



The 5 Step Marketing Strategy For Small Businesses

**A Step-by-Step Guide for Making
Marketing a Little Easier**



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What's the 5 Step Marketing Strategy?

Marketing isn't for the faint of heart. There's something new every day it seems. And how, as a small business owner, can you be expected to do everything!?

Just like when you set off on a journey across the country or plan to purchase a new high-ticket item, implementing marketing for your business follows a process. [Marcus Lemonis, of CNBC's "The Profit"](#) has a business mantra: "Trust the process."

Marketing is a process. It's circular, cyclical, top-down, bottom-up, and hierarchical. It's a matrix, it's a pyramid...it's a PROCESS! As with most processes, if one of the steps in the process fails, the entire process can fail. So it is with marketing.

Sure you can jump into the middle of the funnel and sell, sell, sell your product (who do you know who does this?) or you can follow five steps to make certain your marketing efforts are executing at the highest return on investment (ROI).

For those of you who don't want to read any further, here's the secret sauce:

Step 1: Define marketing goal

Step 2: Determine target audience

Step 3: Plan approach

Step 4: Craft message

Step 5: Evaluate results

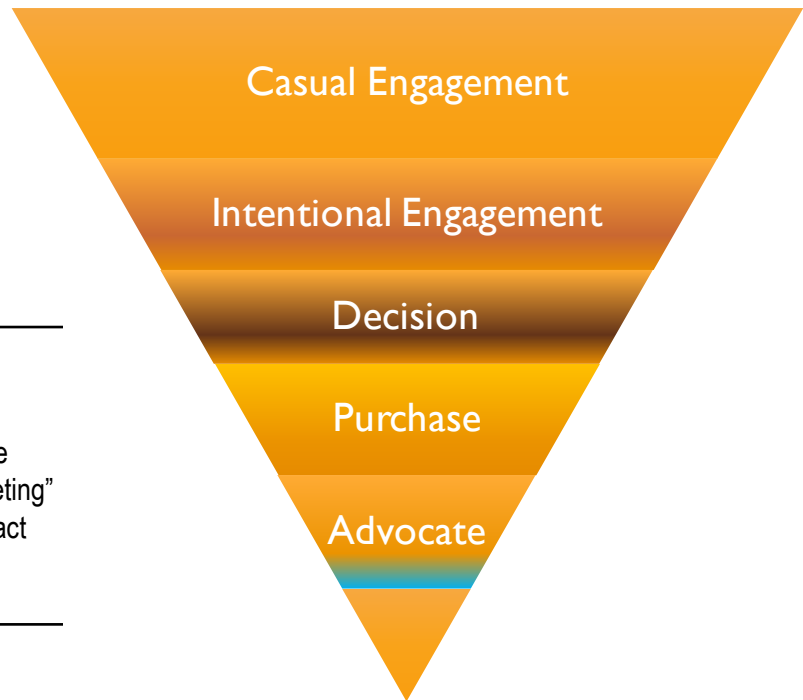
That should be all you need to get started...if you know, fully, what each of those steps entails.

In this guide, I'll explain what it means, how to do it, what to expect, what to avoid, and how to lessen the marketing load by trusting the process.



The Funnel

It used to be the top 3 items in this chart were exclusively marketing and the bottom two were handled by sales team once the buyer was in the door. I like this one because it feels more “marketing” oriented versus sales oriented. Our job is to attract the customer, not close the sale.



Nowadays, buyers making a buying decision will frequently encounter our marketing efforts throughout the process as they follow a pattern from start to finish, known as a [“Sales Funnel”](#) or “Marketing Funnel.” Different words have been used to describe each level, but that doesn’t matter. What matters is what your audience is doing at each level. Here’s how I explain it in my workshops:

I want to buy a pair of shoes for playing pickleball. I go online and search “Pickleball shoes.” At that point in my CASUAL ENGAGEMENT, I’m only a little curious and may get easily distracted. I might look at a few images, then move on. I might ask around on the court or read a couple blogs or watch videos. I’m not ready to buy. Social media does it’s best work here.

