Marketing That Matters Workbook

Does your marketing meet your needs?

If your *marketing* goals aren't aligned with your *business* goals, that's bad! If you're not sure if they're aligned, that's also bad. Whether you are a first time business owner or a seasoned marketer, this workbook will show you how to convert your business goals into effective marketing campaigns so none of your marketing dollars ever go to waste.

Contents

Turn Your Business Goals into Marketing Objectives

Workshop: Business Purpose Statement

Directions: Take a few minutes and fill in the blanks below. Think about what you do really well and who needs that product or service most.

The purpose of _____ is to provide or produce _____

name of business or service   product or service

for _____ so that _____.

customer (be specific)   result or benefit to customer

Workshop: What's on Your Mind?

Directions: Below is a list of questions that will help you capture your short-term and long-term goals. Take a moment to answer each of the questions below. If you are doing this workshop with a group, be sure to discuss your answers with one another.

1. What about your business keeps you up at night?

2. Where will growth likely come from?

3. How does your company make money?

4. Which competitors are doing well in the market and why?

5. Where do you want your business to be 5 years from now?

Workshop: Business Strategies

Directions: Below is a list of business strategies and how you might use them to achieve your goals. Choose one item from both the long-term and the short-term sections and transfer them to the Business Objective Builder workshop table.

❏ **Improve margin/profit.** Great for companies looking to reduce costs and increase revenue. There's usually a trade-off though. For example, some investments to reduce cost may not pay out for a few years making the company less in the short term but very profitable in the long term. Typically, more established companies or those with smaller profit margins, like retail companies, prioritize this.

❏ **Grow revenue.** Companies often do this by either trying to increase the total number of sales at the same price or by increasing the price. That is, revenue would go up even if total sales do not.

❏ **Increase volume.** Companies who wish to increase volume will either decrease cost to drive more sales or use various tactics to drive more demand. This might mean they are less profitable in the short-term.

Workshop: Business Objective Builder

Now that we have identified some strategies to achieve your objectives, let's add more details so that they can be accurately measured. Remember, you can't improve what you can't measure. This step is critical. Fill in your selected business objectives from the previous workshop.

Feel free to add any needed context to your selected business strategy. Examples of additional context include:
- Demographic or type of customer (for example, millennials, retirees, new customers, home owners)
- Geographic (for example, northern Europe, Los Angeles, global)
- Product or business line specific (for example, used cars, deluxe editions, high-profit items)

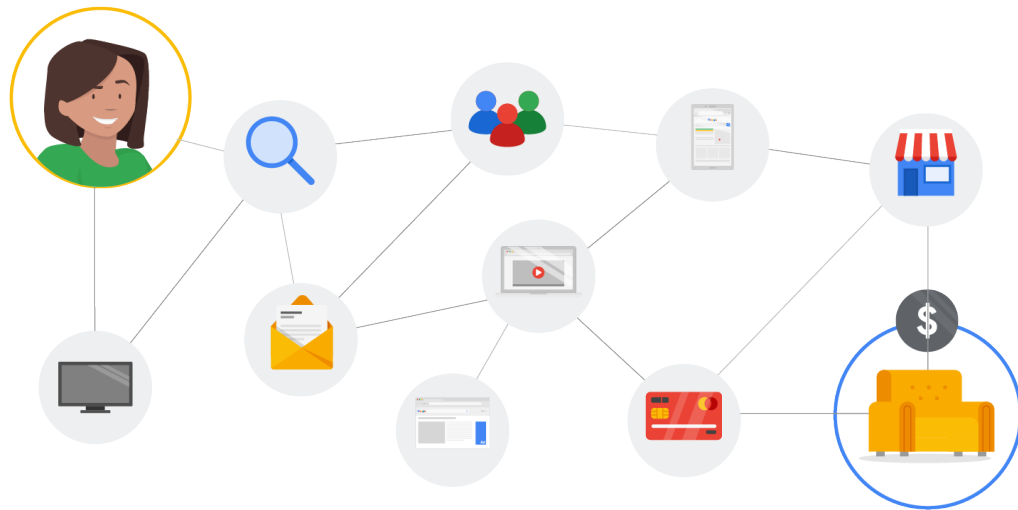|	Business strategy	Measurable change	Timeline
Example	*Increase units sold in Asia*	*by 12%*	*over the next 6 months*
Business Objective			

Workshop: Map Your Customer Journey

Directions: Answer each of the questions below in three sentences or less.

Awareness. How would you describe your company to someone who's never heard of it?

Consideration. How would you describe your product (or service) to someone who's heard of your company but unclear about what you could do for them?

Purchase. Why would someone choose your product (or service) over a competitor's? What's so special about it?

Loyalty. How can you deepen your relationship with your customers or enable them to advocate on your behalf?

Workshop: Marketing Objectives Builder

Fill in your marketing objectives for each row below. Then determine a measurable change and timeline for each. For many smaller businesses, determining these objectives can be daunting. Fill in as much as you can.

