wastes your marketing time and money.

Selecting space on the expo floor

Where your booth is located is often more important than its size. If you're on the outside aisles, you likely won't get much traffic. You need a booth on a heavily trafficked aisle, such as one near the entrance, leading to the back dining or sitting areas, or near or adjacent to a large company that tends to get a lot of traffic.

Getting a good booth can be tricky. Hosts schedule exhibitor meetings to select booth space a year in advance. You are given a time to select your booth according to your level of sponsorship or how much you paid for your past booth. When booking a booth for a given year, be sure to ask about scheduling time for the following year so you aren't left with a poor location that can negatively impact your results and ROI.



TIP

A major booth at a big national convention or trade show is costly (somewhere between \$15,000 and \$50,000 — or even more, depending on show — which may be beyond your current budget). Consider sharing a booth with a similar business if you aren't sure you can get a good return on the cost of a booth. If your business has regional affiliates, share space with one or several of them.

Getting people to your booth

Like any form of marketing, your trade show booth competes with others for traffic and staying power. If you just show up and set up your booth, you'll likely be disappointed in your traffic, even if you have a top-notch display or gimmicks to attract visitors. You need to work the crowd before they show up. The best way to

do this is to get an attendee list from the organizers if it's available before the show. You'll most likely have to pay more for this list, but it's often worth the investment.

Here are some direct marketing ideas for using attendee lists to up your trade show ROI:

- » **Offer:** Give people a reason to come by your booth. Are you offering a white paper, a free audit, or a discount on your product or service?
- » **Experience:** Create an offer or experience at your booth that's worth people's time. Try a free informational mini seminar with a proven expert in your field.
- » **Contest:** Offer people a chance to win something they actually want for themselves, such as a free iPad, a free hotel stay, or a gift card for gas or groceries.
- » **Free product:** Give premium swag that's actually useful. Instead of a free pen, come up with something that stands out from what others are giving. Be sure it's useful and relevant to your audience so your logo will remain visible over time, and easy and safe to transport home in your suitcase.
- » **Presentation:** Look for submission guidelines for presentations at shows you plan to attend and pitch a session or workshop around your area of expertise. Speakers are selected as much as a year in advance, so plan ahead. Your presentation can help drive traffic to your booth (without costly promotions).

Bringing customers together with your team and each other, at your own event or a trade show, sparks relationships that have the potential to pay off for years. You can spark loyalty and build new networks for not a lot of cost or effort. Be sure to create meaningful experiences that are worth customers' time and will be remembered long after the fact.

IN THIS CHAPTER

- » Strategizing your e-commerce program
- » Understanding the options for selling online
- » Discovering how best to use Amazon or eBay storefronts
- » Taking note of key off-line distribution strategies
- » Considering channel structure and options for resellers
- » Gaining ideas for improving in store sales

Chapter **15**

Tuning In to the Right Sales Channel

You can build the greatest product ever invented, but it won't matter if you don't have an equally great distribution channel and strategy in place.

No matter which business category you're in, you cannot ignore the burgeoning growth in e-commerce, which has accelerated at a record pace in recent years (particularly as a result of the COVID-19 pandemic). And you cannot ignore the accelerating expectations and demands of customers in all spaces to have both online and off-line options for doing business with you. The fast trajectory for online sales worldwide will leave laggards behind and continue to reward early adopters. For most businesses, adding an e-commerce option isn't a matter of *if* but *when* if you want to survive.

This chapter sets forth some tips and tactics for moving into e-commerce as easily as possible. I tell you how to set up your own e-commerce store, set up store-fronts, get your product noticed on third-party sites (like Amazon), and more.

Setting Up a Successful E-commerce Program

Setting up an e-commerce program is actually simpler than you may think, given all the platforms and technology that are now affordable for small and large businesses alike. This section explains some of the challenges you face getting started with an e-commerce program and outlines many simple and affordable solutions for succeeding.

Rising above the competition

According to www.digitalintheround.com, there are upwards of 12 million online shops worldwide. More than 2 million of these shops are in the U.S. alone. By comparison, there are 2.14 billion online shoppers around the world. This trend is likely to continue to grow as online shopping has become an integral part of consumers' lives, just about anywhere on the globe.



TECHNICAL
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In the U.S., approximately 263 million people shop online. Some shop online after they've had too much to drink. These online purchases made by intoxicated shoppers adds up to \$30 billion a year of — likely regrettable — purchases.

You *can* compete for online sales. The best place to start is with your existing customers, who likely would welcome more options for engaging with you. Once you get them shopping your online store, you can reward them for purchases, referrals, reviews, and shares to social media pages.

By building an engaging website that appeals to the triggers of choice (discussed in Chapter 2) and providing a fulfilling customer experience from landing page to shopping cart (as discussed in Chapter 3), you'll also secure new customers.

Often what sets one e-commerce star above another for visits and transactions is *search engine optimization*, or *SEO*, which isn't something you set up once when you launch your e-commerce site or Google Ads campaign. As mentioned in Chapter 13, you need to continuously monitor search terms, keywords, campaign optimization, clicks, click-through rates, and conversions, just as you do your website. Monitoring the keywords and SEO efforts of your competitors on sites like SpyFu is also a powerful way to stay ahead of the pack.

Fulfilling orders and delighting customers

With stores having to offer curbside pickup or stop doing business in 2020, new distribution methods blossomed during the COVID-19 pandemic. Curbside pickup and click and collect — also known as *buy online, pick up in store*, or *BOPIS* — soared, and they show no signs of slowing down. According to *Business Insider*, U.S. shoppers alone spent \$72.46 billion on BOPIS purchases in 2020, representing a 107 percent growth rate over 2019. Multiple studies indicate that many consumers intend to keep shopping this way.

BOPIS offers many opportunities for businesses large and small. Small businesses can keep up with online order fulfillment by offering BOPIS options rather than trying to package and ship product. If you assign one or two staff members to prepare pickup orders prior to in-person shopping hours, you can offer BOPIS without adding much to your labor costs or interfering with your in-store customer service. You can also set up lockers in store or outside your storefront. Customers can pick up their packages much like picking up their mail, reducing the need for staff engagement, customer lines for pickup, and, best of all, extra payroll for fulfillment.

Curating customer experiences online

Your e-commerce store must provide the same kind of engagement, services, and support as your brick-and-mortar store, if not more. Expectations for 5-star service online are, and will continue to be, high. Personalizing online shopping with relevant live chat opportunities or customer service follow-up is key because consumer expectations are no different for online engagement as they are for in-store interactions. A 2018 Accenture study shows 91 percent of consumers were more likely to buy from brands that recognize them, use their name, and provide relevant offers and recommendations, off-line or online.

With the right e-commerce or customer relationship management platform, you can offer live chat with employees who have access to customers' data and can deliver personalized service based on past transactions in real time. By empowering employees to solve issues immediately and offer incentives to keep customers satisfied, your online experience can be just as good, if not better, than your in-store service.

Converting online traffic to sales

Abandonment is a real thing in e-commerce, and while you can't take it personally, it impacts your bottom line and marketing return on investment in ways that can feel very personal. Abandonment in the e-commerce world happens when

people get off your site without making a purchase or leave items in their cart and never come back to check out.

Consider this statistic reported by BigCommerce (bigcommerce.com):

U.S. retailers spend close to \$24 billion on digital ads per year to drive traffic to e-commerce websites, and on average experience conversion rates between 2 and 3 percent.

Despite this not-so-encouraging statistic, it's critical to offer e-commerce in a world where customers want options and will patronize the brands that give them choices that fit their lifestyle and expectations.

The following guidelines can help you secure sales:

- » Offer an easy checkout system.
- » Do not require registration or account setup to complete a purchase.
- » Offer discounts on shipping or products.
- » Ensure your product and checkout pages load quickly
- » Offer live chat support during extended shopping hours.
- » Offer refund policies that favor customers, not your business.
- » Execute strategies to increase your shopping cart fulfillment rates.

Upping your SEO rankings

Again, SEO is an important aspect of e-commerce success. If you aren't on the first page of *search engine results pages*, or *SERPs*, you're not going to drive traffic to your site. Consumers tend to have the patience of a gnat and usually won't look past the first SERP that Google, Bing, or the like serve up. However, first pages now list several ads before the organic options, making it harder to get a top listing without paying a lot.

The work-around is to put some extra effort into elevating and maintaining your SEO rankings to ensure you're at the top of key searches related to your business, and that you stay there! You need to constantly monitor key terms in your Google Ads account, keep your website tagging current, and monitor keywords and search result rankings for your competitors. Again, SpyFu is a great site for keeping tabs on your competitors and gives you decent insight for free.

Increasing shopping cart fulfillment rates

Even with 70 percent or more of online shoppers abandoning their carts, you can get them back with some simple tactics, such as emailing or texting incentives to complete a transaction. According to Wix, triggered emails can quickly get back around 10 percent of shoppers. Most e-commerce platforms offer automated triggers for re-engaging abandoned shoppers. You can also use a marketing service like Omnisend.

Following are some strategies that will help you minimize abandonment:

- » Progress bars showing the steps left to complete an order tend to keep shoppers on course for completing the checkout process.
- » Keep the shopping process simple and easy to navigate. Make it easy to put items in a cart and continue shopping. Amazon goes a step further and lets you click on a Buy Now button, which skirts some of the steps in the checkout process. Keeping items in a cart when shoppers leave your site allows them to start where they left off if they were distracted or interrupted when finalizing their purchase.
- » Speedy page loading is essential. Because we've become accustomed to instant gratification and speedy access to information, shoppers waiting for a page to load will likely give up and go elsewhere.
- » Making shoppers register on your page before checking out will decrease your shopping fulfillment numbers. Many consumers don't want to opt in to marketing emails or texts just to get what they want. Find other ways, like registering for special discounts, to get email addresses for future marketing.
- » Live chat support is not just expected but often critical to closing a deal. Many shoppers would rather ask questions in live chat than search your page for return policies, shipping options, and more. If you don't have a live chat feature staffed by your team, keep in mind that many e-commerce platforms offer *chatbots*, which are apps that can mimic conversations and interact with customers. While not the most ideal solution, it's often better than no interaction at all.
- » If possible, have thumbnail images of products in a customer's shopping cart visible throughout the checkout journey. This can keep their enthusiasm for the product alive and prevent abandonment.

