



MARKETING PLAN

"Marketing is not an emergency,
It's a planned, thoughtful
exercise that started a long time
ago and doesn't end until you're
done."

Seth Godin

For over 30 years, Community Futures has been a proven leader in supporting rural entrepreneurs and small to medium enterprises just like you throughout BC and across Canada to survive and thrive.

The businesses and communities we serve have faced many challenges, including addressing accelerating change and disruptive technologies.

The Marketing Plan booklet will assist and guide you through the planning process for the annual marketing efforts for your business.

Marketing

~ Common Myths ~

Myth #1: My product/service is for everyone!

In fact, everyone is not your customer. It is important to know whom you are marketing to, in order to know how to reach them.

Knowing your target audience will help you know how to reach, engage and build a relationship with them. The platform, imagery, tone of voice, language, and timing will all play a big part in your marketing efforts.

Myth #2: If you build it they will come.

In fact, simply existing is not enough. You may be overworked right now, but in 6 months or a year where will you be? How will clients find you? How will clients/customers know that your product or service will make their life better?

Myth #3: I use word of mouth, I don't need to advertise.

In fact, word of mouth IS advertising. Ask yourself this, who is talking about you, what are they saying, who is in control of the narrative, are you aware of bad referrals, and how are you reading to them?

It is not uncommon for small businesses to overlook or even believe that marketing is not a necessity for their business. Marketing plays a key role in starting, succeeding, growing and selling your business. This program is designed to walk you through the annual marketing planning process, utilizing traditional and digital marketing efforts.

63% of adults actively talk about products and services online and 81% read what other people post about the products.

25-40% of all traffic and lead generation comes from earned media.

83% of consumers trust digital word-of-mouth more than content produced directly by advertisers.

Effective Media Outreach & PR Stats [3 case studies] (press.farm)

Traditional & Digital Efforts

~ Integrated Marketing Communication ~

Marketing: the action or business of promoting or selling products or services, including market research and advertising.

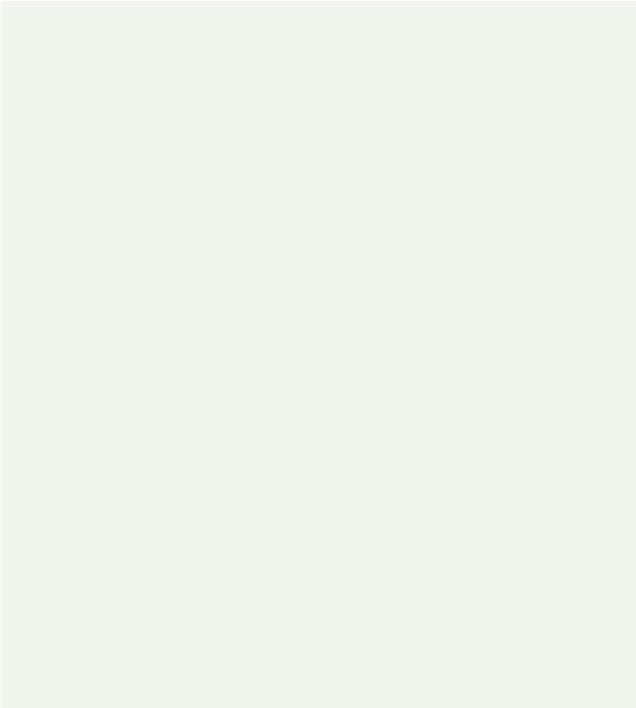
Integrated Marketing Communication: a planning process designed to assure that all brand contacts received by a customer or prospect for a product, service, or organization are relevant to that person and consistent over time.

There are two types of marketing, inbound and outbound.

Outbound or traditional marketing is any type of marketing where a business initiates the conversation by sending a message out to a mass audience.

Platforms: newspaper, radio, billboards, yellow pages, business cards, hand written notes, pamphlets, post mail, etc.

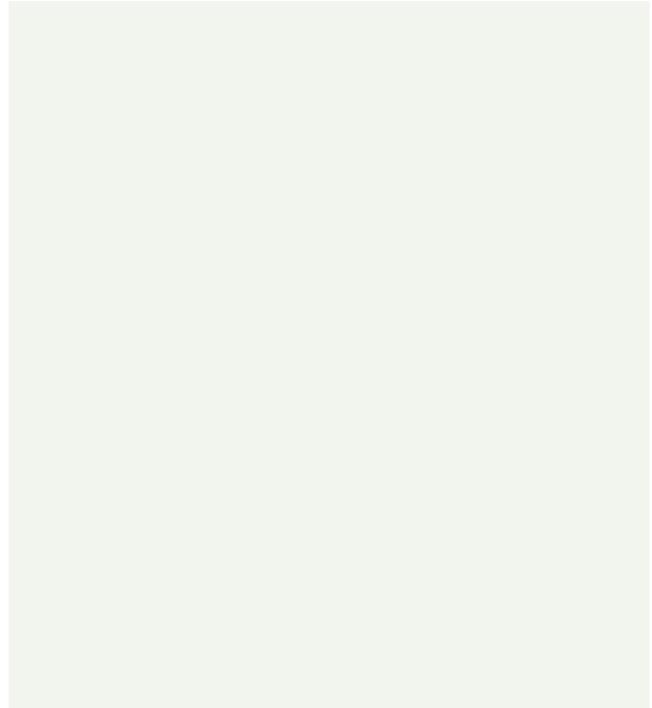
Make a list of the traditional marketing platforms you currently use for your marketing efforts.



