

DEVELOPING YOUR MARKETING STRATEGY + RUNNING YOUR FIRST MARKETING STRATEGY MEETING!

For small, or growing
businesses!

About this book:

In this first book, our objective is:

- To discuss why a marketing strategy is so important.
- To outline what you need to know to build your own.
- To provide guidance on how to get the right information, from the right people, at the right time.
- How to develop your own marketing strategy.
- What key parts are included in every marketing strategy.
- What to do after you create one!





MARKETING STRATEGY - WHY ARE THEY SO IMPORTANT?

Marketing Strategies are your roadmap to getting your brand and business out in front of the people who need to know you exist. They are the comprehensive way to look at your messaging and positioning and determine the best way to utilize your marketing resources (resources, time, money.)

They are not created to be a one-and-done - in fact, we recommend they be reviewed once a year and audited every 2-3 so you are keeping up with the changes in the economy, your industry, and the changing of technology.



OFTENTIMES BUSINESSES MISS THE MARK BY TRYING TO DO MARKETING AD HOC AND WITHOUT A PLAN, WITHOUT THE BUY-IN FROM A SALES TEAM, OR THEY THINK THAT MARKETING WILL JUST "DO" ITSELF.

The marketing strategy you create for your brand and your business is integral to growth. The latest statistics show that streamlined marketing strategies that align with sales initiatives can grow revenue by 20% in most cases.

Partnering your sales and marketing teams to develop a strong marketing strategy is a smart business move no matter if you sell B2B or B2C. Marketing builds awareness, adds value, showcases a product or service, and generates excitement about what you do.

In an age in which consumers are so well educated, there is no time to have a disjointed and fractured marketing strategy. If your consumer is out there looking for answers, you should be providing guidance and value every chance you get. Like we say – if the customer is already out there looking for information you need to be the one providing it to them. Educate your audience every chance you get!

SO WHAT IS A MARKETING STRATEGY?

Marketing Strategies are documents that outline things like:

- Company profile and/or executive summary.
- Mission, vision, and values.
- Messaging and positioning.
- Your businesses unique differentiators.
- Your audience/customer personas.
- Marketing goals both short and long term.
- Technology planning.



NOW - WHAT (AND WHO) DO YOU NEED TO RUN YOUR FIRST SUCCESSFUL MARKETING MEETING?

- The right people.
- The right pre-work.
- An agenda that serves as a guide.
- Key jobs assigned to a group of people to ensure that ideas and information are not lost.
- An understanding of what needs to be done after, and who will do it!





MARKETING STRATEGY - YOUR ROADMAP.

A Marketing Strategy is a collection of techniques, tools, and methods that act as a roadmap for an organization to aid in how to direct its resources towards the best opportunities that align with the overall marketing and sales goals.

Generally, a company's marketing strategy includes both short-term and long-term activities that contribute towards developing strong brand awareness, increasing interactions and engagement, and ultimately converting more prospects to do business with you (however that looks).

A strong Marketing Strategy and a clear Content Strategy (book 2!) will help businesses win.

WHY ARE MARKETING STRATEGIES SO IMPORTANT?



Marketing Strategies are really useful for teams of any size.

It's just like a blueprint or a guide book for your marketing initiatives and how you'll accomplish the marketing goals you set for yourself.

Keeping everyone aligned and on-track makes the wheels move smoother and the "train" pick up speed a lot faster!

Most marketing strategies are created to answer a few key questions:
what, why, and how.

DON'T FORGET ABOUT SETTING YOUR GOALS BEFORE YOU START YOUR MARKETING PLAN!

Before we jump into marketing strategy, we encourage you sit down and outline your goals for the year and for the next 2-4 years. **Marketing strategies need to be both short-term and long-term so you can leverage your short, quick wins to gain traction with your long-term marketing goals.**

It's so important to make sure that you know your marketing goals before creating your strategy so your marketing strategy reflects the goals!

Marketing goals need to be clearly defined for the marketing team and your organization as a whole. Marketing goals need to be both short-term and long-term as marketing isn't a one-and-done exercise.

Marketing is the continued engagement of you and your brand with your audience to build a trusting relationship, so that any leads can be passed to the next team – usually a sales team.