Understanding Your Options

There are many options for taking your business online. You can build your own website with an e-commerce feature and fulfill your own orders, or you can contract with a company that will do the work for you for a percentage of your sales. It's not *if* you'll go online, but which option you'll use in today's consumer culture, where e-commerce is growing 20 percent per year. Some options include:

- » Building your own e-commerce website
- » Contracting with a service that manages your product sales and fulfillment for you
- » Setting up a storefront on a major e-commerce site like Amazon or eBay

Whichever option you choose, you're setting up for a fun, rewarding, fast, and adventurous journey for your business. Hold on and enjoy the ride!

Building your own e-commerce store

There are numerous platforms for do-it-yourself (DIY) e-commerce websites, and numerous review sites to guide your decision process. One example is www.best10ecommercesitebuilders.com.

It's important to review websites that compare e-commerce platforms to see what users have to say about ease of development, design, SEO management, payment and shipping processes, service, and tech support. And, of course, to find out if they offer the services and features you need to start out strong and achieve sustainable growth.

If you're just getting started, there are many affordable options that provide the same services and features offered on big brand websites. You may be surprised at how many features you can get for less than \$100 a month from an e-commerce platform like GoDaddy, Square, or Wix, three highly rated and highly used platforms.

Features you can get from affordable platforms for small businesses include:

- » Design Templates
- » Analytics and Sales Dashboard
- » Chatbots
- » SEO tools and/or support

- » Syncing to marketplaces like Amazon, eBay, Facebook
- » Automated inventory management across multiple channels
- » Abandoned cart recovery
- » Segmented email campaigns
- » Discounts and gift cards
- » Automated tax calculations
- » Card readers services (additional fees will apply)
- » Email and text reminders for customers
- » Online appointment scheduling
- » Tools for managing business listings on Google, Yelp, etc.
- » Posting to social media stores
- » Email subscriber sign-up forms

Website Builder Expert (www.websitebuilderexpert.com) lists the following as the seven best e-commerce platforms:

- » **Wix:** best for small online stores
- » **Shopify:** best for larger businesses
- » **Squarespace:** best value for the money
- » **Square Online:** best way to sell for free
- » **BigCommerce:** best for purely online businesses
- » **Volusion:** okay all-around, but best at nothing
- » **Big Cartel:** best for independent artists

Various website builders have various advantages. For example, one of the features highlighted about Wix, a highly rated platform with hundreds of easy-to-use templates for retailers, is its easy integration of products and even full catalogs to Amazon and eBay. An advantage of using Square Online is its automated integration with Square's point of sale and banking tool.

It's important to do the research on e-commerce platforms and read what others have to say about ease of site and store development, quality of support, and so on. Uploading your photos, product descriptions, and setting up pricing and shopping options requires a substantial time commitment you can't recoup if you decide to switch platforms down the road.

With the right system, setting up an online store can be as simple as

- » Choosing your platform
- » Defining your product line and/or service offerings
- » Customizing an existing template around your brand persona and products
- » Uploading product images, pricing, and so on to your store
- » Connecting your store to a payment system, bank account for credit card fees, and so on
- » Setting up shipping options for customers
- » Clicking the *Publish* button

Paying someone else to do it for you

If DIY isn't your thing, you can find sites that will take care of many of the management functions for you. Many of these sites cater to a specific business line. For example, one company might specialize in e-commerce sites for counselors and life coaches, another for artists.

Darkroom.tech is a site that hosts storefronts for photographers. You choose your template, and upload your photos and prices, and they manage your shop and fulfill orders for you. You end up paying 5 to 15 percent of your revenue for these services, but you gain back the time to focus on your business.

Keep in mind the personal time you have available to maintain your site, manage inventory uploads, review analytics and sales dashboards, and perform other housekeeping functions. If your time is scarce, this option may be best for you.

When browsing options for platforms that manage sites and processes, pay attention to how much you will be paying to process each order. Is it 15 percent, 30 percent or more? How do the fees of those platforms you are considering compare with commissions you would pay resellers such as brokers, retailers, or galleries.

Setting Up Third-Party Digital Storefronts

As of 2019, online marketplaces accounted for the largest share of online purchases worldwide. Leading the global rankings of online retail websites in terms of traffic is Amazon, which registered more than 5.2 billion unique visitors in June

2020. In terms of *gross merchandise value*, or total amount of sales over a specified period, however, Amazon ranks third behind its Chinese competitors Taobao and Tmall. Both platforms are operated by Alibaba Group, the leading online commerce provider in Asia.

Not surprisingly, the two biggest e-commerce outlets used by U.S. retailers are Amazon and eBay. Both are great for getting your products out to the masses, but they're quite different in how you use them. Amazon offers a retail structure and will often fulfill your sales as well as feature your products on its site for a fee. eBay is mostly a marketplace provider and offers tools to help you better promote your products to visitors on its site. With both sites, you have access to a lot of shoppers, while having to overcome a lot of competition, of course.

Consider these numbers:

	Amazon	eBay
Monthly active users	197 million	109 million
Annual income 2021	\$33.6 billion	\$11.8 billion
Number of independent sellers	2 million	25 million
Number of products available	353 million	1.7 billion

As you can see, a lot of selling takes place on these sites, and your product will be one of dozens, or nearly two billion if you choose eBay. However, setting up a storefront on Amazon or eBay often pays off. Amazon merchants report that sales went up when they began selling on Amazon and that the volume of sales outweighs the cost of any selling fees.

So the question is, to eBay or Amazon?

Selling with eBay

You are probably familiar with Amazon but may not have a lot of experience with eBay. Before deciding on a digital storefront, you should know what eBay has to offer. More importantly, you should consider the eBay offers that Amazon doesn't. Here are some key differences:

» **eBay offers a distinct atmosphere that is more like a market than a big online retailer.** It's like a big online farmer's market for individuals who want to list and sell personal goods at discount prices. Instead of selling your product for you like other sites will, eBay provides guidelines and tools so you can sell your items successfully, but you do the rest.

- » **eBay has a lot more products to sell.** That's because individuals, not just merchants, are selling goods. This can make it harder for your products to stand out.
- » **eBay has lower selling fees than on other sites.** This allows you to keep more of the revenue from your sales.
- » **eBay isn't always considered trustworthy.** Consumer perception is that eBay is like a big garage sale with a few new items mixed in. As a result, it's not perceived to be as much of a trusted brand with customer-centric policies and practices as other sites.

The key to success on eBay is to get your product to pop up on the first page or two of the search results. Here are some tips that can help you get noticed:

- » **List your product in two or more categories.** Some customers may not know which category to search in, so list your products in all the categories that make sense. For example, if you're selling a winter coat, list it as a jacket and a coat and see what happens. You should be able to track which listing made it to the shopping cart as well. It may cost more to do this, but if you don't get noticed, you don't get sales.
- » **Offer free shipping.** eBay gives listings with free shipping preference in its rank ordering of search results. If you offer free shipping, make sure you cover at least the cost of standard shipping in the overall price you list.
- » **Avoid keyword spamming.** *Keyword spamming* is when you slip a popular keyword into your item description that doesn't really belong there. For example, saying, *If you love Ralph Lauren's designs, you'll love these bath towels*, is against eBay policy and may get your listing — and you — kicked off the site if the towels aren't actually Ralph Lauren towels.
- » **Become the top seller.** eBay rates independent sellers and lists customer reviews. Be sure to offer fast, responsive, and honest transactions at all times to maintain a high seller rating. Just one bad review can send shoppers to the next item listed, and because it takes only seconds to move on in a digital store environment, they most assuredly will.

Selling with Amazon

Studies show that more than half of all online shoppers start their search for new products on Amazon. As a retailer on the site, you can sell your products with Amazon.com as the payment processing system for your shopping cart, or you can become an Amazon seller, paying a monthly fee for Amazon to list and fulfill your product. Following are some keys to success for selling on Amazon:

- »» Continuously manage your SEO efforts on Amazon to ensure the keywords you use in your product listings align with Amazon's search algorithm. This algorithm, referred to as A9, searches multiple factors to determine how any given product will rank in the results shown to shoppers for related variables. You need to carefully select keywords for your products just as you do for search engines like Google and Yahoo.
- »» Always make sure your product is eligible to have a Buy Now button in the listing, and be sure to set up your Buy Box eligibility by following the prompts in the Manage Inventory section of your Amazon Seller Central account. The Buy Now button is a distinction some of the top merchants and best selling items earn. When consumers click on that button, they are able to process their purchase more quickly, and this translates into more sales for the seller.
- »» Uphold high standards for product quality, pricing, and customer service to ensure you show up at the top of search results and maintain your eligibility for having a Buy Now button on your listing.
- »» Monitor your product listings regularly to make sure Amazon hasn't suppressed them for any reason. Amazon scores sellers on its site, and maintaining a top position in search results, and the critically needed Buy Now button, depends on having nearly perfect scores for product quality, on-time delivery, product condition, and shipping and return policies. If your score falls unexpectedly, you could lose your product rankings without much warning.
- »» Fulfill your orders through Amazon's Seller Fulfilled Prime program so your goods will be listed as Prime products. Being a Seller Fulfilled Prime participant means your products will be easier for customers to find. Your products will also have a greater chance of being among featured products in your category. Amazon also lists your products for two-day free shipping which you are obligated to fulfill at your cost. The extra sales from being ranked higher and featured more often compensates for shipping costs quite quickly. With this program, Amazon can monitor your inventory to ensure product availability, which is key to getting the Buy Now button on your listing.
- »» Post only high-quality images of your products that clearly depict the value and excellence of the items you offer.
- »» Use clear and compelling copy to describe your products, and make key features and specifications stand out in bulleted text.
- »» Include customer reviews and answers to customer questions with your listings. This gives shoppers confidence in you as a seller and helps boost your search ranking on Amazon.

Considering Off-line Distribution Strategies

Beyond building your own e-commerce site or setting up storefronts on third-party platforms like eBay or Amazon, there are other distribution options to consider.

- » **Retailers:** You can build your own network of retailers that carry your product, or you can contract with a middleman distributor that places your product in retail outlets, chains, or independent stores. The downside of selling via retailers is the high commissions you'll pay to them directly as well as to brokers. You may be giving away 30 to 50 percent of your product revenue with this model.
- » **Multilevel marketing representatives:** *Multilevel marketing*, also known as *network marketing*, is where individuals sell products as 100 percent commission-based representatives of the brand rather than as salaried employees and recruit others to sell with them. They receive a percentage of any sales associated with other representatives they recruit.