Inbound or digital marketing focuses on pulling customers in. A business sends messages to its target audience, whether it is organic (free) or paid.

Channels: website, social media, paid ads, SEO, email marketing, content marketing, influencer marketing, etc.

Make a list of the digital marketing platforms you currently use for your marketing efforts.



Traditional & Digital Efforts

~ Integrated Marketing Communication ~

There are three media channels, paid, owned and earned.

Paid media involves paying to drive traffic, conversion and lead creation to owned media properties. Paid helps you scale up your marketing efforts and reach more people than non-paid formats.

Examples: newspaper/radio ads, paid search, display ads, social media ads, influencers

List the paid media you are currently using in your marketing efforts.

Owned media is content you create and have control over or manage. It promotes your brand in a very personal way by exhibiting your company's values and highlighting what the product or company does.

Examples: your own content, logo, packaging and point of sale

List the owned media you are currently using in your marketing efforts.

Earned media is free publicity generated by consumers, PR, and brand advocates who speak about your brand or product. This is the goal for all brands / businesses.

Examples: engagements, reach, shares, reviews and recommendations.

List the earned media your business has earned to date.

Target Audience

~ Buyer Personas ~

A buyer persona is a fictional, detailed, specific profile of your customer or target audience. They are used to give you, the marketer, a very specific idea of whom you are speaking to when creating marketing content. Creating personas will help your marketing efforts by

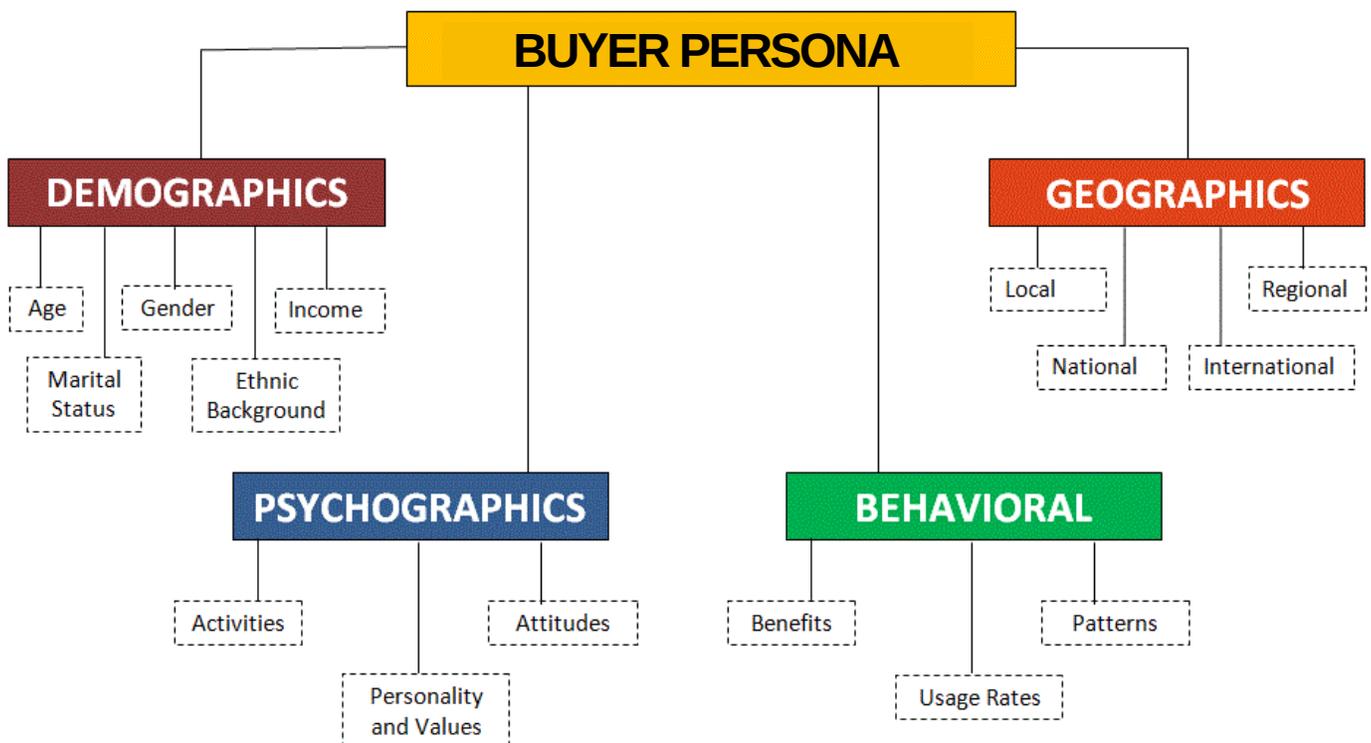
- humanizing your audience
- ensuring you ask the right questions
- getting and keeping everyone on the same page
- keeping you focused on your writing styles, tone of voice
- leading you to real potential clients

You will, without a doubt, have more than one persona for your business.

