

## (Name of Company) Personalized Marketing Plan

### OVERALL MARKETING AND COMMUNICATIONS PLANNING GOAL:

Support the mission of your company by planning, implementing and evaluating branding, customer experience, marketing and communications to internal and external targeted stakeholder audiences.

**Our Strategic, Measurable Business Goals:** *Specific, measurable goals that marketing can impact*

- **Examples:** *Sales, revenue, profits, customer satisfaction & retention, sales per customer*

**Our Mission Statement:** *The written purpose of your company & serves as a common goal*

- **Example:** *We strive to employ the best people & provide the most efficient, cost-effective, accountable service & equipment, as well as offer the best warranties available to our customers*

**Our Vision:** *Describes the completion of your mission describing the desired future in clear terms*

- **Example:** *Exceeding customers' expectation so they actively refer family and friends, thus growing our loyal customers for life*

**Our Beliefs and Values:** *Things that you believe in & drive your operations & decision-making*

- **Examples:** *Integrity, Quality, People, Responsiveness, Accuracy, Value*

**Our Products and Services:** *The clear list of the programs & services you offer*

- **Example:** *We provide a comprehensive package of air conditioning & heating services to include sales, installation & service plans.*

**SWOT Analysis:** *This is an analysis of the internal strengths and weaknesses and the external opportunities and threats that need to be considered and addressed in the formal marketing plan*

| Strengths (Internal)                               | Weaknesses (Internal)                         |
|--|---|
| Great reputation, many years serving our community | High employee turnover                        |
| Solid financial position                           | Too dependent on a few customers              |
| Excellent physical location in the community       | Lower awareness due to small marketing budget |

  

| Opportunities (External)                         | Threats (External)                           |
|--|--|
| Growth in our community creating increased needs | New competitors in our community             |
| There are many interested possible collaborators | New government regulations are challenging   |
| Many companies providing complementary services  | New, more efficient equipment via technology |

**Using the SWOT Analysis:** *Things you can do to exploit your strengths & opportunities & minimize your weaknesses & threats*

- Ways you can increase your strengths:
  - Develop better outside signage to take advantage of your great location
- Ways you can minimize your weaknesses:
  - Develop a strong staff recognition, reward & retention program to reduce turnover
- Ways you can exploit your opportunities:
  - Meet with other complementary providers in our community to develop strong collaborations
- Ways you can reduce the threats:
  - Work with your elected officials to better understand new laws & to minimize impact

**Competitive Analysis:** *Your direct competitors & what they do best*

| Competitor       | What They Do Best   |
|------------------|---|
| 1) ABC Air       | Brand recognition. Excellent branding & advertising           |
| 2) Smith Heating | History. Business established in the 1970s                    |
| 3) Air Solutions | Great at generating leads with business telemarketing service |

**Our Brand Promise:** *This is what you promise to deliver beyond the service or products you offer*

- **Example:** *Re-defining what exceptional dependability and reliability looks like!*

**Our Signature:** *The tag line that clearly communicates who you are & how you positively impact the your stakeholders*

- **Example:** *Get Comfortable with Us!*

**Our Target Markets:** *The specific target markets you want to address in your plan this year*

- **Examples:**
  - *Current customers*
  - *Prospective customers*
  - *Suppliers*
  - *Past (lost) customers*
  - *Employees*

## **TARGET AUDIENCES, KEY MESSAGES, STRATEGIES AND TACTICS**

The plan will, for each target group, the following that identifies measurable goals, strategies & tactics.

### ***Current Customers***

#### **Specific, Measurable Goals:**

- Increase closing rate from the current 65% to at least 73%
- Increase Net Promoter Score from current 68% to at least 81%
- Increase number of USAs from the current 125 to at least 175