WARNING

This model is often referred to as *pyramid marketing* and is often more about earning money from representatives and their recruits than developing high-quality products. In many cases, the products are inferior and overpriced because the price point has to cover commissions to several people associated with the sale. Setting up this model for your business can taint your reputation before you even get started. Top multilevel marketing companies include Amway, Avon, Herbalife, and Mary Kay.

- » **Value-added resellers:** Simply put, a *value-added reseller*, or VAR, is a company that purchases your product and sells it to consumers at a higher price. VARs often make money by bundling their value-add services or products to your product for additional revenue. For example, an auto dealer will buy cars from a manufacturer and then add warranties, financing, maintenance programs, high-end floor mats, and other extras to the package to increase their profit.

The quality and quantity of retailers and distributors are important considerations for business-to-consumer (B2C) and business-to-business (B2B) companies, because they impact not only access to your product but also the prestige and perceived value that drives your pricing limits. If you produce luxury goods, where you sell them is critically important. People expect to pay more at high-end retail stores like Saks Fifth Avenue and Neiman Marcus. But the minute you start selling your luxury items at discount department stores like JCPenney or Walmart, the perceived value of your brand drops, and that can impact your ability to get premium pricing when you sell direct.



REMEMBER

Your channel strategy also needs to address how you present your products at a given point of distribution. In the retail world, that involves purchasing prime display space, such as end-aisle displays at grocery stores and kiosks near the main entrances to department stores. End-aisle displays, or *end caps*, are the most coveted space in a retail setting. They involve much more than where your product sits in the store, often determining how much attention your product gets. End caps often have special signage or product videos nearby, providing a strong advantage over competing products on shelves in long aisles.

On the other hand, online point of distribution promotion is about purchasing search terms for browsers, pop-up ads via programmatic marketing, and mentions on shopping cart pages, such as *Other customers also bought . . .*, which triggers the fear of missing out and helps you capture emotional sales. (See Chapter 2 for more on FOMO and emotional triggers.)

Distribution strategies are key to launching and growing any business in any industry. For B2B marketers, distribution strategies include building a strong reseller network and a concerted focus on getting your products in front of purchasing managers at industry conventions, trade show expos, and similar events as well as product directories.

How you distribute your products can also influence what you are able to charge for your goods. Your price point can fluctuate if you create a sense of scarcity or abundance for your product. Consider the following:

- » **Selective distribution strategy:** You select a few outlets that represent the image and values of your product and charge a high price to compensate for the lower volume of sales and to establish a luxury image — and price point — for your overall brand.
- » **Exclusive distribution strategy:** This approach involves selling through one or a few specialized distributors only. An exclusive distribution strategy can work well for unique products for which you want to create a sense of exclusivity, justify a high price, and secure low distribution costs.
- » **Intensive distribution strategy:** If you're marketing a retail product with mass appeal and want to achieve mass access, this is a good option because it can make your product widely available through many various outlets. It involves getting onto the roster of accepted vendors for giant retail chains like Target and Walmart, which can be difficult and takes away some of your pricing and inventory control. You may have to increase your production capabilities. Before you negotiate terms with the big-box stores, make sure you can scale appropriately with little risk.

You also have to decide whether you want to develop *parallel distribution channels*, also known as *competitive channels*, which involve selling directly to consumers, not just through distributors or retail outlets. Be aware that parallel distribution puts you in direct competition with businesses you depend on to get your products out en masse. This can backfire by souring your relationships with companies that sell your product for you, so do your homework on the implications of parallel distribution for your business before going with this option.



TIP

Here are a couple more ways to get the most out of your distribution program:

- » **Expand your distribution network.** Never quit looking for new outlets for selling your products. Look to the web, community events, e-commerce, and even trade shows where you can actually set up sales transactions.
- » **Increase your visibility.** One way you can use distribution strategies to boost sales is to increase the visibility of your product or service within its current distribution channel by making sure it's better displayed or better communicated.

Many retail chain stores provide better shelving (such as end cap displays or eye-level shelving with a sign) if you offer them special promotional discounts or cooperative advertising fees. Look into these options and take advantage of them when you can afford to do so.

SHELF STRATEGIES TO AVOID GETTING BENCHED

Getting your products noticed on the shelf is key to success in selling products at brick-and-mortar retailers. This is where data meets distribution.

Data analytics are not just for your direct marketing campaigns, personalized communications, and other customer outreach and marketing strategies. You need information about what drives your target customers to which stores, and what other products they may be shopping for. You then need to work with retailers to negotiate shelf space that's on your shoppers' traffic patterns and above foot level, and maximize your visibility among other products in your category.

If you can show your products are generating consistently higher revenue than a competing product at the store, you likely can negotiate better shelf placement.

Understanding Channel Structure

Efficiency should be the driving goal behind your distribution channel strategy. Channel efficiency is based on having a small number of transactions involved in getting the product to the end user.

As Figure 15-1 shows, a channel in which 4 producers and 4 customers do business directly has 16 (4×4) possible transactions, because each producer has to make 4 separate transactions to get its product to all 4 consumers. In reality, the numbers are much higher when you have markets with dozens or hundreds of producers and thousands or millions of customers.

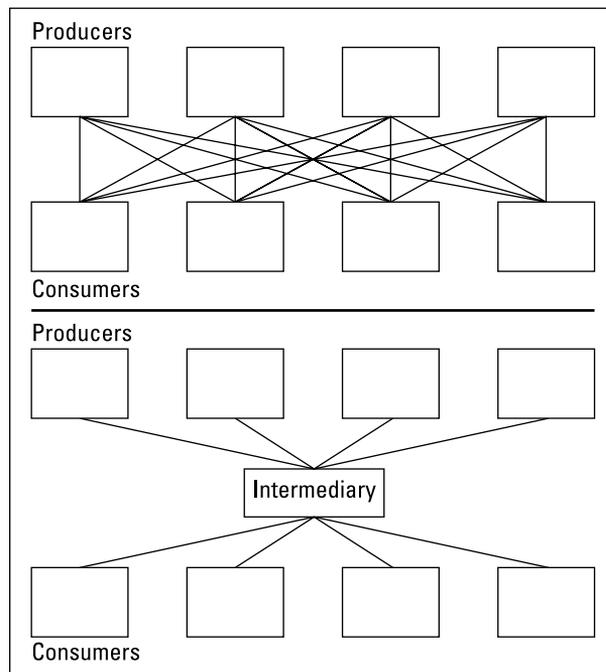


FIGURE 15-1:
Reducing transactions through intermediaries.

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You lower the number of transactions significantly when you use an *intermediary* (someone who handles the business transactions for you) because now you just have to do simple addition rather than multiplication. As you can see, you need only 8 ($4 + 4$) transactions to connect all 4 customers with all 4 producers through the intermediary. Each producer or customer has to deal with only the intermediary, who makes all the necessary connections. Even with markups or commission fees, intermediaries can lower your overall distribution costs because you'll have fewer transactions in your channel.

This example is simplistic, but you can see how the logic applies to more complex and larger distribution channels. If you choose to use a direct channel whereby you deal with customers directly for sales, service, returns, and so on, be prepared for a lot more work on your end, which may not be worth your time and the opportunity cost of dealing with customers' needs over executing more marketing programs to gain new customers and sales. (*Opportunity cost* is the loss associated with choosing one option over another.)



REMEMBER

The trend is toward simpler, more direct channels, online and off-line, and you need to be prepared to handle a large number of customer transactions to be in step with this trend. A good general rule for you as a marketer is to use only as many intermediaries and layers of intermediaries as seems absolutely necessary to reach your customers. Try to keep it simple and add more parties only if you can't do it well yourself.

Preparing for Successful In-Store Selling

Even with the growing volume of online shopping transactions for just about any product category, in-store shopping is still part of the human experience. People like to shop in person, where they can see tangible products, feel the peaches or plums, and mingle with people. Being present in the real world is still a strong component of human nature. For retailers, creating an atmosphere that is inviting and experiences that are worth repeating, are key to growing and maintaining sales and loyalty. This section shares some ideas to help you get started.

Creating an inviting store vibe

A store's atmosphere is critical to building traffic and increasing the value of transactions and overall sales. Creating the right atmosphere requires paying attention to your customers' lifestyle, personas, and why they shop. It's often about more than just the products you sell.

The best way to do this is to conduct in-store surveys at the cash register. (See Chapter 5 for details on surveys.) Ask customers what they like most about your store environment, what's missing, and how shopping with you makes them feel. Then find ways to create an atmosphere that supports your findings.

Harlan Bratcher elevated sales for Armani Exchange when he was the brand's CEO by creating an atmosphere that was emotionally engaging beyond the products he sold. His target audience was young, single adults who enjoy the metropolitan social scene. So he created a nightclub ambiance for his stores. His team

researched the music his customers loved to listen to while dancing, created spot-on playlists, which they played loudly, and added lighting that reflected a dance club atmosphere. Sales skyrocketed. This strategy not only made people feel fun, attractive, and glamorous, which in turn made them buy more, but it also drew people off the streets because the music and lights were audible and visible outside the store.

REI is another brand that creates a particular atmosphere in their stores. Some of its flagship stores have climbing walls that allow customers to experience adventure and their own athleticism. The Denver, CO store has a 47-foot climbing monolith with 6,400 square feet of a hand-sculpted rock-like surface that reflects some of Colorado's most popular climbing areas. It offers 12 routes that are rated for difficulty on the Yosemite Decimal System which governs the sport in the real outdoors, and includes hand cracks, finger cracks, overhangs, and more. They do charge a minimal fee to climb their walls so people will come whether they need to shop or not. However, it's likely hard to be in REI, surrounded by things that make you feel you are on top of the world, and not buy anything.

American Girl is one of the best examples of how to create a lucrative retail atmosphere. Their flagship stores, like the Fifth Avenue location in New York City, offer experiences that make lifetime memories for parents and children beyond the dolls and accessories they sell. These include a cafe that serves afternoon tea, a theater, a beauty salon so children can get hairstyles that match their dolls, and much more.



TIP

Trust your instincts and imagination. Experiment with your ideas and dare to be different. Look to create an experience that makes shopping memorable and something people want to do again.

If you're competing with an established brand like Starbucks, find a new or local twist that makes your experience a bit different. Add easy-to-serve lunch foods like soups and prepackaged salads from a nearby café, offer books by homegrown authors, display local artists' work, provide seating designed for laptop use, and create a different experience that reflects the local culture over the sameness of an international chain.

