

The Five Step Marketing Plan

Finding your company's direction through focus, strategy, tactics, implementation and evaluation.

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Foreword

In the 15 years I've known and worked with Lewis English he's always been passionate about several things: Bad films, obscure sports, virtually any form of music, and helping others to succeed.

The latter is why he's always taken a different approach to marketing, and why he's been ahead of the curve as the industry has evolved in the last few years. A genuine desire to help someone succeed means collaborating. It means working with them to understand who they are, why they are in business and what success actually looks like to them.

It's not about telling people what they need and convincing them you can deliver it just because you know your way around Google Analytics.

Lewis sent me the first pages of this book on the 50th anniversary of the Apollo 11 moon landing. Space exploration is another of his passions, and it's easy to see how this lifelong interest has informed his work. That first mission to the moon is one of history's greatest examples of teamwork - proof of what can be achieved through genuine collaboration.

But more than that, it teaches us about challenging assumptions. When the Apollo programme began, NASA didn't even know what kind of spacecraft they would use to get to the moon. Most assumed they would take a direct approach, just like in the movies. A single ship, fired from Earth, landing on the moon, then blasting off for the trip home.

Those assumptions were wrong. We now know that NASA could never have met JFK's target of a lunar landing by the end of the 1960s if they pursued the direct approach. But thanks to the persistence of a small minority, the programme changed tack and created a craft that would orbit the moon while two astronauts took a trip to the surface and back in a smaller module. A whole lot of teamwork and radical engineering followed, and history was made in July 1969.

This book will invite you to challenge your own assumptions. Assumptions about your customers, your market, your business and your potential. If you rise to that challenge and take this opportunity to understand where you are now, I know it will help you get to where you want to go.

Andy Mackay
September 2019

Introduction

This book is for everyone who can't afford a Chief Marketing Officer. It's for everyone who knows they need some marketing, but doesn't know where to start. Start here.

I have built my knowledge and experience in strategic marketing by working for a wide range of organisations over the last decade. Some have had fewer than 50 employees. Others, such as The University of Manchester, employ over 12,000. During my time in the industry, I've noticed one key difference between large businesses and smaller ones: The access they have to the ideas and understanding of strategic marketing.

Strategic marketing takes a long view of your business and creates a plan that has a real purpose. Without it, there is no method or strategy - just buying in marketing as and when you need it, giving no real thought to the long-term effects. Big businesses are constantly thinking strategically. They look at what the focus, strategy and direction of their marketing is, and what it should be. In larger organisations there is an understanding that marketing is necessary, useful, and an integral part of the organisation.

This just isn't the case for smaller businesses, yet in all my research I haven't found a single good reason for startups and small businesses not to see strategic marketing as a foundational pillar of their company. The simple fact is most small businesses don't have a strategic, long-term plan for their business or their marketing. Why is this?

I believe it is 50% priorities and 50% knowledge. When a company starts out, the first objective is to become sustainable. That is, and should be, a fundamental driver, but this priority can be achieved in several ways. Many people will put together a business plan for their bank, to secure funding. This plan talks about how they operate and what they

need money for. It may even touch on marketing - stating they need to build a website or design some leaflets. A fundamental part of marketing is almost guaranteed to be missing from this business plan, namely who they are, what they stand for and who they want to reach.

If you don't know who you are and what benefits you actually bring to your business, then how can you possibly translate that to your customers?

When I left my last job and started a strategic marketing company, I did so because I believe that startups, and small and medium businesses, need strategic marketing more than larger businesses. But they don't have the access due to a lack of expertise or money.

A large company would never go out without any research and order a £200,000 website that is not supported by any other marketing. Yet startups and small businesses do this every day.

If a small company, less than a year old, goes out and spends £15,000 on their new website, without any idea of what its purpose is, or which customers they want to reach, it could be catastrophic. £15,000 can be a full year's budget that brings together networking, social media, video and, yes, a website. Instead, without research, companies are spending more than they have on just one part of a marketing plan.

So, I decided to write this book. The Five Step Marketing Plan is designed to help you improve your knowledge of strategic marketing and enable you to set your priorities. It will help you realise what your customers really want from you and what your company should be saying to convince them.

This book is not thousands of words of theory. It contains practical and usable advice. As a business owner, you don't have time to read War and Peace. This book is just long enough to give you a different perspective; a better understanding of your business and how to market

it. It is designed to be read in order once through and then used as a reference any time you want to create a plan for a company, product, service or campaign. There are five sections, each one relating to one of the five keys. Within these sections, there are various questions you will need to answer to ensure your plan is a success.

Question this book. It is based on research and real-life experience but is intended to guide. It will only benefit you if you question how this guidance can relate to your business.

Core concepts

Before we begin, it's worth getting to grips with a few core concepts. Philosophies that will help guide you through the chapters, underpinning and explaining my approach.

Think of this like the basic tips and general advice you might read at the start of a cookbook. Then the five steps are like the recipes you'll flick to and refer back to as you create and shape a marketing plan for your business.

My aim is to give you the knowledge, understanding and guidance to build a marketing plan unique to your business, because your business is unique. There is no one solution to a problem, so this is a strategic planning book with a difference.

Some books offer complete plans, using a specific method or one cool trick. This is not that kind of book. Instead, I'll give you a framework so you can build a marketing plan. For that to work, I need a commitment from you to really reflect on your business and what your customers want from it.

Starting with that attitude is essential, because a positive attitude achieves so much more than a negative one. I once had an opportunity to speak at an event in London. I was working for a company that wanted to break into a new sector and after the last-minute cancellation of another speaker we were given a chance to speak to that new industry at their biggest conference of the year. A fantastic opportunity.

The only problem was that we didn't have a talk prepared and we were given three days' notice. A negative attitude at this point would have derailed our plans, but a positive one made it happen. Our team worked together to deliver a great talk that really set us apart.

You get so much more done if you believe you can do it.

And that brings me to our first core concept ...

Marketing IS your business

Let me be clear - marketing is not an isolated entity in your business. Decisions you make about your company will directly affect your marketing and how successful it can be.

This means you need to understand your business and how it works before you spend anything on marketing, and that's what we'll delve into in the focus section.

The majority of my work as a marketing consultant should be going into a newly formed business before they start a marketing plan and helping them build a strategy. Unfortunately, that is rarely the case.

I once worked with a company that had spent over £30,000 on marketing material such as case studies, leaflets, brochures and a website. That's a lot to spend on materials in any case, but especially since they had no focus or strategy.

Once we had sat down and workshopped both of these, they and I realised none of the work done so far was going to entice their target market to work with them. They had just wasted a new car's worth of money. And what was worse, they would have to produce new materials with only a fraction of their budget remaining.

There is a common misconception that marketing is an expense like buying pens and has no tangible benefit. Now, as someone who has worked in marketing for 12 years and written a book on the subject, you won't be surprised if I defend the field and push its virtues. So I won't

give you a pitch on the importance of marketing (just read the rest of the book for that).

Instead, I'll switch the question around. Don't ask how important marketing is to your business, ask how important business is to your marketing.

Imagine trying to sell a piece of technology to someone, but you aren't quite sure what it does. By treating marketing as a separate entity, and not understanding that your business IS your marketing, you are selling a mystery box. And no one likes mystery boxes.

If your business relies on customers to buy services or products, then they need to feel comfortable buying from you. A customer who is confused, angry or unsure will not buy.

Their journey starts before you even know they are a potential customer. They will interact with your company and its branding before you are aware they exist, whether it be through an article in a magazine, your website, social media or any other form of marketing. And they are already making decisions about you. Marketing is what you do to influence that decision-making process, but it's also what your business is to your customers. They don't get to attend board meetings and see your company vision. Again, marketing IS your business.

It can help your whole business position itself in a way that intrigues and attracts. But if thoughtful, targeted marketing is not at the heart of your business plan, your customers simply won't know about you.

Don't wing it

So many people think they can 'do' marketing, and do you know what? They are probably right. Passion, knowledge and determination can help you achieve almost anything in life. But it's much easier if you

have a plan, and any good marketing plan should include the five steps detailed in this book.

The art of not having a plan is a useful one to master, but winging it - just doing something because it feels right - is only a good approach in a crisis. When there are no other options and the situation truly calls for it.

Marketing and business planning is rarely a crisis, even if it feels like one.

A good plan costs money. It costs time. It costs effort. A plan can reveal some uncomfortable truths.

That's why so much marketing is done without firm foundations, without an understanding of the audience and their needs. I chose the name of our company - Underpin Marketing - because planning is a core part of what we do, and it sets the tone and direction of everything from branding exercises to social media posts.

An effective marketing plan begins with understanding your audience. You may already have a good idea of who they are and why they would want to do business with you, but creating a plan is an opportunity to dig into this further.

It is also an opportunity to save yourself some money. When we go into consultation meetings with our prospective customers the biggest objection we get is that there isn't any budget for focus planning or strategic reports.

Our response is that we create the budget for them by reducing long-term costs, because everything becomes more effective. No business, including yours, wants an expensive marketing plan. You want an effective marketing plan.

Besides, the notion of ‘expensive’ is subjective, determined by the person spending the money. A £1 million marketing plan is very expensive to a small business if it produces no leads. But what if it helps generate ten times that amount in new business revenue?

A solid plan prevents duplication, marketing that doesn’t resonate with your customers, and time spent on tactics that deliver little return.

Instead of focusing on expensive, focus on effective: a plan that has a plan. Before you create a website, leaflets, brochures, or anything else, you need to think about your customers, who they are, what they need from you and the best ways to communicate your message to them.

Answering these questions will allow you to begin your branding and marketing work and set the tone for your content, and is one of the most important things this book will help you achieve.

Open up

This book will also help you to understand the importance of being open with yourself, and to learn what questions you need to be asking of, and about, your business. An open, positive mindset will ensure you get the right information to deliver the best possible marketing plan for your business.

But be warned: the fear of failure can close off possible solutions to your problems. It is okay to recognise, for example, that a customer you currently have is not the right one, and that your future marketing direction might mean not working with them anymore.

It’s also good to be open to new ideas, and even previous ideas that might not have worked. Just because you tried email marketing in the past and it didn’t yield results, doesn’t mean you shouldn’t try it now.

Record stores are a great example. About 20 years ago vinyl records were dead and most people had moved on to digital music and CDs. Opening a record store focused on vinyl in the late 90s would have been an extremely niche proposition, with a very small market.

Fast forward to the present and you have record shops popping up all over because attitudes have changed. People have realised vinyl has a different sound and it's become not only a collector's item, but the preferred way to enjoy music for a huge number of customers. Trends change.

Panasonic dropped their line of vinyl record players in the early 2000s because the market had dried up. In 2017 they relaunched them. If they had not been open to change then their expertise in the manufacture of analogue record playing equipment would have remained dormant, instead of revitalising their fortunes.

Remember, your business is not a success because you think it's great. Your business is great because your customers think so. It's time to be humble and understand that you need to be entirely focused on your customers and what they need. If you do this, your marketing will always point towards your customers. This book will constantly ask what your customers want, think and need. Don't guess. If you remain open and use the methods I describe to get a true picture of your customer, then the marketing becomes easy. You know what they want - just give it to them.

Empathy, empathy, empathy

That need to understand the customer brings me to the biggest threat to any business: jargon. The phrases or expressions used by groups of experts or within a profession that are difficult for those in the wider world to understand.

When working on a marketing plan, you should always use empathy to understand where your customers are coming from. Empathy is

getting inside the mind of someone else to understand their feelings and motivations, like trying to understand why someone is stressed or anxious.

Many people think that being empathetic is something you are either born with, or you aren't. But that isn't true.

Development specialists have studied children of varying ages for signs of empathy and found that before the age of five, children are unable to have any empathy towards other people. One of the ways this manifests is the inability of small children to catch a yawn.

We have all caught a yawn at some point. Someone in the room yawns and a couple of minutes later you are yawning too. This is an example of unconscious empathy. You have seen that someone is tired, you empathise with that person, and now you feel tired. Weird, right?

This natural response is grown and developed in young minds. A four-year-old will not catch a yawn, but an eight-year-old probably will.

Another example is the Sally-Anne test. This is a psychological development test that shows whether a person has the ability to get inside the mind of someone else and work out whether they know something or not, based on that person's experience. The test goes something like this:

Sally takes a ball and puts it in her basket. She covers it with a blanket and leaves the room. While she is out of the room Anne takes the ball out of the basket, replaces the blanket and puts the ball in another basket, covering it with another blanket.

Sally comes back in the room. At this point you are asked the question: "Where does Sally believe the ball is?"

If you have empathy you will understand that even though you saw Anne move the ball, Sally didn't. So you expect her to look for the ball in the first basket.

Young children are more likely to believe that Sally knows everything they know, so they will say she will look for the ball in Anne's basket.

Of course, this is not a conclusive test for determining physiological development, but it is useful to demonstrate the ability to recognise what other people know. And we can apply this test to our marketing. Knowing what our customers know - and, crucially, what they don't know - means we can better tailor our plans to them. This prevents us from patronising, assuming they know what we know and, most importantly, speaking to them in a way they don't understand.

Jargon can derail this effort. It confuses potential customers, making them less likely to engage, but businesses use it for a variety of reasons:

- 1) They want to appear knowledgeable, so confuse using complicated terminology with demonstrating expertise. It's a fine line.
- 2) They're so used to communicating with people within an industry, and the shorthand that comes with it, that they struggle to break the habit.
- 3) They just don't realise it's jargon, because the terms are so familiar to them they don't realise they are confusing to others.

