

An aerial night view of a city skyline, likely New York City, with numerous illuminated buildings and streets. The image is dark, with the city lights providing a textured background for the text.

MARKETING PLANNING

LIKE A

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The Importance of a Coordinated
Approach to Marketing in 2024

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About the Authors



RAJAT KAPUR, **MANAGING DIRECTOR**

As the Managing Director of &Marketing (and-marketing.com), Rajat “Raj” Kapur strives to provide small, medium, and mid market businesses unparalleled marketing strategy and execution services. His team of professionals can either augment an existing team, or outsource the marketing function for a client.

Raj brings nearly two decades of professional experience in marketing, sales, & strategy development experience spanning B2B and B2C Fortune 50, mid-sized, & small companies. He is a hands on leader, sought-after facilitator and experienced marketing lecturer with experience across five continents. He has a proven track record of using analytics to drive action, strong interpersonal skills, and unrelenting customer focus.



TRACEY COLLA, **MARKETING DIRECTOR**

Marketing Director Tracey Colla focuses on ensuring each client’s needs are being met in a timely, productive, and creative way. She is a well-rounded marketer, with a talent for identifying opportunity, product strategy and positioning, go-to-market strategies and launches.

Prior to joining &Marketing, she worked as Marketing Manager for Jamba Juice and Peet’s Coffee in the SF Bay area. Whether developing strategy or securing seamless execution, Tracey pulls cross-functional teams and clients together for results-driven marketing.

DEVELOP YOUR MARKETING FRAMEWORK

Begin With a Clear Vision and Corresponding Marketing Strategy

VISION:

What is your long-term success vision?

MARKETING STRATEGY:

Who are your target consumers?

What are your consumers' biggest challenges?

What makes you unique as the solution to these challenges?

What tactics can you use to attract your consumer's attention?

COORDINATE YOUR APPROACH

Death by Tactics & Resources

Small and medium-sized businesses often suffer from spreading their efforts too thin over a multitude of random activities. This method of diversification can work, but only if all of these efforts are intentionally coordinated.

Modern marketing departments are usually composed of at least 10 distinct roles, so the resources to staff an entire marketing team are impossible for small and medium-sized businesses. Marketing planning also becomes difficult when senior level marketing leadership isn't available. Fortunately, the [Fractional CMO model](#) is perfectly positioned to address this need.

A key to managing resource needs is to assign one person to manage the marketing calendar containing a documented record of all marketing and sales activity for the next 3-6 months. This way, you always have a single source of truth and a single point of contact responsible for the record. It is also essential to assign a single owner for each task/deliverable to maintain accountability.



NOTES:

List names of individuals who can take ownership of marketing management.

Write 1 tactic you can focus on each month for the next 3 months.

Ensure marketing ideas are reasonable and achievable to ground strategies in reality and set the stage for tangible success.

UNLEASH YOUR UNIQUENESS

- *Focus on what makes your company stand out among competitors and leverage those traits in your messaging. What can you say that your competitors can't?*
- *Select your tactics carefully to leverage your unique offering to your target decision makers. Consider where they go for information, whether that's online or offline.*
- *Don't forget that AI is now a very useful tool for idea generation, helping businesses with resource constraints achieve more in less time.*

Content

All of your content marketing and website copy should reflect and emphasize what makes your offering unique while simultaneously framing your consumer as the hero of their own story. When creating a content marketing strategy, conduct research around terms that your audience is searching for in regards to your business or service and develop content that answers questions related to those terms.

Social Media

If you are using social media, establish guidelines that reflect consistent visual aesthetics and a written style that is true to your brand's personality. Assign a specific person to answer emails and respond to questions on social media to establish consistency and regularity. Customers want responses that provide them with real value. This will inspire brand loyalty and encourage them to try your brand again. When using influencers, be sure to vet them thoroughly so you can select individuals who align with your brand and its mission. You can find 6 tips on influencer marketing for small businesses [here](#).

Email Marketing

If you want your subscribers to take action, you must include a powerful call-to-action (CTA) in every email. It's ideal to focus each email on one CTA so your readers know exactly what to do — they are, after all, often skimming rather than reading in-depth. You should also consider testing different versions with different CTAs to determine what works best for inspiring action.

- Our email marketing provider of choice is MailChimp. Learn more about MailChimp [here](#).

