

# The **Social** Brand

## THE MARKETING PLAN MINI-COURSE WORKSHEET

### **Directions on How to Use Worksheet:**

Open this Google Document and go to the File tab in the upper left hand corner and click “Make a Copy.” This will copy all the content for the main file into a separate document where you can fill this in and use on your own.

Once you’ve completed this worksheet, you can simplify your marketing into a marketing plan. We’ve also provided a template for that [here](#).

# BUSINESS IDENTITY

## Identify Your Core Values

Your company's core values are the beliefs, philosophies, and principles that drive your company to a common goal. Many companies will have 3-5 core values (words) that are then followed by a sentence or paragraph to explain. Our favorite are simple phrases that represent your values in a concise and simple way. The Social Brand's core values are:

- Human Connection
- Continual Learning
- Teamwork & Collaboration

To identify your core values, start by making a list of words that your team connects with. Make that list here:

*Example: quality, trust, integrity, relationships, connection*

Now that you have a list of words that you connect with, organize your words into common themes. Try to simplify it into 3-5 common themes. Add columns to the table if necessary. Copy and paste the words into the columns below.

Theme #1	Theme #2	Theme #3
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Now eliminate words that are duplicates of each other. Brainstorm phrases, sentences or words that represent each theme. Put your final core values here:

- 1.
- 2.
- 3.

## Write Your Identity Statements

In this section, we encourage you to take the time to write mission and vision statements for your company if you don't already have these defined. Many people struggle with understanding the difference between the two statements, and not every company is ready to write both of these statements. The difference between a vision and mission statement:

A **mission statement** is focused on the present and is directed toward the *external* users of the business and how the business serves those people. A **vision statement** is focused on the *internal* efforts of the business and is used to inspire and give the company direction in the long-run. Ultimately, the mission statement acts as the guide, telling you *how* you'll achieve your vision statement.

But we definitely recommend developing at least one for company if you haven't already done so.

### Mission Statement

A mission statement is composed of 3 key elements: who, how, and why.

	The Social Brand's Mission Statement	
Who is your target market? Who do you serve?	Our target market is businesses looking to connect with their customer base.	
How do you serve that target market?	We evaluate those businesses to determine who their "right" people are and help connect with those people in the right way in a digital setting.	
Why would they work with you? What sets you apart from others in your industry?	Our core value is to promote human connection within our internal team, our clients, and their clients.	

Once you have answered the questions above, compile your answers to create one fluid mission statement.

*For Example: The Social Brand exists to creatively promote human connection. We do this by helping businesses speak to the right people, on the right platform, in the right way.*

<i>Your Company's Mission Statement:</i>

## Vision Statement

To help you identify the key components of your vision statement, answer the questions below:

What's your company's biggest ambition?	
What commitment do you have to key stakeholders? (ex. <i>Team members, clients, shareholders, and communities</i> )	
How do your core values tie in?	

Once you have answered the questions above, compile your answers to create one fluid vision statement:

<i>Your Company's Vision Statement:</i>

## Building SMART Goals

	<b>Specific</b>	<b>Measureable</b>	<b>Attainable</b>	<b>Relevant</b>	<b>Time Bound</b>
	<i>What do you want to do?</i>	<i>How will you measure if you were successful?</i>	<i>Why is it probable that you can reach this goal?</i>	<i>How does it align with your values &amp; long-term</i>	<i>What is the time-frame for this goal?</i>

				<b>objectives?</b>	
<b>Example Goal:</b> <i>Increase reach on social media by 25% in the next quarter.</i>	<i>Increase exposure on social media.</i>	<i>Increase followers on Instagram by 500 people on each platform.</i>	<i>Based on growth in last quarter in Facebook and Instagram followers, this goal is attainable. (We gained 350 followers last quarter without trying)</i>	<i>We know that our target audience is on Instagram. We believe that our solution truly improves the quality of life for our audience, so reaching more of our target audience will improve more lives.</i>	<i>Over the next quarter</i>
<b>Goal #1</b>					
<b>Goal #2</b>					
<b>Goal #3</b>					

## CURRENT CHALLENGES & OPPORTUNITIES

### Identify Barriers & Resources Available

Barriers are things that your company is facing or hurdles you have to overcome.

*Example: Lack of brand awareness in new market*

Opportunities are areas that you've never tapped or resources you aren't currently utilizing.

*Example: Starting a targeted social media campaign in that specific area*

In this exercise, we're going to have you identify 10 barriers and areas of opportunity.

**Barriers:**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

**Opportunities:**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

## CURRENT MARKETING EFFORTS/AUDITS

In this section, we're going to evaluate your current marketing assets and efforts to see what's working and what's not?

## Branding

- How will it connect with your target audience?
- Is it effective?
- Does it set you apart from your competitors?
- Does it clearly communicate what you do?