Example: if my business is an ice cream truck, my target audience would include: parents of young children, grandparents of young children, people with a sweet tooth, people who are outside and in the area where I am parked, etc.

My target audience excludes vegans, people who do not like ice cream, people who are making healthy food choices, etc.

The chart below outlines some details to include in the buyer personas for your business. Include a name (can be real) and photo (best to use stock images) as they do represent your clients/customers.



Remember: to check in with your team, make this a group effort! Personas are living documents, meaning they will evolve with your business. Keep them updated!

Target Audience

~ Buyer Personas ~

Example: Below are a few of the personas we have created for our organization.



Larry Loan

Represents new loan clients

Demographic Profile

- Business owner with 4 employees
- Age 45+
- Married with two children

Motivations

- The business is a part of him
- Money and success
- Business pivot to online platform
- Business growth
- Community minded

Online behaviours:

- 3-5 hours online daily
- Uses the cloud for bookkeeping and payroll
- Uses email everyday
- Uses online banking apps for personal and business banking needs

Digital Channels Used:

- Preferred search engine: Google Chrome
- Social Media: Facebook, YouTube, Twitter
- Listens to podcasts
- Email
- Zoom
- Google Docs



Ivana Coach

Represents coaching clients

Demographic Profile:

- Aged 55 years
- Starting a new business
- Digital Savvy
- Married, adult children

Motivations:

- Be a decisions maker
- Success
- Opportunity

Online Behaviours:

- 10-12 hours online daily
- Always has smartphone on hand
- Primarily uses laptop
- Limited internet service at home
- Tethers cell phone as internet booster
- Newsletters from suppliers to stay up to date with industry changes and trends

Digital Channels Used:

- Streams Netflix and Google movies
- Audio books
- Spotify and YouTube for playlists
- Search engine depends on customer/supplier
- Uses windows operating system



Learning Linda

Represents training clients

Demographic Profile:

- 30 years old
- Self Employed, unincorporated
- Single, no children

Motivations:

- Efficiencies and convenience
- Independence
- Learning is power

Online Behaviours:

- 8-10 hours online daily
- Reads blogs and supplier emails to stay up to date with industry changes
- Researches digital tools that make life easier
- Stays up to date with sports news and game scores
- Attends webinars regularly

Digital Channels Used:

- Search engine: Chrome, windows
- Social media: Facebook, Instagram, Twitter
- Apps: Receipt Bank, Trello
- Email daily with clients and suppliers Messaging in Facebook group chats

Target Audience

~ Buyer Personas ~

Work together with your team to build the personas for your business. These are living documents, they will evolve and change with your business. Keep them updated and refer to them often.



Name

Demographics:

Name

Demographics:

Name

Demographics:

Target Audience

~ Buyer Personas ~

Work together with your team to build the personas for your business. These are living documents, they will evolve and change with your business. Keep them updated and refer to them often.



Name

Demographics:

:

:

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Name

Demographics:

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Name

Demographics:

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Goals

~ *What do you want to achieve?* ~

Your chances of success increase if you write down your goals and share them with your team. It ensures you are all on the same page and working on tasks required to achieve the goal.

When writing your goals, get feedback from your team and any stakeholders. Be sure everyone is on the same page with the 'how, where and when' to achieve the goal.

Setting goals is the first step in turning the invisible into the visible.

Tony Robbins

The SMART style of goal setting will help you stay focused on the goal and result. You will be able to measure the results as you go to make sure things are progressing or determine if you should change or shift your efforts. Using this model will also help you and your team stay on track reaching the goal within a timely manner.

Specific: the objective is well-defined with a clear goal. Be sure you state exactly what you aim to achieve – be crystal clear – so there are no misunderstandings. Your goal should be understood by everyone who reads it, including those that are not a part of the marketing team or even your business.

Measurable: Now that you have a specific objective, it's time to make it measurable. You will use numbers! You will need to know your baseline – Key Performance Indicators. At the end of the campaign, you will be able to look back and quantify your impact and translate the numbers into a business target.

Achievable: Reality check time! Creating an achievable objective means it is reachable with currently available skills, budget and timeline. Keep in mind the potential constraints or limitations that exist.

Relevant: It is essential to know if the objective is relevant to the bigger picture. Marketing objectives should line up with business objectives. Once the marketing objective is crafted, take a step back to check that it is still relevant – that it makes sense for your business.