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MARKETING GOALS CAN BE SOMETHING LIKE THE BELOW:

- To increase overall brand awareness with your audience.
- To increase overall brand awareness with a new audience/segment.
- To acquire new customers in your current vertical.
- To increase website traffic or form conversions on your site.
- To create content that helps establish industry authority.
- Work on ways to increase customer value.
- Work on new ways to boost brand engagement.
- Improve internal brand.
- To increase revenue.

As you can see, there are some that are clearly and quickly measurable, some that are longer-term strategies, and some that will take partnering with other departments to fully achieve.

While everyone wants to increase revenue, we recommend not solely focusing on that as a goal of marketing – only because it doesn't take into account the other key stakeholders that need to be involved and synergized to create strong marketing strategies.

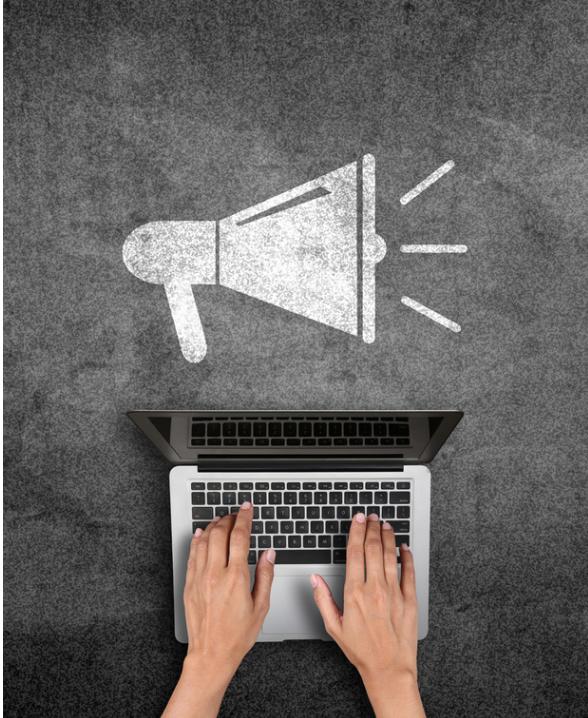


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SO HOW DO YOU TAKE THOSE GOALS AND MAKE A STRONG AND CLEAR MARKETING STRATEGY?

The goals are important, and we will revisit that – but before you can take pen to paper (or get to typing) it's imperative that you know **who** you are talking to.



If you haven't spent recent time evaluating your ideal customer, now is the time to do so. Outlining who you are speaking to keeps your audience and their needs top of mind, and helps you stay clear on your marketing mission.

Get clear on your customers and why they'd want to interact with you.

Outline their wishes, their pain points, why you solve their problems, what they care about – and bring them to life. Understanding the WHO makes the how and why easier!



A FEW THINGS TO REMEMBER...

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Spend time doing research – even on your competitors.

Seeing what else is out there with respect to content, ideas, chatter, engagement, and events your competitors are doing can help give you a pulse check on what your audience may already be interested in but even more so for where the industry is missing the connection to your audience.

A competitor analysis can help you see where you need to step up in your current marketing goals and tactics and what you do really well that your competitors can't come close to.



Figure out what tools you need.

After you've outlined your ideal customer and their wants and needs, it's time to determine what tools you'll need to spread your message.

What social accounts, software, content, collateral, and more will you need to have in your toolkit in order to connect with your audience?

A holistic look at how you plan on continuously connecting with your audience can help you decide what tools you need in your tool belt to achieve your goals.



DON'T FORGET to take those goals and make them actionable!

You have your goals, so now it's time to break down how you'll achieve those goals.

For instance, if you want to increase awareness with your audience – outline what social platforms you need to be on, how to increase engagement on the ones you are currently on, how much money you'll spend on digital ads, how much you'll spend on print ads, etc.

If you want to acquire new customers in your current industry vertical – determine what content you'll write, how you'll spark conversations with them, what call to action needs to be on your content so the audience knows what to do, etc.

If you want to increase customer value – figure out how to ask them for your NPS, consider a loyalty program, determine what your referral program could be, how can you work on your customer engagement after the sale so your customer is surprised and delighted, etc.