Stimulating sales at point of purchase

The *point of purchase (POP)*, or the place where customer meets product, represents a critical opportunity to increase your sales. Although customers may have a planned purchase in mind when heading to your store, research shows that the majority of their purchases are actually unplanned. It's like going to the grocery store for just one thing and ending up with \$100 worth of groceries you didn't have in mind when you left home.

This is the phenomenon of POP advertising, those signs on store shelves or end caps that “remind” consumers they need specific items. Table 15-1 shows you just how important POP advertising is, given the percentage of unplanned purchases at grocery stores and mass merchandise stores. (The statistics are from Point of Purchase Advertising International.)

TABLE 15-1

Nature of Consumers’ Purchase Decisions

	Supermarkets’ Percent of Purchases	Mass Merchandise Stores’ Percent of Purchases
Unplanned	60%	53%
Substitute	4%	3%
Generally planned	6%	18%
Specifically planned	30%	26%

Your direct, mass, and display advertising and social media messaging drive people to your store. Your merchandise selection, POP advertising and messaging, pricing and display strategies, atmosphere, and interactive experiences including augmented reality (AR) get them to purchase more (see the nearby sidebar for an explanation of AR).



TIP

Here are some tools you can use to improve engagement and enthusiasm for shopping at your store:

- » Place signage on shelves to draw attention to products for which you want to boost sales.
- » Set up freestanding floor displays that grab attention for products and promotional prices.
- » Add QR codes to displays, signage, and other POP communications if you want to give customers ways to link directly to a promo or an informational web landing page.
- » Display signage with a scannable app code (supplied by a 3D app maker) that in turn produces an AR display on the shopper’s phone or tablet. Let shoppers see in AR how that hat, bracelet, or other product will look on them. When you make the experience “real” through engaging technologies, consumers internalize the value of your products and become emotionally invested, which is when you increase your chances of closing the sale.

A CLOSER LOOK AT AR

Augmented reality, or *AR*, is the overlay of digital imagery, often 3D, on some underlying context, usually what you see in front of you. In a store setting, customers encounter a sign that says, *What does this watch look like on you?* They hold out their arm, and suddenly they see themselves wearing that very watch. In a B2B setting, a sales rep might use a tablet to photograph a factory floor and then show the plant manager a 3D simulation in which new equipment is placed in context.

Firms like Blippar (www.blippar.com) and Augment (www.augment.com) are potential sources of 3D pop-up images and information that marketers can use to enrich the B2C shopping experience. Generally, you set up an account with an AR supplier; upload 3D images, exploded views, videos, or other content associated with specific scannable symbols for your products; and then let shoppers know they can download a free app that will give them an interactive experience at the point of purchase.

AR applications work well for both online and in-store shopping experiences for home furnishings, eyeglasses, hair and beauty products, and much more. With AR apps, you can let customers “see” how your products will look on them. This takes POP displays to a whole new level. Customers can upload an image of themselves or a physical setting to see how a hair color or lipstick color will look with their coloring, or how a chair or bathroom fixture will look in their home, with their flooring, wall colors, and room dimensions.

Check out AR apps offered by Home Depot, Wayfair, Target, and IKEA for home improvement products, and Sephora and L’Oréal for makeup and hair products.



REMEMBER

Technology changes quickly for all businesses. You must stay on top of marketing technology changes that impact how you distribute, sell, and market your products and the type of experiences you can create. If you don’t, others will, and you may fall behind. Best advice for anyone in marketing today? Don’t blink!

IN THIS CHAPTER

- » **Prospecting tactics and tools for B2B businesses**
- » **Tips for achieving lifetime value for your customer**
- » **Closing sales with ESP selling methods**
- » **Managing your sales pipeline**
- » **Using account-based marketing to secure loyalty, get referrals, and increase account value**
- » **Compensating and managing your sales force**

Chapter **16**

Prospecting and Selling for ROI

Sales is no longer about offering a product, taking an order, and delivering it on time and on budget. In fact, it never really was. Sales efforts that work are about nurturing relationships, having dialogues rather than sales monologues, and caring for customers' material, functional, and emotional needs.

To that end, successful organizations in all industries, and both the business-to-business (B2B) and business-to-consumer (B2C) sectors, create a sales culture around customer needs, not just a sales plan with supporting marketing materials. A successful culture is one in which all team members see their primary role as serving customers' needs, taking care of every detail, and delivering the kind of

attention and care that makes customers feel like your only customer, or at least your most valued one. Although this may seem a bit idealistic, it's not, because if you don't do it, a competitor will — and a few already are.

A successful business culture is one that is focused on securing lifetime value from every customer, not just immediate sales. Achieving lifetime value requires a plan to nurture customer relationships throughout all their purchasing years, not just the initial sales cycle.

The key to sustainable profitability is to have robust strategies in place for nurturing lifetime loyalty, securing new sales from new customers, and generating referrals among highly qualified leads. In other words, you need to have strong acquisition and retention programs that focus on capturing the lifetime value of each customer.

This chapter outlines some selling strategies for customer acquisition and retention and provides tips for building strong sales channels. Because B2C purchases are often far less complex than business purchases, and can often be impulsively triggered with the right digital communications at the right time, the majority of this chapter focuses on tips and tactics for the complex B2B sector, in which sales cycles can last months or even years.

Exploring Proven Prospecting Tactics and Tools

The hardest part of selling is finding the right customers. This is further complicated by the fact that getting teams to embrace prospecting can be the hardest part of running a sales organization.

Prospecting is the act of identifying qualified leads for your business and nurturing those leads along a sales journey that involves meaningful conversations, needs assessments, product demos, customized proposals, and customer experiences that secure loyalty and referrals. Finding the right leads and keeping them on a path to *yes* is no easy task. It takes a lot of time, commitment, trial and error, and a thick skin. On average, the conversion rate for B2B sales, according to the International Centre for Trade and Sustainable Development, is 20 to 25 percent of the leads pursued. For an individual sales rep, the conversation rate is 2 to 5 percent for leads pursued and nurtured.

Clearly, the key to maintaining a steady revenue stream is to secure and convert more leads than you lose. Sometimes, that's easier said than done. This chapter is full of tips and tactics to help you with this task.

Prospecting tactics that work

Prospecting may seem daunting, but it's a key part of growing a successful business. This section presents some strategies you can use to prospect better.

- » Making phone calls still works, especially when you're calling existing clients to ask for more business or referrals for new leads. Calling past clients is also worthwhile because you may find them in a position to work with you again, and a phone call simply prompts the reconnection.
- » Attending or sponsoring events is one of the most effective prospecting tactics because you meet real people, in real time, and spark real conversations that can lead to sales. Trade shows, webinars, and online and off-line training courses are examples of events that pay off. You can find more on leveraging events for sales in Chapter 14.
- » Sending emails is a solid way to introduce yourself to leads and spark conversations that can lead to engagement and sales journeys. As mentioned in Chapter 11, the success of email campaigns for prospecting depends on the readiness of the leads you send email to, compelling copywriting that gets email opened and acted on, and your ability to follow up quickly to nurture any interest generated.

Perhaps the most powerful tactic for prospecting is patience. Connecting with a potential customer to nurture a valuable relationship and build trust almost always pays off better than rushing the process and going for an immediate sale to meet your sales quotas. Sending leads your educational content (discussed in Chapter 7) can showcase your expertise and partnership value beyond the products or services you sell. Often, the organization that provides the most support for informed decision making is the one that gets the sale.

Prospecting tools that generate leads

Beyond tactics, sales teams need tools to help them identify qualified leads and turn those leads into customers. Marketing technology innovators are rapidly adding to the toolbox of options to help businesses identify shoppers in their space, and connect for meaningful engagement. This section sets forth a few of the tools that are available now.

Website visitor identification software

You can subscribe to a software platform that identifies the companies represented by the people who visit your website. With this information, you can then search for the decision makers at that company in the positions you want to target. Some platforms go so far as to make suggestions as to who the actual person might have been. Most stop at giving you the actual person and email identified as that currently breaches privacy protocols.

Leadfeeder is one of the top visitor identification platforms available today. Its software uses internet service provider data to let you see who's visiting your website and where they work, how long they were on your site, which pages they visited, and more. You can also set up behavioral and demographic filters that sort and score the leads you receive.

Sales intelligence software

You can also subscribe to a sales intelligence software platform that enables you to identify companies worth targeting for your business and then find the people in the positions you need to reach. These tools provide email addresses, phone numbers, and business addresses for prospects, and help you build lists of the ones to target. You can then sync those lists with your contacts in HubSpot or another customer relationship management (CRM) platform.



TIP

There are numerous sales intelligence software providers to choose from. Leaders in this category include LeadIQ, 6sense, and RocketReach. G2.com, a review site for business technology, provides feedback on visitor identification software and sales intelligence software companies. It's worth taking a look at what they have to say before choosing a software platform for your business.

LinkedIn

For B2B sales, LinkedIn is the pinnacle of online networking tools, with more than 66 million monthly active users in the U.S. alone. A standard LinkedIn account allows you to search companies and people to find out more about brands and their employees.

The platform's Sales Navigator tool allows you to conduct specific searches, see who views your profile, send InMails to leads you find (LinkedIn's version of direct messaging with the app), build lists of leads, and more. The Advanced Sales Navigator sends you Buyer Interest Alerts to help you keep track of what your leads pay attention to and any changes in their profiles that may impact their *lead score*, which indicates their readiness to buy and how closely they match your customer criteria or profile.

Prospect lists

Purchasing prospect lists can actually do your brand more harm than good. The reality is, when you email prospects on these lists, you're spamming contacts that have no prior relationship with you, so your emails are likely to generate a lot of unsubscribes and spam reports. Both issues will hurt your Sender Score (discussed in Chapter 11) and can get you blocked from emailing contacts you have permission to reach out to. As mentioned in Chapter 11, you need to carefully vet the lists you purchase and work with reputable suppliers that can build models with contacts identified as willing to receive marketing information.

Instead of buying prospect lists, you're better off creating your own database of leads in your CRM platform from quality contacts you've engaged with emails, direct sales, social media posts, and the other tactics and tools mentioned in this section.

