SAMPLE COMPANY

Actionable Marketing Strategy

Prepared on 1 Jul 2022 by:

catalyst
CONTENT

Table of Contents

Business Overview

WHO WE ARE	WHAT WE DO	HOW WE DO THIS	WHY WE DO THIS
Company X is...	We offer...	By....	We believe....

WHO DO WE SERVE

Avatar #1	Avatar #2	Avatar #3	Avatar #4	Avatar #5

VALUES

Principle #1 Description of how this is expressed.	Principle #2 Description of how this is expressed.	Principle #3 Description of how this is expressed.

PERSONALITY

Quality #1 Description of how this is expressed.	Quality #2 Description of how this is expressed.	Quality #3 Description of how this is expressed.

OUR PROMISE / VALUE PROPOSITION

Choose Company X for ... that ... and ....
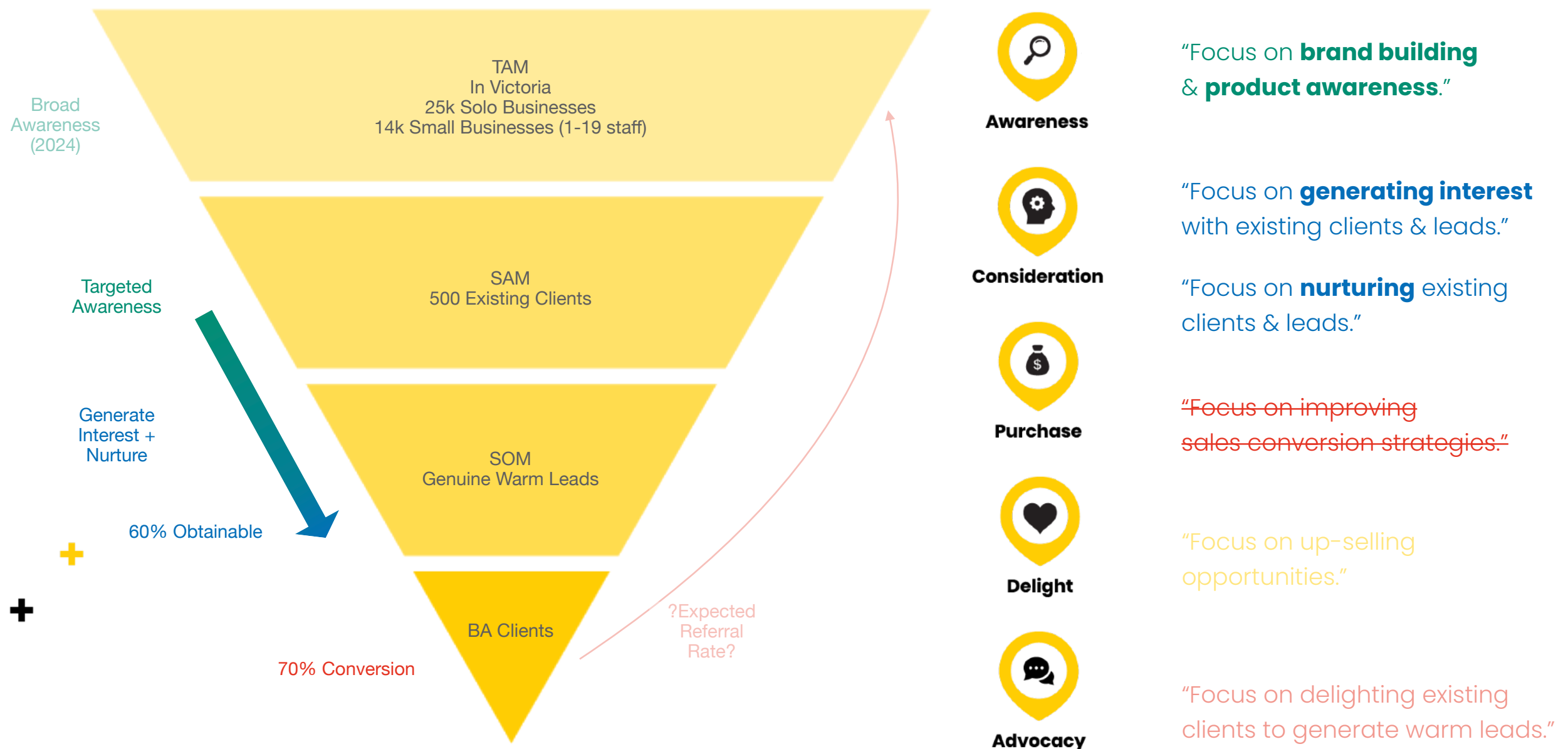
OUR TAGLINE

3 words...
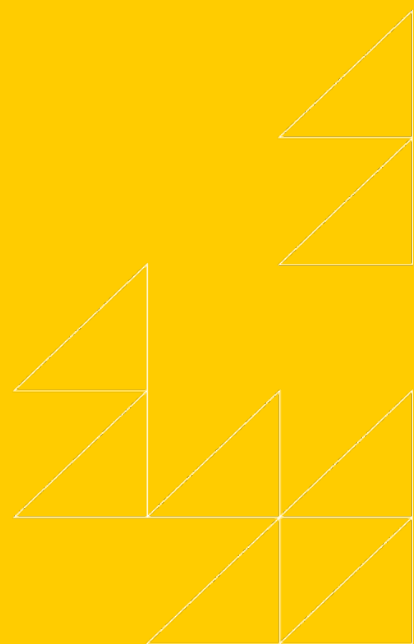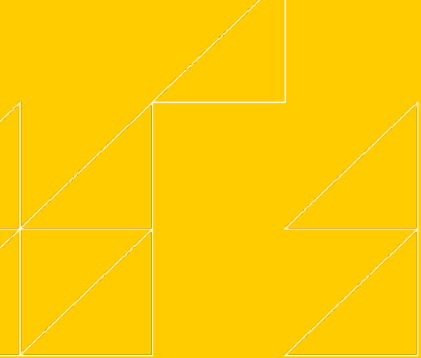
Business & Marketing Goals

Business & Marketing Goals (by business size x product)

	Service #1 (Relevant Sectors)			Service #2 (Relevant Sectors)		
	Avatar #1	Avatar #2	Avatar #3	Avatar #1	Avatar #2	Avatar #3
General annual revenue target	Min $300k. Ideal $400k. Stretch $500k.					
Average revenue per client size per service	$2k	$15k	$6k	$3k	$25k	$7k
Number of **clients** required	15	2	10	10	1	5
Annual revenue by product	$30k	$30k	$60k	$25k	$25k	$35k
Conversion rate	50%	50%	50%	40%	40%	40%
Number of leads required	10	4	20	10	3	13
Consolidated number of clients required	20			10		
Consolidated number of leads required	50			25		
Annual number of qualified leads required from marketing	**20**			**10**		

Marketing Funnel, Journey + Objectives

Broad
Awareness
(2024)

Targeted
Awareness

Generate
Interest +
Nurture

60% Obtainable

70% Conversion

TAM
In Victoria
25k Solo Businesses
14k Small Businesses (1-19 staff)

SAM
500 Existing Clients

SOM
Genuine Warm Leads

BA Clients

?Expected
Referral
Rate?