Emotional responses are so important to the buying process, and the more jargon you can eliminate from your communication, the closer the emotional connection you will be able to make.

Write it down

A marketing plan should be dynamic, constantly adapting and evolving with the needs of your business and your customers. But many companies use that as an excuse not to write their plan down. A study by

Gail Matthews at Dominican University in California found you are 42% more likely to achieve your goals if you write them down.

The fact is, without a documented plan that includes all five steps, it's far too easy to lose sight of your objectives. A planning document gives you and your team focus, and ultimately saves you time and money.

You should always be guided by the SMARTIE principle, so the plans you create will be:

- Specific
- Measurable
- Attainable
- Relevant
- Timely
- Individual
- Evaluated

Each one of these is important. To have a good plan you need them for the following reasons;

Specific

You need to understand what you are trying to achieve. Your plan has to be easily understood and simple to explain.

Measurable

"Is it working? I don't know." Your plan must contain certain criteria by which you want it to be measured. If it doesn't then how do you know if it was a success?

Attainable

Curing all human disease is a noble aim, but it would be better to start with something more attainable, like the common cold. By all means be ambitious, but goals should be within reach, so you're not tempted to quit.

Relevant

Does it matter? Is this plan going to help your business move in the direction it wants? There's little point in having a plan to cure disease if you make chocolate bars.

Timely

What is the timeframe? How long will this last? A plan with no fixed ending means you have no fixed goal.

Individual

Is this plan a copy of something else? If it overlaps with another plan you have, is it intentional or are you duplicating effort?

Evaluated

Are you checking to see whether it's working? Did you learn something that will help your next plan be even better? Evaluation is key. So important in its own right, in fact, that it's one of the five steps in this book.

You're ready

So now you're armed with a positive attitude about marketing's role in your business, a willingness to be open and ask the difficult questions of yourself, and a commitment to keep your customer at the centre throughout. With all those concepts in mind, you're now ready to explore the five steps to finding your company's direction: the correct focus, a researched strategy, consistent tactics, thorough implementation and proper evaluation.

You may have bought this book because you feel you are in the midst of a crisis. Let me tell you, the few hours you will spend reading it and

working through the steps will not ruin your business - but they might save it.

Find the time, relax, and get yourself into a positive and creative headspace. Prepare to plan for your business's future because I guarantee you that a good marketing plan can help you achieve anything.

Focus

What is focus?

Before you start thinking about strategy, tactics or implementation, you first need to understand your own company. You need a focus, and that focus comes from having a brand you believe in.

I haven't called this step 'brand' because there are some common misconceptions of what a brand actually is. Many people think it's a logo, some colours and a tagline. These are some of the outcomes of creating a brand, but you need the following;

- Mission
- Values
- Priorities
- Message
- Target Customers
- Personality
- Benefits
- Physical Branding

If you define all of these, your company will have focus, and a brand.

Your mission is why your company does what it does, and what it hopes to achieve. Values are how your company operates, its ethics and what it stands for. Your priorities are the things in your company you think are important. Your message is what you want people to know about you.

Your target customers are ... well, they are the customers you are targeting. But you need to understand their motivations, their habits and whether they should even be your customers at all. It's no good knowing

one or two of these. Each one is important and should interact with and complement the other two.

A personality is how you speak, act and think in front of your customers - your tone, your style, your voice - while benefits are what they get from you. Finally, your physical branding is how all of these things come together and manifest themselves in things like your logo, your tagline and your company colours.

I'll explore each of these in this section. You may be tempted to move straight into strategy, but your marketing - and your company - will benefit if you take your time and understand the true importance of business self-reflection.

Why do we need a focus?

It's impossible to do any of the things discussed in this book if you do not have a grip on what your company stands for and where it wants to go.

Marketing is seen by many as a separate function to other departments. There is a common saying that "everyone is in sales". That's true. But it's also true of marketing. Marketing only works if the products and services you promote match up. If your company doesn't know what its processes are, then it can't tell its customers what service they can expect.

The worst thing you can do when it comes to marketing is overpromise and underperform. And that's where focus comes in. With a focus that the whole company understands, you can ensure that your marketing reflects your company and your company reflects your marketing. With your mission, values, priorities and customers aligned, you can home in on what your company needs to do and discard the distractions and wasteful marketing.

A prime example of this is the interaction between marketing and customer service.

Customer service is at the centre of any marketing. Let's say you spend money on an online advertisement or paid-for social media advertising. It's beautifully written and is perfectly attuned to what your customer wants.

So they pick up the phone and they ring your customer service team to buy the product, but the customer service team is rude and unhelpful. The customer feels betrayed and doesn't buy anything. What happens when we evaluate this customer's journey through the business?

When evaluating any customer's journey you will need to work out what money was spent on marketing, where it was spent, and how well it fared. On first glance the evaluation is easy. The marketing worked, the customer service failed, and we should improve the customer service, right? Well, yes and no.

Of course the customer service should be looked at, but from a wider perspective the initial premise is an issue. Customer service and marketing have been treated as two separate things. The marketing didn't work because the focus wasn't there in the customer service department. With a good mission, a positive set of values, fully understood priorities and well researched customers, the whole machine would work as one. You would be making decisions based on common ground.

Marketing only works if everything around it makes its promises true. And marketing is only truthful if it is an integrated part of the business.

It's time to see focus as something more than just marketing talk.

So, what does your company do?

This seems like an easy one to answer. When you first set up your business you will have had a good idea of the kind of products or services that you supply to your customers. That is your interpretation of what your company does. What do the people who use it think it does? A good handle on both these perspectives will help you understand your position, because if they aren't the same, you need to understand the miscommunication and work out a way to close the gap.

Don't be afraid to adapt. Bubble Wrap was originally marketed as wallpaper in 1957, before its usefulness as protective packaging became apparent. Have you ever played with a Frisbee? That term was born the very same year, inspired by the fact that children were throwing the Frisbie Pie Company's tins around as toys. Your customers might not use your products or services the way you expect, so be prepared to change your expectations.

Mission

Your company's mission is the reason your company exists. It's the 'why?' that drives you. Many companies turn their mission into a simple statement.

A mission statement differs from a vision statement in that a vision is where you want to be at the end of your mission. One of the most famous vision statements of all time is computer giant Microsoft's original vision:

"A computer on every desk, in every home."

There's no indication of how they will do this, but it's what will happen if Microsoft's mission is achieved. It's aspirational, but not very useful. A vision statement is an outcome and although these are good to have, at the start of your journey you should prioritise how to get to your goal. A vision statement is the kind of thing that you should have in the back of your mind, something to inspire you.

A mission statement should be at the forefront of your mind.

Google's mission statement is: "To organise the world's information and make it universally accessible and useful."

At the start of a company's life, or during a transition or rebrand, the focus should be on its mission and, therefore, its mission statement, because it's a light that guides you on your way, not a distant one on the horizon.

What should a mission statement do?

A mission statement will define what you do to the different stakeholders you interact with: your customers, your employees, your owners and the world or community around you. It will give your company a purpose. All of these things make a mission statement seem daunting, but in reality, it can be very simple. And the effects can be transformative.

A good mission statement will allow you to create your branding, persona, values, priorities, ethics and culture. It will provide you with a star and will allow the rest of your company's solar system to rotate around it. The gravitational pull of your mission will ensure everything else moves in tandem.

Under no circumstances should you create a mission statement just because someone tells you to. A mission statement will have a fundamental effect on your business and if you create one without thought, and then follow it blindly, you could have big problems. To create a mission statement, you need to understand why. Not having a mission statement is bad. Having a bad one is worse.

Further into this book I will discuss your rivals and what they can tell you about your own business. I won't go into too much detail here, but a

great way to see whether your mission statement is useful is to ask if it could also describe the mission of your biggest rival. If it can, then it's too generic and not personal enough to your business.

To write a good mission statement, you need to understand what your story is. Why did you start your business and what is the reason you think your customers would want to use you? This isn't something that will necessarily go into your written mission statement, it's the kind of thing that comes across between the lines.

Your mission statement should define what you do for your customers, employees, owners and community.

- What does your company do that makes it special or unique for your customers?
- Why is your culture the way it is?
- How do the owners help foster the first two answers?
- What good does it do in the wider world?

Once you have the answers to the questions, it's time to craft a two or three sentence statement.

How to use a mission statement

A mission statement is a living thing. It's not something to do once and put in a drawer somewhere. Remember to constantly evaluate, discuss and refine your mission statement.

You need to use it to advise and scrutinise every decision you make in your business. If you plan to advertise, look at what you are doing and see whether it meets all the criteria set out in your statement.

If you want to do something, and you think it would be good for the business, but you don't think it's compatible with your mission

statement, it's time to evaluate not only the thing you are trying to do, but also the mission statement itself.

Values

Values are all about your culture. Your company culture is the beliefs and morals that you use when interacting with people outside the business. This can be your customers, your suppliers or the wider community. You do not have to have a written culture for your company or organisation, but it should be reflected in your values.

When looking at company values, understand that what is done within the company is not always seen the same way outside. Perception is as important as reality, so it's always worth going outside the organisation, to your customers or trusted advisors, to see what the world thinks your values are.

Your values should align with your mission statement. These are two things that need to work together. If your company's mission is to deliver eco-friendly products and one of your values isn't sustainability, then you will have conflicting ideas.

The next stage is to decide what values you want your company to adhere to. They have to be achievable and understood by the entire organisation. Between 3 and 5 values is ideal, but don't worry too much about that for the moment. Take a piece of paper, or your phone, and write down adjectives that describe your company's position. It's helpful to follow these rules when looking at your values:

Values must be at the expense of something

This can be a tricky one to get your head around. A value must stop you from doing something you don't want the company to do. It must restrain you. For example, if you wish to be environmentally sustainable, then that may limit your ability to use cheaper materials in your products. If you want to be community-focused, then there might be

certain things you are no longer able to do because they would harm the community. Customer-focused means everything has to be done for the benefit of the customer, not the company.

Values must have a purpose

Values are amazing things that can inspire your whole organisation. They are invaluable if everyone in the company, and outside it, understands why you have chosen them. If they don't make sense, and you can't explain it, then they're not values.

Values must be actionable

Make sure your values make financial, ethical and logical sense. An impossible value won't inspire action.

Values must align with each other, and the mission statement

Make sure all of your values interact and complement each other. To be cheap and well-made seems contradictory. If your company can change that equation so you can provide top quality products for a very small price, then that's a unique selling point. But in most cases having both those things as values means one will have to be sacrificed for the other, and values cannot be selective.

Defining the meaning of your value is also important. Let's take sustainability again. One person's idea of what this means will be different to another. A sentence after each value, which clarifies your meaning, provides focus and prevents ambiguity.

How to use values

Your values now need to be woven into every fabric of your business. Your processes and data gathering should all adhere to your values, allowing them to become automatic. When bringing new employees, suppliers and customers into the company, it's useful to bring them up to speed on your mission statement and your values. This will set

expectations and allow them to aid you when it comes to turning your values into a unique selling point for your company.

Priorities

You would be surprised how many people do not truly know what their priorities are.

A priority is something that you are focusing on within your company and would put in front of other things lower down your list. You can have priorities for individual departments and strategies, and you should also have an overall priority for your business.

Your number one priority is something that is more important than anything else in the company.

A mission statement is why you are in business and a value is the way you want that business to be conducted. But a priority is different, it's a tangible thing that you want to achieve. It will help you drive business and act as a destination point that you can strive for.

A lot of people will say that money is their number one priority. This is a cute answer, but in reality, money is the outcome of your top priority. A top priority is something that focuses your whole company, marketing included. Without this focus, your company might put its effort into something that isn't going to push your marketing forward.

Your number one priority can take many forms; it can be a specific key performance indicator, it can be getting into a certain market, or getting a certain amount of free advertising for your product or service. The only thing it really has to be is something that you can measure a strategy or tactic against to ensure you stay on track.

For example, if your top priority is to reach the older generation with your product, and your main tactic for doing that is a teen-orientated

social media campaign, your number one priority tells you that maybe this isn't a good course of action

Another example might be that you want your products to be made out of the best possible parts to deliver the best possible product. If you then source your materials based on this priority, you already have an idea of what you are looking for. You are gaining focus. And if you have a focus in your business, you have a focus in your marketing.

Message

A message is an often-unrepresented part of your focus. A message translates your mission statement, values and priorities into something outward facing. It's nice for a customer to see your values and mission, but they are predominantly an internal function to help guide you. The question when it comes to message is what does this mean for the customer, and what's the best way to explain it to them?

I have a message for my company. It's written in something we have called our 'code of conduct'. We also have an internal mission and values, but these are not public. The code of conduct is. It allows us to shape the customer's perception of us. It allows us to take control of the narrative and deliver something that is easy for them to grasp. We want our customers to be comfortable, to know what to expect. If a customer is confused or irritated, then they are less likely to buy something from us. The message your company gives to its customers should be a reassuring one.

The message of your company is actually a hybrid. It's a mix of focus, strategy and implementation. It's the first thing that you will write, if you follow this book, that is specifically for your customers. It's something you should write down, complete the rest of this book's journey, and then revisit.