Selling for a Lifetime

Lifetime value — the foundation of sustainable brands — is the projected net value a customer represents to a brand over their entire life cycle. Capturing lifetime value is critical for any business in any industry, B2B or B2C. It's far cheaper to retain current customers than it is to acquire new ones. And when you keep customers — and keep them happy — they often become brand ambassadors who bring more business to you at no additional cost.



REMEMBER

As you develop plans to capture lifetime value, keep in mind that it's more than customer loyalty. The calculated lifetime value for your business reflects customers' total value throughout their life cycle for your category. For your marketing plan, it should also reflect the value of the customers they refer to you. Your marketing and selling strategies therefore need to include incentives for capturing valuable referrals.

Calculating lifetime value

You can calculate lifetime value using three formulas: simple, complex, or scientific. Whichever method you use, you must build your sales strategies around lifetime value because you need to retain customers to be profitable. Continuing to sell to the customers you already have is far less costly than always striving to acquire new customers.

When you increase customer satisfaction, you increase their lifetime value to your business. A report by Harvard Business School showed that even a 5 percent

increase in customer retention can generate a 25 to 95 percent increase in profits. That pretty much sums up what your sales priorities should be.

For your business to be profitable, your *cost of acquisition*, or the total amount you spend to convert a lead to a customer, must be below the revenue they bring to you and within your target profit margin. The next sections briefly explain the different formulas for calculating lifetime value.

Simple

The simple formula just uses the average customer value per week to show the revenue your customers can generate for your business each year and over their lifetime:

$$52 \text{ weeks}(\text{average customer value/week})(\text{years in life cycle})$$

For example, if you're a sandwich shop with an average customer who visits three times a week and spends a total of \$25 a week, and your average customer life span is 20 years, your calculation would look like this:

$$52(25)(20) = \$6,500 \text{ per customer for 5 years}$$

This shows a customer value of \$1300 a year, which over a lifetime of five years, equals \$6,500.

Complex

This formula takes into consideration individual variables per customer and your average profit margin.

$$(\text{lifespan in years})(\text{weeks/year})(\text{average purchase/visit})(\text{visits/week}) \\ (\text{profit margin/customer})$$

Here is an example of how this would be calculated for a company that has a potential life span of 10 years with customers visiting 8.3 weeks of the year, spending an average of \$3 per visit, and contributing a 20 percent profit margin. $(52)(8.3)(3)(0.20) = \$2,589.60$

Scientific

The scientific formula is the most complex because it takes into account your *discount rate*, which is a percentage that projects the current value of cash flow. The formula looks like this:

$$M(r/1 + i - r)$$

In this formula, M represents a customer's *gross margin* over their life cycle, r equals the business's customer retention rate, and i equals the discount rate, which is typically between 8 and 15 percent.

For a business with a gross margin of \$1,000 for a customer's lifetime, a retention rate of 75 percent, and a discount rate of 10 percent, the lifetime value per customer works out like this:

$$1,000(0.75/1 + 0.10 - 0.75) = \$2,142$$

While all these formulas give you a solid look at the potential lifetime value of your customers, you need to choose one that best fits how you operate. If you are a small business and just want to measure the impact of loyalty to help guide your marketing spend, keep it simple. If you are a complex company and need finite information to guide your pricing and get you to specific profit margins and revenue, then work through the more complex formulas. However, keep in mind the reason behind calculating LTV is to help you see the power of keeping customers over their purchasing lifetime and help determine how much you should spend on loyalty programs.

Understanding the importance of customer loyalty

A customer's lifetime value is often greater than the numbers calculated using the formulas in the previous section. If you can retain customers for their consumer life span, you're likely satisfying them to the point that they're referring others.

If each customer who's worth \$26,000 to you over a lifetime refers three customers with the same lifespan and number of years, then each customer is worth \$104,000. This alone illustrates the importance of customer loyalty and referrals, especially because you didn't incur any expenses bringing in the revenue each customer referred.

Retaining customers is far cheaper than acquiring new customers and can grow your business faster than almost any other activity. Various studies show that it costs five times more to acquire customers than to retain them, and a 2 percent increase in retention is akin to a 10 percent decrease in operating costs.

Even with all the marketing technology available to help you nurture relationships, loyalty is difficult to attain. Many studies, including reports from the Consumer Council on Loyalty, show that in one year's time, consumer goods companies can lose up to 40 percent of their customer base, and even low-priced products, such as cold cereal have lost substantial sales from more than half of

their most loyal customers. Gaining those lost sales back every year requires a lot of resources that can be better spent on building year-over-year growth.

For B2B enterprises, customer loyalty is critical because a single customer can generate substantial revenue a year, and losing even one customer can throw off your entire bottom line.

Loyalty programs are not all the same. Even within the same industry, programs differ substantially between B2B and B2C brands. In the following sections, I share some insights to help you set up a program that's right for you.

Consumer loyalty programs

Loyalty programs for consumers most often involve points they can redeem for discounts or goods. Successful programs allow consumers to choose how they want to be rewarded and give them options for using the points they've earned.

American Express Membership Rewards is one of the fastest-growing and most successful consumer rewards programs. Cardholders can redeem points for goods they're already purchased and for gift cards from a wide variety of brands. They can use points to cover travel expenses or recent charges made on their cards. They can also pay with points or donate points to charitable organizations, a further way of empowering consumers to do what matters most to them.



TIP

When creating your own loyalty program, find ways to give your customers as many options as possible to make your rewards more meaningful and personal.

B2B loyalty programs

Successful B2B loyalty programs focus on added value that goes well beyond the products or services provided. For example, if you operate a business supply store and sell laptops for customers' sales teams, you might offer a free printer every time they buy several computers from you in a given year. You can also throw in annual software subscriptions, like Adobe or Microsoft, for repeat purchasers. If you sell equipment, you can offer some free maintenance services for those that purchase equipment from you.

The best loyalty programs for B2B companies are built around providing partnership value rather than redeemable points or discounted prices. It's often considered taboo for buyers to get personal rewards for business purchases anyway. Added value in a B2B loyalty program can include

- » **Educational materials to help purchasers make informed choices.** Offer loyal clients decision guides, competitive comparisons, return on investment (ROI) calculators, and similar tools.

» **Services exclusive to customers that help them grow their business outside the value you offer.** Consider hosting workshops where you provide exclusive insights or skills training to help your customers improve their marketing, boost customer retention rates, or lower operating costs. Brand events for “clients only” add an aura of prestige while enabling clients to gain actionable insights and network with others in their industry.

Customer attrition rate

Truly understanding your customer loyalty status involves understanding your customer attrition rate as well. To figure your *attrition rate* (or customer turnover), follow these steps:

- 1. Compare last year’s customer list with this year’s customer list to find out how many customers you lost during the year.**
Ignore new customers for this calculation.
- 2. Count the total number of customers on last year’s list.**
That gives you your *base*, or where you started.
- 3. Divide the number of lost customers (from Step 1) by the total number of customers (from Step 2) to get your turnover rate.**

For example, if you started the year with 1,500 customers and lost 250, your attrition rate is nearly 17 percent. If you find yourself in that situation, it’s time to focus on improving customer service.

Getting to Yes via Emotional Selling Propositions

For a complex B2B company, closing a sale often requires taking the customer on a fulfilling journey that leads to a rewarding and profitable partnership. The more complex your business, the more steps there are in this journey. Customer experience typically has many touchpoints before a sale is closed. Steps are designed to help you identify those that are likely to become customers and those that are not a good fit so you can move and not waste valuable resources on leads going nowhere. The key is to efficiently manage each step for each prospect so you don’t waste time on dead ends, and instead spend your valuable time and resources on those that are a good fit.

The most effective steps in a customer journey are those that align with or fulfill the emotional selling proposition (ESP) associated with your product offerings. These steps might center around offering a checklist to help prospects make informed decisions or providing case studies that demonstrate the customer satisfaction. Your goal in developing a sales journey should be aligned with as many emotional triggers as possible. For the basics on ESPs, check out Chapter 2. Chapter 3 has more on customer experience.

Defining your process

Figure 16-1 displays the sales and service process as a flowchart. Note that the chart doesn't flow automatically from beginning to end. As leads mature or opportunities and needs change, you can cycle back to an earlier stage and continue moving them on a journey to conversion.

Adapt this flowchart for the variable emotions and ESPs associated with your customer segments. For example, if you're a creative designer selling your services to a 30-year-old manager at a high-tech company, you may want to center your initial steps around building trust in you as a person and then credibility for your competency by sharing examples of your work and the associated results. If you're selling to baby boomers, your focus may be on the heritage and history of your brand and then your reputation as a supplier.

Figure 16-1 integrates the sales and service processes because they go hand in hand. Customers choose the partners that provide the best support, not just the best overall value in price, functionality, and quality. This happens in B2B and B2C. You can't stop nurturing a sale when you close the deal and write the order. You need to sell and nurture sales with the goal of capturing lifetime value at all times. So you need to think of a completed sale as the beginning of a relationship-building process. More sales calls, further presentations, and efforts to find new ways to serve the customer can help you retain and grow the account.



WARNING

Watch out for leads that drain your time with questions about pricing and customized services yet show little propensity to move forward with your business. Unfortunately, you'll encounter people who pretend to be interested in your services and product demos just to turn around and ask their current supplier to match your offers. This happens most in industries where contracts with suppliers are long and hard to break, so be on the lookout for this possibility and have the discipline to move on when you suspect it's happening.