Awareness

Consideration

Purchase

Delight

Advocacy

"Focus on **brand building**
& **product awareness**."

"Focus on **generating interest**
with existing clients & leads."

"Focus on **nurturing** existing
clients & leads."

~~"Focus on improving
sales conversion strategies."~~

"Focus on up-selling
opportunities."

"Focus on delighting existing
clients to generate warm leads."

Audience Personas

Broad Audiences - Business Owners

Avatar #3
27%

Avatar #1
41%
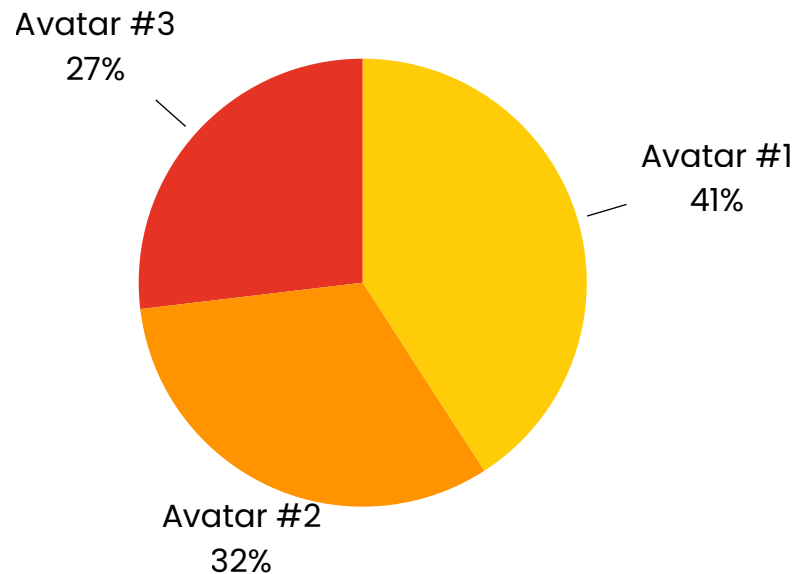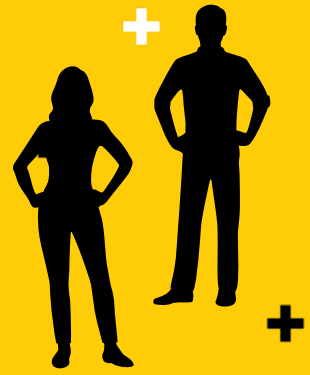
Avatar #2
32%

Avatar #1

Resistant to change
Growing beyond capacity
Danger of becoming obsolete
Succession planning
Closing skills & resourcing gaps

Avatar #2

Resistant to change
Growing beyond capacity
Danger of becoming obsolete
Succession planning
Closing skills & resourcing gaps

Avatar #3

Resistant to change
Growing beyond capacity
Danger of becoming obsolete
Succession planning
Closing skills & resourcing gaps

Resistant to change
Growing beyond capacity
Danger of becoming obsolete
Succession planning
Closing skills & resourcing gaps

"I'm driven to improve my business."

Context & Problem

What is their reality?
How did they get to this problem?
Why can't they solve for this?
Why can't your competitors solve for this?

Goals, Motivations, Needs

😰   😍   🤩

Fears...   Wants...   Needs...

NAME??
Role / Job

xx - xx years old
Business Description (Minimum turnover, employees, etc.)
Avatar Description

"My business is wearing me down."

Journey: From Trust to Conversion

1. Matt discovers us by…
2. At the point of ****, Matt feels *** and researches further by ***
3. After ***, Matt thinks *** and decides to reach out by ***
4. The first point of contact is *** and the conversation is about ***
5. We diagnose by asking ***
6. Matt usually responds with ***
7. This triggers a conversation about ***.
8. When Matt indicates readiness by ***, we offer ***.
9. Matt hesitates because of *** and ***
10. We assure him by saying *** and offering *** to start.
11. Matt converts because *** and ***
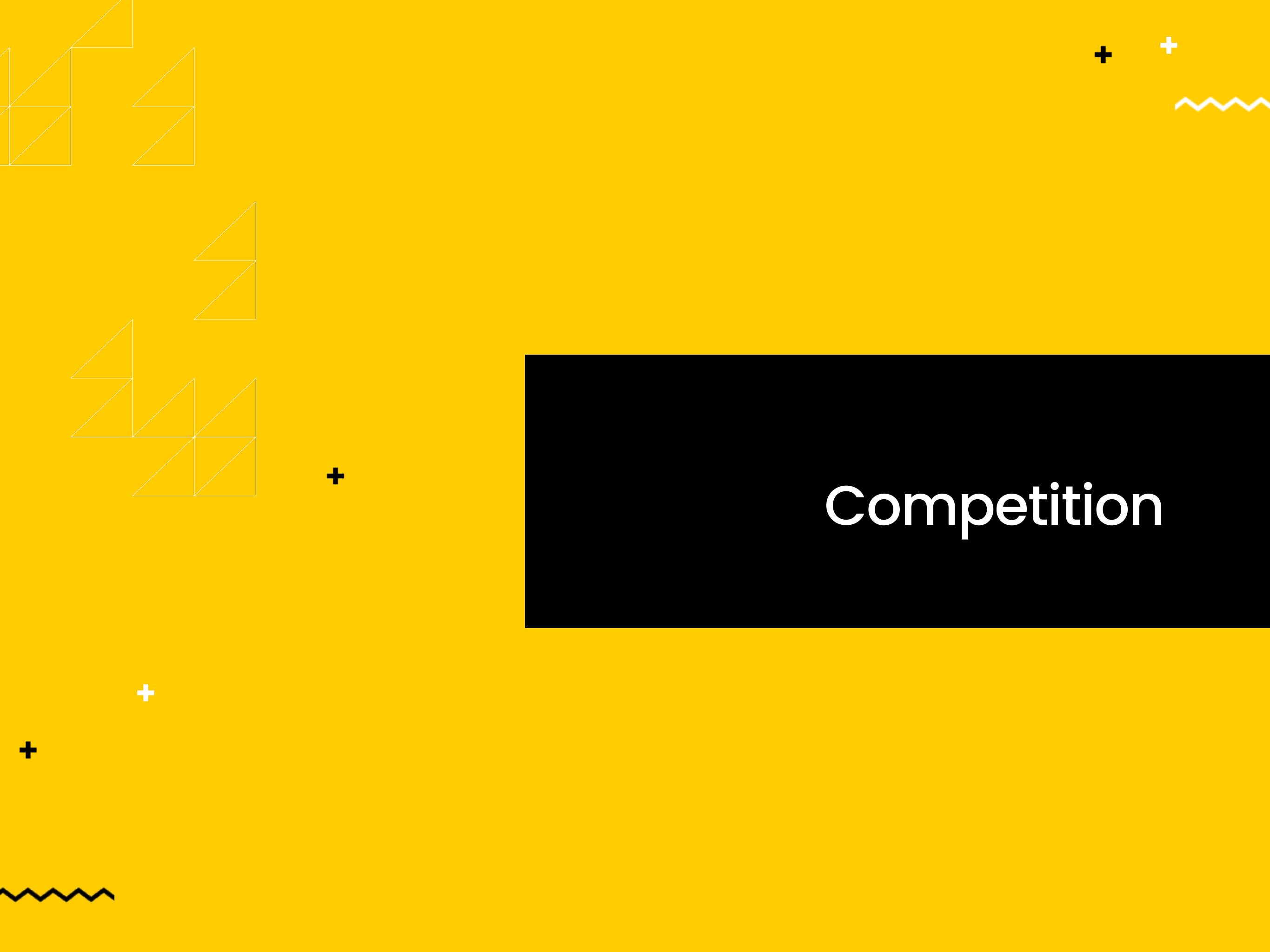12. Matt refers because *** and ***.