#### **Strategies & Tactics:** *Specific strategies & tactics that you will employ directed at this target*

- **Major Strategy 1:** To increase sales volume among current customers, develop a comprehensive referral strategy to improve retention & likelihood to recommend to a friend with resulting new customer referrals
  - **Tactic 1:** Develop a referral program to increase referrals. Leverage current survey to create strong testimonials. Encourage current customers to share their experiences on Facebook, Google+, Yelp.com & YP.com to build trust
  - **Tactic 2:** Develop a stronger email contact list. Use seasonal e-newsletters with a targeted promotional focus. Become a trusted advisor to current customers through the use of informational e-newsletters
  - **Tactic 3:** Develop an effective program to deepen the customer experience at all touch points to include birthday, holiday & anniversary messages, social media & referrals
- **Major Strategy 2:** Develop a comprehensive strategy to grow the number of Ultimate Service Agreements (USAs) as an effective ways to build the overall business & customer loyalty
  - **Tactic 1:** Develop an incentive program to reward employees for meeting or exceeding weekly & monthly USA goals
  - **Tactic 2:** Create an effective sales training program for technicians to improve their closing rate by a minimum of 25%
  - **Tactic 3:** Cross-sell USA through the development of sales collateral materials too include fliers & brochures with timely follow-up. Ensure that USAs are prominent on the web site & all marketing communications including seasonal e-newsletters

**APPENDIX 1 – OVERALL PLAN TIMELINE & RESPONSIBILITIES**

| Target/Strategy   | Marketing Tactic                            | When | Who | Comments                            |
|-------------------|---|------|-----|-------------------------------------|
| Current customers |   |      |     |                                     |
| Referral strategy | Formal referral program                     |      |     |                                     |
|                   | Develop overall plan                        | 3/1  | MH  |                                     |
|                   | Review current information on current sites | 3/4  | MH  | Yelp.com, YP.com, Facebook, Google+ |
|                   | Develop an on-line customer survey          | 3/6  | LL  |                                     |
|                   | Include survey link on all invoices         | 3/8  | LL  |                                     |
|                   |   |      |     |                                     |
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|                   |   |      |     |                                     |

## **APPENDIX 2 – MARKETING SUPPORT MATERIALS**

(This is an example of the list of marketing support materials)

The following are the specific marketing materials that should be considered to support the plan:

- Web site & social media sites
  - New messaging to communicate consistently with the branding
  - Overall colors, logos, look & feel consistent with the branding standards
  - New navigation & features to facilitate 2-way communication with all audiences
- General use support materials
  - 4 page sales brochure
  - E-newsletter template
  - Power Point template for various presentations

## CUSTOMER EXPERIENCE JOURNEY

|   | <b>Pre-Conception</b><br>(1 <sup>st</sup> impressions)   | <b>Introduction</b><br>(Greeting)  | <b>Interaction</b><br>(Process of doing business with you)   | <b>Purchase</b><br>(Buying experience)   | <b>Expansion/Referral</b>  |
|---|--|--|--|--|--|
| <b>Goals</b><br>What do we want to accomplish?                      | What notion do people have before they meet you?<br><br>Your goal...set a great expectation for the rest of the experience | Stakeholder now has an expectation of the experience<br><br>Your goal...exceed it! | Your goal...deliver your brand promise to build customer trust   | Your goal...the experience should make them want to do more with you!            | Your goal...maximize the experience so they buy more, spread great WOM & refer their friends             |
| <b>Physical</b><br>Locations/Settings                               | Website & SEO<br>Social media<br>Advertising<br>Word of mouth<br>Special events<br>Reviews & testimonials                  | Physical interaction<br>Office phone call<br>Email contact                         | Your location<br>Their place of business<br>A trade show or fair<br>Over the phone or web site         | Fast response time<br>On-time<br>Simple & accurate invoicing<br>Guarantees       | Recognition & rewards<br>Ways to thank them<br>Referral programs<br>Surveys<br>Reviews & testimonials    |
| <b>Emotional</b><br>How do you want your customers to feel?         | "They look professional & can be trusted"<br><br>"We are excited to consider doing business with them!"                    | "We are glad we called!"<br><br>"They seem very friendly & focused on my needs"    | "They care about my needs!"<br><br>"I can find what I need"<br><br>"They value me & value my business" | "They are very easy to work with"<br><br>"They want to make it right every time" | "They really want me as a long-term customer"<br><br>"They value my business & would miss me if we left" |
| <b>Memory-Maker</b><br>What do you want your customers to remember? | "Wow, what a great story of results!"<br><br>"We hear only great things about them"  | "They seem like they really care"  | "I can't wait to get started"  | "I could not have gotten the results I got with anyone else"                     | "They are more than a supplier; they are a friend"   |