I next decide that I only want Asics pickleball shoes (there’s no such thing but there should be). At this point of INTENTIONAL ENGAGEMENT, I’ve decided I’m a little brand loyal and have moved a bit closer to becoming a buyer. Here, I’m looking at comparisons to eliminate the other brands and trying to make a case for why I NEED new pickleball shoes. I’m not ready to buy. Your website will need to be really helpful.

Step 3, the DECISION is where marketers can have the MOST influence. At this stage, I’ve collected most of the data I need to make a decision, but there’s still one step so many people will follow at this point: asking their friends for recommendations and reading online reviews. FB Pages, Google presence, Websites, all contribute to helping me decide to buy. If you don’t have free shipping, don’t bother me.

So finally, I’m ready to make a PURCHASE. Marketing’s all done, right? Wrong. Marketing, at this point of the funnel, is concentrating on finding out *what else can I sell this buyer?* Re-marketing additional products, upgrades, subscriptions, loyalty rewards, and asking for reviews are part of the marketing tasks here. Tell us how we can do better?

And if you thought you were done *now*, nope, still marketing. At this point, you want your customers to be satisfied enough that they will tell others about your or ADVOCATE. The opinion of a friend on facebook has been shown to outrank academic *and* technical resources in the buying decision, so be nice to your buyers.

Following your customers through the funnel will help you track and analyze behaviors on which you can base further marketing efforts.



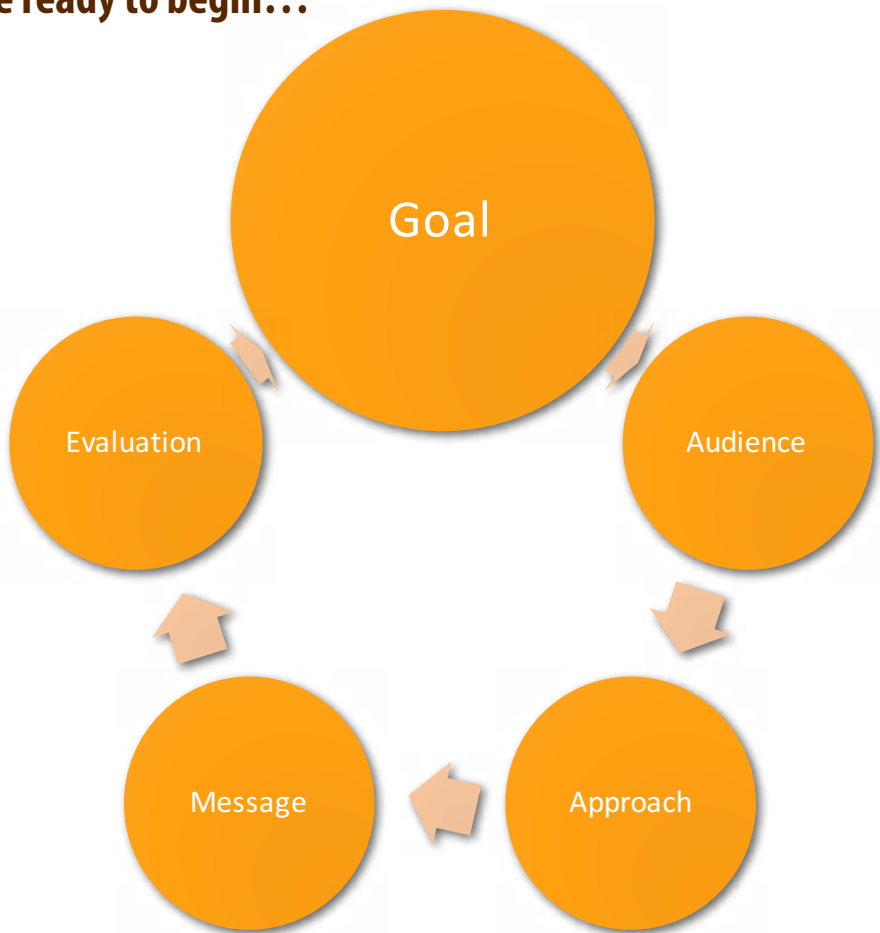
Now you're ready to begin...