## Website

We want you to analyze your website from two perspectives: technical performance and user experience. Technical performance of your website is how your website performs on a technical level (such as loading quickly, how it looks on a mobile device, etc.) On the other hand, user experience is how people who visit your website experience the site (such as message clarity, dynamic content, ease of navigation)

### *Technical*

Utilize [www.gtmetrix.com](http://www.gtmetrix.com) to check out the performance of your website.

- Load time:
- Time to Interact:
- Performance Score:
- Does it look good on a mobile device?
- Does it look good on a tablet?

## User Experience

- How will it connect with your target audience?
  - Is your target audience shown on your website? (photos, videos, mentioned in the copy)
  - Are their pain points addressed?
    - *Example: We know medical practice administrators are too busy to deal with social media - so on our page about social media we address how much time they'll save by outsourcing this to our company.*
- Is the message on your website clear?
  - In other words, can a new website visitor clearly understand what problem you solve and who you solve that for within 3 seconds of arriving on your home page without any other context?
- Is the content on your website dynamic?

Think about the variety of people that visit your website. Different types of people have different ways of processing information, such as visuals, audios, and written copy. You want to present the information on your website in enough formats that regardless of who is on your website, they can easily process what you are saying. This is what we are referring to as dynamic content- presenting the same information in different formats. Ultimately, having dynamic content throughout your site will increase the likelihood of them converting into paying customers.

- Visual - Graphics/Photos/Videos
  - Auditory - Podcasts/Videos
  - Readers - Written Copy
  - Verbal - Conversational
  - Doers - How to Guides
- Does your website build trust in your website visitor's mind?

Building trust in your audience on your website can be done in a number of ways. However, the ultimate goal of the site is to convince someone to work with you. Here are a number of ways this can be accomplished:

- Testimonials
- Examples of work
- Case Studies
- FAQ section - frequently asked questions

- About Us page - showing *who* they'll be working with and what your background is
- How easy is it to navigate to the information that your users will need to find?  
No page should be more than 3 clicks away for your user. Keep that in mind.
- Does every page have a clear call to action?
  - Does your call to action align clearly with the action that your users prefer?
    - *Example: We know that when working with medical practices who primarily work with older patients, that the call to action needs to be a phone call because older patients prefer phone calls versus email or form fill out. On the flip side, when working with a company targeting young and busy professionals, we integrate chat features on the website because these users will prefer instant messaging to picking up a telephone.*

## Social Media

Your social media strategy should consist of four goals:

- Reach as many people in your target audience as possible
- Consistently educate those people on your product/services through engaging content
- Help your brand remain top of mind for those who may need your product/services in the future
- Drive those people to your website so they'll convert into paying customers

The following questions are designed to help you identify if your social media strategy is accomplishing those goals.

- Consistency
  - Are you posting on a consistent basis?
- Effectiveness
  - Is your message clear and relatable?
  - Do your graphics connect with your audience?
  - Are you reaching new people?
  - What's your engagement rate?
  - Is there a strategy to what you are posting?

- Conversion
  - Is your social media driving traffic to your website?
  - Are people converting into paying customers from your social media?

## Email Marketing

Email marketing is still one of the most effective ways to nurture leads simply because you aren't fighting an algorithm to get your content in front of your audience. With email marketing, you aren't fighting the algorithms so every person has the opportunity to read your content.

Your email marketing efforts should do as follows:

- Drive traffic to your website, blog, and other forms of content
  - Grow your social media following
  - Implement automated strategies to decrease abandoned carts, welcome subscribers to your list, and educate new followers about your brand
  - Build credibility and authority with your audience by sharing insightful information, resources, and content
  - Improve communication with your audience
- 
- Consistency
    - Are you emailing on a consistent basis?
  - Effectiveness
    - Is your message clear and relatable?
    - Do your graphics connect with your audience?
    - What's your open rate like?
    - Do you have a plan to grow your email list? Is it working?
  - Conversion

- Are people converting into paying customers from your email marketing?

## SEO

Utilize [Neil Patel](#) or [Moz's](#) SEO tool to get the information you can't get elsewhere.

- Do you have a Google My Business account?
  - Is all of the necessary information filled out?
  - Are all of your products/services listed on your Google My Business profile?
  - Have you posted to your Google My Business?
  - Do you drive current/past customers to your account to leave a review?
- Do you know what keywords your target audience would be searching for when looking for your products or services?
- When you search for these keywords on Google, does your business come up near the top of the search results?

*NOTE: Many times Google will know that you're related to your business, so it will give you a false impression of ranking well on Google. Go into Incognito mode or use a friend's computer that you're not signed into to try this exercise. This will give you a more true answer.*

- Do you have Google Analytics and Google Search Console installed?
- What is your domain score?
- How many backlinks does your website have?
- Does every page on your website have at least 1,500 words of keyword-specific content written on it?