Time-bound: Your objective needs to be time-bound to limit the time spent on the particular objective. Selecting the length of time, you think it will take to reach your goal will help you figure out how aggressive you need to be with your marketing efforts.

Goals

~ What do you want to achieve? ~

Example:

Increase the number of loan client referrals by 30% by sending monthly email campaign newsletters to referral partners outlining new and current business lending services CFNC provides.

Specific: Increase loan client referrals by 30%

Measurable: Mailchimp insights to track open and click-through rates and new client profile forms indicating referrals, CRM to track new loan clients.

Action: Sharing detailed service information about CFNC with referral partners will make it easier for referral partners to send quality loan client leads.

Realistic: Mailchimp account in place, will need to create and build the audience for referral partners, budget allocation and collaboration between General Manager and Marketing Manager. The Marketing Manager will research and create the content to execute the monthly campaign

Time: Once per month for the fiscal year April 2021 – March 2022. Allowing one month to create and build the audience for the campaigns.

Write 2 or 3 objectives for the upcoming year.

Objective #1

Goals

~ *What do you want to achieve?* ~

Objective #2

A large, empty rectangular area with a light beige background, intended for writing the details of Objective #2.

Objective #3

A large, empty rectangular area with a light beige background, intended for writing the details of Objective #3.

Competitive Analysis

~ Finding the Gap ~

It is necessary to know who your competitors are, and what they are doing. You are not looking to copy them, you are looking for gaps. Gaps in the products/services you offer. You can be ahead of the game by solving your customer's problems and identifying new problems that are created with the product or service.

Competitor #1 _____

Similarities

Differences

Gap

Competitor #1 _____

Similarities

Differences

Gap

Competitor #1 _____

Similarities

Differences

Gap

Competitor Benchmark

~ Tracker ~

Use the chart below to track what your competitors are doing on digital platforms.

Channel	Competitor #1	Competitor #2	Competitor #3	Your Business
Who is their ideal customer?				
SEO On-Page Score				
Backlinks				
Website Domain Authority				
Organic Monthly Traffic				
Keywords				
Social - Followers				
Ad Spend				
Content Type				

Competitor Benchmark

~ Tracker ~

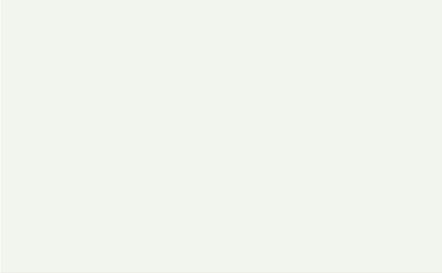
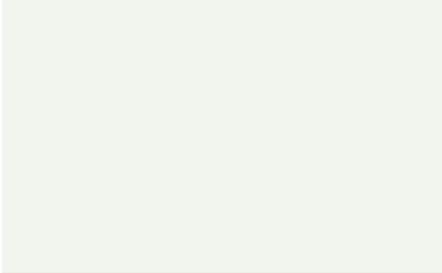
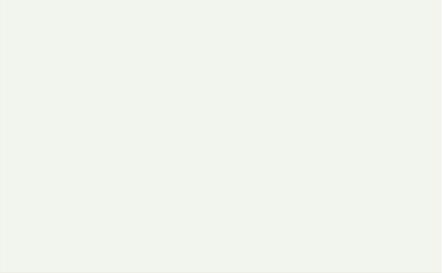
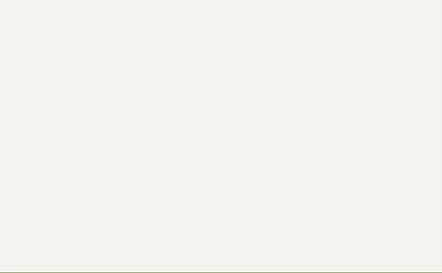
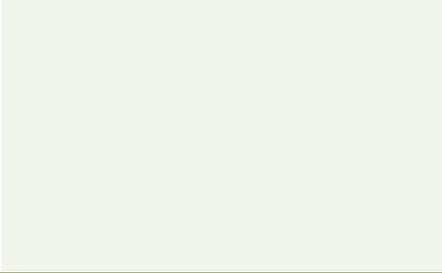
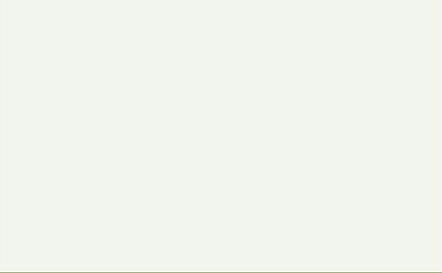
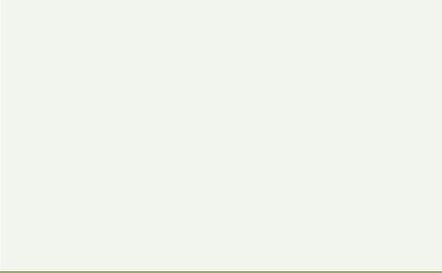
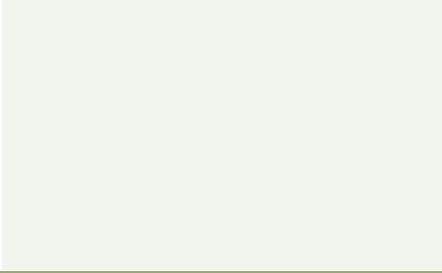
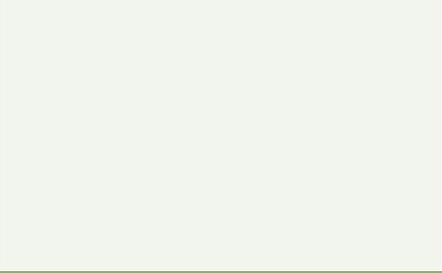
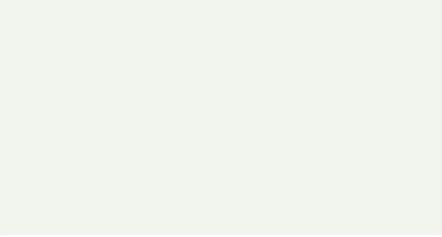
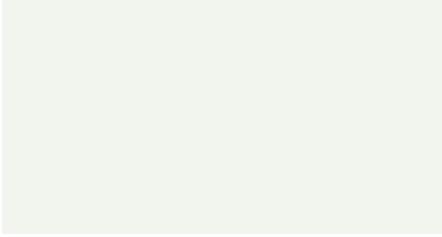
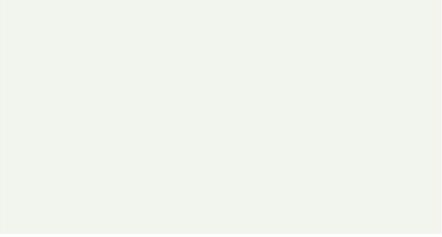
Use the chart below to track what your competitors are doing on digital platforms.