Step 1: Define Your Goal

Remember the rule of 7?

It's not 7 anymore, it's more like 17-20 touches you will need with your audience before they make a buying decision.

Make each touch count with a plan!



Your marketing goals are what you want to accomplish through customer engagement. Many businesses set “goals” that are unattainable because they have instilled no way to measure the outcomes. There is a “Call to Action” (CTA) but no way to measure whether it worked or not.

Missing a *measurable* goal will result in lost data to support measuring the ROI of that particular marketing effort.

Non-Measurable Goals result in warm fuzzy feelings:

- Do better at responding on social media (better than what?)
- Increase donor engagement (no measure of success)
- Reach more people (how many more?)
- Increase donations (by what amount?)

Measurable Goals result in quantifiable accomplishments:

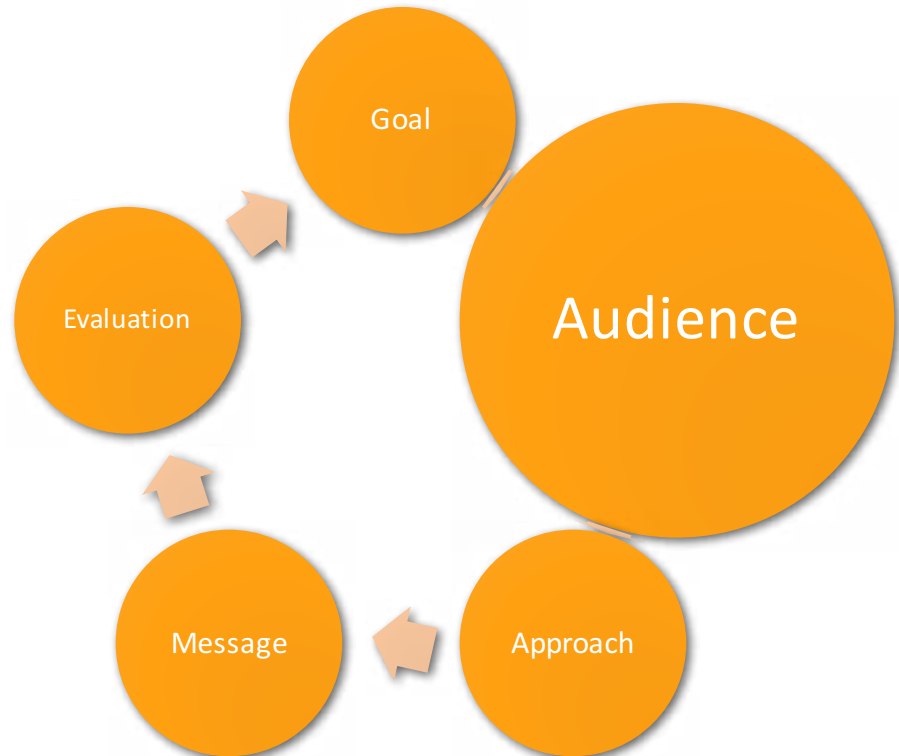
- Reduce response time on social media to 90 minutes
- Increase donor engagement to 10 touches per month
- Reach more people by sending a quarterly newsletter
- Increase donations by 10 percent

If your marketing campaign idea has a number in it, it's probably a solid, measurable goal!



Step 2: Determine Your Audience

Who's your ideal customer?
Where are they?
How do they spend their time?



Who's your ideal customer?