Basically, take your big goals and figure out how you'll map out the ways to achieve those goals!

Now - host and run your Marketing Strategy Meeting!

Let's discuss who needs to be included in the marketing strategy meeting.

The below people should be included in this Marketing Strategy Meeting. Their roles are all different but the departments in which they generally work in are all connected to one another, whether or not they realize it.

The list of attendees should be the following:

- Entire marketing team.
- Sales Director/Manager.
- 1-3 members of your C-suite (this helps with strategic direction and business overview).
- Customer Service Director/Manager.
- Product Managers.
- Project Managers.
- Subject Matter Experts in your organization (people like Engineers, QA, Product Development, etc.)

Yes, these people are THAT important!

This is a robust team, but try and keep it to about 12-14 people in this meeting. Don't forget – the more people in the meeting, the harder it will be to not only hear ideas but to keep everyone on task. Keep the meeting to a maximum of 14 people. If you need more people, consider a few different meetings.

These people are all very important to developing a Marketing Strategy that conveys the right message, connects with audience pain points, and inspires action in a way that makes the most sense.

A TIP
FOR
YOU



You can build out a document right at the beginning and add information and important documents as you go. A simple word document or a shared folder can get you started and make it all feel less overwhelming.

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Next up, let's talk about how to prepare and invite the people we mentioned above.



You want to have a productive 1 ½ to 2 hour meeting so you want to ensure that the right people are included in the meeting AND that they have the right pre-work done so that the time together brainstorming is maximized.

Pre-work with respect to a marketing strategy means getting everyone involved thinking in the same ways about marketing strategy topics. Each different department will have different answers to these broad questions, but here is where you will find magic.

Bringing all of these people together and having them put thoughts behind the same questions can really help synergize your message and positioning and build a very strong marketing strategy.

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WHAT TO DO TO GET THE INVITE RIGHT

So what kind of pre-work should you be asking your invitees to do, and how do you invite them to do the work and attend the meeting?

Email out an invite to the members you've identified, and include the pre-work in it. After you email the invite out weeks before your meeting, make sure someone on the marketing team follows up 1 to 1 ½ weeks before ensuring that the attendees have taken some time to review their pre-work.

For an example of your invite email, we suggest:

Hi [attendees],

I am inviting you to a Marketing Strategy Meeting for our [company/brand/etc]. The goal of this meeting is to come up with a marketing roadmap and strategy so we can connect with our audience in an authentic way on our site, in our blog, and on our social channels to drive more interaction with our [company/brand/etc].

Prior to this meeting, please make sure that you review any of our current marketing channels and be prepared to bring ideas about:

- What we do well, overall and in our current messaging, marketing, and content initiatives.*
- What our competition is doing better regarding messaging, marketing, content and connecting to customers.*
- Thoughts on who we sell our products too, and how we sell to them.*
- What are some pain points you think our customers have, and how do we solve them?*
- What questions you often answer for customers.*
- What you wish our customers knew more about.*
- Sales, inside sales, project managers: What tools/items could make your jobs easier?*

Can't wait to hear your thoughts and ideas!

[Signature]



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Marketing Meeting Agenda

Create a clear agenda that will guide your meeting to keep everyone on topic and within the time you allotted to have this discussion.

The agenda we consistently use is the following. This isn't an end-all-be-all but this has successfully created conversations in organizations that have helped us create so many different robust, comprehensive, and agile Marketing Strategies.

The sample agenda:

1. Introduction/Ice Breaker
2. Meeting Objectives/Goals
3. Discovery Questions
 - a. Current Situation – business and marketing.
 - b. Where do we want to go?
 - c. Competitive Atmosphere.
 - d. Discuss current marketing mix and channels.
4. How are we different?
 - a. What makes our business different from the competition?
 - b. What are we doing right when it comes to marketing and messaging?
 - c. What could we work on?
5. Roundtable discussion about the following topics
 - a. Who do we sell to? What are our main customer profiles, and how do we continue to speak to them in our marketing channels?
 - b. What marketing channels are we on that we should stay on, and where are we that maybe we don't need to be?
 - c. What are customer pain points? What problems do you hear over and over again when talking to customers?
 - d. How do we as a business solve the above pain points?
6. Open discussion about the below
 - a. What is going on in the industry now?
 - b. Where do we see the industry going in the next 1, 3 years?
7. Wrap-up/Assignments and Dates

Marketing Strategy Meeting Do's

There are a few things that you need to do during a content meeting.