The message can be seen across your business. It might manifest itself as an ‘about us page’, or a code of conduct. Whatever it is, it should be specifically tailored to your business.

Target Customers

Now you have a mission statement, a set of values, priorities and a message.

Whether you are a new or existing company your next step is to work out whether your current customers fit into your new focus. If you don’t have current customers, then think of the different kinds of customers you might like to work with.

This means evaluating, assessing and understanding your customers. Be warned, you may find that some do not fit your new focus, and then you need to decide whether it’s your customers or your focus that’s wrong.

When evaluating your customers, data is key. It’s amazing how many companies just don’t have a handle on their data.

It’s very easy to take a gut decision and run with it because it seems right. It’s also easy because a gut decision takes no preparation and no research. If it required those things, it wouldn’t be a gut decision. And although a gut feeling can have a place in a decision-making process, relying too much on this approach is risky and can have a potentially catastrophic effect on your company.

It’s the difference between shooting an arrow blindfolded and shooting with full vision. You’re much more likely to hit your target if you can see it.

Working out who your customers are is more than creating an inventory. You should build a profile, understanding their wants and

needs. If you create a set of standard information to categorise each customer, you can then start to compare them and rank them on their value to your business. There are several methods to collect information, including:

- Surveys
- Interviews
- Anecdotes from staff
- Existing financial data
- Public domain financial data
- CRM Data

Surveys

Surveys are a great way to get valuable, independent information about your customers. Many organisations shy away from doing surveys, as they can act as a harsh mirror on their own company and can highlight some big challenges that need to be tackled. Like an ostrich burying its head in the sand. Sure, you don't see the car coming, but it doesn't mean it's not going to hit you.

There are many apps and websites that can help you with creating a survey, including Survey Monkey and Google Forms. The structure of the form is only a small part of the task though. The main factor in whether a survey will provide you with useful information is the questions you ask. A good question can reveal an amazing amount of information, but a terrible one can be worse than useless, it can provide you with false information that will send your company off in the wrong direction. I could write an entire book on survey questions, but here are a few tips:

- Don't ask open questions
- Avoid biased and leading questions
- Make sure your answer choices provide clarity
- One question should give one answer

And as with all things, you need to take the answers and blend them with other information, such as the items highlighted below, to get a more widely researched opinion that doesn't rely on just one source.

Customer interviews and anecdotes from staff

Surveys are good, but we find that real, face-to-face interactions with customers yield the best results. Existing customer interviews can allow companies to truly understand their audience. Unlike your surveys, be sure to ask open-ended questions that focus on perceptions and experience.

Existing financial data and public domain financial data

Your company is not a charity. Unless, of course, you are a charity. But even then, you still need to be financially responsible to your stakeholders. If you believe that your current customers are also going to be your future customers, but they are the kinds of companies that don't pay very well, then you are setting your marketing - and your company - up for a big fall.

There is a wide range of financial information available to you. From Companies House and credit checking websites to your own company's financial data. Use these things to rate your customers, and potentially future customers, to ensure the marketing you do yields actual financial return.

CRM Data

Depending on how your company operates, and what you value most in your customers, you may want to weight, or rank, these individual data sources in different ways. For example, if you are a company that only deals with financially stable customers, then internal and public domain financial data might be more important to you than anecdotes from staff.

You also need to understand the provenance of your data. With something like Companies House information, or financial data, you can be reasonably certain that this information can be relied upon. A CRM

system and anecdotes are only as good as the humans who input or create the data. If your CRM system hasn't been updated correctly, then be wary of relying on outdated or unreliable data.

What is a CRM system, and do you have one?

A Customer Records Management (CRM) system is a technology that allows you to catalogue and manage all the interactions and relationships you have with your potential, current and past customers. The aim of a CRM system is to improve business relationships and to help understand what is happening within your company.

The benefits of a CRM system are numerous. From a marketing perspective you can create reports that highlight things such as customer habits, which customers are making you the most money, and - most importantly - which ones are not. It can help when it comes to how your business operates and allows you to be data and evidence driven over gut instinct and guesswork.

Many people see CRM as unnecessary administration, but it is a fundamental part of good marketing. In fact, it's a fundamental part of your business. If someone is off sick, or on holiday; if an employee leaves and you bring someone else into the role; if upper management wants to see how the company is performing, so they can forecast for the future. All the data they need would be in a CRM - if it was correctly updated and maintained. Without this information and insight, you are just shooting blindly in the dark.

Personas

Your customers are real people, so they have both positive and negative traits that might be specific to only them. Let's take a bakery, for example. A customer might believe that you should only ever use organic flour, but that doesn't mean every customer demands organic flour. Rather than relying on individuals to shape your marketing, you should create personas.

Personas are not real people. They are a collection of traits and interests that target customer groups of your business might possess. By creating different personas, you can see how different members of your audience might interact with your company.

But first you need to ask yourself several questions.

Why should they be your customers? Not everyone is your customer, why have you chosen your existing ones? Is it by choice or necessity? What should your reasons be? And why have they chosen you? What do you mean to them? Will they advocate for you?

Expertise and good service are reasons for customers to stay with you, but everyone says they offer this. You need to understand what is unique and why your customers choose and stick with you if you are to communicate that to potential new customers. Once you have answered these questions, you can start to work out their motivations and build a set of characteristics that allows you to direct your marketing more effectively.

You then need to think about the customer's problems and how your business helps solve them. Don't focus on your products, focus on their impact. This can be the 'why' of your company. People don't really buy products, they buy solutions, and once you realise that you will change your perception of marketing. This is all about understanding your why, and how that translates to a compelling reason for a customer to do business with you. Doing business might ultimately mean buying a product or signing up for a service, but that's not what they really need to do, they need to choose YOU and do business with YOU.

Another question to ask is how well does the customer understand the problem you solve? Does your marketing need to educate as well as sell? Be prepared for some harsh truths - you know your business and your solutions inside and out, but the better you know it, the harder it is to

translate. Be prepared to find out they haven't got it so far. But that's good news, because it means those who didn't choose you before had a reason. Maybe better messaging means they'll choose you this time.

Most people have a good handle on their unique selling points internally, but that's not the same as understanding a customer's motivation. They might have reasons completely unrelated to your USP. If your USP is strong enough, then it's a question of how you articulate it. What you tell your staff and job applicants might make sense to them, but is it clear enough to cut through the noise for a less captive audience?

Once you know the answers to all of these questions you can start to build a persona. Use the following traits to create an idea of what your various customers are like:

- Age
- Gender
- Job Title
- Likes
- Dislikes
- Motivations

Company Personality

Personality is very different from persona. Personas are all about the kinds of customers you want and the traits they have. A company personality is what, how and in what way you should interact with your customers.

When thinking about your focus, you need to decide what character you want your company to have. A company personality is the style, tone and voice your marketing will have. By understanding what your customers want, and how and where they like to be spoken to, you can develop a brand that really connects and makes it more likely that they feel the emotions you want them to feel in response to your brand.

Every company, product or marketing strategy has a personality, whether they have developed it or not. Here are a few examples:

Apple

Apple make communication technology such as tablets, phones and personal computers. Their brand is cool, young and innovative. When they speak to their customers it is simple and plain because that is what their target market wants. They are not technical, and they deliver products that are fun, easy to use and well made.

Radeon

Radeon create computer graphics cards. They are seen as cutting edge, technically impressive and able to deliver exceptional performance. Their customers value information and technical specifications. Their personality is one of an expert in their field that can provide you with the specific piece of equipment for your computer. They are not claiming to be easy to use or for every level of understanding.

Dell

Dell provide complete computer products such as personal computers and laptops. Their personality is developed to appeal to the business community and their target customers demand work-oriented products that help their businesses run smoothly.

Apple, Radeon and Dell all provide products in the technology sector. They all have something to do with personal computers and communications, but the way their products have been developed and marketed means they perform very different functions. The reason for this is their focus and their personality.

The three parts of a company personality

A company's personality can be broken down into three parts. The style, the tone and the voice.

Style

The style of your personality is the most visible element of your brand - it's the words you use to communicate.

A good way to understand style is by thinking about how you speak to friends, compared to how you might speak at work. As someone born and raised in Manchester, when I am speaking to friends in the city, I will use local slang, swear words, conjunctions such as can't and won't, and even my accent changes. This may be something that happens to you. If I speak to someone from my local area, I suddenly slip into a thicker accent, and will start sounding a bit more like Liam Gallagher. If I am speaking to someone whose first language isn't English, I will formalise my vocabulary because I want them to understand me.

When in a formal setting, my choice of words changes. I become more formal, more neutral. Why? Because my audience is different. If I spoke to a prospective business client, an interviewer, or a manager like I speak to my friends then I would create the wrong impression, and they would probably be less likely to work with me.

Style can highlight your company's strengths and weaknesses through your choice of words. And again, this comes back to your focus. If your mission says you want to reach an older audience, using certain words will confuse and annoy. It's all about that gravitational pull, keeping your system in orbit.

Style can create different perceptions. Let's take a look at the drinks market.

This is taken from the website of Innocent smoothies:

“Here at innocent, we want to leave things better than we find them.”

“We know it sounds a bit airy-fairy, but we strive to do business in a more enlightened way. We want to take full responsibility for the impact of our business on society and the environment, and try to move our impacts from negative to neutral or (better still) positive.”

The first thing you will notice is that Innocent doesn't brand itself with a capital letter - it's innocent. They use words like airy-fairy. They use simple words and relatively short sentences. The words they use can be easily understood by anyone. They come across as positive, happy and engaging. Innocent's brand is based on fun and informality - their style has to reflect that.

Let's take a more formal brand - Langley's Gin. Their target market is more sophisticated. Let's see how they describe themselves.

“Quintessentially English”

“Langley's England is the aspirational home to classic, quality gins styled for modern settings. Known for its excellence in craft, quality and tradition, it has an innovative spirit, which challenges conventions.”

“With a taste for daring and originality and with exploration and discovery at its heart. Langley's England adheres to the rules of the finest crafted gin. The brand builds on this story by delivering distinct and provocative activities, which illustrate its contemporary relevance and distances it from the expected approach of its peers.”

You can see that the words used are longer - quintessentially, contemporary and provocative. The aim of the above paragraph is to show a sophisticated and knowledgeable approach to their gin. They are also trying to portray a sense of adventure through words like daring and exploration. All of this is done through their style. Langley's is a premium product marketed to a premium audience. If they used the same style as Innocent, would they sell as much gin?

With these two examples, we can see that the words we choose in our marketing can have a huge impact on whether we connect with our customers. It's why each step in this book is so important. To get the right style, you need to know what your mission, values and customers are.

Tone

The tone of your company's personality is linked closely to your style, but is more to do with the attitude by which you want to deliver your message. Are you the kind of company that wants to be seen as cheeky, provocative, or passionate? The way in which you speak, or write, to your customers differs depending on how you want to be seen.

Let's go back to Innocent smoothies. Their style is incredibly informal, but their tone is cheeky, funny and subversive. Just take a look at their contact page. One of the best things I knew about Innocent even before researching them for this book is that every bottle says you can drop into their head office, known as Fruit Towers, any time you like. This is part of their attitude and it's delivered on their website like this:

“(The entry gate is on Kensal Road. Just in case you thought you had to scale the fence.) We're closed on evenings, weekends and public holidays. If a 9-5 is good enough for Dolly, it's good enough for us.”

Their attitude is more than just the words used, it's part of the way they speak to their customers. This is their tone.

Another example is National Geographic. Their style is more formal and their tone is more passionate and focused on the facts. On their website they describe themselves as follows:

“The National Geographic Society is an impact-driven global nonprofit organization that pushes the boundaries of exploration, furthering understanding of our world and empowering us all to generate

solutions for a healthy, more sustainable future for generations to come. Our ultimate vision: a planet in balance.”

Their tone here is of supreme integrity and honesty. They tell you their vision, they focus on how they aim to make a lasting impact and they feel passionate and knowledgeable about the work they do. The National Geographic Society is about conservation and that really comes through in their style, their tone, and in the final piece of a company personality - voice.

Voice

A key part of The National Geographic Society’s company personality is what they stand for, their opinions and thoughts on subjects.

A voice can be quiet, or it can be loud, and it all depends on what you want your customers to think of you. A quiet voice is subtle about where you stand on certain issues, and those issues might not be very controversial. For example, you might believe that everyone has the right to enjoy high quality cottage cheese. That’s not particularly controversial, but it can be part of your mission, values and company personality, and so your marketing should reflect that. The National Geographic Society believe in the protection and sustainability of the planet, and the plants and animals that call it home. When they speak, they use their style and tone to demonstrate their passion - they use their voice to state something specific.

Other companies make their voice a central part of their marketing too. Lush Cosmetics believe that all products should be natural, sustainable and environmentally friendly. This is something that is widely used in their marketing. People know that if they go to Lush Cosmetics, they will be buying ethical products. This becomes a synonymous part of their brand, all because of their company personality.

Different company personalities for different strategies.

Your company may have multiple strategies running at once. If you have different products marketed at different target customers, it stands to reason that your personality may also be different. A good example of this is how Strongbow markets its cider in Britain, compared to the United States.

In the UK, Strongbow is aimed at males between the ages of 20 and 40. The drink is always shown in a full, standard pint glass, held by young men in trendy pubs and bars. In the United States, Strongbow targets young, sophisticated women. The marketing portrays well dressed women, usually at parties, drinking from chalice-style glasses.