Channel	Competitor #1	Competitor #2	Competitor #3	Your Buisness
Social ----- Followers				
Ad Spend				
Content Type				
Social ----- Followers				
Ad Spend				
Content Type				
Social - ----- Followers				
Ad Spend				
Content Type				

Year in Review

~ Campaign Schedule ~

Seasons, events and holidays throughout the year may impact your marketing efforts. The calendar below depicts provincial holidays and some local community events. Use this calendar as a birds-eye view for your marketing campaigns. Add your promotions and campaigns to the calendar.

January ____	February ____	March ____
Jan 1 - New Years Day 	Feb 14 - Valentines Day 	Mar 17 - St Patrick's Day 
April ____	May ____	June ____
Easter 	Mother's Day 	Father's Day 
July ____	August ____	September ____
July 1 - Canada Day 	Civic Holiday 	Labour Day 
October ____	November ____	December ____
Oct 31 - Halloween Thanksgiving 	Nov 11 - Remembrance Day 	Dec 25 - Christmas Day 

Creating Content

~ What's Your Message ~

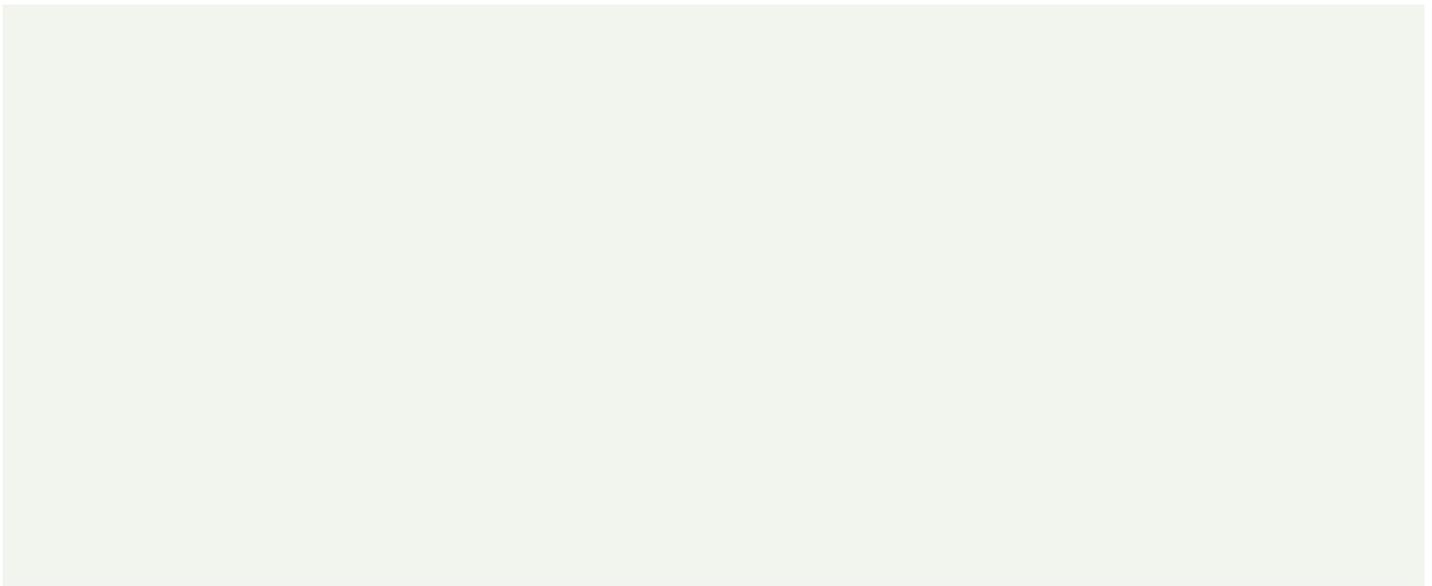
When building content, there are some questions you can ask yourself about your business to get started. We have included some examples.

