

The Strategic Marketing Workbook

For clarity, insight and action to increase sales, delight
your customers and to build a strong brand.

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Worksheets and templates included in this workbook:

- The Questionnaire.doc
- Marketing & communications strategy.doc
- Your Customer Journey.ppt
- Marketing Channel Framework.ppt
- Your Customer Personas.ppt
- KPI-framework.ppt
- Your brand framework.ppt
- Tasklist.doc

Intro and purpose

The purpose of this workbook is to help you plan, execute and optimize your marketing and communication activities to support your business goals. To find that sweet-spot between business value, relevancy for your customers and your brand.

The questionnaire and the marketing and communications strategy document are where you define the answer to the hard questions and get to grips with your current situation. The customer journey map is where you set yourself into your customer's perspective and needs prior to a purchase of the service you are offering. And by using the channel and content plan you pin down your presence both on and offline to meet your customer and by using the KPI-framework you will then have a holistic view of your marketing activities KPIs to evaluate the activities more accurately.

In short, this toolkit with worksheets and templates helps you run marketing for your business in an effective way, to increase sales, delight your customers and build a stronger brand.

This strategic workbook requires some pre-knowledge of marketing and is designed to elevate your current marketing activities and help you get to the next level.



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Modern marketing and business development

Modern marketing is a combination between strategy, business development, communication, customer insight and an actual way of working based on insight, iteration based on a holistic perspective.

Expectations change with new technologies and services available which means that marketing becomes more complex, yet easier and moves closer to business development in a sense.

Advertising does not work anymore

Today you need to understand your customers needs, pain points and journey from a decision to a purchase of a product or service. The "new advertising" is everything from being present in social media, crafting useful content, to creating marketing and communications material for your company which has real value for your customer.

Last click conversions is not an accurate metric

Your marketing mix is like a football team. Each player has their role in the team. So does your marketing. In order to be successful and know where to spend your company's marketing budget you need to know which channel who has which role and what their strengths are. See beyond the last click and create a holistic KPI framework to be able to properly evaluate each initiative, channel and platform.

Make calculations and dare to fail forward

With so much information available today - use it to your advantage. You can use benchmarks, industry averages for specific channels and mediums as well as your own data to calculate predictions and potential. That said, even though you can make calculation, your creative, content and website also plays a huge part in your marketing results. Therefore test everything, learn and tweak as you go along as well as calculate potential.

Your competitor is anyone and everyone

With the increase of digital services, technology, platforms and tools comes new possibilities. Anyone with imagination and determination can start a business and turn a market on it's head as well as completely outrun companies and brands that have been around for a long time. Remember Kodak?

Don't let your own organisation stand in the way

Modern marketing and communication requires a new way of working. The key is to enable knowledge, ideas and information to be shared across an agile organisation. To take one recent example, Elon Musk turned a tweet into reality in only 6 days:

<https://medium.com/@loic/elon-musk-turns-a-tweet-into-reality-in-6-days-6189c1795a41#.wmt2fdtkq>

Key numbers for modern marketers

Modern marketing is a mixed bag of creativity, content, algorithms, data and mathematics. You can easily calculate the potential of various marketing channels with some key numbers and industry averages for certain channels. These are some key number that are useful to have up your sleeve to evaluate marketing investments:

CPO = cost per order (or lead) use this to calculate the cost per order or lead. Use this to calculate a cost you can spend to generate an order, lead or customer.

Customer Lifetime Value = the average value of a customer through their time with you, as a customer. For this calculation you need to know the average weekly spend per customer. The average customer lifespan (in years).

ROAS = the return on ad spend (including any agency fees). To calculate this you need the total cost of the marketing initiative, including any agency fees for a campaign period. For the same date range you need the revenue generated from that specific campaign.

$$\frac{\text{Cost}}{\text{Amount of orders}}$$

= CPO

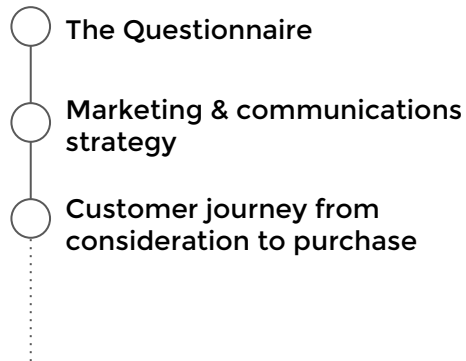
$$\begin{aligned} &\text{£ avg. weekly spend per customer} \times 52 = Y \\ &Y \times \text{avg. customer lifespan} \end{aligned}$$

= CLV

$$\frac{\text{Revenue generated from marketing activity/campaign}}{\text{Total cost of campaign}}$$

= ROAS

Instructions



There is only three things that I recommend that you do before you head into the other worksheets and templates. That is the questionnaire and the marketing and communications strategy. Followed by the customer journey. That prepares you for the rest of the worksheets which you can work through in any order and both add and subtract to, to really customise to fit your brand, business, product, market and target audience.

To perform these exercises I recommend printing these worksheets and have a workshop with your company key stakeholders, either use post-its and add to the pages, or write directly on the pages. Once done, you update the electronic version with your notes compiled as well as customizing them, if you have the time - add your brand font, logo and colours to these documents to really make them yours.

Once done you can save these documents and distribute within your organization, print them to have these visible in your office space as well you now have something to work with in the future, to update and move forward from.

The Questionnaire



This is the hard questions that will prepare you for all the other worksheets in this pack. The purpose of this is to help you define your biggest business challenges, think about how your product may need to be updated, as well as defining your long term plan and business goals.