The product is the same, but the brand is different because the target customer is different. Approaches can also change depending on the product, the time of year and other factors.

Benefits

Now you have the majority of your focus in place, you need to translate it into tangible things that your potential customers can benefit from. These benefits must match what your customers actually want and be easy to understand. They are the effect of your mission, values and priorities. For example, if one of your values is honesty, then one of your benefits might be that your customers will always receive what they ask for. This benefit is real to the customer and can be physical, or part of a service that they can expect to receive from you.

Another example is having sustainability as a value. The benefit to the customer is that they will have a clear conscience when it comes to the environment, allowing them to buy with confidence.

It's good to write down the benefits of your company. When writing a website or brochure, it's important to highlight these benefits as you go

along, because these are the things that will really speak to your customers and put them in a frame of mind to buy your products or services.

Physical Branding

The final part of focus is to turn all of this hard work into physical branding. Physical branding includes the following things:

- Name
- Colour Scheme
- Logo
- Tagline
- Style Guide

This can be subjective and also quite specialist, so it's worth seeking out advice and guidance on this, or even hiring an expert. Here is an overview of the basics:

Name

What's in a name? Quite a lot. Your company name says so much about you and can turn people off if it's not right. Hydrox is a name that conjures up cleaning fluid or chemicals. In fact, it is the name of a biscuit. Invented in 1908, it was copied by a very famous competitor - Oreo. Oreo has now become a global brand, whereas Hydrox was discontinued in 1999 and only recently relaunched with little success. I believe that Hydrox failed because of its name - it just doesn't fit. Make sure you find a name that fits. It's worth asking friends and family for their opinions - take them on board, but always remember that it's your business and you make the decisions.

Colour Scheme

Humans live in a colour-based world. Red and yellow can mean danger in one situation, or vibrancy and fun in another. Security firms always have blue signs and heating companies usually have orange.

These colours are chosen because they illicit a certain response. Blue means police in most countries, and orange represents warmth. Make sure you pick a colour scheme that fits your purpose and values.

Logo

A logo can become a fashion phenomenon. Choose wisely and make sure you do your research. Have a look at what your rivals are doing and make sure you stand out from the crowd. Also make sure you meet expectations. If you are an exciting company that wants to attract younger customers, make it bold, bright and vibrant. If you are a financial company, maybe tone it down a little.

Tagline

A tagline is your message condensed down into just a few words. It's a good thing to have because it's a sign you have everything else right. If you think of the focus section of this book as a funnel, then the tagline is at the very bottom. You have your mission and values, and that gets translated into your priorities and message. Finally, you condense that message down into a few simple words that mean so much. It sounds hard to do, and sometimes it is. I always find inspiration by not thinking too hard about it and writing down every idea I have. Once you have lots of ideas, you can then pick the best bits of each.

Style Guide

A style guide is a nice luxury to have. It is a document that allows you to detail how you want your brand to be used. These usually cost a bit of extra money and aren't always needed if you are doing your own branding and know how you like everything to look. But once you start to grow you might need to let others know how you like your branding, and that's where a style guide comes in. There are some great examples of style guides out there and most of your favourite brands will have one, often available to the public.

A Solid Foundation

When thinking about how we look at focus, we need to understand that the work we do now will help us create everything that comes after. Without a solid foundation and understanding of what your business is, then anything you build will inevitably be unstable. Trust me when I say that not having a focus will cost you more time, money and effort than having one. The questions in the next four steps are easier to answer because you now have a focus. The cost of everything will reduce because you know what you need.

The hardest part of this plan is over - now we know who you are, we can start delivering that message to your customers.

Strategy

Introduction to Strategy

Once you have an understanding of your company's focus, you can begin to think about the specific marketing you would like to do to promote your service or product. In other words, you need a strategy. The great thing is you already know your company's direction, priorities, personality and target customers, so you have a massive head-start on most companies. But don't pat yourself on the back too hard, you now need to decide what this specific marketing strategy is going to do.

Strategy differs from focus because this is no longer about the big company questions. It's more about the marketing you are going to use to ensure you meet your goals and targets. A lot of companies will bypass this stage and head straight for the tactics, but this can lead to big problems down the road.

I like to play a game at the start of every course or workshop I run. The rules are very simple: Everyone closes their eyes and counts to 20 together. But there is a catch - you can only say one number each, and if you interrupt each other you have to start from the beginning.

The aim of this exercise is to demonstrate the futility of working without a good strategy. People will inevitably interrupt each other with the same number and have to start again. You can feel the frustration build as they realise that this simple thing, counting to 20, has become a seemingly impossible task.

Why is counting to 20 so hard in this situation? What have we removed from or added to this situation to turn the simple into the impossible?

Well, the problem is communication and planning. It doesn't matter how confident you are in your focus, if no one knows what the other people in the room are doing (because their eyes are closed) there is no way to collaborate and work together. They just have to try to anticipate everybody else, without any information.

When I tell them they can open their eyes and speak to each other for 30 seconds to come up with a plan, they do it with ease.

Here's another way of explaining this: Imagine your priority for the summer is to get from Land's End, the most southerly point in Britain, to John O'Groats - the most northerly. How would you approach this challenge? You wouldn't just set off without a compass, a map, or even Google. Think about the consequences of just walking, without any idea of where you are going. This would be unproductive, a waste of energy, and extremely foolish. And even if you randomly struck on a bus stop, an airport or a train station, how would you know it is going to take you closer to your destination?

This sounds like an absurd thing to do, but thousands of companies are doing the equivalent every month. It seems reasonable at the time - you know who you are and who you want to reach so you just start doing the work. But having something that you can refer back to and keep you on track will improve the marketing you do. Let's take a look at some real-life consequences of not being led by a good strategy.

Building the website.

It's always a real disappointment when we meet with new customers and they have already gone out and developed a website. Depending on what you want to achieve, a website can cost anything from a couple of hundred pounds to tens of thousands. The record, from personal experience, was over £600,000. No footballer is really worth £100 million, but if someone is willing to pay it then that's the cost. The same is true of websites. And they cost an awful lot less when you have an idea of what you want, and - just as importantly - what you don't.

Before diving headlong into buying things like websites and brochures, ask yourself: Why do I need this? What purpose does it serve? Every question in this book will help you reduce the cost of your website. Because the more confident you are of your marketing, the more confident the suppliers of that marketing will be, which will lead to reduced costs, improved service and a better end product.

Whether you are working on your own or as part of a larger organisation, you need to be able to justify your marketing and demonstrate return on investment. It doesn't matter whether it's small or large, long-term or short, you need to be able to answer the questions: "Is it worth it?" and "Is it working?"

Sunk Cost Fallacy

One of the major questions we are asked when consulting on a rebrand or realignment is whether we can use the branding, communications, websites and other marketing material the company already has. So much money has been spent, and they don't want to waste the investment. But this can be a real problem, because blindly accepting that all existing materials must be maintained can mean falling victim to the "sunk cost fallacy".

It's human nature to want the work you have already done to be worth something. If you have invested £30,000 into brochures, websites and leaflets, then you expect them to be good and useful. To admit they are not is a big step in admitting that your current strategy is wrong. The sunk cost fallacy describes putting an extreme amount of emphasis and value on work already done. It's "throwing good money after bad" - just because you've invested time, money and effort into something doesn't mean that it's any good. And no matter how good it is, it may not be right for your new strategy.

Reflecting on your previous attempts at marketing can be difficult, but it's a necessary part of changing how you view the long-term success of

your marketing and your business. The best way to do this is to remove the cost element and just ask the following questions:

- Does it reflect my mission, values and priorities?
- Does it resonate with my target customers?

If the answer to either of these is no, then it's time to re-evaluate whether you need to keep or get rid. And it's worth pointing out here that it is because we went through the focus section of this book, and understand these questions, that we can evaluate what our existing marketing is doing for us, and what our future marketing might look like.

This change in mindset is much easier to achieve by a sole trader, startup or small business because there are fewer people to convince. In larger organisations it can be hard to justify to a finance department or a CEO that we took the wrong path and the best thing for the company is to turn around, return to the previous fork in the road and look for another way.

BlackBerry mobile phones are a major example of this. In the early 2000s their products boasted a physical keyboard and they were marketed to business customers. They had invested so much time, money and effort into cornering this market that when the market changed, they couldn't. There was no reason that BlackBerry couldn't have been at the forefront of the new smartphone revolution, but the sunk costs of their research into physical keyboards and business-based marketing prevented innovation and adapting their approach. How many people do you know who own a BlackBerry today?

The keys to moving on from your sunk costs are openness to change, and strong evidence.

How do we justify marketing spend without good evidence?

The answer is simple: We can't. Good marketing needs to be based in fact. You need to be able to create a comprehensive plan, not just for your

marketing, but also for how you will collect the data, stories and anecdotes you need to ensure your marketing is working. If you rely just on your gut feeling or the experiences of the past you will find yourself in a situation where you are once again fumbling in the dark. The market moves pretty fast. If you don't stop and look around once in a while, you could miss it.

What is a strategy for?

A strategy is a way for you to turn your focus into tangible ideas and direct them to achieve specific goals.

You've worked hard to create your focus, but without a strategy it will just sit there, unimplemented. A strategy is how you start to deliver on your promises. If you want your company to be customer-focused, this is where you describe how you are going to do that. A strategy can also centre on a specific part of your business.

Different Types of Strategy

You do not need to choose just one of these, and you definitely shouldn't choose all of them.

Company strategy

A company strategy is a marketing plan for the whole of your company. The other strategies detailed here focus more on a specific part of your business. A company strategy is good if you have set effect-based goals, or if you have a small business.

The advantage of a company marketing strategy is that it will encompass everything you do through a broad strategy that delivers tangible results.

Rebrand strategy

A rebrand strategy is usually a short-term approach when changing your name, logo or your overall values or business direction. A rebrand can happen for many different reasons, but it should never happen just because you think it's been a few years and it needs an update.

If you believe a new logo, name or mission will help you reach more customers, then great. But make sure you have done your research and asked your existing customers their thoughts. Because while you might think that your current brand is past it, your customers might love it.

A rebrand can also be seen as a way to escape a bad reputation. People will ask questions like "What was wrong with the old one?" "Are you in trouble?" "Why do you want us to forget your old brand?" Any rebranding marketing material should include an honest story about why you want to make a change. If you don't explain it, then people will just explain it for you, and usually in a negative way.

Realignment strategy

A realignment strategy is for when you want to move your whole business from one industry or sector into another. This can be done for several reasons. You may see a good business opportunity in a new industry and believe your company's expertise could be a unique selling point. Alternatively, you could recognise that your current industry or sector is declining and you want to ensure the future of your business.

When developing a realignment strategy, it is important to try to transfer as much of your history and legacy over to the new strategy as you can. If you have 50 years' experience in a certain industry, demonstrate that experience and expertise in your marketing.

Service strategy

Some of the services you supply might have specific benefits for a portion of your target market. If you're already known for design and installation of a product, you may want to focus on the servicing side. This is where a service-specific strategy can be useful. It allows you to

promote and market without worrying about covering everything you do. It can be more focused and more relevant to your target customers.

Product Strategy

Each product you want to market might need a strategy all by itself. The product might be specifically focused towards a certain target customer, or you might want to draw attention to a new or expanded offering.

What should be included in a strategy?

Overview

An overview is important, but I tend to write this last. Once all of the other parts of your strategy are in place it becomes much easier to give a brief summary of what you aim to achieve.

What market are we targeting, and why?

Your company has target customers, but each strategy you put in place should also have a target customer. This should be a more specific section of your audience. For example, if your company focuses on people over 50 who require travel insurance, you may have decided you need a strategy to help you grow in a particular location, or among people who specifically require specialist skiing insurance.

Market research

It's so important to understand the market you are entering. It could be said that it's even more important to understand the market you are already in. You may have noticed by now that I'm keen to challenge assumptions. What you think you know and what you need to know are very different things and market research gives you an honest and objective look at an existing or new market, depending on what your strategy calls for.

You've already done some market research at the focus stage. But this time is different, as it's no longer about your company - it's about the specific goals and objectives of your strategy. If you want a strategy that launches a new product, you need to know what else is available in the market and what your audience needs. Combine this with your focus research and you will be painting a picture of ways to reach your target customer both as a company and through a product.

Competitor research

Why would your customers use your biggest rival?

Looking at this question from the customer's perspective creates a great opportunity for self-reflection, and a starting point for some important research.

Why is this company your biggest rival? Is it because they make more money than you, or do they provide a better service than you? Do they have more products than you? By understanding your rival, you understand yourself. And by asking these questions you can see where you don't quite stack up. Once you know these failings and weaknesses you can then start addressing them to create a more compelling proposition. You should never use this information to degrade or belittle your rivals; use it to make yourself better and to understand your customers better.

Other factors that might be in play when working out why your customers are using your rivals over you include location, ease of website use (the user experience), branding, and the wording of marketing materials. Compare and contrast and get an idea of the true differences between your organisations. When you then come to deliver your new plan, you will have a firm, realistic understanding of your sector. No guessing, just evidence and customer-based research.

Previous Marketing Efforts

Sometimes there is no substitute for being out there and doing it. And if you have already done it, whether it has worked or not, you have valuable insight into your business, your customers and your industry. Use it!