When I do workshops and we discuss “Target Audiences” I always ask the question, “Who’s your target audience?” Most of the time, they are able to identify a few superficial characteristics their audience members share, but if anyone ever replies, “Everyone,” I throw an eraser at them. Seriously, even if EVERYONE *is* your target audience, you’re going to have more successful marketing results if you segment audience members into identifiable segments with 30 or so demographic, behavioral, habitual, lifestyle, and buying preferences identified. Then, you can tailor your promotions to those audiences who are really in a situation to NEED (not WANT) your product. You’re filling a *Need*.

So where are your customers? Where do they hang out? How do they spend their time? Do they *need* or *want* your product? It depends. What’s your market? Consumers? Other businesses? It matters.

Business to consumer (b2c)

is where a lot of marketers live. You are hoping to reach an actual *person* with your marketing. When considering your audience in b2c, keep in mind these qualifiers:

- Geographic location (region, local, state, country)
- Demographics (age, gender)
- Personal habits (where they shop, where they buy)
- Expendable income (think “donors” or “charity”)
- Attitudes toward your product (love it or leave it?)

Business to business (b2b)

takes a slightly different path. You are trying to reach the buying decision maker, through a professional business interaction and want to include audience identifiers like:

- Industry economics (boom or bust ahead?)
- Size of business (how deep will you have to dig to find buyer?)
- Buying process (is the buyer available to contact directly?)
- Attitudes toward your product (do you have a good reputation, verifications, etc.?)
- Objectives to overcome (what do people think they know about you?)



Step 3: Plan Your Approach

Want takes a backseat to *need*.
Your goal is to fill a *need*.



Marketing=Price • Product • Place • Promotion • Distribution

Remember those marketing buzzwords? They still apply. But if you haven't done your homework, the process won't work. Answer these questions first (maybe even before starting your business).

- What price point will the market bear? Can the audience afford your stuff?
- Do people *want* or *need* your product?
- Do you have a visible presence in your market? Online? Print?
- What's your "Competitive Advantage?"

Your competitive advantage is often described as your "Special Sauce." What's YOUR Special Sauce? How does what you provide or do differ from everyone else out there?

For example, lawn care isn't a very differentiated product—unless: 1) you use ONLY electric powered equipment to save the environment; and 2) all your topical treatments are based on organics and worm casings or compost tea. That's some really special sauce.

It's easy to find people interested in one (or both) of those things and appeal to them with your "better way." What one or two things set you apart from anyone else in your competitive sphere?

Before you head down any marketing trail, do some research. Answer the questions above with two reliable sources of data; yourself and others:

Do some primary market research

— data you collect *yourself*. Look at what your successful competitors are doing. Evaluate its effectiveness. Dig into competing audiences. Analyze its audience

Do some secondary market research

—data from *trusted sources*. Read industry publications. Follow businesses in your industry. Watch webinars. Check with sources like **SBA** and **SCORE**.



Step 4: Craft Your Message

Want takes a backseat to *need*.
Your goal is to fill a *need*.



Get to the WHY first!

To “talk to” your audience, you want to be able to meet them where they are. Your messaging includes things like stories, posts, comments, blogs, websites, emails, twitter feeds and more. Anywhere you write something, you’re using your “voice.” But how you say it online may not be as important as “what you say.” Yep, that’s totally backwards from everything you learned in communication class.

But think about it. The “voice” you use is consistent everywhere. It’s the voice of your company; it doesn’t change much. However, your message, can change with every single contact. And crafting your message requires a purpose/goal/objective/call to action, whatever (choose one or more) that considers Why is your product designed to do for people?

- Save time or money?
- Improve quality of life?
- Increase personal satisfaction?

“Why” should always be your starting point, but you also need to consider the *how* when it comes to crafting your message. Be sure to consider:

- Frequency of messaging. How often do you want to connect with your audience?
- Number of “touches.” Is your message satisfying a one-time or ongoing objective?
- Who will implement? Purposeful participation and commitment
- Call(s) to action. What’s your objective? Call Now? Click Now? Register?
- Test and retest. Don’t be afraid to edit your message if you find out it’s not having the effect you desired.

