



Partnering for Prosperity
SMART *ly*



Creating Results for YOU!

Partnering for Prosperity
SMARTly

Develop Your SMART Marketing Plan

It is all about relationships, communication and service. Good marketing strategies have SMART goals. To help you develop your marketing program, PS104 Graphic Design Company provides these worksheets to help you clearly determine and describe your goals, set a deadline for meeting them and collect data to help you understand the desired end result. This will be accomplished by focusing on SMART¹, a key performance indicator (KPI) that helps make “smart” goals! Let’s review what SMART stands for.

Specific

When creating a goal, you want it to be as short, and to the point as possible. Having “a good marketing year” doesn’t state a specific marketing goal. Imagine that your boss is about to leave for vacation, and you have less than 90 seconds until he/she runs out the door, and all they want is to quickly hear what next year’s goal is -- what are you going to tell them that concisely explains the marketing goal?

Measurable

A business may indicate that they want to “gather more email addresses.” While that is a goal, it’s not a trackable goal. If you start the new year with 100 email addresses on your subscriber list, and end with 110, technically, you met your set goal. But altering it to read, “Increase our email subscribers by 25%,” suddenly you can measure your progress every month to see if you’re on track to ultimately growing your list to 125 subscribers. Now you really know you hit your goal!

Attainable

It’s still important to keep goals realistic. If in your company history you’ve generated an average of 10 leads every month, jumping to 2,000 leads per month would be too drastic. Businesses may be tempted to do this in an effort to motivate employees. But in reality, this might discourage the staff, because such a leap would likely seem unattainable.

Relevant

Why have a goal if the goal doesn’t matter? Say you’re a widget manufacturer that has 100 stores who will only accept 10 widgets per month in their widget store. In this situation, your goal likely shouldn’t be to increase production of widgets from 1,000 per month to 5,000 per month. While it’s great you have more product, if no one is going to take them for sale, why bother? Your goal should be something along the lines of, increase distribution channels by X%.

Time-Bound

While having all the aforementioned helps develop a solid goal, you need to ensure you have a timeline for meeting that goal. Going back to the widget example, if you do decide that your goal is to increase distribution channels, you need to know when you will accomplish this in order to know when to start working on a secondary goal of increasing widget production. You don’t want a situation where you end up with more widget stores taking your widgets, but no widgets to give. Tragedy!

Now that you understand SMART goals, head over to the next worksheet to start identifying YOUR AUDIENCE. Never fear, we’ll return to SMART goals a little later to wrap up your marketing plan!

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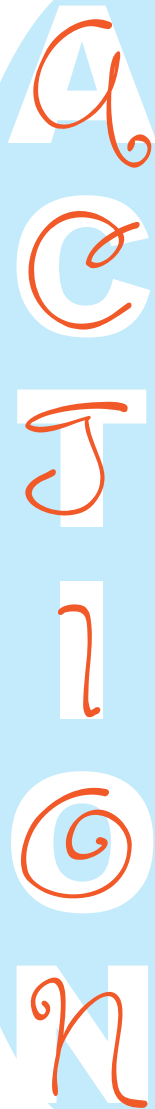
& YOUR BIZ

Partnering for Prosperity

ACTION steps

Identify Your Audience

It's still all about relationships, communication and service. Develop a relationship by knowing who you're talking to, then focus on sharing truthful information with them for effective market communication. Use this guide to identify your target audience. You may have multiple target groups sub-dividing your total audience, so complete this exercise as many times as necessary to include them all. Be sure to name each target group with a unique title.*



What are your current (or prospective) customers' demographics?

- Age: _____ • Gender: M: ___% F: ___% • Marital Status: S: ___% M: ___% D/S: ___% W: ___%
 - Kids: _____ • Vocation: | blue collar ___% | white collar ___% | professional ___% |
 - Geographical proximity to store: _____ • Residential situation (circle one): | urban | suburban | rural |
- * If you are dividing your audience into target groups, give this one a name, so as to differentiate it from the other target groups in your total target audience: _____

What is your target group's persona?

Assigning a persona or "behavioral profile" to your target group helps define and refine the branding message that most efficiently produces results. Think about your current and/or intended audience and ask yourself how they spend their life? What are their habits and routines? For example, are they more likely to go to dinner at Chovey's and a show at the Academy Theatre or are they pig roast and hoe-down kind of folks? Will they drive their car until the wheels fall off or do they purchase a new car every year? Do they commute a long way daily or use their car only for Sunday church? You get the idea. Give the demographically identified group a general persona that describes their typical life-style:

What psychological barriers need to be overcome?