NAME??
Role / Job

xx - xx years old
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Competition

Channel Scoreboard #1

		Client	Competitor #1	Competitor #2
Search	Authority	9	29	21
	Backlinks	19.7k	846	1.1k
	Linking Domains	36	183	150
	Organic Traffic	160	334	435
	No. Keywords by Rank Top 3 | Top 10 | Others	3 | 6 | 450	5 | 49 | 1,300	23 | 108 | 2,100
	Traffic Type Non-Branded | Commercial Intent	21.5% | 3.4%	23.4% | 2.1%	71.8% | 5.5%
	Paid Traffic	0	0	0
Google MyBusiness	Rating (Stars)	4.8	4.9	5.0
	Reviews	20	40	3
	Updates	0	6	0
	Media by Owner	9	14	1
Website	Blogs	441	119	81

13

Channel Scoreboard #2

		Client	Competitor #1	Competitor #2
LinkedIn	Followers (new)	197 (86)	817 (283)	217 (42)
	Employees	18	30	17
	Total Posts	15	0	0
	Engagement Reactions + Comments + Shares	165 128 + 1 + 36	0	0
Facebook	Followers or Likes, Posts, Post Regularity, Engagement	86 | 5 | n/a |	1.1k | ?? | 17/m | 125	415 | n/a | n/a | n/a
Instagram	Followers, Posts, Post Regularity, Comments		1.2k | ?? | 17/m | 18	
Twitter	Followers, Tweets, Tweet Regularity, Engagement		N/a	945 | n/a | n/a | n/a

SEO

Keyword	Position	Visits	Difficulty	CPC
<competitor #1 name>	1	256	27	3.47
what is mygovid	2	12	44	0
xero projects	7	8	35	2.86
what is mygov id	2	6	50	0
creative accountants	4	5	43	7.23
id is	11	4	78	7.58
single touch payroll finalisation	12	4	21	0
mygovid	50	4	66	0.37
stp finalisation	11	3	21	0
xero tracking categories vs projects	6	3	23	0

Competitor #1

Awareness → Consideration → Purchase → Delight → Advocacy

C#1's content marketing strategy to target *almost* **Matt** and **Joe**, and:
▸ retain them (delight)
▸ stay front of mind (advocacy)
▸ support their research (consideration)

Messages

Positioning: We're for every business: creatives, ecommerce, tradies, booze...

Actual Audience: Rebels who own small businesses

Messaging themes:

- Market / Problem: Devote your time to what you value

- Solution: Outsource CFO, Advisory, Talk it out

- Personality: We're quirky & a bit different

- Team work = Dream work

Blog categories: **At Competitor #1**, Covid, Lifestyle, Personal Finances, Super, Tax, Xero, Your Business

Key tactics / approaches:

- Reactions first - they want to stand out and be memorable - design, stories, merchandise (less about facts, statistics, principles, humanity, etc.)