Note: you can sign up with &Marketing to get priority support, just click this link and create an account or connect your existing billing plan: https://admin.mailchimp.com/referral?code=lf_1Txe6WX8

DIGITAL ADVERTISING

- If paid digital advertising is part of your plan, we encourage you to be focused on ROI and clear metrics that align with your business goals.
- Growing businesses should consider these three types of digital advertising:
 - Search Advertising (usually Google Ads)
 - Social media advertising
- With all types of advertising
 - Start with research on where your audience is spending their time
 - Constantly measure progress (at least monthly, if not more often)
 - Make regular adjustments based on what is working and what is not
 - Adjust your budget accordingly (at least quarterly)

Interested in learning more?

- If you are considering Google Ads, we'll do a complimentary PPC evaluation for you! Contact us here : arealhuman@and-marketing.com



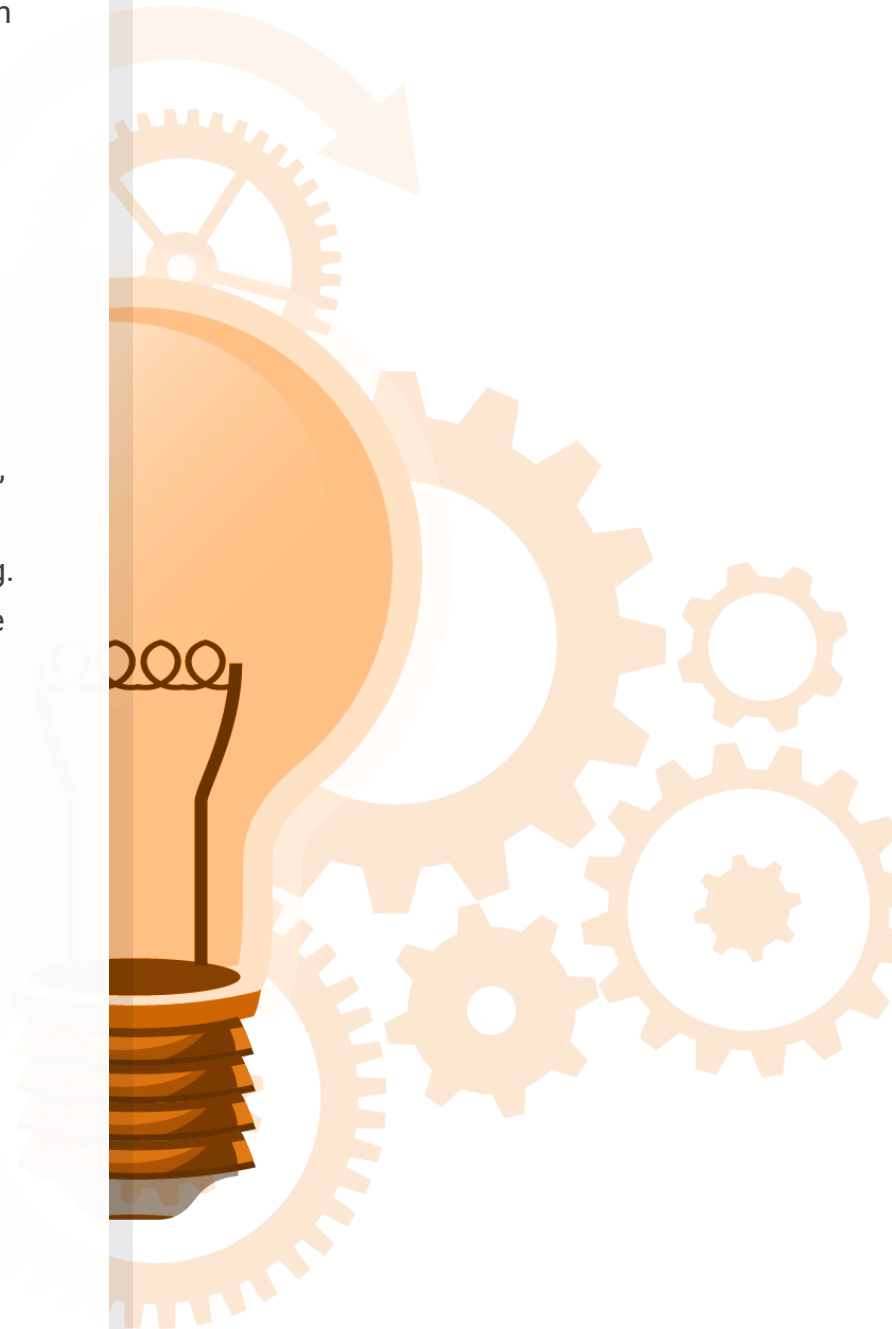
Example of a 3 to 6 Month Marketing Calendar