## Sales Collateral

- Are all versions of your sales collateral consistent?
  - Meaning each version reflects the same:
    - Solutions to pain points
    - Tone of voice

- Branding such as fonts, colors, personality
- Does it clearly identify the solutions to your potential customer's pain points

## Other Marketing Efforts

- If you are involved in other marketing efforts, make sure to complete a full audit of whether or not it is driving the results you are looking for.

# TARGET MARKET

## Identifying your target audience

Knowing who you are targeting your company towards is vital to any of your branding and marketing efforts.

How to identify your market using the graph below:

1. Think of your entire customer base as a whole
2. Identify the top 3 verticals of your entire customer base (i.e. they are in the same industry, a large group is women, a section is in a particular age group, etc)
3. Zone in on one vertical at a time to identify their key demographics, the challenges they face, their pain points, what types of media they consume, their central locations, etc.

	Example	Vertical One	Vertical Two	Vertical Three
<b>Name of Buyer Persona</b>	Medical Offices			

<b>Demographics (Age, job title, gender, education, marital status, income, etc)</b>	<ul style="list-style-type: none"> <li>→ 30-50 years old</li> <li>→ Typically married women</li> <li>→ Job titles are Office Admin</li> <li>→ Have a Bachelors or Masters</li> </ul>			
<b>Challenges or Pain Points</b>	<ul style="list-style-type: none"> <li>-Are too busy managing the office to focus on marketing efforts</li> <li>-Don't even know where to start</li> <li>-Has a large patient base that needs constant touch points/follow-ups</li> </ul>			
<b>Medias They Consume</b>	<ul style="list-style-type: none"> <li>-Are active on social media</li> <li>-Offices are frequently spotlighted on local news channels</li> <li>-Other physicians in their market communicate via email</li> </ul>			

Where are they located? Where are their customers located?	-We can provide marketing nationwide -Their clientele/ patients have to be local			
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## COMPETITIVE ANALYSIS

Now that you have analyzed your marketing efforts and business assets, do the same for your top three competitors:

	Competitor #1	Competitor #2	Competitor #3
<b>Business Name:</b>			
Web Address:			
Core Values			
Vision Statement			
Mission Statement			
Services/Products Offered			
<b>WEBSITE</b>			
Load time:			

Time to Interact:			
Performance Score:			
Does it look good on a mobile device?			
Does it look good on a tablet?			
Who is their target audience?			
Is the message on their website clear?			
Is the content on their website dynamic?			
Does your website build trust in their website visitor's mind?			
Does your website build trust in their website visitor's mind?			
How easy is it to navigate to the information that their users will need to find?			

Does every page have a clear call to action?			
<i>SOCIAL MEDIA</i>			
Are they posting on a consistent basis?			
Is their message clear and relatable?			
Do their graphics connect with their audience?			
What's their engagement rate?			
<i>SEO</i>			
Do you have a Google My Business account?			

When you search for keywords on Google, does their business come up near the top of the search results?			
What is their domain score?			
How many backlinks does their website have?			
Does every page on their website have at least 1,500 words of keyword-specific content written on it?			

## BUDGET

1. Make a list of every single marketing effort you would like to utilize

Vendor	Category	Price

2. Prioritize the marketing efforts you believe you have the biggest impact to improve your overall digital presence

3. Compare your prioritized list with the amount of gross revenue your business will generate and cut the list/items where need be

## MARKETING RECOMMENDATIONS

Up to this point, you've simply been gathering data - this section requires combining that data into a workable plan that is broken down into phases. These phases typically allow for you to capture ROI that can fund the future phases of your plan. In other words, if you start with Google Ads and the ads work - you'll have more money to invest into Facebook ads in phase 2.

Before you begin breaking your plan into phases, take a strong look at your company's goals, the current challenges being faced, your target audience, and the gaps identified in your competitor's marketing. You want to ensure that the marketing you choose to invest in adequately considers the research you conducted and addresses both where your company is now and where you'd like to be in the future. This plan should act as a roadmap on how to get where you'd like to be.

From there, you must take into consideration what your budget allows.

In phase 1, you always want to start with Brand Identity and Branding issues first as these are the foundation of your brand. This would include:

- Logo
- Key Brand Assets
- Website
- Messaging

In most cases, phase 1 will be fixing one of these things. Although fixing these things first may not directly fund your phase 2, it will lay a solid foundation for you to begin ramping up your marketing efforts.

From there, you would move into Marketing and address the issues found in your audit. You want to break things down enough that you allow for the return on investment of each phase to fund the following phases.

Record your marketing plan here:

**Phase 1**

**Phase 2**

**Phase 3**

Once you've completed this worksheet, you can simplify your marketing into a marketing plan. We've also provided a template for that [here](#).