Goals

Your company has priorities; your strategy should have goals. You need to understand what you want to achieve from this particular strategy. There are two general types of goals:

Number-based goals

These are what you might traditionally call key performance indicators. Things such as increase in revenue, profit, items sold, customers created and leads generated are all examples of number-based goals. If you want to increase the number (or, in some rare cases, decrease the number) then you have a number-based goal.

Effect-based goals

These are less concerned with numbers, instead focusing on perception and prestige. An effect-based goal could be brand repositioning, public relations reach or customer education. You can't put a number on it, but you want it to happen.

A good rule of thumb is to have two number-based goals and one effect-based goal. This gives you tangible objectives without overlooking the positive effects of word-of-mouth or marketing outcomes. It's also worth noting here that number-based goals are usually seen as investments and effect-based goals are seen as expenditure.

Budget

Before thinking about what your marketing budget should be, you should first decide what you want the outcome to be. The standard

practice for determining how much a company should spend is based on turnover. The rule of thumb for marketing spend is 2% to 6% of turnover, or expected turnover, for the year. There are some who spend a lot more - Apple commit roughly half of their overall turnover to marketing, which is extreme. Whether you choose 2% or 6% depends in part on the answers to the following questions:

- How much do I want to grow?
- How quickly do I want to reach my targets?
- How much of a risk am I willing to take?

Your answers will determine whether you should pursue a radical or conservative marketing strategy. The more you want to spend, the more radical your approach.

What is your marketing budget?

Perhaps the most complicated question of this whole process is: “How much money do you have to spend on marketing?” The budget for a marketing plan can range from practically zero up to billions of pounds. In 2017, Samsung spent \$11.2 billion on advertising alone. Every company’s decision-making process should be grounded in fact, but research shows that four in five companies work on budget alone, without any written plan.

The good news is that if you have come this far then you should be well on your way to having a plan. Knowing your focus and your strategy will allow you to speak from a position of knowledge and ensure your money is spent wisely.

Investment vs Spending

There is a big difference between investment and spending. If you invest in marketing, then you expect to earn something in return. If you spend on marketing then you want to see something come of it, but there's no fixed amount you want back. Both investing and spending have their place in marketing, and most plans will have elements of both.

Investing in your marketing is when you put money or effort into your marketing with the intention of getting an overall gain from it. This gain can be profit or an advantage in the market. The way you work out what you expect to get back is through a calculation known as a return on investment or ROI

Return on (Marketing) Investment

As part of your overall marketing plan, you are going to need to understand the effects of your hard work. You need to know the return on your investment. Marketing is slightly different than other forms of ROI because most things in your company could have a value if you sold them. Marketing does not. This means marketing is more of a risk and therefore needs to be scrutinised and evaluated to ensure that the risk is as low as possible.

The reason you should focus on Return on Marketing Investment (ROMI) when looking at a strategy is because it shows you how much your marketing is contributing to your company, specifically through profit.

ROMI can be calculated using the revenue that is generated by marketing. For example, let's say you gained four orders that totalled £1,000 and each of those orders came directly from marketing efforts, on which you spent £250. Your ROMI calculation would look something like this:

$$(1000 - 250) / 250 = 3.0$$

This effectively means that for every £1 you spend on this specific marketing campaign you will gain that £1 back as well as another £2 - a ratio of three to one.

This exercise could belong in the evaluation phase, but it's also a useful tool for setting goals. If you do your research and understand your

customers, you can make an educated assumption as to what you should expect to get back from your marketing. Thinking about your ROMI will help you maintain focus and avoid simply hoping for the best.

A word of warning, however: Return on Marketing Investment is not a silver bullet. As with all ideas in this book, it only works when paired with other sources of information and other techniques. Never rely on one number or metric to show you how your entire plan is working, especially ROMI. That being said, it's a good sanity check and a way to see marketing in a number-orientated way, alongside impact and reach.

Spending

Whereas investment is easy to explain to others in your organisation, and even the bank, there are benefits to marketing that go beyond direct sales or increases in specific metrics. Creating a buzz or improving recognition of your brand can be a great way to raise your company's profile in the long term. A great piece of PR that highlights your mission and your values might not have a number attached to it, but if it means more customers can find you then it has its own kind of value.

Resources

To make your marketing plan a success you need the resources to support it. If you have a great marketing campaign that generates 50 leads for your business, do you have the customer service, sales and project management staff to handle the influx of new work and enquiries? A great marketing plan can fail on the resources allocated to handling the consequences of the plan. Here are some of the things you should consider:

- Do you have the staff to handle the enquiries that come through because of the increase in publicity?
- If your sales team receives bonuses, do you have the means to pay for the higher conversion rate of better-quality leads?

- Are there any processes or systems you need to put in place if you are launching a new product or service?

With all of these elements combined into a single document, you now have the makings of a powerful marketing plan that can take your business to new heights. Next, we'll take a look at the tactics you can use to deliver on that potential.

Tactics

Now that your strategy is taking shape, it's time to think about the tactics to deliver it. Strategy is the big picture, while tactics are the various methods you'll choose to deliver your goals.

We're going to take a look at a few different options before we move onto implementation and I encourage you to flick back to these pages to refamiliarise yourself whenever you're considering new approaches or directions down the line.

A tactic is the weapon you choose; implementation is the way you swing that weapon. For each weapon, we need to understand what it does, its benefits, its challenges and the situations in which you should use it.

Website

Overview

Websites can be extremely important. They are the modern-day equivalent of a shop front, showing the world who you are and what you do. In a very basic sense, a website is a series of linked web pages that can be accessed by anyone through direct links, referrals from other websites, social media, search engines, or through paid advertising.

What should be contained on these pages differs depending on your business, but a standard list might include: A homepage, a service page, an 'about us' page, a contact page and possibly a news or blog page. Some of the other tactics described here will use a website as a way to host or share the information.

Benefits

The benefits of a website are numerous. A good website will demonstrate your skills, your expertise and give you a fully customisable part of the internet to call your own.

Challenges

The biggest questions facing a company when it comes to a website are what it should do and how much it should cost. The answer to both of these will be “it depends”. No, that’s not particularly helpful, and although I do provide some general tips in the next section of this book, it’s worth speaking to someone about your specific needs for guidance through the process.

When you should use it

The first thing many people do when they start a company, even before creating a business or marketing plan, is to purchase a domain name and build a website. The thing is, not every company needs a website. They can be expensive to build and expensive to manage. Server fees, web development and design costs can range from a couple of hundred pounds to tens of thousands.

It might sound counterintuitive in this day and age, but you absolutely can run a business without a website. You can sell products on platforms like Etsy, Facebook, eBay and Amazon Marketplace. Perhaps you are a local, community-based company and one-to-one interaction provides all your leads.

Never implement a marketing tactic just because you feel like you should, or someone else told you to. But if a website is right for your business and you’d like to learn the best ways of creating and maintaining it, check out the website entry in the implementation section of this book.

Photography

Overview

In a world of websites, brochures and social media, photography is key. A visual representation of what you do can really set you apart. And while hiring a professional photographer can be a big expense, especially early in the life of your business, there are alternatives. Sites such as Pixabay and Pexels allow you to use stock imagery for free. Be warned, however. This photography looks professional, but the resource is open to everyone and it's difficult to set yourself apart when you are using the same imagery as your rivals.

Stock photos can also be purchased from sites such as Shutterstock. These pictures are usually higher quality and are less likely to be used elsewhere. My preference is always to use your own photography, and with professional quality cameras built into modern smartphones, it's easier than ever.

Benefits

Good photography can deliver a message better than an entire page of writing. The colour, tone and mood of the image can convey your position in the market, your target audience and what they can expect from you.

Challenges

The power of an image also means you should be careful not to send the wrong message. This is the risk of photography that doesn't reflect your business, or is not of good enough quality.

When you should use it

You should always have a good suite of photography, as you will never know when you might need it. Many of the other tactics you might

choose, including websites, brochures and even pay-per-click advertising, rely on quality imagery to be as effective as possible.

Written Content

Overview

Written content gives you an opportunity to communicate with your customers clearly and succinctly. Whether it's a blog, industry news on your website, or a downloadable PDF that gives detailed insight into a topic affecting your customers, your writing can demonstrate expertise as well as explain your services.

Benefits

No matter what industry you are in, written content allows you to answer your potential customers' questions and convince them making contact is worth the effort. You can use blogs to show you're aware of the issues facing them, and more in-depth content can establish your authority in meaningful and relevant ways.

Challenges

Good writing is powerful. Bad writing is destructive. Spelling mistakes and grammatical errors can be off-putting even if a customer is impressed by what you do, so the challenge for many businesses is making sure content is of high enough quality. You also need to make sure your writing reflects the tone, voice and style you've established for your company, otherwise you risk confusion and contradiction.

When you should use it

Most people conduct some sort of research before making a buying decision, and that usually includes reading website content. If you have a website, quality regularly updated content is essential to establishing credibility. If you don't, any material you produce for offline distribution must be professionally written so you can give the right impression.

Social Media

Overview

Ah, social media. The current king of content. Platforms such as Facebook, Twitter, Instagram, YouTube, Pinterest and others allow you to interact on a personal level with your customers and distribute content quickly and efficiently.

If you are new to social media it's worth seeking out a more in-depth look than I'm able to provide here, as this is a huge area and each network works differently and can serve a different purpose.

Benefits

For the right organisation, social media is not just a way to interact with your customers - it can be a way to directly sell your products and services. Most social media, including Instagram, now has the function to buy directly from the app, so these sites can become your checkout cart.

Even if you just want to promote your services, start a community, or find out about the latest trends, social media can be a fantastic tool.

Challenges

The challenges of social media, just like its benefits, are numerous. The first one you need to overcome is the stigma that "everybody needs to be on social media". This is categorically not true. Companies like Wetherspoon and Lush have made big splashes by shutting down their social media accounts in recent years. The reasons for this differ, but the essence of it is that their customers weren't on those platforms, or it wasn't the best way to deliver their message.

Meaningful social media takes time. It takes a long time to set up, nurture and interact with your followers, and outsourcing is often the most effective approach. Underpin Marketing manages social accounts for some clients for 10 hours a month, which is just enough time to create

regular posts and monitor two networks. Those hours are broken up into a few minutes here and a few minutes there, but they are much more meaningful because of the experience and expertise behind them.

Before taking on the work of setting up and managing a social media strategy, ask yourself: Can I do this well for the time I want to spend on it? if not, it might be better to put your precious effort into something else.

When you should use it

Your social media should have a purpose. If you are doing it only because others have told you that you must, then stop. If you have done your target customer research and found that the best way to reach them is through social media, then choose to invest your time in this tactic.

Email

Overview

Email marketing can be a key component of your business plan. It's a way to provide useful information and offers to your customers in a more personal way than a website. You can do this through a newsletter, a set of triggered emails or an ongoing campaign.

A newsletter is usually a collection of articles and information delivered regularly to your customer's inbox. A triggered campaign comes in the form of an email sent when a certain action is taken, or a requirement is met. For example, if someone buys something from your website, you may want to send them an email a few weeks later offering them another product. An ongoing campaign is a set of emails sent over a predefined period. These are usually linked together and may provide insight or educational material to your customers.

A whole host of email marketing platforms are available, with Constant Contact, Poppulo and Mailchimp among the ones I have used over the years.

Benefits

Email marketing, when done well, maintains contact with your customers so they come to you the next time they need the services you provide. Keeping your company in your customers' thoughts is one of the most important marketing outcomes you can have, and email is often the best way to achieve it.

Challenges

Relevancy is key. One good email is better than three bad ones, so make sure you always think about your motivations before sending an email. Not least because you are required to include an option to unsubscribe - basically a big button that reads "this is not relevant to me, don't allow this person to contact me again". If you're not providing something of interest or value, people won't hesitate to opt out.

Another challenge of email marketing is that it is not a substitute for face-to-face interaction. Many think of email as the only way to contact customers, but people like buying from people. Don't rely too much on email marketing, make sure you go out and meet your audience if it's possible to do so.

When you should use it

Email marketing should be used when you have a good customer base and they need to be kept up to date with new offers and information. It's often the best way to stay in contact with your target audience, but it also comes with risks.

PR

Overview

Public relations is usually associated with the protection or promotion of your company's image. This can be protection from a crisis, or positive promotion through press releases and interaction with the media. Some PR is proactive, meaning you are promoting something, and some is

reactive, i.e. something has happened and you want to contribute or gain control of the situation. Types of PR include:

- Customer relations
- Media relations
- Investor and internal communications
- Crisis management
- Product launches

Benefits

The benefits of PR can be enormous. It is usually more subtle and considered more reputable than simply advertising. This is because an editor or an influencer will have decided your cause is worthy and so they are adding their reputation and clout to yours.

PR can also be a lot of fun, as you need to be innovative and creative to get a return. Few things are better than sitting down with a PR person or a marketing company and coming up with some great ideas for your business around a table.

Challenges

Depending on your objective, PR can be very expensive. It's possible to manage your own PR, although it requires an awful lot of industry expertise and contacts.

When you should use it

PR is great when you have something specific to promote or something interesting to say. If you have decided that your target customers respect innovative and market-leading companies, then PR is a great way to deliver that impression. But you should not use PR if your company is not ready to launch or promote. PR is all about confidence and if you don't quite have it yet, then it will have little impact.