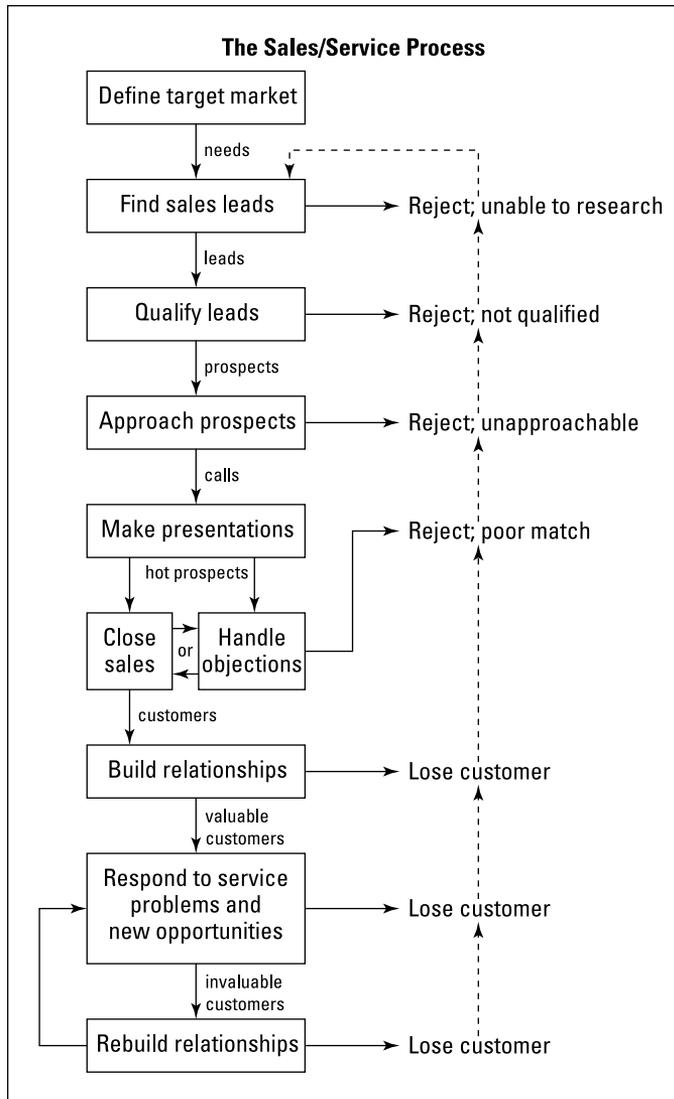


FIGURE 16-1:
A flowchart showing the process behind sales and service.

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Establishing SME status to bolster sales

Because all businesses today have access to the same tools for identifying leads and communicating or selling to them, it's important to stand out as experts in your field. Achieving *subject matter expert (SME)* status for your team members can differentiate your brand and team from your competitors. Customers and prospects want to align with partners who can provide insights that help them avoid poor choices that may result in lost personal credibility and even career

opportunities. All of us want to work with people who can help us succeed. If you know as much or more about their industry as your customers and prospects do, you'll likely become one of their top choices.

Following are some ways to emerge as an SME who can add value for clients beyond the goods or services you sell:

- » **Follow industry news.** Schedule time in your week to monitor industry news, or the magazines and websites that report on businesses and activities specific to your trade. Stay on top of mergers, acquisitions, regulations, and best practices for your industry. When you reach out to a prospect, you can build conversations around how current events are creating opportunities or presenting challenges for businesses like theirs. The insights you share will often be “news” to clients who don't take the time to read industry updates and will instantly position you as a source of valuable insights they need to address to succeed.
- » **Prepare market reports.** Read new studies put out by think tanks and research companies like Forrester, Gartner, Deloitte, and Nielsen; business news companies like Bloomberg; and other groups that originate studies on trends and projections for industries you serve. These reports are full of verifiable data and insights that help businesses large and small make informed choices and avoid costly mistakes. You can compile key findings and actionable information in brief reports for your customers as an added value of partnering with you. Because many customers likely won't have the time to read full market reports regularly, you'll become a valuable resource for insights that add partnership value for your brand.
- » **Speak at industry events.** Find a topic on which you have a strong track record and submit speaking proposals to associations and other organizations that host or sponsor conferences and conventions. As a speaker, you're instantly ordained as an SME, and you'll get valuable free exposure for your expertise and brand. At your session, offer a white paper or session summary on your theme and resources cited in exchange for contact information so people in your audience will give you permission to reach out to them afterward. Doing this can get you hundreds of contacts to add to your contact database.

These activities elevate your SME and partner status, both of which are critical to keep prospects on your journey to yes and get them off a competitor's pathway.



TIP

As you read industry news, you'll also identify people on the move — those taking new jobs or getting promotions — to positions involved in decisions to use suppliers like you. Use your market intelligence gathering not only to elevate your value to customers but also to find new leads to add to your contact database.

Prioritizing Your Pipeline

Identify your leads according to how qualified they are to close a sale in a specific time period and work them accordingly. If you qualified your leads properly when they first entered your sales funnel or system, you should know each lead's propensity and time frame for purchasing. Sort them on a scale for closing time and transaction value. Doing so will help you better identify your highest quality leads and direct your efforts and those of your sales team.

Categorizing each opportunity

CRM systems from providers like HubSpot and Salesforce enable you to assign probabilities for closing to each prospect during a specific time period and score leads as high, moderate, or low for closing. Organizing your leads in a pipeline template on your CRM platform or even in Excel will help you see how to best spend your resources and time. You can't get back time you spend chasing business that goes nowhere, so assign probabilities and lead scores quickly in a prospect's journey to help you maximize your efforts and reach your sales goals and quotas efficiently.

Categories to consider in your sales pipeline include

- » Immediate opportunity
- » Future opportunity
- » Demo or meeting booked
- » Post meeting status
- » Closed won
- » Closed lost
- » Objections

Sorting by emotional triggers

You also need to sort your leads according to the emotional triggers that most influence them to engage, trust, and purchase. Review your customers' ESP profiles (see Chapter 2) and build your sales presentations, proposals, and messaging around those emotions. If you can address and minimize any fears and insecurities at the beginning of your sales process, you'll have a much greater chance of moving customers to *yes* in an effective manner.

Developing questions or screening criteria around your ESP profiles can also help you sort out high-quality leads and eliminate poor-quality prospects quickly. If you have detailed conversations when initiating relationships and prepare a robust needs assessment to qualify each lead, you can ask what they are fearful of missing out on, what anxieties they face when purchasing in your category, and what kind of proof of concept they need regarding your brand's product and service promises. Ask what social proof they need to move forward. Answers to these questions will inform your sales conversations and offers.

You should also document the emotional and tangible reasons an account didn't close in an "Objections" category of your pipeline (see the previous section). These reasons may include price, risk aversion, lack of status, and so on. As leads move from one category to another, be sure to document what changed. For example, did a lead's probability percentage move from 75 percent to 25 percent, or vice versa. Document all reasons for a lead to either move forward or backward so you can mitigate any related issues with future leads and learn how to better manage your leads as a team.

Consultative Selling and Account-Based Marketing

Consultative selling is just what it says it is: consulting prospects on how to make wise decisions versus trying to sell them something out of the gate. Consumers, clients — all of us — prefer to be informed and involved rather than sold anything. *Consultative selling* involves providing information and insights that help your customers achieve their goals for costs, performance, outcomes, profits, and so much more.

The next sections include tips and tactics that will make you a consultant, not just a sales rep.

Tactics for consulting with consumers

Beyond providing information that helps prospects and customers with the decision process in an objective manner, consultative selling includes the following actions:

- » Consult first, build trust second, and sell third.
- » Listen to your prospects' and customers' needs and act on their best interests, not your own.

- » Offer suggestions and solutions that meet their purchasing goals, not your sales quota.
- » Address their fears and show you can help them avoid setbacks.
- » Ask thought-provoking questions that inspire your prospects and customers to think about their problems and solutions from new angles.

When you follow these steps, you build value that your competitors can't match.

Tips on consultative selling

Here are some simple but powerful tips for consultative selling:

- » Gather information about your customers and prospects to identify the following:
 - Specific issues and needs for the level they're at in their jobs and the influences of the current market environment
 - Which competitors are likely calling on them so you can address their messaging and promises and build your case
- » Share industry data and insights that validate the need for your products. You can also show calculations for how much products in your category can impact a client's bottom line.
- » Anticipate the questions your customers and prospects are likely to ask you and be prepared to answer with confidence, validation, and facts.
- » Ask what criteria drive their decisions about products and partners they choose. Don't assume you already know this answer.



REMEMBER

Consultative selling goes far beyond the first closing. It's about nurturing the account for an entire lifetime and adding new levels of value along the way. Always take the following actions to keep accounts and lower defection rates:

- » Follow through after the sale to ensure all expectations were met.
- » Do periodic reviews to help identify issues that can be improved as well as new opportunities.
- » Continue to share insights to help contacts with all aspects of their job.



TIP

If you lose sales to competitors, call those leads after a few months to see how happy they are with their choices. If they aren't happy, you just opened the door for a second chance with fewer competitors to beat this time around.

Relying on account-based marketing

After you gain a customer, you never quit selling yourself or consulting them. You need to realize that customers may decide at any time to look elsewhere. To prevent this from happening, develop an account-based marketing (ABM) program for your sales team and customer service reps to follow.

ABM involves many tactics that can help you identify risks and create opportunities. Here's a list of three effective ABM activities:

- » **Account reviews:** At least once a quarter, you should meet with your clients, in person, if possible, to ask how you're doing. Ask them to score your team on responsiveness, service, and added value. Enable them to score your team members confidentially if you want to get the most objective insights about team members they may not want to offend.
- » **Personalized offers and rewards:** Customize offers for new services and reward your loyal customers with added value. Loyalty in business goes both ways. Show them what you can and will do to reward their loyalty over time and how the added value can boost their bottom line.
- » **Assessments or audits:** For some of your larger accounts, audit the ROI they've experienced with you as their partner. If you're in the business of repairing manufacturing or medical equipment, for example, you can show them how much they saved with your repairs over the cost of a new device or machine.

Show that working with you has positively impacted customers' revenue and profitability. This is a powerful marketing story to tell when you're asking for more business or increasing your pricing.

Creating Sales Presentations with ESP Power

What makes a sales presentation great? Pretty much anything that gets customers to say *yes* quickly or fosters evangelism to get internal purchase approvals to move forward. You have a greater chance of achieving these outcomes when you build your presentations on emotional values, your ESP, functional promises, and industry stats that activate the psychological triggers associated with authority, social proof, and trust.

Inform, involve, inspire

The goal of any sales presentation is clearly to convince the prospect to become a customer. Presentations built upon the following *three I's* can help you get an *in* with decision makers:

- » **Inform.** When you provide information that enables purchasers to make wise, informed decisions, you become a partner, not just a supplier or vendor. Include current industry data and findings in your presentations to show you know the market and help your audience discover something new.
- » **Involve.** We've all heard the age-old wisdom of presenting your ideas in a way that makes others think they're actually their ideas. Well, this works exceptionally well in selling. You accomplish this by involving clients in the discussion about solutions rather than just presenting your solutions. Expand on what prospects are doing right, acknowledge and praise successes, and show how you can build on their current foundation to help them achieve even greater outcomes.
- » **Inspire.** A prospect's inspiration to try a new product or supplier comes from being validated for what they've already done and being encouraged to take their successes to a new level. It doesn't come from being handed a contract and a pen. Inspiration comes from many directions, including
 - Being shown new ways to improve, not told that what they're doing is wrong
 - Being given new tools and insights for building on current successes
 - Knowing others have succeeded by making similar choices or working with your company
 - Being given free trials and generous return policies, which take the fear and risk out of purchases



TIP

A proven method for inspiring trial that works well in both B2B and B2C sales is to give prospects a free trial. Many people like free trials and don't cancel free accounts when they expire, so that "free" trial often results in revenue. Most important, it takes the fear out of making a commitment that's hard to cancel and makes the initial purchase easier.