	Marketing objective	Measurable change	Timeline
Example	*Increase brand awareness*	*by 3%*	*In the next 3 months*
Awareness			
Example	*Increase brand favorability*	*by 5%*	*by end of year*
Consideration			
Example	*Increase sales*	*by 3%*	*In next 6 month*
Purchase			
Example	*Decrease cancelled accounts*	*by 6%*	*by end of year*
Loyalty			

Workshop: Plan Your Creative Messaging

Using the results from 'Map Your Customer Journey' as a reference, write four ads (headline and description) for each segment of the customer journey.

Build Awareness

Headline

Description

Influence Consideration

Headline

Description

Drive Purchase

Headline

Description

Grow Loyalty

Headline

Description

Optional Workshop: Media Mix Planner

Check the appropriate media channel and stage of the customer journey that make sense for your marketing efforts.

The last four columns are 1) Awareness 2) Consideration 3) Purchase 4) Loyalty.

Media Channel	Examples	1	2	3	4
TV	Local or national commercials	☐	☐	☐	☐
Radio	Radio segments	☐	☐	☐	☐
Outdoor	Billboards	☐	☐	☐	☐
Print Media	A page in the New York Times	☐	☐	☐	☐
Search	An ad on google.com	☐	☐	☐	☐
Display	An image ad shown on nytimes.com	☐	☐	☐	☐
Video	A video clip shown on Youtube	☐	☐	☐	☐
Social Media	An Instagram ad	☐	☐	☐	☐
Email	Promotional newsletter	☐	☐	☐	☐
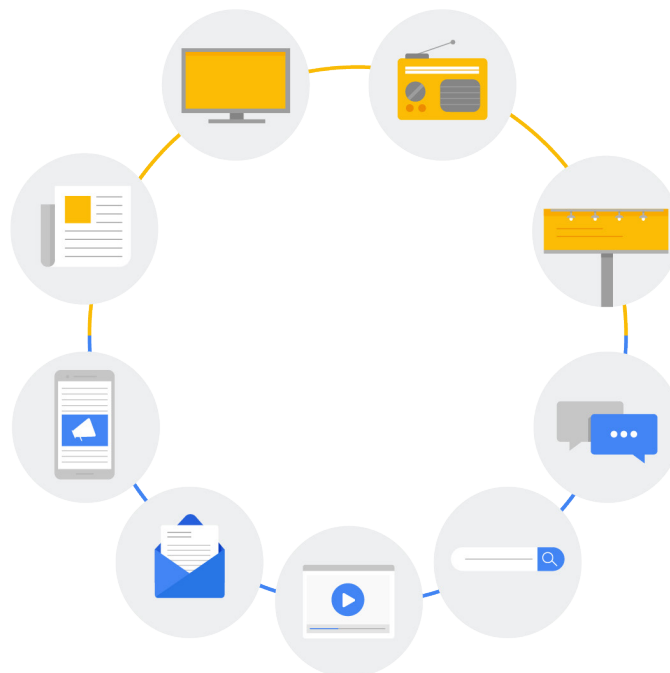
Assign Value to What's Being Measured

Workshop: Identify your attribution model

Let's take a moment to identify the best attribution model for your business. In general, when advertising with Google you should choose DDA (data-driven attribution) as your model. For it to be available, you must have at least 15,000 clicks on Google Search, and a conversion action that has at least 600 conversions within 30 days.

If you can't choose DDA, opt for a model that distributes the credit across multiple touchpoints, such as linear, time decay, or position-based.

Note: If you're using attribution in Google Ads, it's only available for tracking your website, call, or imported conversions.

Attribution model	Description
Data-driven Attribution	☐ Machine learning determines the best way to distribute credit for your conversions
Linear	☐ Distributes credit by evenly applying credit to every single touch in the buyer journey
Time-decay	☐ A multi-touch model that gives more credit to the touchpoints closest to the conversion
Position-based	☐ 40% credit is assigned to both the first and last interaction, and the remaining 20% credit is distributed evenly to the middle interactions
Last click	☐ The last touchpoint receives 100% of the credit for the conversion
First click	☐ The first touchpoint receives 100% of the credit for the conversion

Workshop: What are your conversions?

Conversions are the actions you want your customers (or potential customers) to take when they encounter your marketing messages. The most obvious conversion is usually the purchase of the product, but your business may also need to identify additional conversions for people who are at different stages of the customer journey. For example a subscription service may wish to offer a free trial period to potential customers.

- Visit a website
- Revisit a website
- Submit a form
- Create an account
- Watch a video

- Open an email
- Start a product trial
- Buy a product
- Rebuy a product
- Upgrade a service

- Make a referral
- Share on social media
- Download an app
- Make a phone call

Directions: Choose some conversions from the list above or create your own. Fill them in below and add any additional needed context

Conversion	Details	Tracked in
Submit a form	*Submit a request for a quote*	*Google Analytics*