Month	Theme	Tactic/Segment	Success Metric	Owner	Status/Link
July 2024	Summer Grilling Season (All segments)	Blog Post: Spice up your BBQ	Traffic, Bounce Rate, Time on Site, Conversions	Content Writer	Complete & Posted (Link)
		Paid Social Media - FB/Insta free product promotion	Clicks, Time on Site, Conversions	Content Writer	Complete & Posted (Link)
		Brand Ambassadors - free product and BBQ post suggestions	Engagement, Referral Traffic, Conversions by BA	Marketing Manager	Sent to Influencers
		Newsletter - 2 previous blogs + founder's bio +	Opens, Clicks, Revenue	Marketing Manager	To be sent Thursday
August 2024	Back to School (segments 1 & 3 only)	Blog Post: Simple Family Meals	Traffic, Bounce Rate, Time on Site, Conversions	Content Writer	Draft ready for approval
		Paid Social Media - FB/Insta share and win	Clicks, New followers, Conversions	Marketing Manager	Images need to be approved (Link)
		Brand Ambassadors - Lunch box promotion (segment 3)	Engagement, Referral Traffic, Conversions by BA	Marketing Manager	Items ordered and being packed, shipped by X/XX/21
		Google Ads - Back to School (Segment 1 only)	CPC Cost per conversion, Revenue	Ads Manager	Research Complete, need to approve budget
September 2024	New flavor launch	Blog Post: Football & New Flavor Launch	Traffic, Bounce Rate, Time on Site, Conversions	Content Writer	Draft outline WIP
		Social media - FB/Insta new product teaser	Clicks, New Followers Conversions	Content Writer	Images need to be approved [Link]
		Brand Ambassadors - send early samples	Engagement, Referral Traffic	Marketing Manager	Need to finalize
		Google Ads - TBD	CPC Cost per conversion, Revenue	Ads Manager	Discuss keywords to target
October 2024	Halloween				
November 2024	Gratitude				

MEASURE YOUR SUCCESS

1. Be intentional about what success means to your business and how that success can be measured.
 - Set a standard prior to executing each marketing tactic so you know what success looks like before you start.
 - Execute tactics that can be measured both by consumer segment and marketing vehicle.
2. After each phase of execution (at least monthly), assess your results and strategy, then pivot your methods as needed.
 - Scale up the methods that are working.
 - Adjust or disregard the tactics that are not delivering results.
3. Create a standard monthly report for all marketing activity, online and offline, and review it with all stakeholders. Make the report as actionable as possible.

NOTES:



ABOUT &MARKETING

In today's fast paced world, many growing businesses are struggling to modernize their marketing approaches because either they don't have the expertise or the bandwidth to do it themselves.

&Marketing provides seasoned marketing strategy professionals and a nimble execution team to help our clients achieve their goals. Our unique partnership model allows us to augment our client's existing teams or outsource the entire marketing function in an affordable, flexible, and transparent way.



To learn more about how a coordinated approach can work for growing businesses, read our case studies:

- eCommerce growth strategy for a specialty foods company [where we helped grow their online sales by 3x per month.](#)
- B2B Lead Generation program [where we drove a 10x increase in marketing leads quarter over quarter.](#)

To stay up to date on marketing news and updates along with insights on how your company could benefit from a coordinated approach, [sign up](#) to receive our monthly newsletter.



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MARKETING JARGON

Marketing Jargon is rampant and quite often causes more confusion than drives clarity. Here are several terms that are commonly used and clear definitions for each. This is a working document which needs to be continually updated as new terms need to be added.

Have a question about a term or see a new one that needs to be added? Let us know!

MARKETING TERMINOLOGY & DEFINITIONS

- **Analytics** - Implementing, reporting on, and actively using data in your marketing efforts to gauge effectiveness, understand your market, and discover opportunities. For &Marketing, this means identifying key metrics for all marketing tactics and reporting on them regularly with recommendations.
- **Bounce Rate** - the percentage of a website's visitors which leave the website almost immediately after viewing only one page. Generally, anything over 90% is very poor (meaning 90% of visitors leave almost immediately), and below 50% is considered "world class."
- **Brand Ambassador** - A person who is hired by an organization or company to represent a brand in a positive light and by doing so help to increase brand awareness and sales.
- **Call-to-action, or CTA** - This is the name for wording and links on a website which drive you to do something, like "click here," "read more," or "buy now."
- **Click-through rate, or CTR** – the percentage of users that actually click on a link vs those who saw it (an impression).
- **Content Marketing** - Producing creative and/or informative content in the form of blogs, white papers, videos, pictures, etc. to attract interested customers and encourage sharing among fans. At a fundamental level, you should have some content which allows you to regularly interact with your audience in a way that is relevant and encourages engagement.
- **Conversion** – when a visitor takes the desired action while visiting a company's website. A conversion can be a purchase, membership signup, download or registration for a newsletter.
- **Cost per click, or CPC** – a calculation to determine the total cost of an advertising program vs how many users visited a given page.
- **Digital Advertising** - This refers to any use of paid advertising online - search engines, social media sites, streaming media, and popular websites to reach your market through the Internet. This differs from Pay-Per-Click because it focuses on reaching new audiences.