- **Webinars & Seminars**

- Downloadable Guide

- Employees as content creators

- Branding their employees banners

Conclusion: Competitor#1's content revolves around the practical running of a business rather than growing a business or achieving personal fulfilment. They wear their personalities on their sleeve and the website is flashy but the content lacks proof and rings hollow. Competitor#1 does reasonably well to weaponise its staff.
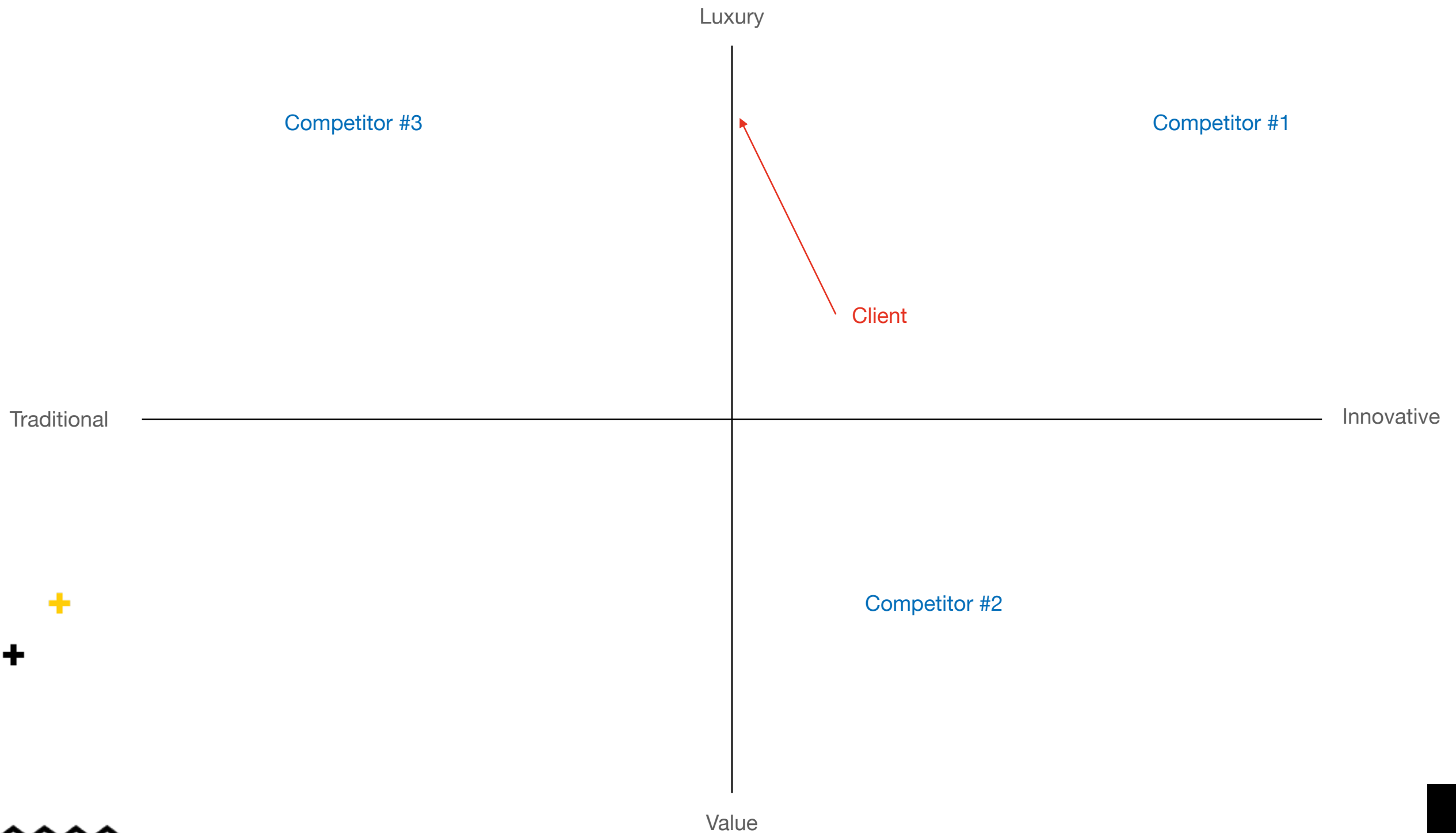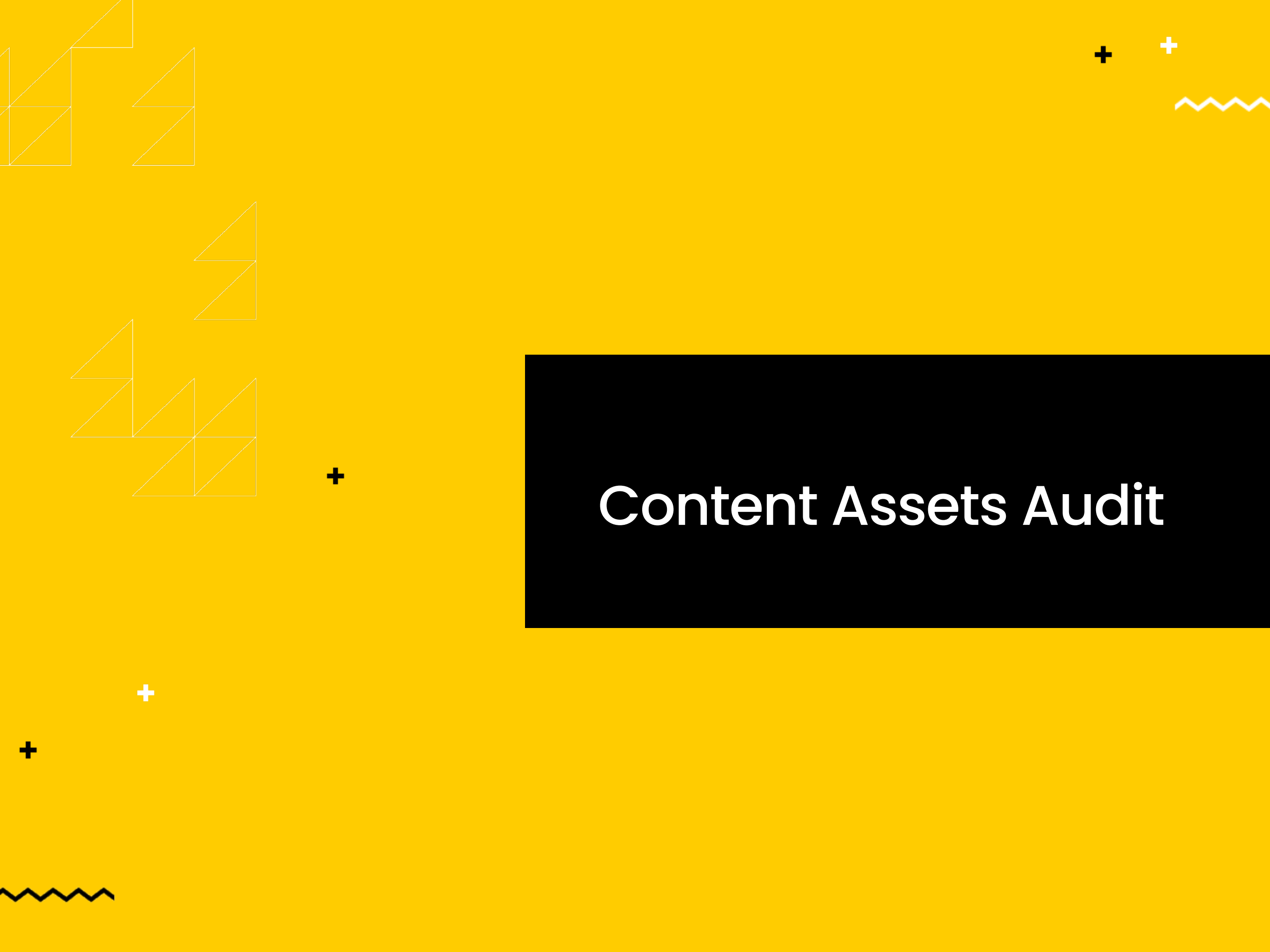
Competitor #1

Awareness Consideration Purchase Delight Advocacy

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Market Positioning

Luxury

Competitor #3

Competitor #1

Traditional

Innovative

Client

Competitor #2

Value

Content Assets Audit

Approach

Audit.

How effectively does Client's <u>content</u> <u>asset</u> speak to the target personas?

Recommendations.