After hosting and facilitating meetings like this for years, we have a few tips and tricks for what to do and what not to do during and after these meetings.

Our DO's!

- Take a leader role and guide the meeting to go in the direction you need.
- Designate roles within the marketing team – facilitator, note taker, time keeper, etc. This way information doesn't get lost and the marketing team can listen with a "marketing" ear.
- Write down your deliverable marketing suggestions all in one place. What we mean is – there will be a lot of ideas flowing for marketing needs to help support sales and the organization, so while it's not important to focus on the deliverables during this meeting, having a list to review after will save you time in the future.
- Ask more questions, especially around customer success and customer concerns, to uncover hidden pain points and marketing messages.
- Ask people to freely give their ideas, and ask the team to allow that to happen without judgment – no question or suggestion is too far-fetched!
- Use re-direction to get people back on track:
- Try things like:
- Tell me more about.....
- [Name], you mentioned....
- Let's circle back to [the topic]...
- Let me see if I have this right....

A TIP
FOR
YOU



Assign roles before the meeting, so people have a vested interest in being and participating in the meeting. The facilitator should also be ready to LISTEN to the group so they can uncover common themes, pain points, and clear marketing messages.

Marketing Strategy Meeting DON'Ts

Our DO NOTS!

- Don't start the meeting without a plan!
- Don't forget to encourage sharing and open communication.
- Don't forget to assign roles so nothing gets missed or forgotten.
- Don't forget to send out the email invite with homework so your team can come as prepared as possible.
- Don't forget to debrief after the meeting – within 48 hours so ideas are fresh.

The idea of this meeting is to get people to dump their thoughts and brains in a room, and for the marketing team to listen with their “marketing ear” to uncover what is happening outside of the business that needs to be communicated to the current and potential audience.

While this all seems overwhelming, it really doesn't have to be! Having a plan in place to get to the bottom of what should be included in a Marketing Strategy means smarter marketing, better ROI on marketing initiatives, and an increase in revenue.



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Once you have those goals and the steps to get there, compile your marketing strategy into a document for you to share with your team and to iterate on.

A complete Marketing Strategy document is not that hard to compile – especially if you have done that pre-work that we outlined above!

To compile your marketing plan in a clear and comprehensive way, make sure you have these key areas in your strategy:

- Introduction – high level outline of marketing strategy and goals.
- Audience Analysis
- Positioning/Messaging
- Goals and Objectives
- Competitor Analysis/Research
- Communication Plan
- Content Pillars
- Technology Plan
- Metrics/Benchmarks
- Key Stakeholders/Assignments/Due Dates/Gantt Chart

A marketing strategy with these parts above will be so helpful to your team and any key stakeholder that will be working with you. Taking the time to outline the marketing plan and then create a robust strategy to get the balls rolling so you can really connect to your audience and drive sales and interactions with your business.



So now the meeting is done - what's next?

Create that Marketing Strategy document and get off to the races!

Focus on spending time on finishing this plan and all the initiatives that need to be done, and delegate them! It can seem overwhelming to have to take all of the information you received and make a plan, but your future self and your team will thank you for the hard work you are doing.

A Marketing Strategy is truly an iterative roadmap that can help guide your marketing efforts and make sure you and your team (and the organization!) is aligned and marketing to the right people with the right message.

Marketing Strategies are the “training plan” you create to help you punch above your weight class and connect with your audience by telling your story.



What now?

Let's move on to the next book!

What you need:

- Your Marketing Strategy Document
- Coffee!
- A desire to REALLY roll your sleeves up and create some awesome content for your brand!



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We can help.

We have been working with companies both big and small for over a decade, helping bring their marketing dreams and wishes come to fruition.

We pride ourselves on our ability to get up to speed fast, help architect viable solutions for clients, and work with teams to develop the right road map to get to where they want to go!

We support businesses in a variety of different ways - and we can help yours!
We are only an email away.



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