Events

Overview

There are two main approaches to events - attending someone else's or running your own. In my company, my number one tactic for meeting potential new clients is running workshops and events in the local area. This is because my business is based on long-term education on the benefits of having a good marketing plan. It won't work for everyone and it might not work for you. But events can be a networking opportunity that allow you to showcase a product, educate people on your industry, or help people collaborate.

Attending events run by others, for example networking meetings, expositions, coffee mornings or seminars, is also a great way to meet potential customers. But there is some etiquette involved when it comes to selling products and services, and you should always check with the organiser that your approach is appropriate.

Benefits

Running an event allows you to control - to some extent - what is said and what the event is about. You can use it to entice potential customers with things you know your company excels at. Events also allow you to give back to the community and provide a service to your customers. You can establish authority and expertise in your field, such as in the case of a financial institution delivering a presentation on tax relief. When attendees need a company to deal with tax, that's who will be forefront of their mind.

Attending other people's events allows you to get out into the community. Some of these events require companies to pay to attend, but even if they don't it is worth being prepared, as you'll want to make a good first impression. To get the most out of the event you may need materials, a stand and possibly a budget to promote your business.

Challenges

After pay-per-click advertising, there is probably no marketing tactic more financially risky than signing up to attend a large exhibition or event as a sponsor. A central London expo based at a venue like the Excel can cost in the region of £5,000 to £75,000, depending on how big a splash you want to make. You need to be sure that it will be a financial benefit to you. Make sure you understand the potential Return on Marketing Investment of the event (see the Strategy section of this book) and be confident that the right customers are going to be in attendance.

In terms of your own events, it's up to you whether you decide to run them as free or paid. Each approach comes with its own challenges. The key is to make sure your event doesn't turn into a sales pitch and I'll discuss this further in the implementation section. Whether you are charging or not, make sure you provide something of benefit.

When you should use it

Both self-created events and other people's events should be used when you want to meet people face-to-face.

Networking

Overview

Networking is an ancient and tested way of meeting new businesses. No matter where you are you can probably find a local business group or a chamber of commerce that runs regular networking events. At its core, a networking event is when a group of local businesses get together to see if there is a benefit in working together. Some are very informal and some involve speed dating-style pitches or roundtable discussions. Unlike digital marketing, networking involves face-to-face interaction and a certain level of communication skill. It's always worth doing your research before you go, as not all events are suitable for all businesses.

Benefits

The benefits of networking are numerous. You get to meet a group of businesses or customers you know are from the local area. You can create a lasting and personal impression. And events are relatively cheap to attend. Outside of your time commitment and a few business cards, the potential outlay is usually minimal. At Underpin Marketing we do the majority of our marketing through networking and our record is 56 genuine business contacts from a £10 entry fee.

Challenges

Oh, the challenges of networking. I love networking and I'm tempted to write a book about the challenges alone. You'll find more detailed information in the implementation section, but in short: There are many networking events that would be a complete waste of time for your business.

That might be because they're not focused on your industry or because they're just not well enough attended, so it's worth doing your research. You also need to be wary of networking groups that are, in fact, multi-level marketing businesses (MLMs, or pyramid schemes). Any networking event where you are expected to bring in referrals for other businesses is an MLM. Some offer great benefits and they have their place, but you should understand the risks and do your research before investing money in one specific event.

It's also worth remembering that if you turn up with the intention to sell rather than network then you are likely to come across as irritating. Ask questions and grow a relationship first - networking is all about sowing seeds, not harvesting money.

When you should use it

Everyone should try networking at least once. If you go in with an open mind it can become your primary source of marketing. At Underpin Marketing we like to get to know customers before committing to any work, as we aren't for everyone and everyone isn't for us, so networking is great for us.

It's also a personal thing. Training course attendees have described me as having “gusto” and “the gift of the gab”, and I enjoy the thrill of meeting new people and finding out more about their businesses. It's only when I know they would be interested in hearing more about my business that I start talking marketing. But the editor of this book, and my sometimes business partner, would take a very different approach because he is more reserved and more focused on the technical side of the work.

Perhaps more than any other tactic on this list, personality is key. That doesn't mean introverts or shy people shouldn't network - far from it. It's about understanding the context and how your strengths can be used in that environment

Video

Overview

Video isn't the future - it's the here and now. Each and every day one billion hours of video are watched on YouTube alone. And the great thing is that thanks to smartphones and cheap equipment, anyone can be a YouTube star. All you need to do is find something your customers are willing to watch. There are many different types of videos you can create - from sales videos, to instructional videos, to case studies. As long as you have a focus and a strategy it should resonate with your customers and provide an educational or entertaining experience that will help grow your base.

Benefits

A visual medium such as video can reach customers that don't like reading marketing like websites or brochures. It can also seem more engaging and interesting, if you get your focus right.

Challenges

Time is a major challenge and the learning curve for creating professional video can be steep if you want to go DIY. There are plenty of companies that can help you craft the perfect video, but remember that a marketing supplier is only as good as the direction and focus you provide. I have seen many videos that look amazing but say nothing at all, which ultimately provides no real value.

When you should use it

Videos should be used as part of a suite of marketing tactics. Video alone probably won't bring you business, but it might prompt people to download a brochure, visit your website, or email you with an enquiry. Younger generations are particularly interested in video content, so if your plan includes reaching that target market then video shouldn't be overlooked.

SEO & PPC

Overview

You may be wondering why I have grouped Search Engine Optimisation (SEO) and Pay-Per-Click advertising (PPC) together. There are two reasons:

- They are easier to explain together
- If you want to do PPC, you need a good SEO strategy

Google Search, in essence, is a ranking website. It uses a set of rules (an algorithm) to determine the best information to give a person searching for a specific term. SEO is a series of things you can do to help make sure Google decides your information is the best choice. But Google is a company and it needs to make money. One of the ways it does that is to allow companies to bypass the ranking system and pay to be at the very top of a search. This is known as Pay Per Click advertising.

SEO can take a long time to take effect, whereas PPC can happen quickly. Think of SEO as taking the stairs and PPC as taking the lift. One is quicker, but the other is much better for your long-term health.

Benefits

Good SEO means companies can find you when they are searching for solutions to their problems. Achieving a spot on that elusive front page also helps establish your knowledge and credibility.

PPC, meanwhile, delivers almost instantaneous benefits, as long as you have the money to pay for them.

Challenges

There are no quick fixes in SEO. Organic growth can take a long time to manifest itself as tangible results. It can be relatively expensive and although the techniques to improve your website's ranking in Google are pretty well understood, Google never reveals its algorithm, so nothing is guaranteed.

PPC can be a huge money drain with little return. If you have followed the steps in this book and realised that you need PPC to boost your business, then make sure you set your budgets and understand what you want to get out of it. I would also suggest finding someone who knows the industry to help you, as it's a very technical area. I'm no PPC specialist, so I would be wary of sending you in the wrong direction.

When you should use it

It may not reveal details of its algorithm, but Google provides great insights when it comes to SEO and PPC. If you need your company to be found when people search online, then you need some form of SEO or PPC plan.

Door-to-door

Overview

Knocking on a customer's home address is unlikely to be your main tactic for growing your business. But when it comes to business-to-business communication, door-to-door can still have its place ... if done correctly.

Benefits

If your business provides a personal service, such as gardening or building work, a pitch that explains you are in the area and would be able to give preferential rates could be useful. Be sure to couple this approach with leafleting.

Challenges

Door-to-door can be seen as quite invasive and is also now highly regulated.

When you should use it

You should use door-to-door if you have a hyper-local business and want to focus on individual streets or neighbourhoods. Make sure your leaflet or flyer is clear, concise and immediately interesting to your customer, as the majority of marketing that comes through a letterbox goes straight in the bin.

Leaflets and Brochures

Overview

In the age of digital, when we can access information at any time at the press of a few buttons, there is still a lovely feeling when you are handed a well-designed leaflet or brochure. Humans are tactile creatures and sometimes we just like to have something in our hands. Leaflets and brochures can be almost any size, from a flyer about an event to a full product brochure akin to an Argos catalogue or a phone directory.

The key thing to remember is purpose. Don't design because you feel like something is needed. Design something because you know your customers need it. To save on costs, and if your target market is willing to

forgo the physical copy, you can create a digital brochure that serves the same purpose.

Benefits

Leaflets and brochures, when done well, can really elevate your business development. Simple design software such as Canva can create low-cost, eye-catching designs. For everything else there are some great graphic designers out there who will be able to help you. But remember, it's not all about the design - make sure you have good written copy and photography too.

Challenges

A bad brochure can leave a bad impression. It's better to have nothing to hand over than something that says things you don't want. Brochures can also be very expensive, especially if you want something that really makes an impact. Always remember to factor in printing costs, as even the choice of paper has a huge bearing on the overall quality of any brochures or leaflets you produce.

When you should use it

If you meet a lot of people face to face, or are promoting events in person, brochures and leaflets are essential. If you are an online-only company, then maybe not so much.

If your budget is not as big as you would like, it might be worth doing a Return on Marketing Investment calculation, which can be found in the strategy section of this book.

Don't use EVERY tactic

All of these marketing tactics will be useful to some businesses some of the time. The worst thing you can do when it comes to deciding which tactics to use is to choose them all. The tactics detailed here do not represent a checklist or a scorecard, they are a menu. And you wouldn't go to a restaurant and order every item on the menu, would you?

If you have a solid foundation of focus and strategy, you should now have a good idea of which specific tactics will work to reach your customers at the right time, in the right way.

Implementation

Implementation, in a more extreme way than the other steps in this book, is dependent on your current business circumstances. Other sections apply equally whether you haven't started a business, are in the early stages, or are making changes to an established company. But when it comes to implementing your focus, strategy and tactics, circumstances matter.

So I'm taking my own advice. If I had just written an implementation plan for everybody, it would have served nobody. The potential readers (customers) of this book are both new and established businesses, so I realised the only way to serve their needs is to have two distinct implementation plans - one for startups and one for established companies. The startup plan starts below and is followed by the established plan. Some of the tips and tricks are the same, just applied in a different way, but please feel free to read both.

One final warning: These plans are not templates. They are guides and tips. By the time you've reached this point you should have developed a better understanding of your business than anyone else on earth. Seek advice and take what you can from these plans, but don't let anyone - including this book - tell you how to run your business.

The Startup Implementation Plan

When you first start a business you have all the time in the world, and also no time at all. The pressures of going out and generating business or servicing the needs of your first clients can be overwhelming. Then add to that the administration, finances, tax registration, renting office space and buying in products. It's a lot of work and sometimes the branding and marketing tasks get left behind.

There are countless books out there - some specific to your industry - that will help you understand the best ways to do all the setup and administration tasks. But this implementation plan is designed to help you get your voice heard quickly, cost-effectively and efficiently.

The first thing to do is gather all the work you have done so far. It's important not to just jump headlong into implementation, no matter how tempting that is. When starting a business, you feel like everything must be up and running yesterday, but if you plan you will be better prepared and therefore less likely to make mistakes than if you just "wing it".

So take your focus, with its company personality, mission, values and all the other defining features and lay it out on the table. Take your strategy - that amazing document that tells you where you are going and how you are going to get there - and place it next to it. Find that list of tactics and all those juicy ideas for content, social media posts or videos and have it ready. It's time to implement!

The first thing I would do is take a look at the tactics you have decided to use and order them by effect. For example, if you chose a website, social media and video as your three main tactics, you need to decide which ones rely on the others. That will help you decide which one to work on first.

Social media is great, but you're going to want to link to your website so people can find more information about your products and services, hopefully visit your contact page (more about that soon) and make an enquiry. So your website needs to be ready before you start putting those tweets and posts out. A video is good, but you need somewhere to host it, and a way to promote it. But not so fast. If you are using social media, then you need something to engage your audience, and this is where a video might come in.

All this brings us to a useful tip. The order in which you build things might not be the order in which you release them. You will need to know

what the video is to build your social media campaign, but you need to launch your social media account before you promote your video.

Implementing your plan can be a case of building things up first, planning them out and then delivering them over a set timetable. This is much better than an ad hoc approach.

So let's talk about building that website.

Your Website

By now you understand what your company wants to achieve, how it wants to achieve it, what budget you have for marketing and how you want to promote yourself. Most likely, but not always, you will want a website. The first question people ask me about a website is how much it should cost. I have worked on websites that have cost nothing but my own time, all the way up to one that cost over £600,000. The differences between those options, and all the websites you can create in between, are usually function, planning, style and purpose.

Function

What is the function of your website? If it is a digital version of your shop window, where you can't buy anything and it's just a way to tell people what you do and then direct them to your contact page, then you do not need to spend a large amount of money on it. If you would like a website where people can log in, or they can purchase things directly from it, then you may need more expensive functions.

How much you spend on these functions must be married to how much you plan to make from selling your products. If you spend £10,000 on a website that sells £1 items, that's a lot of sales before you recoup the expense.

When thinking about function, remove yourself from the equation and ask yourself: “What do my customers want?” This question may have been asked in the focus or strategy phase but if not, it’s not too late. Adding a chat function to a website is a popular approach at the moment. In addition to asking yourself about the cost of creating, managing and staffing the function, ask yourself: “Is this what my customers want?” Or better yet, ask them.