How can the content asset more effectively support the target personas at the different stages of the buyer journey?
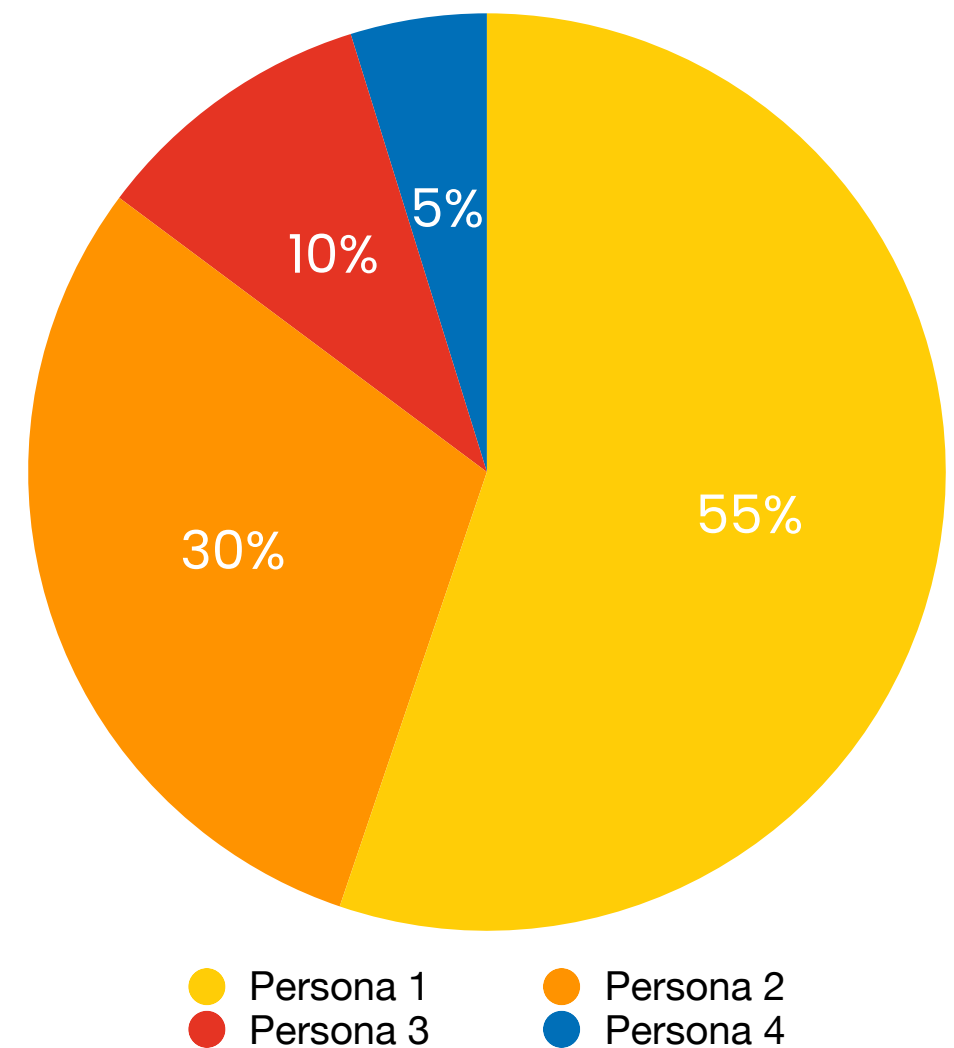
Key Findings & Recommendations

Broadly, the content assets:
▸ Finding #1
▸ Finding #2
▸ Finding #3

Broadly, we recommend:
▸ Recommendation #1 – the **website** to address the
▸ Recommendation #2 **channels**
  • From LinkedIn to Website + FaceBook
▸ Recommendation #3 – Email Marketing

Perceived Current Targeting

5%
10%
55%
30%

● Persona 1   ● Persona 2
● Persona 3   ● Persona 4

Audit: Website | Digital Storefront

	Matt	Persona 2	Persona 3
Efficacy Score	3	1	3

Messaging / Impressions

"Message 1"
"Message 2"
"Message 3"

Current Purpose / Place in the Buyer Journey

Analysis and insights.

Key Recommendations

1. Recommendation 1
2. Recommendation 2
3. Recommendation 3

Strategy = Messages x Tactic

Marketing Strategy

Drive *** from ***
by ‹building more relationships based on trust›,
‹staying front of mind across key channels›,
‹with clear differentiation messages›,
and ‹compelling stories›.

"Market Message #1"

This message:

1. helps target audiences appreciate ***
2. positions client as ***
3. sets client up to ***

"Word 1" could be interpreted as ***.

Sub Messages	Variations of Expression (examples)					
	Facts	**Principle**	**Emotions**	**Visions**	**React**	**Actions**
Variation / Example #1	Expressed as a data point	Expressed as a value	Expressed as an act of making others happy	Expressed to evoke imagination	Expressed to evoke a reaction	Expressed as the bottom line
Variation / Example #2						
Variation / Example #3						
Variation / Example #4						
Variation / Example #5						
Variation / Example #6						

Strategy = Messages x Channels x Tactics

Audience Category	Buyer Persona	Stage A|C|P|D|A	Core Messages	Targeted Messages	Channels / Tactics
Clients	Matt	C	As captured in previous slides	Specific Messages for Matt	~~Instagram~~ ~~Video stories~~
	Joe	C		Specific Messages for Joe	Improve the Website + Articles Regular Facebook Posts Regular Post "Commentaries" Monthly Live FB Show Improve EDMs
	Susie	C			
	Alfred	D			Improve EDMs
Referrers	Zien	A			LinkedIn Sales Navigator + Downloadables + Health Checks Expert Guests on FB Live Show
	Natanya	D | A			Improve EDMs
	Bob	A			Improve EDMs
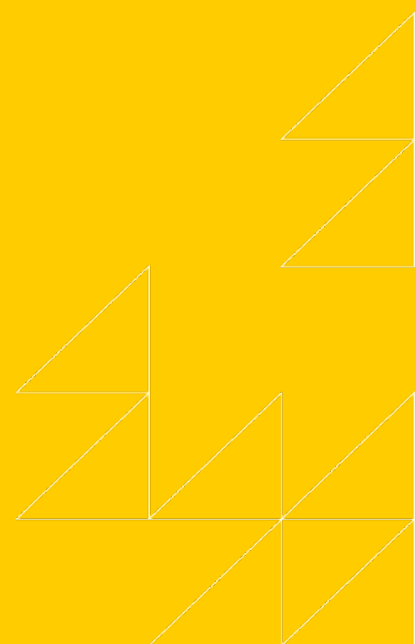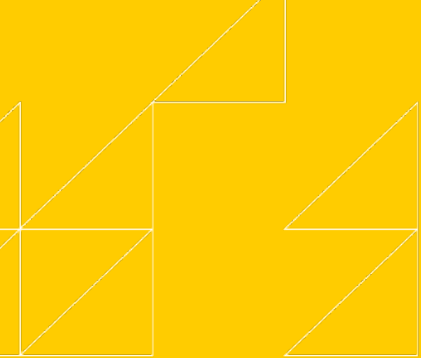
Tactic Prioritisation
>> Content WishList

Marketing Budget

4 potential budgeting approaches:

1. **5-to-1 ROI: To unlock $1,000,000 marketing budget should be $100k /year x 2 years**
2. 5-to-1 ROI: To unlock $1,722,000 marketing budget should be $344k /year x 2 years
3. 11.3% of Budget for B2B Services companies: ???
4. 12% of Revenue for B2B Services companies: ???