85% of customers will not purchase on their first visit to your store and 98% will not purchase at the first online visit. They need to feel like they fit in with your business - NOT vice-versa! What is standing in the way of this target group from engaging with you? Remember, prospects need to know, like and trust you before they will buy from you. Identify the areas in which your business can improve at helping each of your particular target groups to know, like and trust you.

Now that you have a good understanding of YOUR AUDIENCE, head over to the worksheet on the next page to consider YOUR COMPETITION.

Partnering for Prosperity
ACTION steps

Research the Competition

It's still all about relationships, communication and service. Start gathering information on your competitors and plan your own strategies to keep your customers and win (not steal) customers away from competitors. Here are some tips to get you started.

Start with an online search of your competitors.

Stay on top of the latest in your industry by finding out what the competition does online.

Consider hiring an industry analyst.

If your budget allows, hiring an objective 3rd party to give you insights may bring some clarity to your next steps. There are organizations that research, study and evaluate the people who are and should be your competitors. They can tell you where the industry is trending and what unmet market needs exist. If your business is part of a franchise system, ask your franchisor for industry research for your region and market.

Tune in to your competition's social networks.

"We find that monitoring tweets, Facebook posts, blogs, and other new media mentions of our competition is an easy, cost-effective way to stay in tune with and in the know about the public's sentiment about our competitors," says Michael Meschures, the president of Spaphile.com. Scour through reviews on sites like Yelp or Citysearch to find mentions of your competitors' deals. Sign up to receive your competitors' newsletters and e-mail blasts. Do it to stay one step ahead, not to mimic their offers or campaigns.

Ask your customers.

When you gain a new customer, ask them what dissatisfied them about their previous vendor. Likewise, if you lose a customer, try to find out what the competitor did to win them over. Gather enough of these kinds of stories to find out why some consumers prefer them. Then adjust your offer and customer experience to beat theirs.

Attend conferences and trade shows.

Visit competitors' booths at conventions and observe their interactions with customers, pick up literature, and evaluate the quality of their products, services and even their marketing materials.

Get to know suppliers.

If your industry shares suppliers, ask simple questions of vendors for your industry. They may not share specific information about your competition's orders, but they may share general information about what and how much they sell to others in your market.

Conduct an email survey.

Survey your competition regarding their products and services. Ask whatever you want to know. We recommend that you hire this done or in such a way as to be anonymous.

Call 'em up.

You'd be surprised how much information you can gather just by approaching your competition as a potential customer would.

Now that you have a good understanding of YOUR AUDIENCE, and you researched YOUR COMPETITION, head over to the worksheet on the next page to identify your audience's FELT NEEDS.



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ACTION steps

Identify Your Audience's Felt Needs

It's still all about relationships, communication and service. Let's anticipate how best to serve your customers by identifying their felt needs. This helps refine the "service" part of a stellar buying experience for your target audience. Your customers must appreciate YOU so much, that they tell everyone they know to go buy from you. Remember, they don't care what you know until they know you care!

List all the product groups and service areas that you offer:

Products:

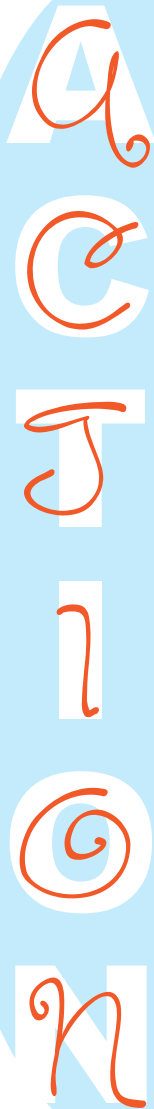
Services:

Identify the felt needs of each target group that your products and/or services can meet?

Start by listing the target group name and list all perceived needs that they may have for which your business has a solution. Knowing what you know from the Audience ID exercise, begin to brainstorm about how your products and/or services meet the needs and wants of each target group. You will likely need to use the back of this sheet if you have many target audiences, product groups and service areas.

TARGET GROUP	FELT NEED	PRODUCT and/or SERVICE

Now that you understand YOUR AUDIENCE, researched YOUR COMPETITION and identified your customers' FELT NEEDS, head over to the worksheet on the next page to brainstorm and create STELLAR CAMPAIGNS & SMART MARKETING MESSAGES!