There are many companies out there that will provide you with a website for a small subscription fee. There are others that will host your site for free. And even more that will build you a website based on your specific requirements. Each have their pros and cons, and each will have their supporters and their detractors. I have seen a web development company market its websites for “just 80p a day”. I have worked in the industry for a long time and have no real idea what that means. Is there a long-term contract? What kind of support are you getting? What does - and, more importantly, doesn’t - come with that price? When speaking to a web developer, remember - their mission is to get you to buy their website. Here are my key website tests to help you on your way:

- What is the lifetime cost of this website? Consider the difference between 80p a day with support for £300 an hour, and a £3,000 website with unlimited free support.
- Can I update it easily?
- Who owns my website?
- What kind of support do I get?
- Who is responsible for the backup?
- How many functions am I paying for that I don’t need?

If your web developer can’t or won’t answer these questions, it might be worth shopping around. Do your research, ask the hard questions and know that designing and writing the Underpin Marketing website cost less than the equivalent of £700 at our hourly rate (not including SEO work).

Planning

Planning can have a huge impact on the quality and cost of your website. I was recently speaking to a function developer who had to charge his client extra because halfway through the website building process they decided to change the site map. A site map is the layout and structure of your website. Imagine changing the layout of a new railway line halfway through building it. It's going to cost a lot more.

Before you start out, work out what you need. Most websites should have the following:

- Home page
- 'About us' page
- Service page(s)
- Contact page

They may also need:

- Blog
- Ecommerce pages (for sales)
- Member or customer section (back end login)

Knowing up front what your site map will look like is just one of the many ways you can reduce the time and cost of your website. Others - which we won't go into in much detail here - include picking photography early, writing copy in conjunction with your web developer, understanding customer needs and knowing the limitations of your website provider choice before getting started.

If you want an all-singing, all-dancing website, but you go for a generic site builder like Wix or Squarespace, then you will come up against a big problem. Wix and Squarespace are very good at what they do - beautiful but shallow websites. If you want a deep and rich website, then you need to pick the right tool for the job. Which brings us to style.

Style

What do you want your website to look like? This will definitely be influenced by your focus and your strategy. If you want embedded video, moving backgrounds (parallax), flying spaceships or anything else, this will affect cost. Be sure you are aware of the cost first and that you have chosen the right website developer or development tool to do it.

Purpose

Purpose is key to bringing the other elements together. Sure, we would all love an amazing £100,000 website that blows the socks off every single customer that comes across it. But do you need it now, and is it worth the financial risk? Ask what your customers want. Will they be okay with a simple website that costs less than £1,000 but is the result of keen insight and sits alongside the perfect strategy for your customer? Or do they prefer ‘big bucks’ websites not backed up by anything else? The choice is yours.

Let’s look at the different types available.

Free website platforms

Website platforms like Blogger are simple and easy to use. But their functionality is limited and if you want to add things like your own domain name or implement an SEO plan then these will cost extra.

Subscription cloud-based platforms

I couldn’t possibly list all of the subscription cloud-based website platforms out there, but they usually fall into two categories. Those that allow third-party support and those that don’t.

Wix and Squarespace are great if you want an easy to use platform that looks really good, but they don’t allow much third-party integration or code edits. This can be important if you want something that is outside of the platform’s capabilities.

WordPress is a platform that is supported by third parties. You can download widgets, apps and integrations that allow you to have a much wider scope of functions. WordPress is harder to use than Wix and Squarespace, and it can sometimes be difficult to get things just the way you want. You may also have to pay for premium themes.

With all of these approaches you can pay someone to develop the site for you, or you can do it yourself. Be sure you know what your time and skills are worth, and if they would be better spent elsewhere, then pay someone else to do it for you.

Server-based web developers

Rather than hosting in the cloud, for protection, security and - sometimes - better website performance, you may want to host your website on a server. This will mean working with a web developer or an IT specialist, as unless you are using the server for other things, it's rarely financially worthwhile to own and operate your own server. I am not a web developer, so it's worth doing your research and asking any prospective supplier the key questions that were set out earlier in this chapter.

Build your own website from scratch

Have you done this before? Are you willing to spend years learning a very technical digital trade? Are you willing to wait those years to build your website? Do you have lots of free time? If the answer to any of those questions is no, then don't build your own website. It's a specialist item and if you understand what you want and what your budget should be then let a specialist do it. You have more important things to be doing than building a website from scratch.

Getting people to see your work

A website can be a great shop front, but if no one is walking past it, walking into it, or buying something from it, what's the point? A lot of the

tactics in the previous section are based around the idea of getting people to understand - and therefore be interested in - your product. Rather than going through the benefits and challenges, as we did in the tactics section, here I am going to provide tips and tricks for some of the tactics, to allow you to get the most out of them. There are plenty more tips out there, and it's worth reading specific books or articles on your chosen tactics. These are just some of the things I have picked up along the way.

Website Design

Website design can help you get more people to your site, and more importantly keep them there and direct them to enquire.

1) Make a website as easy as possible to navigate. Potential customers will give up easily, so include a contact form at every reasonable opportunity. With emphasis on the reasonable! A pop-up banner that appears if someone spends a certain amount of time on the site, or scrolls a certain distance, can be a good way to achieve this. The banner can prompt them to enquire, direct them to a specific page, or invite them to sign up for a newsletter. Making these prompts immediately after they arrive on the site can seem intrusive and will likely have the opposite effect to the one you intend.

2) Make your contact page as simple as possible. A complicated page that asks too many questions will put people off, so ask for as little information as you can. I recommend First Name, Last Name, Email Address, Telephone Number and Message.

3) Make sure your site is mobile friendly. In this day and age, a non-mobile friendly site is unforgivable. That's not my opinion, that's the opinion of Google - where 96% of search traffic comes from. They penalise heavily if you aren't giving visitors a good mobile experience.

4) Own your own domain. There is no reason on earth that you shouldn't own your own domain name. This is the web address for your website. It usually starts in www and ends in a .com or similar. Imagine someone owning your limited company or your equipment and being able to ransom it to you at will. Your domain name is an important part of your business identity. The time and money you spend on it through improving your domain authority, search engine optimisation and content marketing is all linked to your domain. If someone else owns it, and refuses to give it up, then you might have to start again. And that means a lot of money wasted. A standard response from marketing companies is to say that you don't understand domains and they are helping you. But it's not that hard. You should ask them to teach you, or find someone who is willing to help with your domain whilst you own it.

5) Learn how to update your site regularly. Most content management systems are easy to use and I always suggest learning how to update copy and make minor changes to your website, as your web developer may charge an hourly fee for these services, even if it only takes a few minutes. Maintaining control is key to improving efficiency and reducing costs.

Content

Content comes in many forms. Written content, photography, podcasts and videos are all great ways to entice your customers to your website, and make sure they learn all about you, so they feel comfortable enough to buy from you. I recommend you seek out guides in the form of videos, articles and books on the specifics of each content area, as there is so much to learn, but here are my tips on setting yourself apart.

Written content

News, blogs and other types of written content are a great way to provide the regular, quality content that is so important to getting the

attention of Google and other search engines. They also help demonstrate your expertise and answer the questions people might have about working with you.

But writing is not necessarily for everyone. One of the biggest mistakes people make when they start producing content is to write about what they do, or something that interests them. This often happens because they're blogging for the sake of it, because someone told them it's important and quoted some stats about how much more business they can generate.

Yes, writing is an essential tool in the modern world of content marketing, but you can't just pick up a tool without knowing how or why you should use it. Before you put proverbial pen to paper, you need to understand your audience. Who are they? What are they interested in? Why do you believe you can solve their problems?

Your focus and strategy will help answer these questions, and you should bear the answers in mind throughout the process. Quality is more important than an arbitrary word count, so focus on interesting content, avoid jargon, and include snappy soundbites or powerful quotes that encourage people to share what you write.

Video

Everyone has a mobile video studio in their pocket. The smartphone I use can record in 4k. This is so crisp and sharp that most screens can't even render it properly. Depending on what you want to do, you can create your own video with ease. There are numerous tutorials online, as well as books on the subject.

The key is not the quality of the video, but the quality of the message. One of the most viewed business strategy videos on the TED Talks website is Simon Sinek's "How Great Leaders Inspire Action". I urge you

to seek it out because it has some fantastic ideas about how to look at and talk about your business. It's also worth noting that the video is recorded at a strange angle, at a conference where the lighting is terrible. He's drawing things on a flipchart and the audio is not great.

None of this matters because the message transcends it. If the video had amazing production values but a terrible message, it wouldn't have any impact. Always focus on the content first and the production second.

Photography

Images are used in most forms of marketing. In leaflets, brochures, social media and websites, good photography is just as important as design or the written word. It's easy to take photos on a phone, but if you have the budget, get some professional photographs of your product. I always find a local photographer at a networking event. They usually cost between £150 and £700 per day, depending on experience and equipment. Here are a few tips to bear in mind:

- 1) Don't rely too heavily on a few images. Make sure you have enough that your customers don't become bored of them.
- 2) Be consistent. Humans love things that match and a look that matches the rest of your branding reinforces a subconscious awareness of consistency.
- 3) Minimise images before uploading them to your website. High-resolution images are often cause of slow-loading websites, and a slow website can mean lost customers.

Social Media

1) Make sure you add pictures and videos to your social media posts. Posts with visual elements see, on average, a 37% increase in engagement.

2) Don't post 100 times a day unless your customers demand it. A few high-quality posts each week, which reflect your brand and provide something useful, are so much better than random thoughts.

3) If you say you are going to post three times a week, make sure you do. Not posting something for weeks and then throwing out a dozen in one day can do inadvertent damage to your reputation. Consider using a content calendar to keep yourself honest, and make sure you are consistent.

Specialist marketing (SEO, PPC, PR)

I am a strategist, not a specialist. Knowing what you know - and what you don't know - is an important part of running a business. So, here is what I know about SEO, PPC and PR: I know to go out and find someone who knows more than I do. These disciplines are highly technical and require a great deal of industry-specific knowledge. What I can give you is some tips on what to expect, and how to deal with marketing specialists.

1) Make sure you understand and own everything. If a specialist is unable to tell you what they are doing for you in a way that you can understand, then they are not very good at their job. You might even lend them a copy of this book so they can read my advice on empathy.

2) Make sure you get regular updates and regular reports. You need to know what you are spending your money on, and the effects of that investment or spend.

3) Ask lots of questions. For the same reasons mentioned above, you should always know what's going on. And be sure to set a budget and stick to it; if they need more money, then you need more return.

4) Don't get tied in. If a company wants a two-year commitment, ask them why. Understand your terms and conditions before you start. If it's not going well, what can you do about it, and can you leave? Never get stuck.

Branding

A brand is so specific (and important) to you it's hard to give definitive tips. But I spend a lot of my time with customers working on branding, so here are a few things to consider:

Collaborate

Branding is incredibly subjective. Remember that your opinion is one of many and never the most important one - your brand has to resonate with your customers. You might recall from the focus section that Hydrox is a type of biscuit, but it doesn't sound like one. Oreo is a very similar biscuit, and it sounds like one. A lot of people thought Hydrox was a good name - make time to step outside your bubble and get alternative opinions.

Competitor analysis

If you want to stand out, you need to know what everyone else is doing. Have a look at names, colours and personalities. You have your focus and strategy, so you know what your customers want and will be able to balance standing out with meeting their needs and attracting their business.

Finding good suppliers

A logo can cost anywhere between £5 and £5,000. Having an idea of what you want before you get into any discussions will help reduce that cost, but be aware that you get what you pay for and a £5 logo will probably not be freshly designed or specific to your company.

This section is short because it is so personal, but I love talking about branding. Drop me a line at lewis@underpinmarketing.com and we can chat about your branding ideas, and hopefully I will be able to point you in the right direction.

The Established Implementation Plan

The sunk cost fallacy is the biggest threat to an established company's implementation plan, followed closely by the phrase "but that's not how we've done it before". No matter how long you have been in business, no matter what marketing activities you have undertaken in the past, this journey is all about challenging assumptions. Some of those assumptions will hold up, which is great, but you need to be prepared to go in a new direction.

And you need to take your time, bringing your focus, with its personality, mission and values, together with your strategy document and the list of tactics you've decided to employ. Your starting point will depend on your existing activities and which of them you plan to continue. For example, you might already be producing great videos, but have no means to promote them, which makes getting your social media accounts up and running a high priority.

Your Website

I talked about the sunk cost fallacy in the strategy section of this book and it's important to bear it in mind now you've reached the implementation phase. Many people are reluctant to make the changes they need to make to their website, or create an entirely new one, because they don't want the money they've spent in the past to be wasted. But if your website doesn't reflect your brand and your values, or serve the needs of the target customers you've identified, the money is already being wasted.

That doesn't mean an expensive new website needs to be a part of this process. I have worked on a site that cost over £600,000, and some that cost nothing but my own time. The key is to understand what you need to achieve and the options available. For me, the key differences are usually function, planning, style and purpose.

Function

If your site is simply a digital version of your shop window, where customers can't buy anything and your main objective is to encourage them to contact you, there's no need to spend a lot of money. But if you need to upgrade to allow people to log in or make purchases, make sure you know what you are looking for and how it will benefit your customers.