1. What does your target audience need to know about your business?

Example:

Retail: quality is important to us

Contractor: we treat your home as if it were our own

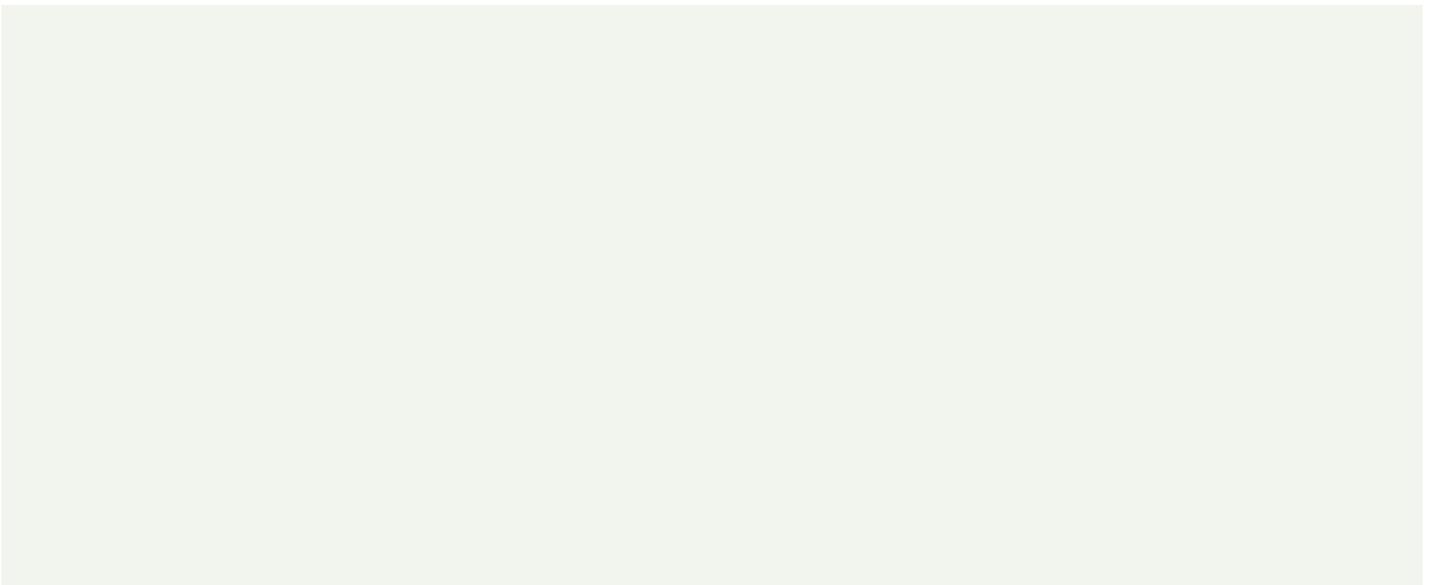


2. What does your target audience need to know about your industry?

Sample:

Retail: not all clothing is created equally

Contractor: not all contractors are certified or insured



Creating Content

~ What's Your Message ~

3. What does your target audience need to know or believe about themselves?

Sample:

Retail: You are worth it

Contractor: you spend most of your life in your home, it should be beautiful

4. What are the values that you can use to create a connection or trust with your ideal customer?

Sample:

Retail: When you shop local, you return local

Contractor: We will listen to your needs and build from there.

Creating Content

~ What's Your Message ~

5. What results could your customer/client see if they use your product/service.

Sample:

Retail: Look good, feel good

Contractor: exactly what they wanted

6. What small problem can you solve for your client/customer that creates a new problem you can solve?

Sample:

Retail: clothing for every season

Contractor: one room is beautiful, the rest of the house needs attention now

Campaign Creation

~ Example ~

Campaign title: *Referral Partner Campaign*

Campaign Date(s): *First Friday of the Month beginning April 1st, 2022*

Objective:

Increase the number of loan client referrals by 30% by sending monthly email campaign newsletters to referral partners outlining new and current business lending services CFNC provides.

