



## Database Marketing Plan

### Getting Results from Ezy Communicator

The following information will help you produce an database marketing plan for use with your Ezy Communicator system.

This plan is ideal for new users to help you get started, but it's also useful for existing users to help you get better results.

Follow the steps below to create your own plan to ensure you are getting the most out of your database marketing.

#### **Step 1 - Establish objectives**

What do you want to achieve with database marketing? You need to know this so you can choose appropriate strategies.

Here are some example objectives:

- Attract more new clients
- Interact with current clients more frequently and efficiently to increase retention
- Strengthen relationships with alliances and facilitate more referrals
- Educate and excite database about our full range of products/services to increase sales

#### **Step 2 - Select strategies to deploy**

Now you know what you want to achieve with your database marketing, you need to choose some strategies to facilitate this.

If you need some help with strategies, [click here to download our Goldmine Strategies ebook](#) which covers more than 50 ways you can use email and database marketing in your business.

We often suggest to:

- Brainstorm a list of ideas with your team
- Select the strategies you want to start with (including ones you can automate)
- Identify their schedule/frequency
- Then work out a manageable process to get started (stages of implementation)

Here is an example of the chart you need to create:

<b>Strategy</b>	<b>Objective</b>	<b>Target</b>	<b>When</b>	<b>Who</b>
General newsletter	Add value to our relationships; generate an interest in our full range of products/services; be seen as the expert in industry	Clients/ prospects	Monthly	Joe
Welcome emails (automated)	Add value to the experience of a new client; give them a constant flow of information that will benefit them; make them feel that they are important to us	New clients	Weekly for their first 6 months (starts when they are added to client group in database)	Suzie
Birthday cards (automated)	Make them feel special; add value with a voucher from our alliance	Clients	Annual	Joe
Quarterly workshops	Education; promote other services; attract new clients; manage full process online to leverage time	Clients/ prospects	Quarterly	Nicky
Sales/promotions (2 x seasonal and 2 x referral)	Attract new clients; add value for existing clients; get more sales	All	Quarterly	Joe
Feedback survey (1x new clients and 1 x existing clients)	Evaluate performance against our KPIs (Key Performance Indicators); identify key areas to improve on; show clients we value their opinions	Clients	6 montly for existing clients, 3 months after first purchase for new clients	Nicky
Marketing survey	Test out and introduce new products/services	All	6 mnthly	Nicky

### **Step 3 - Plan database**

You need to set up your database so you can implement these strategies. But first, you need to figure out how you want to organise all your contacts within your database.

You need to break them up into groups, such as clients, prospects, alliances, suppliers so you can easily send campaigns to different groups. [Click here for instructions on creating groups.](#)

Note – one contact can belong to multiple groups. For example, real estate company may have 'clients' as a group but also 'commercial clients', 'investment buyers' and 'residential clients' so they can target their news and offers to specific groups to increase effectiveness.

You can also target campaigns in more detail by setting up custom fields in Ezy Communicator, which are the different types of information you collect on each contact, such as first name, last name, birthday, date became client. [Click here for instructions on setting up your custom fields.](#)

### **Step 4 - Import contacts**

Now it's time to put all your contacts in your database.

You can export them from most program into a spreadsheet (in CSV format) then import them into Ezy Communicator - [click here for instructions.](#) It's much quicker to import them into their individual groups now, so set your spreadsheets up by group before you import them.

If your contacts are already in Ezy Communicator, export them all then arrange them into spreadsheets based on their groups and re-upload them. Each contact is identified by their email address, so when you import them again, their details will just be updated rather than duplicated. good thanks.

### **Step 6 - Implement plan**

Now start working on your first campaigns.

Create and set up all the automated ones first to get those up and running, then work on the regular ones like your newsletter. You can start working on them now then save them as draft campaigns until you are ready to send them.

Note – you have a few options for creating automated campaigns. They can be scheduled to send on a particular date (eg. every month) or based on a trigger (eg. contact added to group). To do new client welcome letters, you would schedule them to send a certain number of days after contact joins the group 'clients' and then make sure you add all new clients to the 'client' group in the database to trigger the campaign.

[Click here for some instructions for using Ezy Communicator.](#)

**And now it's your turn. [Click here to download a blank template](#) for your plan and schedule a time to sit down by yourself or with your team to work on this. Your business can get great results from database marketing, so make sure you are using Ezy Communicator to its full potential.**