Resource	Role	2-Year Budget
Company Director / CMO (4 hours a week)	Direction	25,000
In-House Marketing Lead (1 day a week)	Lead	60,000
	Implementation	
Out-Sourced Marketing Agency	Strategy	91,000
	Consultancy	
	Implementation	
Other	Ads, Sponsored appearances, etc.	24,000
		200,000

Tactic by Stage

Solidify Foundation

1. Google MyBusiness update
2. Website update including:
   a. Lead gen content
   b. Content editing
   c. Landing pages
3. Social profile update
4. Grow Social followership (organic)
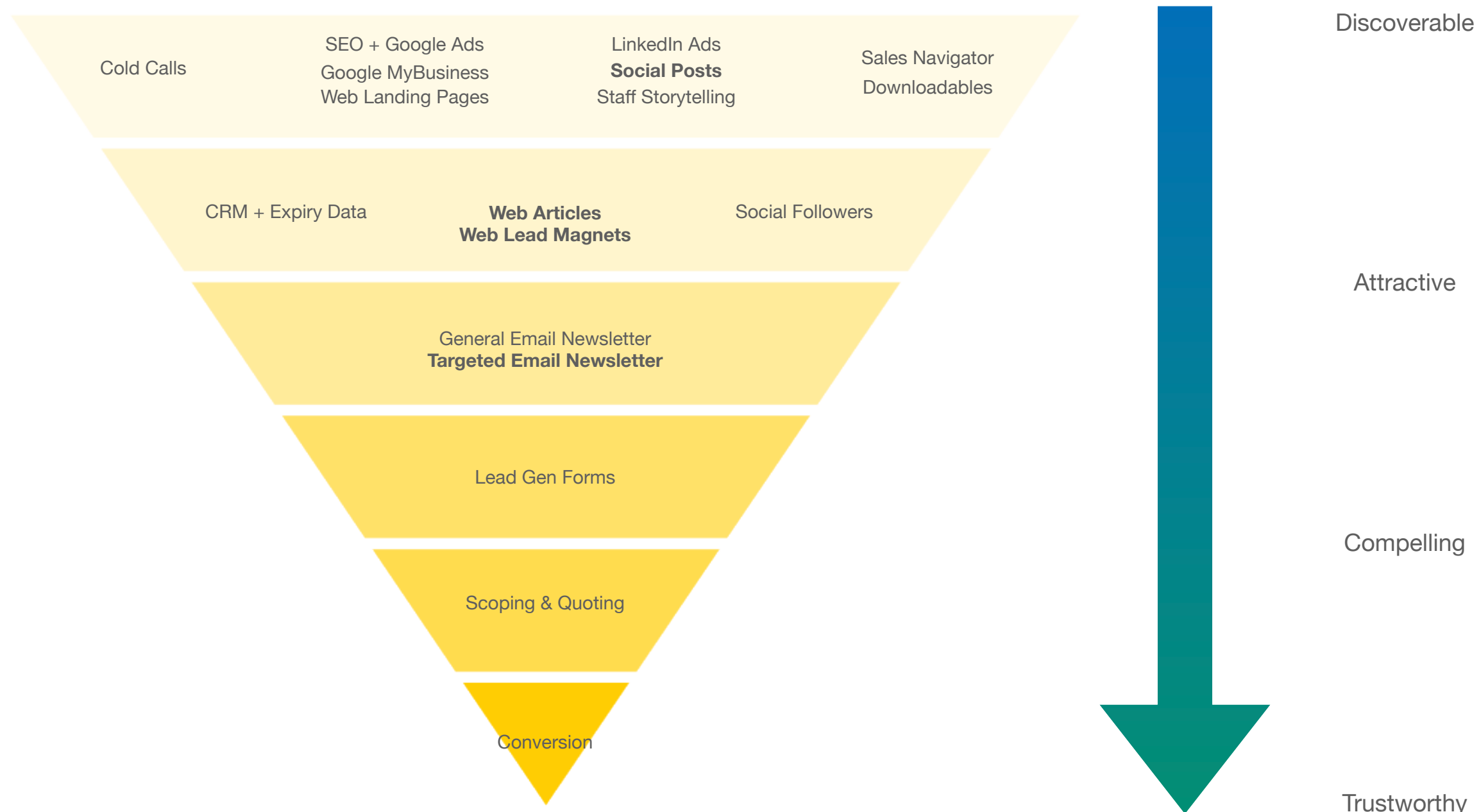5. Downloadables update
6. SEO pivot
7. Staff storytelling workshop

Create Stories

8. Story bank development (by industry, according to priority) including:
   a. 6 months of articles
   b. 6 months social posts
   c. Staff generated content (posts)

Initiate Conversations

9. Article posting (1/f)
10. Social posting (2/w)
11. General email campaigns (1/m)
12. Targeted email campaigns (1/m)
13. LinkedIn Sales Navigator (2/w)
14. LinkedIn Ads (on-going)
15. Google Ads (on-going)

Tactics in the Funnel

Cold Calls

SEO + Google Ads
Google MyBusiness
Web Landing Pages

LinkedIn Ads
Social Posts
Staff Storytelling

Sales Navigator
Downloadables

CRM + Expiry Data

Web Articles
Web Lead Magnets

Social Followers

General Email Newsletter
Targeted Email Newsletter

Lead Gen Forms

Scoping & Quoting

Conversion

Discoverable

Attractive

Compelling

Trustworthy

Tactics by Channel

Search
SEO pivot
Google MyBusiness update
Google MyBusiness posts (1/w)
Google Ads (on-going)

Web
Foundational updates including:
- Lead gen content
- Content editing
- Landing pages

Story bank development
Article posting (1/f)