Target Audience:

Referral Partners - bankers, accountants, bookkeepers, realtors

Platform(s) / Channel(s):

Email - Mailchimp

Roles & Responsibilities (who will do what):

*Greg/Siggi - inform Elizabeth of new/changing lending products
Elizabeth - create email content including backlinks to CF website and appointment booking tool.
Janet - edit
Elizabeth - send to referral partners on the first Friday of each month*

Key Performance Indicators (KPI):

Mailchimp insights to track open and click-through rates and new client profile forms indicating referrals, CRM to track new loan clients.

Campaign Creation

~ Example ~

Campaign title: *Referral Partner Campaign*

Plan:	Approved by:	Launch Date:
<p><i>April content to include:</i> <i>New Start-Up Lending Product</i></p> <p><i>Applicant requirements:</i></p> <ul style="list-style-type: none"><i>• Must be a new business</i><i>• Must be a youth (under 30)</i><i>• Must be in Northern Rural Community</i> <p><i>Connect with Siggie at CF - Link to booking tool</i></p>	<p><i>Edited - Janet</i> <i>March 30th</i></p> <p><i>Approved - Greg</i> <i>March 31st</i></p>	<p><i>April 1st, 2022</i></p>
<p>KPI: <i>Open rate = XX % # of new loan clients this month =</i></p>		

Plan:	Approved by:	Launch Date:
<p><i>May content to include:</i> <i>What we can offer:</i></p> <ul style="list-style-type: none"><i>• Custom loan terms and amortizations</i><i>• Repayment schedules to match business cash flow</i><i>• Flexible security requirements</i><i>• Higher loan to asset value ratios</i><i>• No prepayment penalties</i><i>• Ongoing staff support</i> <p><i>Connect with Siggie at CF - Link to the booking tool</i></p>	<p><i>Edited - Janet</i> <i>April 29th</i></p> <p><i>Approved - Greg</i> <i>May 2nd</i></p>	<p><i>May 6th, 2022</i></p>
<p>KPI: <i>Open rate = XX % # of new loan clients this month =</i></p>		

Plan:	Approved by:	Launch Date:
<p><i>June content to include how we help businesses:</i></p> <ul style="list-style-type: none"><i>• Business Planning - put ideas to paper</i><i>• Cash flow projections - prepare for ups and downs of operating</i><i>• Getting set-up - starting, buying or growing a business</i><i>• Brainstorming: Sometimes it is good just to have someone to exchange ideas with – we're here for that!</i> <p><i>Connect with Siggie at CF - Link to the booking tool</i></p>	<p><i>Edited - Janet</i> <i>May 27th</i></p> <p><i>Approved - Greg</i> <i>May 31st</i></p>	<p><i>June 3rd, 2022</i></p>
<p>KPI: <i>Open rate = XX % # of new loan clients this month =</i></p>		

Campaign Creation

Campaign title:

Campaign Date(s):

Objective:

Target Audience:

Platform(s) / Channel(s):

Roles & Responsibilities (who will do what):

Key Performance Indicators (KPI):

Campaign Creation

Campaign title:

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Content Creation

~ Best Practices ~

#1 Be trustworthy - If you're going to offer an incentive, coupon, freebie, or make any kind of promise through any consumer channel or touchpoint, you must be sure you deliver in full. No exceptions. No compromises.

#2 Be authentic - ALWAYS! Many of your customers have grown up online. They have an excellent sense of authenticity when researching businesses. Give them a reason to believe you and trust you.

#3 Be honest, admit your mistakes and own up to your business's areas of improvement. Your customers will appreciate it and respect you for it.

Sample:

There was an issue with our domain provider being unreliable. The Taking Care of Business website was 'crashing' often. This interfered with the continuous support we promote through the membership platform. The decision was made to change domain hosts. We sent an email to our members to let them know we were paying attention and that we were on it. It was important to our brand that we stay in communication with our members. Here's what we did.

Time for an Update!

Hey Elizabeth,

As you may have noticed, Taking Care of Business has had a few hiccups over the past few days.

We have noticed too and we are on it!

Over the next few days, we will be working on the backend of the website to make it more dependable for you and your team. We will send you a quick note to let you know when the site is up and running at full capacity again!

Thank you for your understanding and patience!



And we're back!

Hello Elizabeth,

Taking Care of Business is up and running at full capacity!

You and your team are welcome to explore and register for workshops to help you grow your business, improve your marketing skills and build up your professional development.

Check it out here: [Taking Care of Business](#)

Reach out any time if you need assistance with accessing the website!

Enjoy and have fun!



#4 Be Inclusive. When creating your content, make sure it represents all cultures and demographics. Ensure your language is up to date. Use proper language for gender, race and pronouns avoiding offensive phrases. Include a variety of stock imagery or better yet, use real photos.

*Check out [Nappy.co](#) and [Canva](#) for great stock image options.

Content Creation

~ Best Practices ~

#5 Be smart - Repurpose the good stuff! When you have content that your audience engages with, turn that one piece of content into many.