This is the easy part, as it consists of a questionnaire with 22 questions to answer. I recommend that you start with this document, because everything else will be easy after you've done this.

Marketing and communications strategy



This template helps you create your business marketing and communications strategy. You will need to have your business goals, target audience and business challenges defined before you start.

The document is straightforward and I have added the most common channels for you as headings, which you can add or subtract from.

As well as pre-filled an example for how to use the channel part in terms of purpose, goal and measurable KPI to assign to this.

Your customer personas

NAME THIS PERSONA

Add a picture of someone who could represent them here

Occupation:

Motivations:

Pain points:

Influencers:

Interests:

Likely to live in:

Websites & blogs they hang on:

Magazines they read:

TV they watch:

Other brands they like:

Income bracket:

This worksheet has room for 8 different customer personas. If you don't have that many, just adjust the template to fit the number of personas relevant to you.

YOU WILL NEED TO KNOW AT LEAST

To know your target audience;

Motivations

Interests










Pain points

Where to find them

If you don't have this information try the following:

- Use your facebook page ads audience insight tab
- Investigate Google Analytics and extract what you can
- Create a customer survey

Channel plan

WHERE	WHO (target audience)	WHY (purpose)	MESSAGE	CONTENT	KPI
        					

Once you've made your marketing and communications strategy you can use this template to define where you can find which potential customer.

Add and subtract to this using the icons included for social channels etc.

The template also has your own and paid for channels added which you can subtract and add to.

You will need

- To have done the marketing and communications strategy

Customer journey from decision to purchase

SEE	THINK	DO	CARE
Your customer have no intention of buying your service. However, the context they exist in. What is it? Websites? Magazines? Blogs? TV shows?	The customer is thinking about a solution, service, they are interested to know more since they are thinking about buying. What is important to them now? And where do you reach them? What is the biggest challenge for them in terms of making a purchase?	The customer want to buy. They have made a decision to purchase. Now, what is important to them - and where do you reach them to convince them to buy from your company?	The customer chose your company to buy from. Now, what is important to them? After care? How can you re-inforce the purchase, as well as ensure a return buy from your customer? And where do you reach them?
SEARCH			
Keywords: relevant to your customer in this phase)	Keywords: your customer search on in this phase	Keywords: your customer search on in this phase	Keywords: your customer search on in this phase
MARKETING ACTIVITIES			
Purpose: raise awareness about your brand and product	Purpose: make a person consider your brand and product	Purpose: convince the person to buy the product from your brand	Purpose: re-inforce product, brand and ensure repeat buy or buy your after care products
WEBSITE			
OTHER TOUCHPOINTS			

This is useful to perform and define as you can select media investments as well as create useful content that helps your customer in their decisionmaking process. As well as being a useful tool to put your customer in the centre, and take market shares from competitors. A key in this is to know what the most common challenges are for your customer in each stage, to make a decision to go to the next phase in their process towards a purchase.

The key question is - what is important for your customer in each phase - and how can you help them move into the next phase in their decision and buying process?

If you don't have this information try the following:

- Use your facebook page ads audience insight tab
- Investigate Google Analytics and extract what you can
- Create a customer survey
- And/or interview people from each target audience you want to reach

The purpose of this document is to clarify your brand. Use this worksheet to create an overview of what your brand is, as well as your positioning, values and so forth.

Simply add the information under each heading. Update the brand positioning matrix with 4 relevant labels and position your brand in relation to other brands or words in this matrix.

The moodboard is where you add photos, fonts and other visuals that helps you visualize both your brand and the feelings you want to evoke, while you tell your brand story.

You will need

- Your brand guidelines/book - if you have one
- Images/visuals

KPI framework

CHANNEL/ACTIVITY	SEE	THINK	DO	CARE
MARKETING ACTIVITIES				
Facebook Ads				
Online Display Ads				
Youtube Ads				
Twitter Ads				
Paid Search				
Instagram				
Magazine Ads				
TV ads				
OWNED				
Website Newsletter Blog	New users & sessions	Increased traffic & time on product pages	Conversions & Store locator	Sign-up newsletter Followers

The purpose of this document is to help your business to get a holistic view of your marketing activities, to understand that everything you do has an effect and this way you gain a deeper understanding of how to more accurately evaluate your marketing mix.

Use this document to identify both owned and bought media - how they should be evaluated in each step of your customer journey and how they reflect back to your own website to support the media you invest in.

You add one KPI per channel per phase in the customer journey relevant to the website. I've added one general one in this instruction to illustrate the exercise (for your website)

You will need:

- To ensure you have event tracking and goals set-up in your web analytics software to reflect this
- Your customer journey defined
- Knowledge of attribution modeling ([view Google Analytics](#))

Task list for your action items

Tasklist - collected action items

Date updated:

Responsible:

PRIORITY	TASK	RESPONSIBLE	DEADLINE
1	Content workshop - output a content plan	Jane, Web Manager	
2	Ensure event and goal tracking	Jane, Web Manager	
3	Build a content library	Mycroft, Content Editor	
4	Content gap analysis	Mycroft, Content Editor	
5	Keyword analysis	SEO Agency	
6	Learn more about attribution modeling	Vanessa, Business Analyst	
7	Connect CRM-system with Facebook Ads to find look-a-likes	Shannon, IT	

The purpose of this template is to collect all the tasks you and your team will discover along the way while you work through the documents. Use this list to store all task in one document, then prioritize them delegate as well as ensure action is taken.

Upload to Google Docs and convert to a Google Document, and work your way through it with your team.

A list is a really simple, yet powerful tool to get things done.