LinkedIn
Social profile update
Staff storytelling workshop
- Content creation
- Resharing clients posts
- Interacting to grow trust

Grow Social followership (organic)
Social posting (2/w)
LinkedIn Ads (on-going)

Email
General email campaigns (1/m)
Targeted email campaigns (1/m)

LinkedIn Sales Navigator
Downloadables update
Message templates
Sales Navigator Training
Search, track and build relationships with key contacts (2/w)
"Loaded" In-Mails targeted by industry (50/m)
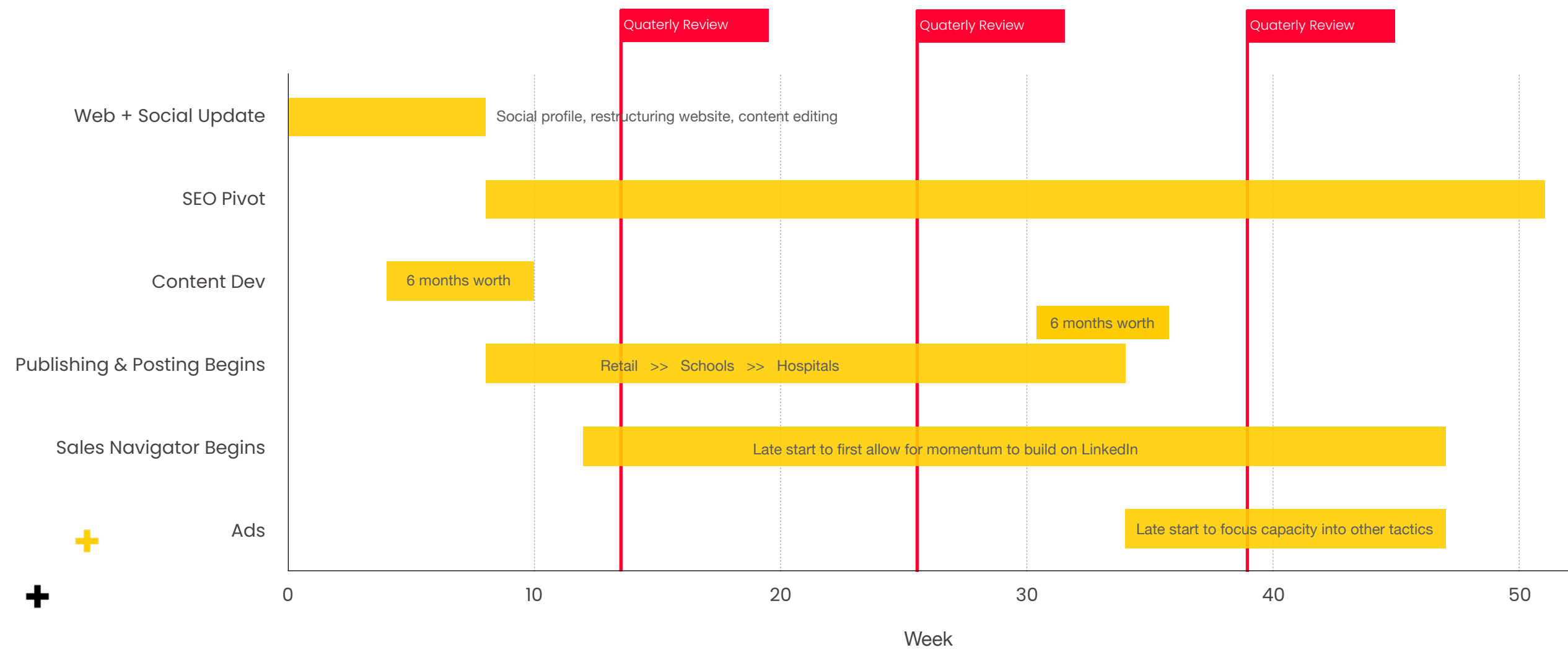
Execution: Immediate Priorities (Jun - Aug 2022)

Tactic (chronological order)	Owner	Cost Estimate	Priority	Notes
Social profile updates (LI + Lead Gen Form, GMB)	Catalyst			
Website updates: restructure, lead magnets, landing pages, content editing	Catalyst			
Content Dev: LinkedIn graphic templates (1 banner, 2 static posts, 1 carousel post, 1 animated post)	Volcanic			
Content Dev: 3 Case Study Articles (writing + stock images only)	Catalyst			
Content Dev: 3 Expertise Articles (writing + stock images only)	Catalyst			
Content Dev: 3 months of Social Posts (writing + stock images only)	Catalyst & Client			
SEO Pivot	Calibre9			
Publishing & posting	Client			
Email Campaigns - 2/m (writing / editing support as required)	Client			

Execution: Short Term Priorities (Sep - Dec 2022)

| Tactic (chronological order)	Owner	Cost Estimate	Priority	Notes
Content Dev: 1-3 Documents Update (edit & redesign)	Catalyst			Variables unknown, low certainty
Staff Storytelling Workshop - Create, Share, Interact	Catalyst			
LinkedIn Sales Navigator Training & Setup	CC			Best to include all inspector contractors
LinkedIn Sales Navigator	Client			Annual subscription
LinkedIn Ads Account Setup	CC			One off
LinkedIn Ad Creation (writing + stock images)	CC			Minimum 2 ads
LinkedIn Ad Management (tracking + optimisation)	CC			Minimum 2 ads

Execution: Timeline View

| | Quaterly Review | Quaterly Review | Quaterly Review |

Web + Social Update — Social profile, restructuring website, content editing

SEO Pivot

Content Dev — 6 months worth · 6 months worth

Publishing & Posting Begins — Retail >> Schools >> Hospitals

Sales Navigator Begins — Late start to first allow for momentum to build on LinkedIn