Don’t be afraid to pivot. If what you’re doing isn’t getting the results you want, it’s usually because something’s off in the audience selection or messaging. Check there first.



Step 5: Evaluate Your Results

Want takes a backseat to *need*.
Your goal is to fill a *need*.



Evaluating your efforts is the only way to determine your ROI!

Actual conversation between me and old-school client who doesn't believe social works

Client: “Why can’t I see a return on my social media ads?”

(I ask to see their analytics, which show that 100 people came to their URL from Facebook and filled out the Contact Us form. If a lead is worth, say, \$100, your ROI is 100 x \$100 of \$1,000.)

Me: “What’s the problem? A hundred people answered your call to action (CTA). That’s worth \$1k.”

Client: “But how do I know if they bought anything?”

Me: “How many people who filled out your Contact Us (the call to action) form bought?”

Client: *“crickets”*

Me: “I brought them into and moved them through the funnel (marketing), but I can’t tell you your own sales numbers; that’s on you.” (sigh)

Sounds a bit harsh, huh? But as marketers, our job isn’t to make sales (that’s why there’s a *sales* department), it’s to generate leads or interest in our products or services. How your sales staff measures the return on those leads is up to you, but I’d suggest a robust customer information management system. Or at least asking every customer who buys “How did you hear about us?” and not accepting a blanket “On the Internet” reply. Dig. Track those sales sources and *then* measure ROI.

Some questions to ask as you prepare to measure your ROI from marketing efforts:

- How often will you review results? Monthly is best; quarterly is probably fine for many.
- How are you measuring success? Likes are a vanity goal. How much did it cost you for customer A to click from Facebook to your website? Cost Per Click?
- What will satisfy the goal? Do you want to enroll 100 people in a workshop or have 20 people download your white paper?
- What will meet the objective? Measurable objectives will give you numeric data.
- Is budget a factor? (duh) but in what ways. Can you afford to NOT invest in marketing? Me thinks not.
- What do the analytics show? It’s easier to overcome a marketing “cost” objection when there are numbers proving it’s working. Learn to read your numbers
- Can you define custom URLs, install pixels and measure conversions? Get a web helper!



A Word About Analytics

You can't measure **ROI** without knowing how to implement and read analytics and insights.

Page	Pageviews	% Pageviews
1. /	325	30.29%
2. /content/take-workshop-97	102	9.51%
3. /resource/local-resources	72	6.71%
4. /content/find-mentor-130	58	5.41%
5. /content/browse-library-97	46	4.29%
6. /about-kalamazoo-score	27	2.52%
7. /resource/business-planning-financial-statements-template-gallery	15	1.40%
8. /chapters/kalamazoo-score	14	1.30%
9. /event/successful-grant-writing-workshop-0	14	1.30%
10. /resource/checklist-starting-profit-business-southwest-michigan	13	1.21%

Real google results tracking how many people landed on which page of your website.

Analyzing your data will tell you exactly what's working and what's not working. There's so much out there, so here are some of the things I like to track to apply to the success of a marketing campaign.

Here's what I look for:

- WHO is visiting my pages/posts and when including things like demographics, frequency, engagement and behavior?
- WHAT pages/posts are getting the most engagement?
- WHEN are visitors are viewing my page/posts. Knowing the day, time, device, and location they use to access our content means no unnecessary channels!
- My customer acquisition costs or CPC for PAID campaigns
- How effective is my CALL TO ACTION? Tracking responses to Call Now, Send Message, Get Directions, Learn More (all directing a user to DO something) can really provide me with solid ammunition for justifying a marketing budget.
- TRENDS over assigned periods of time for evaluation of campaign effectiveness. Does one photo perform better than another in my Twitter feed? Analytics knows.