- **Direct Mail** - Sending people coupons, offers, or announcements directly through the mail using physical media. This is only effective for the businesses on the extreme side of the inbound scale.
- **Events** - Selecting and attending conferences, trade shows, and other events can be an extremely effective way to build awareness, develop relationships with key decision makers, and often, close business.
- **Influencer Marketing** - focus is placed on influential people rather than the target market as a whole. It identifies the individuals that have influence over potential customers, and orients marketing activities around these influencers.
- **Keyword** – a word or phrase someone uses to search for relevant topics on search engines. For example, if you were looking for a chocolate shop, a relevant keyword could be “Buy chocolate bars” or “Looking to purchase truffles from a chocolate shop.”
- **KPI, or Key Performance Indicator** - A measurable value that indicates and demonstrates how effectively a company is hitting their primary business objectives. This is a multi-level concept – you don’t just measure success at one level of your sales funnel; these should be laid out before you even have a chance to measure them. This means setting goals!
- **Landing Page** – the entry page on a company’s website that a user goes to when directed from an external link (like email or social media).
- **Lead** - An individual or a company that has shown interest in one of your products or services.
- **Lead Forensics** - This is the process of using a variety of tools to discover who is looking at your website, tracking unique visitors through email, and observing visitor behavior on the site to identify potential leads.
- **Lead Generation** - Activities with the purpose of generating interest about your product or service. These activities may include content marketing, advertising, referrals and partnerships.
- **Lead Nurturing** - Engaging and building relationships with potential customers through a variety of marketing techniques.
- **Pain Points** - You’ll often hear businesses talking about finding and answering their customers’ pain points. A pain point is a specific problem that prospective customers of your business are experiencing. Think of these as problems. Customers’ pain points are as diverse and varied as your customers.
- **Pay per click, or PPC Advertising** – a pricing model where companies are charged every time a user clicks on an ad, which leads people to a company’s website. This usually refers to programs like Google AdWords and Bing Ads which allow you to target inbound searches (people looking for businesses, products, or services like yours) to bid for results and make sure your business shows up. This is sometimes one of the hardest forms of advertising, but also the most effective for inbound customers.

- **Public Relations** - PR can be an effective way to engage existing publications (virtual or print or both) that are often trusted sources of information for large numbers of people. Developing an effective PR strategy and execution process requires dedicated effort and patience. PR is by definition 'earned' and separate from "Paid."
- **Retargeting** - Ads displayed on websites other than your own to people who have already visited your website to encourage them to return. Retargeting using cookies (data that records where you visit) to advertise to people who already visited your site.
- **Sales Funnel** - the entire sales process as a whole – from prospect to paying customer – and all marketing, advertising and sales processes in between.
- **Search Advertising** – Advertising on main platforms for search are Google ads and Bing. These are advertisements that display when people search on Google or Bing.
- **Search Engine Optimization (SEO)** - Search engine optimization refers to identifying target keywords and search phrases and then making sure the content on your website is optimized to identify with those search phrases based on industry standards. This also includes optimizing your website to be search engine friendly (i.e. load quickly, eliminate errors, have appropriate security, etc.). From a technical perspective, a company optimizes webpages to allow its website to rank higher on a search engine's results page. The higher a site ranks, typically, the more traffic is generated (if the keyword has high traffic). SEO yields more targeted traffic to a site, but is usually a much longer process.
- **Segment or Segmentation** - A group of target customers or prospects who share similar needs and should be approached similarly by a company. This is often used synonymously with "target audience" but these are not exactly the same thing.
- **Social Media** - Using the tools available on a social media platform to connect with your market using content and interaction. Today, social media is one of the fastest ways to grow an audience as long as you can allocate a modest budget to promoting your social accounts and content.
- **Target Audience** - A group of decision makers to whom a company desires to market or sell their products or services.
- **Value Proposition or Value Statement** - A description of your company's top benefits in the eyes of their target audiences, which are translated into marketing and sales initiatives. These generally have to meet three criteria to be effective: Unique (you can't put another provider's name in the same place and have it be true), Credible (your target audience believes that your company can provide this product or service, and Relevant (this value proposition actually solves a customer's need or pain point).
- **Website** - This is the online location a company uses to provide information and attract prospects. A website works as a hub for marketing tactics.

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