Your existing web developer may be able to help you make the changes you need, or you might need to shop around to find a new company that can support you. In either case, I recommend asking a few key questions as part of your research process:

- What is the lifetime cost of this website? Consider the difference between 80p a day with support for £300 an hour, and a £3,000 website with unlimited free support.
- Can I update it easily?
- Who owns my website?
- What kind of support do I get?
- Who is responsible for the backup?
- How many functions am I paying for that I don't need?

Planning

If you are making changes to your website, planning is essential to keep the cost and time of the project down. Sometimes the best change you can make is to strip everything back, rather than simply adding more content. If you've never had a website before, thorough planning will help you avoid spiralling costs. I recently spoke to a function developer who had to charge his client extra because they decided to change the site map halfway through the website building process, so before you start out, work out what you need.

Most websites should have the following:

- Home page
- ‘About us’ page
- Service page(s)
- Contact page

They may also need:

- Blog
- Ecommerce pages (for sales)
- Member or customer section (back end login)

If you want an all-singing, all-dancing website, but you go for a generic site builder like Wix or Squarespace, then you will come up against a big problem. Wix and Squarespace are very good at what they do - beautiful but shallow websites. If you want a deep and rich website, then you need to pick the right tool for the job. Which brings us to style.

Style

Your focus and your strategy should dictate what you want your website to look like. If you need embedded video, moving backgrounds (parallax), flying spaceships or anything else, this will affect cost. Be sure you are aware of the cost first and that you have chosen the right developer or development tool to build or edit your site.

Purpose

Does your existing website serve your purpose, or do you need to upgrade to meet customer expectations? Perhaps a simpler approach would resonate better. Whether you want to build an amazing £100,000 site or stick to the basics, there are various options available, so let's take a look at the main ones.

Free website platforms

Website platforms like Blogger are simple and easy to use. But their functionality is limited and if you want to add things like your own domain name or implement an SEO plan then these will cost extra.

Subscription cloud-based platforms

There are two main types of subscription cloud-based website platforms: Those that allow third-party support and those that don't. Migrating your website is a significant undertaking, so make sure you understand the benefits and limitations of a platform before deciding to proceed.

Wix and Squarespace are great if you want an easy to use platform that looks really good, but they don't allow much third-party integration or code edits. WordPress, on the other hand, is supported by third parties. You can download widgets, apps and integrations that allow you to have a much wider scope of functions. WordPress is harder to use than Wix and Squarespace, and it can sometimes be difficult to get things just the way you want. You may also have to pay for premium themes.

With all of these approaches you can pay someone to develop the site for you, or you can do it yourself. Be sure you know what your time and skills are worth, and if they would be better spent elsewhere, then pay someone else to do it for you.

Server-based web developers

Hosting your site on a server can mean better security, protection and performance, but you will need to work with a developer or an IT specialist. I am neither, so I recommend doing your research and asking the questions I set out earlier in this chapter. Unless you are using the server for other things, it's rarely economical to own and operate your own.

Build your own website from scratch

Have you done this before? Are you willing to spend years learning a very technical digital trade? Are you willing to wait those years to build your website? Do you have lots of free time? If the answer to any of those questions is no, then don't build your own website. It's a specialist item

and if you understand what you want and what your budget should be then let a specialist do it. You have more important things to be doing than building a website from scratch.

Attracting the right attention

Many of the tactics we covered earlier are useful for getting people to understand - and therefore be interested in - your product. You may have tried some of them in the past without success, but don't let that put you off from including them in your new plan if your research leads you that way. It's worth reading further guidance on each before you get started, but here are some tips and tricks I have picked up along the way.

Website Design

If you are not getting the enquiries you hoped for through your website, or are struggling to get people there in the first place, it's worth reassessing your design.

1) Potential customers will give up easily, so make sure it's as easy as possible to navigate. Consider adding contact forms to encourage more enquiries, perhaps using pop-up banners if someone spends a certain amount of time or scrolls a certain distance. These prompts should not be used immediately, however, as seeing them when first arriving on a site can be off-putting.

2) Make sure your contact page is as simple as it can be. If you're asking too many questions you may be putting people off. I recommend asking for First Name, Last Name, Email Address, Telephone Number and Message.

6) Is your site mobile friendly? Google won't forgive a poor mobile experience, so speak to your developer about improving navigation and layout on mobile devices.

7) Do you own your own domain? There is no reason on earth that you shouldn't. Your domain name - or web address - is an important part of your business identity, tied in with all the time and money you spend on improving authority, search engine optimisation and content marketing. Some marketing companies will want to maintain control of your domain and insist it's for your benefit. But they're not that hard to understand. If someone else owns your domain, and refuses to give it up, you might have to start over. So ask them to teach you the ropes, or find someone who is willing to help you manage your domain whilst you own it.

8) Learn how to update your site regularly. If you are not already able to update copy and make minor changes, it's worth learning how. Most content management systems are easy to use but your web developer may charge an hourly fee for updates, even if they only take a few minutes. Maintaining control is key to improving efficiency and reducing costs.

Content

Content comes in many forms. Written content, photography, podcasts and videos are all great ways to entice your customers to your website, and make sure they learn all about you, so they feel comfortable enough to buy from you. No matter what tactics you have used in the past, creating this plan is an opportunity to assess them and revisit, so I recommend you seek out guides on each content area. To get you started, here are my tips on setting yourself apart.

Written content

News, blogs and other types of written content are a great way to provide the regular, quality content that is so important to getting the attention of Google and other search engines. They also help demonstrate

your expertise and answer the questions people might have about working with you.

But writing is not necessarily for everyone. One of the biggest mistakes people make when they start producing content is to write about what they do, or something that interests them. If you have tried writing in the past but found it failed to resonate, ask yourself if this is because your audience isn't interested in written content, or because you were blogging for the sake of it. A fresh approach could mean a very different outcome.

Before you put proverbial pen to paper, take time to understand your audience. Who are they? What are they interested in? Why do you believe you can solve their problems?

Your focus and strategy will help answer these questions, and you should bear the answers in mind throughout the process. Quality is more important than an arbitrary word count, so focus on interesting content, avoid jargon, and include snappy soundbites or powerful quotes that encourage people to share what you write.

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at a strange angle, at a conference where the lighting is terrible. He's drawing things on a flipchart and the audio is not great.

None of this matters because the message transcends it. If the video had amazing production values but a terrible message, it wouldn't have any impact. Always focus on the content first and the production second.

Photography

It's easy to take photos on a phone, but if you have the budget, I recommend investing in a professional. Good photography is just as important as design and writing when you produce leaflets or brochures, and it makes a huge difference to social media accounts and websites.

You'll almost always find a good local photographer at a networking event and they usually cost between £150 and £700 per day, depending on experience and equipment. Be sure not to rely too heavily on just a few images, and try to be consistent with the rest of your branding. Minimise images before uploading them to your website, as large files can increase the loading time and put visitors off.

Social Media

Posts with visual elements see, on average, a 37% increase in engagement, so add pictures and video whenever you can. Experiment with posts at different times of the day and the week, but remember that a few high-quality posts which reflect your brand and say something useful are best. Don't post 100 times a day unless that's what your customers truly demand,

For many businesses, social media efforts break down because they're the first thing to go when people get busy. If you're not outsourcing this work, consider using a content calendar to help maintain consistency and keep yourself honest.

Specialist marketing (SEO, PPC, PR)

I am a strategist, not a specialist. Knowing what you know - and what you don't know - is an important part of running a business. So, here is what I know about SEO, PPC and PR: I know to go out and find someone who knows more than I do. These disciplines are highly technical and require a great deal of industry-specific knowledge. What I can give you is some tips on what to expect, and how to deal with marketing specialists.

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Branding

A brand is so specific (and important) to you it's hard to give definitive tips. If you are rebranding, you need to consider the legacy of

your existing brand and how you will tell the story of the change. I spend a lot of my time with customers working on branding, so here are a few things to consider before you embark on any sort of rebranding exercise:

Collaborate

Branding is incredibly subjective. Your new brand needs to resonate with your customers, not confuse or alienate them. Make time to step outside your bubble and get alternative opinions, or you could find your rebrand backfires.

Competitor analysis

Your focus and strategy will have led you to understand what your potential customers want, so compare this to competitors' names, colours and personalities. Knowing what everyone else is doing will help you stand out and meet your audience's needs.

Finding good suppliers

A logo can cost anywhere between £5 and £5,000. Having an idea of what you want before you get into any discussions will help reduce that cost, but be aware that you get what you pay for and a £5 logo will probably not be freshly designed or specific to your company.

This section is short because it is so personal, but I love talking about branding. Drop me a line at lewis@underpinmarketing.com and we can chat about your branding ideas, and hopefully I will be able to point you in the right direction.

Evaluation

Evaluation sounds boring, and even worse than that, it's the last thing you need to do before completing this book and moving on with your life, right? Sorry to be the one to break it to you but there is another step: Repeat it. You see, you have spent all this time, effort and money building a focus, strategy, tactics and implementation. Once you evaluate it, you are going to want to take what you have learned and put it into practice on your next marketing plan.

No market research will provide the insight you'll get from actually running a marketing plan. Some things will go well, while others won't have the impact you want.

Evaluation should be built right into your strategy, tactics and implementation and as we went through these stages we highlighted certain indicators, stats and metrics that will show you how effective your marketing has been.

What are we evaluating?

This seems like a really easy question to answer. But it's only easy if we know what we are looking for. The first thing to do when evaluating a marketing plan is to go back to the strategy phase and look at the aims. A common mistake in evaluation is misremembering or misunderstanding what the strategy's purpose actually was.

A strategy that was only designed to promote the name of the company and increase the customer's knowledge needs to be evaluated differently than a strategy designed to bring in a target number of customers or deliver a certain increase in profits.

Once you know what the purpose of the strategy was, you need to track the tactics and implementation, to see exactly how these stages

went. Don't just assume they went great or rely on anecdotal evidence. For each social media plan, brochure or other activity, ask yourself the following questions:

- How successful was this tactic, out of 10?
- What went well?
- What didn't go so well?
- What can we do better?
- What have we learned from the experience?
- How do we adapt our strategy to get a better outcome next time?

These questions should provide you with context and an understanding of your work, allowing you to evaluate what's been done in a balanced way. Evaluation should never be about finding failure, or apportioning blame. The fear of failure does some crazy things to people. It can paralyse, it can make you run away from the truth, and it can make you deny things that could really help your business.

If all you get out of a marketing tactic is failure, then you haven't learned anything. Always make sure you take something from everything you do.

What to track?

Tracking is so important to evaluation. If you don't have the data or anecdotes to have an objective measure of success you won't be able to understand what went wrong.

Try to focus on measurements and metrics that mean something. There is no point in simply tracking the number of visits to your website - if you had a million people come to your website and immediately leave, is that a success? Instead, try to find measurements that can have a tangible effect on your bottom line. How many enquiries did you get? How many enquiries turned into orders? If you intend to raise the price

of your product, then tracking an increase in average order value could be a good metric.

You need to decide which metrics and measurements are right for your company, but here are a couple of questions to ask as you get started:

- 1) Does an increase in this stat actually show success? Does it genuinely affect my bottom line?
- 2) Is it SMART? (see the explanation in the Core Concepts section of this book)

What are the benefits of evaluating?

Evaluating with an open mind means you'll never be winging it. Evaluation is all about marginal gains, which are also a popular concept in sports. They're the individual 1% improvements that add up to significant change.

British Cycling coach Sir Dave Brailsford credited the team's Olympic success with finding tiny areas for improvement, and I like to use the example of tennis player Novak Djokovic

Djokovic won 49% of his points and 50% of his matches in 2005, but he was evaluating every part of his game and making small improvements wherever he could. By 2010 those small changes meant he won 53% of his points, but 77% of his matches. And by 2015 he was dominant, winning 93% of his matches and three major titles. He was winning 56% of his points.

Those 1% improvements all add up and can propel a sportsperson - or a business - to greatness. Evaluate every aspect of your marketing plan and make the changes you need to make, no matter how small they seem.

Conclusion

If you go all the way back to the strategy section of this book you will find a small paragraph on ‘Previous Marketing Efforts’.

All the work you have done can be condensed down and inserted into that short summary. And that’s the main thing you should take from this book. It’s here to guide your marketing; to take you from inception through to evaluation, but it’s not an encyclopedia. Each part of the five-step marketing plan can be in-depth or very brief, depending on what your business needs. And the best thing about businesses and plans is that they are constantly fluctuating, so this book will change with you and provide you with insights for years to come. Context is key and what seems like a small point today could change your business tomorrow.

If you have found this book useful then I would love to hear your story, and it’s always nice to get praise. But equally, if it has not been useful, please get in touch. I will be adding to it and updating it over time because marketing and the business landscape is constantly changing, so help me stay up to date by providing your criticism and insight.

Finally, please have confidence. This book is all about providing you with the skills to better understand your business. Confidence comes from understanding, and knowing you are an expert. Now, when you go to a customer, supplier or an industry event you can speak with passion and energy about your business.

So good luck! Not that you need it, because you have a plan.

Thanks

First and foremost, I would like to thank Andy Mackay. Andy has edited this book and is the technical yin to my creative yang. It’s

important to understand what you excel at and what you don't. I am a creative person who has big ideas and rarely focuses on the details. I'm a better speaker than writer - Andy allows me to be understood. He is patient and understanding of my unique way of doing things. He never judges. I can categorically say that this book would not exist if it weren't for him.

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