Email

Three Ways to Keep Your Bookkeeper Happy and Save Money!

Bookkeepers are without a doubt a necessity to most businesses. We have a few tips for you, the business owner on how to keep your bookkeeper happy and save yourself a little money!

#1 - Please do not take the time to fold your receipts into 1/4 inch squares.

While we have a great appreciation of the investment of your valuable time to create such quality fine art, I am sure you will not feel the same great appreciation when you discover the dollars it will cost for us to restore each piece to its original condition.

#2 - Please do not deliver your paper the day your reports are due.

We realize that as business owners and bookkeepers we need to be wizards with time, however, there is still only 24 hours in a day and such a large package of labour may just not fit into that time slot. That will result in penalties and interest for the business to pay, which is way more witchy than wizardy!

#3 - Please visit with us... we are lonely too.

All jokes aside, good communication is a key factor for all business people to have with their team. Members of your team will act... or not... based on the information they receive or do not receive, and that action can be a significant cost to the business if it is based on a miscommunication.

So... when you deliver that package of artfully unfolded paper to your bookkeeper on the day it is scheduled to come in, with a bottle of favorite wine he/she told you about last month (wink, wink), both of you are richer from the experience.

Infographic

KEEP YOUR BOOKKEEPER HAPPY & SAVE MONEY

From Ellen's Desk

Do Not Fold... Even if it is pretty!

While we have a great appreciation of the investment of your valuable time to create such quality fine art, I am sure you will not have the same appreciation when you discover the dollars it will cost for us to restore each piece to its original condition.

Deliver on time... every time!

We realize that as business owners and bookkeepers we need to be wizards with our time, however, there is still only 24 hours in a day and such a large package of labour may just not fit into that same time slot. That will result in penalties and interest for the business to pay, which is way more witchy than wizardy!

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When you deliver that package of artfully unfolded paper to your bookkeeper on the day it is scheduled to come in, with a bottle of wine 🍷, both of you are richer from the experience!

Easy as one, two, three!

stquinnel.com

Community Futures

Social

KEEP YOUR BOOKKEEPER HAPPY & SAVE MONEY

Easy as one, two, three!

NO FOLDING..

AHEAD OF TIME..

CHECK IN..

Blog

KEEP YOUR BOOKKEEPER HAPPY & SAVE MONEY

From Ellen's Desk

Bookkeepers are without a doubt a necessity to most businesses. We have a few tips for you, the business owner on how to keep your bookkeeper happy and save yourself a little money!

Number 1 - Please do not take the time to fold your receipts into 1/4 inch squares. While we have a great appreciation of the investment of your valuable time to create such quality fine art, I am sure you will not feel the same great appreciation when you discover the dollars it will cost for us to restore each piece to its original condition.

Number 2 - Please do not deliver your paper the day your reports are due. We realize that as business owners and bookkeepers we need to be wizards with time, however, there is still only 24 hours in a day and such a large package of labour may just not fit into that time slot. That will result in penalties and interest for the business to pay, which is way more witchy than wizardy!

Video / Vlog



My Hat Series

How to
Keep Your Bookkeeper Happy
& Save Money!

Elizabeth welcomes Ellen for a walk-through of three easy things you can do to keep your bookkeeper happy and save yourself some money!

Community
Futures
Taking Care of BUSINESS

Marketing Crisis

~ Be Prepared ~

We all want to get it right, every time. Unfortunately, that is not always the case. Sometimes things go wrong or are misunderstood from the original intent of the marketing campaign.

It is important to be proactive with your marketing efforts. When you're developing your marketing campaign for a specific event or celebration:

- Share your ideas and content with relevant audiences internally
- Gather feedback before signing off
- Avoid copy (wording) that is overly controversial
- Choose language, imagery or concepts very carefully
- Use your message to empower your audience, not create a sense of alienation.
- Remember, not all publicity is good publicity.

Be prepared for negative feedback from clients/customers. It happens to every business at one time or another. Having a planned response will help you and your team:

- stay calm and professional
- stay on-brand with your response
- respond in a timely manner
- handle the situation on a public platform, showing off your amazing customer service skills
- continue to build trust with existing and potentially new clients

Example:

“We’re sorry this was your experience. It is important to us that you have an excellent stay while enjoying our fabulous outdoor activities. We would like to connect with you directly to resolve this problem. Please contact us.....”

In the space below, write a possible response to a negative review or referral for your business.



Created by: Elizabeth Ross, CDMP

Created for: Community Futures North Cariboo

Elizabeth Ross has dedicated her time with Community Futures helping small business owners find and optimize their place online through digital marketing strategies and tools. As a Certified Digital Marketing Expert, she teaches independent classes and courses specializing in digital marketing tools, strategies and campaign planning.

As the Marketing Manager for Community Futures North Cariboo, Elizabeth provides targeted social campaigns for the Community Futures offices throughout northern BC.

Elizabeth brings over 20 years of experience teaching and most recently has earned a post-graduate degree in Digital Marketing.