MARKETING

Smart Goals Worksheet

Remember to have SMART goals: • Specific • Measurable • Attainable • Realistic • Timebound •

Marketing contact: _____ | Phone: _____ | Email: _____
 Today's Date: _____

S

Specific

1. State your general, over-all marketing goal: _____
2. Which situation best summarizes your marketing needs? (select one)
 - I need more visitors to my website and/or place of business
 - I need more visitors/consumers to convert into qualified leads
 - I need more qualified leads to convert into customers
3. Based on your above answers, set a specific number for an upcoming goal: _____% increase in leads every month.

M

Measurable

If you are unsure what your goal should be, please fill out this chart and PS104 will analyze the information to calculate your recommended goals and help you discover where you need to grow most:

Visits to your store and website per month (this month last year)	
Current (or this time last year) leads per month	
Current (or this time last year) customers per month	

A

Attainable

1. What is the biggest challenge preventing you from reaching this goal? _____
2. How many hours per week can you dedicate to your marketing efforts? _____
3. What is your average monthly budget for your marketing activities? _____

R

Relevant

Do you have the infra-structure to adequately follow-up, serve and convert new leads that you generate? PS104 recommends you think through the process and write out the steps your sales force will go through to follow up on leads in order to convert them to sales.

T

Time-Bound

When would you like to reach this goal? | in 3 months | in 6 months | in 9 months | in 12 months

Now that you identified YOUR TARGET AUDIENCE, researched YOUR COMPETITION, identified the FELT NEEDS of your target groups and gathered pertinent SMART GOAL information, PS104 Graphic Design Company can make recommendations to help you create stellar campaigns and smart marketing messages that will begin...

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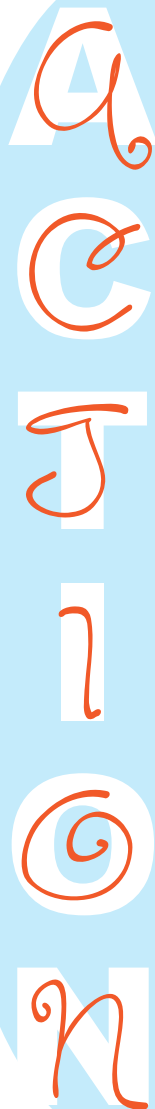
& YOUR BIZ

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ACTION steps

Develop Your Marketing Message thru Campaigns

Even still, it's all about relationships, communication and service. Here's where you grab your target group's attention and begin to initiate relationships and emotional attachments with them through well thought out, audience-focused and professionally designed messaging. You are ready to create stellar campaigns and smart marketing messages. Brand your business!



Brainstorm marketing campaigns for the year.

Once you have determined your sales and marketing goals, consider the following: • must-do special events • seasonal / holiday promotions • charitable donation-driven campaigns • coincide campaigns with your parent company or franchise partners • think up some amazing special offers for your customers, etc. Brainstorm all this right here (use back for more space):

Create a calendar of campaigns.

Get out your calendar and dream your marketing future! Jot down your ideas for individual campaigns in a day planner or use a large wall calendar-type dry erase board for your marketing strategies. Work it out at least 6 months in advance. Use the calendar to determine practicalities for each campaign, such as timelines, task deadlines, available man-power and budget. As you go, consider the following questions:

- 1) BUDGET CONCERNS: What is your total annual marketing budget? _____. Should it be divided evenly between all campaigns or will some campaigns require more money than others? **Y** or **N**
- 2) How many campaigns per year will you plan? _____
(Consider the cost of advertising, cost of the offer itself, available man-hours, lead time to organize the campaigns, etc.) Brainstorm it right here (use back for more space):

- 3) Is there a particular time of year in which you want to focus on improving sales? Do you have a "slow season"? (Consider the pros and cons of spending more or less money and energy on your marketing efforts during your traditionally slower times of the year.) Jot down your thoughts here (use back for more space):

Keep a campaign journal.

Once you know how much money and human resources you have to work with, name each campaign and start a journal. Assign various tasks to specific individuals, so the campaign comes together beautifully and on schedule. Keep the journal with the campaign calendar. It should include a chart like this to keep track of who is doing what. The journal should also include a section to track results and a follow-up report should be submitted to the business owner or marketing director after the campaign is complete.

CAMPAIGN NAME	TASK*	ASSIGNED TO

*The deadlines for each task should be clearly indicated on the CAMPAIGN CALENDAR.

Now that you have planned your MARKETING CAMPAIGNS, head over to the worksheet on the next page to write out your SMART GOALS for them!