

# MARKETING SMART GUIDE

Documenting your marketing strategy is key to building a strong foundation and keeping your entire team on the same page. Use this template to build out your primary goals, audience, and technology landscape.

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## METRICS THAT MATTER.

What are your business goals? Make sure you are tracking the right digital metrics to align with the goals that drive your business.

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## AUDIENCE.

Who are the primary and secondary audience segments you are trying to reach? Clearly outlining your target audience helps focus your marketing creative and messaging, media placement, and targeting options.

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## TECHNOLOGY.

Each piece of marketing technology has a purpose. When those technologies connect and work together, they can create a higher performance marketing engine. Use the template on page two to begin assessing what platforms you use today, understanding how they help move customers through your funnels, and where you might have gaps in your marketing.

### NOTE:

*Get specific. Establish and agree upon clear numbers (percentage increase, total number of downloads, etc.) and assign both a baseline and timeframe to achieve the goal.*

### Example goals:

- *Attain 500 new email signups each quarter (2,000 for the year).*
- *Increase organic web traffic by 10% throughout the year.*

### NOTE:

*If it helps keep audiences clear, create personas for them—including a name and photo. That way the entire team knows if we're talking about Jan (mom with two young kids with a middle class income), everyone clearly understands who is being targeted.*

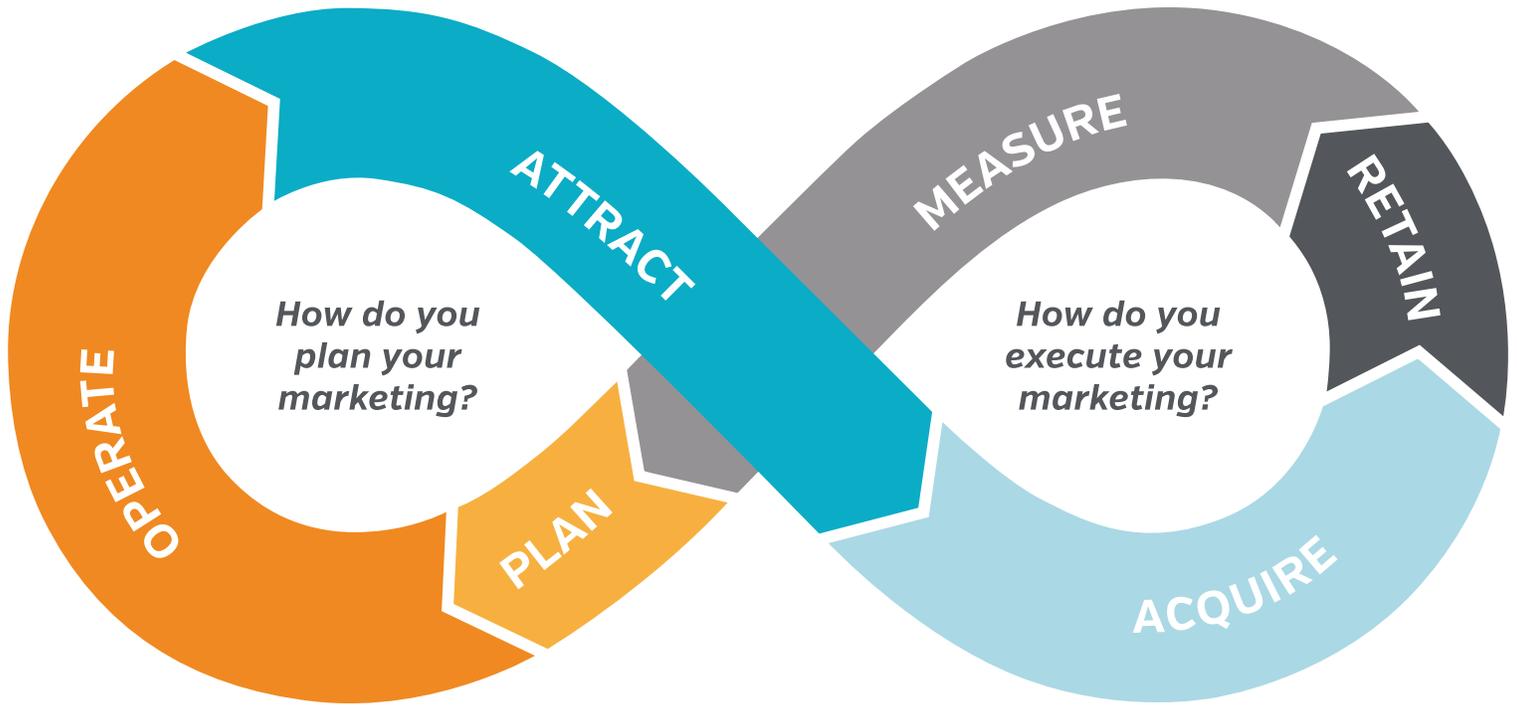
### Example audiences:

- *Families with young kids (0-7 years old) in a 250 mile radius.*
- *Affluent baby-boomers (60+) with no kids at home who live in South Dakota.*

## Digital Marketing FYIs.

- Use your email database to help build lookalike audience. This helps target potential customers who look like your current customers.
- When setting up paid search campaigns, use the keyword function when creating ads to help improve conversion rates.
- Make sure you have events set-up in Google Analytics to easily measure actions taken on your website.
- Make sure you've claimed your local listing(s) on Google.

# ASSESS YOUR MARTECH STACK



## PLAN

Platforms used for project management or planning.  
*Ex. Basecamp, Wrike, Excel, etc.*

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## OPERATE

Platforms used for internal operations to execute marketing efforts.  
*Ex. Quickbooks, Slack, etc.*

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## ATTRACT

Platforms used to attract and reach new audiences.  
*Ex. Google Ads, Facebook, etc.*

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## ACQUIRE

Platforms used to help acquire and manage leads.  
*Ex. CRM, ExactTarget, etc.*

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## RETAIN

Platforms used to retain customers and build loyalty.  
*Ex. Campaign Monitor*

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## MEASURE

Platforms used to measure efforts. *Ex. Google Analytics, Google Tag Manager, etc.*

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