MARKETING AND BRAND PROCESS

■ DAN MACINNIS   ■ DESIGNER   ■ COPYWRITER

SMP

Meeting 1 (CLIENT ATTENDS)   1
What we don't know and what makes us different – Audit
Completed by: Dan Macinnis

Research   2
Ask the right people the right questions
Completed by: Dan Macinnis

Survey customers, employees, competitors to understand existing landscape
SWOT analysis
Ideal customer profile

Meeting 2 (CLIENT ATTENDS)   3
Our findings and recommendations
Completed by: Dan Macinnis

3 - 4 Weeks

BRAND STRATEGY

Workshop 1 (CLIENT ATTENDS)   4
Getting the strategy right
Completed by: Dan Macinnis

Aligning the strategy from SMP into an implementation plan & realistic budget

Create personas   5
Your value & ideal customer segments
Completed by: Dan Macinnis

Create personas for key customer segments
Recommendations for use of personas

Workshop 2 (CLIENT ATTENDS)   6
**Your message & branding.
Present summary from workshop 1 and present personas**
Completed by: Dan Macinnis, Designer, Copywriter

Copywriting   7
Summary of findings from workshop 2
Completed by: Copywriter

3.5 Weeks

APPLICATION

Determine key collateral (CLIENT ATTENDS)   8
Determine priority deliverables
Completed by: Dan Macinnis

Dan Mac to work with client to determine a list of priority collateral. ie: website, newsletter, business card etc.

Copywriting   9
Develop copy for each collateral item (only if required)
Completed by: Copywriter + Designer

Copywriter to work with client to develop first draft content for each collateral item. Sometimes this stage happens after the Design concept development stage if the format needs to be determined before the copy can begin.

Depends on what is required

DESIGN

Concept development (CLIENT ATTENDS)   10
Concept development of brandmark
Completed by: Designer

Design development   11
Design development of brandmark
Completed by: Designer

Design refinement   12
Design refinement of brandmark
Completed by: Designer

Finished art   13
Finished art of brandmark
Completed by: Designer

At the end of this stage, artwork is sent to print or goes live if digital.

Depends on what is required

THE STRATEGIC MARKETING SYSTEM
Process to attract ideal customers

Customer Relationship Pipeline & Buying Path

UNAWARE	AWARE	ATTENTION	INFORMATION GATHERING	EXPERIENCE	SIGN UP/ SALE	REFERRAL
Don't know anything about you or your company	Become familiar with you. Association referal, meet you	They are in the market for what you offer	They want more information and are ready to explore working with you	At this stage, they may be ready for a "taste" or an "**EXPERIENCE**" prior to purchase	The lead becomes a customer when they sign the agreement and pay. Service is provided. A customer becomes a client after using on a long term basis	The customer is happy to refer you after experiencing great service and wants to tell your story and **REFER** you to their network

BE CHOOSY	BE THERE	BE RELEVANT	BE PROVEN	BE HELPFUL	BE FRIENDLY	BE CONSISTENT
Ideal Target Market	Build a Connection	Prospect	Lead	Qualified Lead	Customer then Client	Advocate
ITM PERSONA	WHO WHAT WHY WHEN WHERE HOW	EMOTIONAL HOOK PROBLEM YOU SOLVE	PROOF CREDIBILITY TESTIMONIALS CASE STUDIES PR	EDUCATE LET THEM TRIAL SAMPLE	EMOTIONAL CONNECTION	PROCESS PROACTIVE OCCASIONAL TOUCH

MARKETING, attract, educate, interact, nurture, manage, track

SALES, qualify, present proposals, answer objections, close, manage

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THE STRATEGIC MARKETING SYSTEM
Audit for Small Business

Our goals	Where are we now?	Rank	Where would we like to be?
Brand - stand out from the crowd		1. Undifferentiated 2. Better than competition 3. Distinctly different 4. Truly Unique	
Customer/Market Focus		1. Reactive 2. Demographic 3. Situational 4. Behavioural	
Financial		1. Unpredictable 2. Patchy 3. Steadily improving 4. Highly predictable	
People		1. Struggling to attract and retain right people 2. Patchy - variable record of retaining key people 3. Getting there - success in new hires. Getting right people 4. 100% success in the right people on the bus	
Pricing Strategy		1. Random 2. Considered 3. Market Driven 4. Value based	
Behaviours and Values		1. No set communicated value or behaviour system 2. Some conditions of acceptable behaviour 3. Values and behaviours communicated 4. Valued and behaviours embraced and rewarded	
Systems and Processes		1. Weak systems 2. Core CRM 3. Aligned 4. Fully Integrated	

Our goals	Where are we now?	Rank	Where would we like to be?
Partners		1. Informal 2. Defined 3. Joint programs 4. Highly Productive	
Customers		1. Informal 2. List on a database system 3. Ranked and profiles 4. Ideal customers profiled and targeted for each segment	
Marketing		1. Random 2. Planned 3. Aligned 4. Integrated	
Sales		1. Undefined, patchy 2. Documented 3. Sales Funnel 4. Integrated sales and marketing approach	
Customer Support		1. Random 2. Standard 3. Replicable 4. Highly Repeatable	
Service/Product Portfolio		1. Basic 2. Considered 3. Planned 4. Service lifecycle	
Time Commitment/ Frames		1. Undefined 2. Documented 3. Measured 4. Fully Adopted	
Exit Strategy		1. Not considered 2. Considered 3. Planned	

Marketing Fundamentals Checklist

We want to work with Small to Medium businesses that understand that marketing is an investment system. It is an approach to lead generation, brand recognition and employee engagement. To have an effective marketing strategy the following items need to be considered.

Please indicate where you are with each of these items:

Marketing Fundamentals	Have it (Name)	In Progress	No don't have it	Don't have it or need it
Strategy				
Marketing Plan Research – customers. Competitors. Employee feedback, value proposition, values. Pricing model, Target markets, Marketing action plan				
Marketing Budget with RIO and resources Marketing staff				
Ideal Customer Profile List of Key criteria Sales people have criteria				
Technology				
CRM (Customer Relationship Management) (database of customers, suppliers, media by segment used by sales and marketing)				
CMS Website (Content Management System)				
Analytics set up on: Website, Social media, Email campaigns				
Content				
Content Plan Communications to Customers, prospects, Media and Employees and through which mediums				
Style Guide Logo, PMS, Visual Library				
Social Media Profiles LinkedIn, Facebook, Google+, Pinterest, Instagram, You Tube, Twitter, Blog, Slideshare				

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Process				
Mapped out Lead Generation Touch Points Email Guides Brochures How toos Letters Tenders/Proposal Offers				
Customer/ Staff Surveys				
People				
Ongoing Resources				
Content				
Lead Gen				
Web updates				
Events				
PR				

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Marketing Action Planner Overview	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7
Phase	Build it	Build it	Build it	Launch	Launch	Measure and Repeat	Measure and Repeat
SMP – Research and Strategy Budget	▓	▓					
CMS Web			▓	▓			
CRM Database			▓	▓			
Social Media Profiles				▓	▓		
Lead Generation	▓	▓	▓	▓	▓	▓	▓
Analytics	▓	▓	▓	▓	▓	▓	▓
Style Guide		▓	▓	▓			
Other tools and training	▓	▓	▓	▓	▓	▓	▓