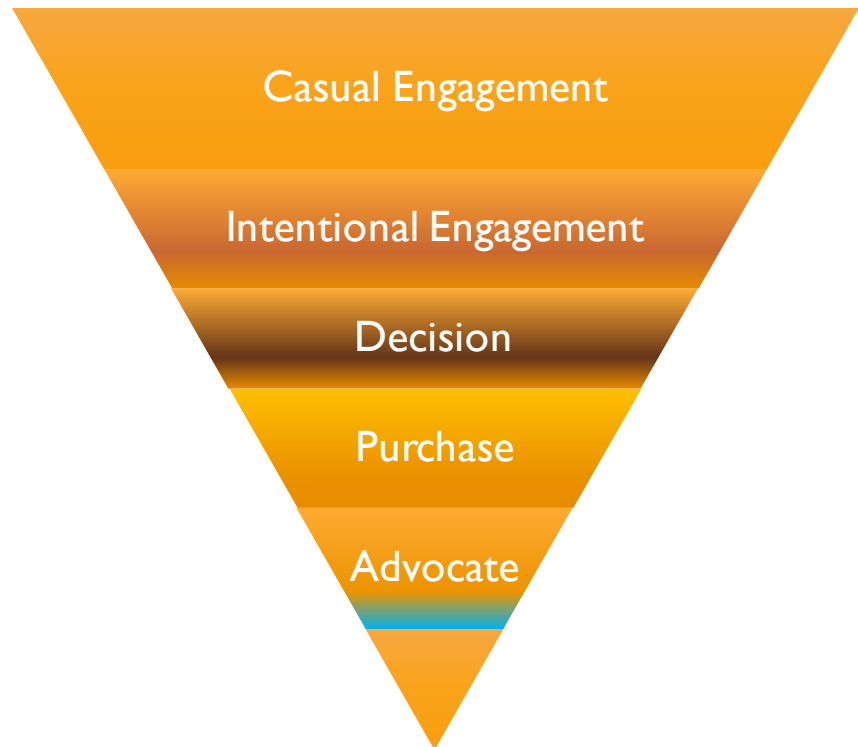
Other things analytics will tell you if you listen:

- Whether your marketing campaigns are delivering traffic to the appropriate URL
- How or if your newest blog post is helping your search results
- How many people who downloaded your ebook also signed up for a seminar with you
- How many people clicked on your post and visited your website as a result
- How long people spend on your pages and where they go
- How to assign value to intangibles like follows, comments, shares
- What's the cost of customer acquisition and clicks

Evaluation should be continuous as analytics will show you exactly what is working and what is not. Science trumps opinion every time with this valuable marketing tool!



If you aren't following a plan, you can't measure your outcomes or determine your ROI. You wouldn't leave home without google maps, why would you drive your business without a roadmap?



It boils down to how well you want your ad dollars to perform

You have a choice on how to do your marketing.

If you wing it, throw some money at a few social or google posts, send an email newsletter once a year, and print a postcard, you will get results...but not nearly as many as you would have if you took that same campaign and planned it carefully from Objective (sell 10 boats) to Advocacy (free updates/advances).

As a lifelong marketer, I'm familiar with the landscape now...and with how it used to be. I'm going to venture a guess that, right now, at this time and place in our history, marketing to a target market is easier and less expensive than ever before. Your business cannot succeed without marketing.

[The science behind the sales funnel](#) shows you exactly how buyers get from Wow! to Now! in the decision-making process. Your customers are somewhere in that funnel (if they don't want/need your product/service, they aren't there, obviously); it's your job to find them, meet them where they are, with the information they need, and the incentive to choose you, at the right time.

If you still can't see the benefit of using the 5 Step Marketing Strategy, give me a shout at cheri@cheribales.com, and let me convince you! [Visit my website](#) for more articles like this one.

Yours in all things Marketing,
Cheri Bales





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