REMEMBER

Your presentation should inform while also making the prospect comfortable and getting them excited. Present yourself with confidence and do your homework on your prospect just like you would for a job interview.

Tell your brand story

A sales presentation should include your brand story and highlight the value you offer prospective clients. A compelling brand story is one in which others can positively and enthusiastically see themselves.

Some tips for creating stories that inspire buyers and close sales include

- » **Build your main points.** As with any persuasive communications effort, you need to clearly define your main points and present them in a way that's engaging. Make a bullet list of three to five main selling points that support your ESP, validate the function or performance goals you promise to deliver, confirm your position in the market, and differentiate you from the rest of the field.
- » **Back up your claims.** Don't expect people to automatically believe your claims, promises, successes, and all the other things you say about your brand and your product or service. They hear similar chatter from every salesperson who walks in their door. Back up every claim with stats, facts, or testimonials from third parties to make them real. Better yet, back up your claims with a discounted trial offer to let prospects see for themselves what your product or services can really do for them.
- » **Show and tell.** Showing is usually better than telling, which is validated by the growing use of videos to promote products and close sales. Videos engage more of the senses, adding to message recall. Customer testimonial videos can powerfully capture the emotions you want prospects to feel, expediting their movement through your sales journey.

Even if you have a great slide show or video, don't use it as a substitute for face-to-face conversations, the most powerful way to convert leads. Make your strategic points in person and base them on what you discovered while listening to your prospect. Use a video if you need to back up your claims with third-party statements or demonstrate how your product works.

Respond to problems

To avoid problems when onboarding new products or services, treat all customers like prospects no matter how long you've been managing their account. Pay attention to every detail of their account to ensure that nothing is set up to fail and they're being serviced properly by everyone in your organization.

The most faithful customers are the ones who had a problem you managed to solve in a fair and generous manner. Many research studies back this up. Inevitably, something will go wrong, and a customer will be upset, disappointed, or

even angry. That's why the account management process has to include *service recovery*, the plan for a satisfactory resolution of problems for unhappy customers.

Make sure customers know whom to contact when a problem occurs and that your entire team is trained to correct the problem immediately. Your service recovery steps should include setting up appropriate protocols and preparing for well-known hiccups.



REMEMBER

Set up protocols and processes that empower your sales and service teams to do whatever it takes to make frustrated clients happy. When you do this, customer loyalty will be stronger because clients know they can trust you to fix problems and take care of their needs.

Service recovery works only when you're willing to make sacrifices to keep customers happy, so define how you will do that and how much you're willing to spend to retain customers based on their value to you now and in the future, and what level of empowerment you plan to give employees to solve problems without involving a manager. Your protocols should cover issues that might occur and issues that have already occurred to assure your teams can move forward quickly.

Organizing and Managing Your Sales Force

Who does what, when, and where? These organizational questions plague many sales and marketing managers, and the answers can make a big difference in sales force productivity.

Should your salespeople work out of local, regional, or national offices? Should you base them in offices where other staff members provide daily support and their boss can closely supervise their activities? Or should you set them free to operate on the road or out of their homes? If you have a small business, should you do all the selling yourself, or does bringing in a salesperson on commission make sense?

The following sections provide some conventional wisdom to help you answer these questions and act in a way that best meets your individual needs.

Determining how many salespeople you need

If you have your own sales force, you should examine the performance of each territory to decide whether more salespeople can help or whether you can make do with fewer people, and where basic sales and service may be falling through

the cracks. Ask yourself the following questions to help you optimize your sales efforts:

- » Are some territories rich in prospects that salespeople just don't have time to get to? Consider splitting those territories or adding salespeople.
- » Are you experiencing high customer turnover in a territory as a result of poor service or other factors you can control?
- » Are your efforts in territories with little sales potential detracting from your efforts in areas with higher potential?

Before you can really determine the efficacy of salespeople in given territories, you need to do some market analysis. What's the total addressable market in a specific region? How many competitors exist in each region, and given your rate of converting prospects to customers, what's the realistic potential for your business? When you can answer these questions, you can hire appropriately and set reasonable individual goals and quotas.

Hiring your own salespeople or using sales reps

You have to decide whether to hire salespeople yourself or subcontract your sales. Most industries have companies that take on the job of hiring and managing salespeople for you. Called *sales representatives* (or just *reps*), they usually work for a straight 10 to 20 percent commission, depending on the industry. Reps that perform consultative selling and customized service often expect, and deserve, a higher commission.

If you have a small company or a short product line, using sales reps might make the most sense. They're the best option when you have scale problems that make it somewhat difficult to justify the cost of hiring your own dedicated salespeople. *Scale problems* arise when you have a limited product line, giving salespeople little to sell and build commissions on, or when the cost of the sales process is higher than the value of the orders placed.

If you have a long enough product line to justify it, hiring and managing your own dedicated salespeople will give you more control, better feedback from the market, and a higher ROI. A dedicated sales force generally outsells an outside sales rep because they are completely focused on your product line.

Finding good sales reps

How do you find sales reps? Word-of-mouth referrals or meetups at trade shows or industry conferences are great ways to find out who is reputable, presents well, and is available. Or, even simpler, ask buyers of products like yours for the names of the reps who currently call on them. Other sources include:

- » **Social media:** LinkedIn has many opportunities to find reps on its job boards and identify professionals looking for work with the Open to Hire tag.
- » **Competitors:** Luring away competitors' reps will enable you to hire people that know your industry and can jump right in. These reps also bring an established and relevant network with them, which enables them to ramp up more quickly than someone starting off new.
- » **Associations:** Industry associations tend to charge nominal fees for posting positions on job boards. These are usually great sources for finding people looking to make a move in their career.

A growing number of websites offer access to sales reps and manufacturers' reps as well as freelance salespeople who work under short-term contracts. These sites provide leads, not final candidates, so make sure you screen people carefully, and if you do hire someone, start out on a trial basis. Because platforms and options change frequently, search online for “outsourcing sales reps” to get a current list of options.

Managing sales reps effectively

After you have reps lined up for each territory, you must regularly track their sales efforts. Which reps perform the best (and the worst)? Usually, 10 to 15 percent of your reps make almost all your sales. Monitor your reps to find out who's the best and make changes quickly to cut your losses and maximize your sales potential. And train each rep how to tell your brand story so your message and ESP are consistent across all reps and marketing channels.

Weekly meetings to review the progress of your team and individuals are a great motivator. No one wants to be seen as the weak link or a slacker when their performance and results lag behind their peers. Creating graphs to visually show sales progress is a good way to get your message across.

Compensating your sales force

If you want to recruit top-tier salespeople, you need to offer them a top-tier compensation plan. Find a way to make your compensation model different from the norm in your industry so your job openings really stand out.

For example, if you want to ensure your salespeople take a highly consultative, service-oriented approach dedicated to long-term support and relationship building, make your compensation salary-based. If you offer sales incentives, consider bonuses linked to long-term customer retention or increased value among existing customers. Your compensation plan will stand out from competitors' pay and send a clear signal about the kind of sales behavior you expect. Similarly, if you want the most self-motivated salespeople, offer a higher commission than the competition.

Because the details of base salaries and commissions vary so much from industry to industry and region to region, you need to research comparable positions to establish a starting point before you design your compensation plan.



REMEMBER

Whatever you pay them, salespeople and sales reps do best when they have high *task clarity*, defined as clear links from their sales efforts to positive results. Make sure they have the products, leads, knowledge, and support to be successful. You'll find that success is the greatest motivator, and your sales force will enjoy the process of selling for you.

Be careful not to provide such a high base salary that there's little incentive to sell. Salespeople tend to do better when they're hungry and eager to earn more.



TIP

Look for people who have an athlete's mind-set, which is often a successful mind-set for sales. People who played sports for much of their youth or in college compete to win, hate to lose, and develop a routine to perfect their skills or sharpen their game. These attributes drive high achievement and profitability for your business, because your salespeople want to beat their compensation goals and their internal competition.

Successful selling depends not only on good systems and service protocols but also on having excellent products that consumers actually want and salespeople who are motivated to sell for you. If your product or service isn't relevant, your sales efforts and staff can't deliver the results you need for your business to thrive.

Always stay on top of your consumers' needs, market trends, and technological innovations to make sure you're relevant in terms of your offerings, not just your selling channels.

6

The Part of Tens

IN THIS PART . . .

Discover ten common marketing mistakes that waste time and resources and find out how to avoid them to optimize your marketing investment and competitiveness.

Understand how to really measure your marketing programs, identify losers and winners, and optimize results across all your marketing channels.

IN THIS CHAPTER

- » Realizing that trying to market to everyone and relying on discounts hurts profits
- » Recognizing the importance of treating all customers (even angry ones) with respect

Chapter **17**

Ten Common Marketing Mistakes (And How to Avoid Them)

Learning from others' mistakes is always better than making your own. This chapter presents ten all-too-common marketing mistakes businesses of all sizes make and how to avoid them so you can keep your sales and marketing efforts on track.

Making Assumptions

Assuming that you know your customers, their preferences, their loyalty to you, and the competitive environment in which you operate is one of the most costly mistakes you can make. In most cases, you're likely wrong.

With all the research and feedback tools available to help you monitor the voice of your customers and their real needs and attitudes, there's no reason to ever assume anything. Regularly survey your customers to see what they like and don't like about your brand, your products, and your service. Do surveys to update your

Net Promoter Score as well. During transactions, ask for individual feedback and engage in social listening. Analyze results to identify trends and things you can do to maintain and increase satisfaction.

Ignoring Customer Complaints

With all the social media channels available, unhappy customers can share a bad brand experience with literally thousands of people in a matter of minutes. In addition to complaining on their Facebook, Twitter, and other social media accounts, they can quickly post negative reviews about you and your products on Yelp, Google, Amazon, and other sites that masses of consumers browse daily.