Ads — Late start to focus capacity into other tactics

Week

0   10   20   30   40   50

Metrics: what matters most?
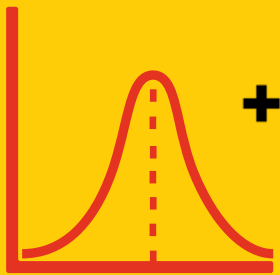
Channel & Post Type	Publishing Frequency	Priority Metric	How does it Drive Enquiries?
SEO	n/a	Ranking of 3-5 priority pages for buying intent keywords	Capture visitors with buying intent
Google MyBusiness (updates)	1 / week	Call Clicks	Supports ranking, indirect
Website (overall)	n/a	Visits to 3-5 priority pages	Funnel visitors with information intent towards key pages
Website articles	1 / fortnight	Views	Convince audiences that are approaching purchase decision
Google MyBusiness (reviews)	1 / week	*Specificity & keywords used*	Social proof convinces audiences
Social Posts	2 / week	Followers Post impressions	Increase organic reach
General Email Campaigns	1 / month	Replies	Efficacy of conversation starter
Targeted Email Campaigns	1 / month	Replies	Efficacy of conversation starter
LinkedIn Sales Navigator	2 / week	Replies	Efficacy of conversation starter
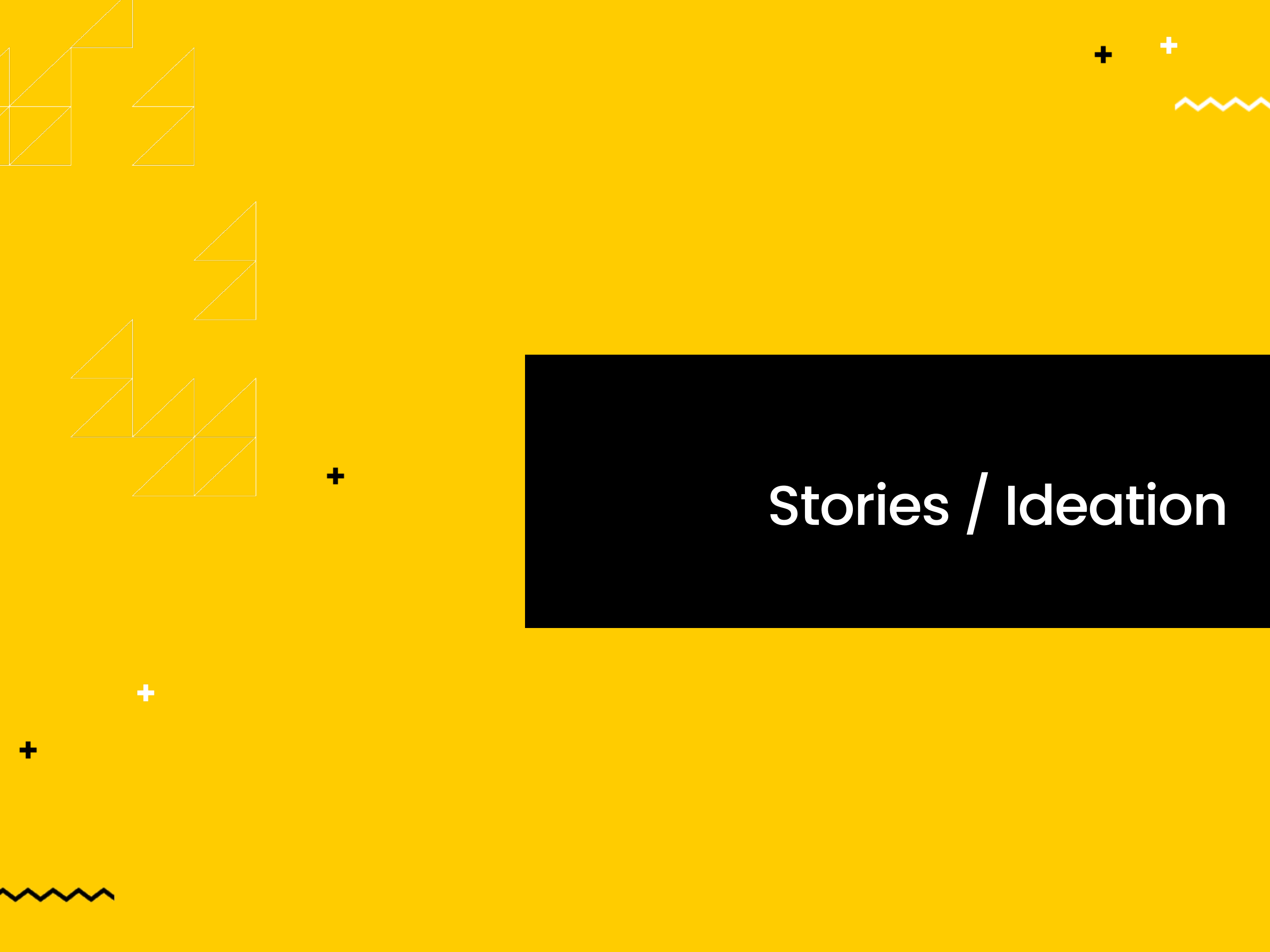
Stories / Ideation

Stories (the tactical vehicle to deliver Messages)

These messages can be communicated across different mediums (articles, social posts, videos, brochures, posters, infographics etc.) via 3 story types:

1. **Expertise Stories**   From existing proportion% > to this target proportion%
   1. Sharing <u>helpful technical information and industry knowledge</u> in a "how to" angle, comparisons, reviews, deep dives into a product / service / law.

2. **Ingredients Stories**   From existing proportion% > to this target proportion%
   1. Sharing about the <u>unique people, perspective, processes, and technology of client</u> to create an appreciation of differentiation and personality.

3. **Transformation Stories**   From existing proportion% > to this target proportion%
   1. Sharing <u>client stories,</u> testimonials and reviews for clients to be assured of competence and what to expect.

Client has done well with *** stories. It needs to add *** story types.
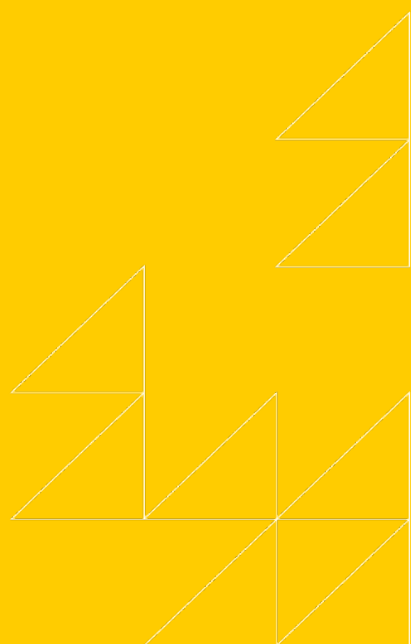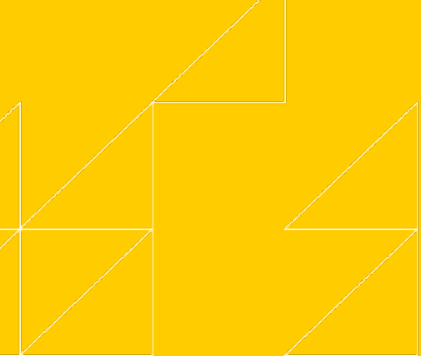
Wish List >> Actionable Plan

"

Great stories happen to those who can tell them.

– Reference Quote