Whenever this happens — and it will — respond immediately on the site the customer used for the complaint. Let the unhappy customer and others know that you care about each customer and ask what you can do to make it right.

Faking Popularity

Just like all the “fake news” on social media channels, there are often a lot of “fake likes.” Take a look at your Twitter messages — chances are, you have an offer from someone trying to sell you “followers.” Like fake news, this isn’t acceptable by any business standards, because you’re portraying your brand as more popular and successful than you are and misleading consumers about your market position. Be transparent about all aspects of your brand in social media and elsewhere.

Using Dirty Data

Nothing’s quite like getting a great offer from a brand you’ve been loyal to for years only to find out that the great offer applies just to new customers! When this happens, it’s often the result of a brand not cleaning up its data to sort out prospects and customers. With all the customer relationship management (CRM) and data management systems available at many price points today, there’s no excuse for this anymore.

Customers expect personalized communications about their relationship with you and rewards for their loyalty. If, after years of giving you their business, they see noncustomers getting a better offer than you’ve given them, you can damage that relationship beyond repair.

Competing on Price

Discounts and price cuts have their place, but only temporarily, such as when you're trying to stimulate first-time trial and build a base of customers for future email or social media campaigns. Keeping prices low for an extended time or offering low prices frequently just puts customers on notice to hold off and never pay full price. You quickly position your brand as the budget option, which limits your appeal, and once you lower a price, you'll have a hard time ever raising it again.

Although reducing prices to meet sales goals may be tempting, keep in mind that repeated price promotions can erode brand value and create fickle customers who abandon you for competitors' promotions.

Ignoring the Emotional Drivers of Choice

As Chapter 2 tells you, 90 percent of people's thoughts and behavior is driven by their unconscious minds. People respond more to dopamine rushes, which make them feel euphoric and unbeatable, and oxytocin releases, which make them feel connected, accepted, and loved, than they respond to clever ads or blowout pricing specials. When you tap the emotional drivers that influence how people feel about themselves and the world around them, you influence behavior.

Everything you do should be based on creating positive feelings and building trust. Without trust, you can't tap into much of anything else.

Forgetting to Edit

If your letter, email, website, print ad, sign, or billboard has a typo, people remember that goof and forget the rest. Not only can sloppy mistakes make a bad first impression among prospects, but they can also make people question how much attention you pay to detail when you produce your products, manage your invoices, and execute on customer service.

Edit carefully and get someone else to look over your shoulder to make sure nothing slips by. Your brand is only as good as your reputation.

Offering What You Can't Deliver

When you make promises you're not sure you can deliver on, you put yourself in the category of bad salespeople who can't be trusted. In addition, if you try to roll out a product that doesn't work yet or get a product on the market before you've worked out all the details for implementation, execution, service, and troubleshooting, you set customers up to have a bad experience with you. Either way, you lose trust and potential sales.

In most, if not all, cases, those disappointed customers can find another supplier to purchase from and assign their loyalty to. And you can expect those unhappy customers to tell others about your mistake, hurting your prospecting and sales efforts.

Treating Customers Impersonally

Every customer is a person who likes to be treated as an individual. No one likes to be a number. Today, with all the CRM technology, you can usually identify who is on the other end of a phone call. When you can, you should address that person by name, thank them for their business, and ask if you can do anything else to make them happy.

Put yourself in the customer's shoes and take a hard look at all your customer interactions. Are they as personal as they should be? If not, invest in better list-checking, a central database of customers, training on how to pronounce customer names, or whatever else it takes to ensure your business treats all customers like important individuals.

Blaming the Customer

Neiman Marcus is famous for its philosophy that the customer is always right when it comes to how they feel they should have been treated or the quality of the product they thought they were buying. It's easy to think that an irate customer is out of line and overreacting. But you need to take the high road and let the customer be right — within reason, of course.

This doesn't mean you have to let people take advantage of you. But when someone has to vent, listen. Try to offer a solution that you both can live with. Whether you work it out or not, you need to remain professional, reasonable, calm, and courteous. If you don't — and even if you were justified — the customer can easily smear your reputation online, and that's a risk you can't take.

IN THIS CHAPTER

- » Understanding what to measure to get the real results of your marketing campaigns
- » Measuring the true impact on your bottom line
- » Discovering key insights for future endeavors

Chapter **18**

Ten Ways to Measure Results (Beyond ROI)

Marketing and measurement are a science and an art, and it takes a commitment to figuring out how to do both things right to grow sustainable results and profits. Chuck McLeester (www.measuredmarketingllc.com) is a pioneer in marketing metrics. He was a frequent speaker for the Direct Marketing Association and contributor to Target Marketing magazine. Now he teaches marketing at Rutgers University.

In this chapter, Chuck McLeester shares the steps to measuring what matters most for long-term success. This chapter presents ten methods to help you measure the real impact of your marketing campaigns and programs, and gain insights on how to best execute future campaigns for boosting results and efficiencies.

Establish Clear Objectives

Like any investment or initiative, you need to define what you want to accomplish and what you want to measure. Too often, marketers don't end up with the correct data points at the end of a campaign to effectively measure the outcomes. This is most often the result of not defining up front what you want or need to measure.

What are the most important results to measure at each stage of your business to help you determine if you are growing at the desired rate, slowing down, or not growing at all? Some key objectives to measure include your cost to generate each lead and your costs to nurture each lead into a profitable customer.

Tie Your Metrics to Your Objectives

Keep things simple so you can identify measurements without confusion. One way to do this is to track only metrics that are directly related to your objectives. It's easy to think that you need to measure everything but the kitchen sink just in case you need more insights later, or so you don't have to do another campaign to learn something — or, better yet, because senior management will want all the data.

Set Learning Priorities

Be selective about the data points you need to gather and how often you need them, especially with online metrics. You don't need to track every possible navigation path and page view. Doing this will just cause confusion and chaos, which is hard to decipher and sort into meaningful actions.

Try to sort your priorities by (1) the things you need to know right away, (2) the information that's good to know but can wait for later, and (3) the data that you don't need anytime soon, if ever.

Establish a Target ROI

Two primary ways for marketers to measure return on investment, or ROI, are

- » Calculating simple ROI, which is simply dividing revenue that you can measure and link directly to marketing programs by your marketing costs
- » Determining your incremental ROI, which you find by deducting your marketing costs from your revenue

Either of these definitions and calculations is consistent with the classic marketing principles of customer lifetime value (the “R”) and allowable acquisition cost (the “I”), which we cover in the next two sections. (You can find out more about customer lifetime value calculations in Chapter 16.)

Know Your Customer Lifetime Value

Every marketer needs to answer the question *What is a customer worth to us over time?* Some companies limit customer lifetime value to the first-year revenue, which defeats the whole concept if customers' purchasing behavior lasts more than one year of their life. Others base lifetime value on the possibility that a customer will stay with them and continue to purchase for three, five, or even ten years.

Delve into your customer history (if you have the data) and see how long your customers, on average, tend to remain loyal to you, how much they spend per transaction and over time, and how much they refer others to you. To do this, you need to be able to track referrals to customers, which should be part of your learning and measurement plan.

Know Your Allowable Customer Acquisition Cost

Knowing how much it costs you to acquire a customer is important for any marketer of any size business, because it directly impacts your target ROI and your customer lifetime value. For example, if your customer value is \$100 for the period you're measuring or the ratio of your customer's lifetime of purchases and your target ROI is 2:1, then you can afford to spend \$50 to get a customer. That's your *allowable customer acquisition cost*.

Establish Benchmarks

Chances are, you're familiar with the concept of a marketing funnel that illustrates how an impression progresses to a sale and how you can use this progression to forecast marketing results. For example, you estimate the number of impressions your campaign will generate and how many of those impressions will funnel down to responses, qualified leads, sales conversions, and revenue.

You can use the final number of impressions that make it to revenue status to calculate your cost per sale by dividing that number into your marketing costs for a given campaign or annual budget.

Turn the Funnel Upside Down

Most often, marketers start at the top, or the mouth, of the funnel with the number of prospects and work their way down by applying historic or projected response rates at different points in the sales cycle. Another way to determine how much you can afford to spend for a qualified lead is to work backward by starting at the bottom of the funnel with your actual or estimated cost to acquire a customer. Then use your conversion to sales percentage (actual or estimated) to determine how much you can afford to spend for a qualified lead, response, and impression.

These benchmarks will become goals for your campaign. As with anything, test and test again to determine what your actuals are.

Adjust Your Funnel Benchmark Assumptions When You Have Real Data

After you get real data from actual campaign results rather than just your projections based on estimates, rerun your scenarios from the earlier exercises. Make the appropriate adjustments to your funnel assumptions so you can launch new campaigns with realistic goals in place.

To reach the ROI goals you define as a result of actual campaign data, you may need to adjust your media purchasing costs to lower your promotion costs, or you may have to accept higher customer acquisition costs and adjust your target ROI downward.

Avoid the Dashboard Trap

Just because your *dashboard*, or central location for reviewing all your data points simultaneously, *can* measure everything doesn't mean it *should*. Don't become obsessed with *what* you can count. Focus on what you need to count to identify profits, losses, and opportunities.

A well-thought-out measurement plan that's tied directly to your sales and profitability goals should provide only actionable information to drive decisions. Otherwise, it's just busywork that keeps you going but leads nowhere.

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About the Author

Jeanette Maw McMurtry, MBA, first became obsessed with marketing when she stumbled upon a marketing textbook just before graduating college with a degree in journalism. Having realized her passion lay in creativity and analytics, she pursued jobs in marketing upon graduation and eventually landed at DDB Worldwide, Ketchum, and American Express, where she learned the science and art of advertising and public relations. Jeanette spent years consulting and executing marketing, customer experience, sales, and training programs for small and large companies, serving as chief marketing officer for various brands across industries. What helped her emerge as an authority on marketing is her in-depth knowledge of consumer behavior and human psychology and her unique approach to triggering the unconscious mind for unthinkable ROI through psychology-based marketing.

Jeanette has been a keynote speaker at global marketing events throughout Europe, South America, the U.S., and the Asian Pacific, and written columns for global marketing magazines. She is the author of *Marketing for Dummies*, 5th Edition (Wiley), and *Big Business Marketing for Small Business Budgets* (McGraw-Hill). When not focusing on the next big marketing idea, Jeanette enjoys spending time with her husband, three daughters, and two cats, who have decided to let her live with them in the Colorado mountains she's called home for years.

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