Community Business Bureau



# Webinar 5: Marketing strategy and plan

# Activity Worksheet

#

Webinar action plan

|  |  |
| --- | --- |
| Our key takeaways/learning points from the webinar |  |
| Questions to ask in the Facebook forum |  |
| We need to understand more about… |  |
| We need to talk to… |  |
| We need to discuss… |  |
| We need to decide… |  |
| We need to do… |  |

# Tools and templates

Customer experience

What will you do to ensure that customers have a good experience with you? e.g. how the waiting area is setup, means of communication and staying up to date with key messages, feedback surveys, complaints processes.

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|  |

Customer journey mapping



Target customers

Who are your most important customers?

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| --- |
|  |

What new customers are you wanting to attract?

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| --- |
|  |

## Key messages

What do existing customers need and want to know – this is the information you need to communicate.

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| --- |
|  |

What do new customers need and want to know – this is the information you need to communicate.

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| --- |
|  |

## Marketing strategy

What are the goals (or what are you trying to achieve) from the marketing activities? Ensure you include activities related to the launch of any new programs/services as well as ongoing new clients to existing services. Remember to look back at your competitor analysis to understand if you are positioning as a “me too” (i.e. no differentiation in the market so everyone competes on the same thing), or if there is something different you can say so you have a real clear positioning.

An example is included in the table below.

|  |  |
| --- | --- |
| Item | Goal or Objective |
| *Example* | *Reach 100 potential new customers in the region with an aim that five of them enquire about a new service with us.* |
| 1 |  |
| 2 |  |
| 3 |  |

What marketing related activities will you undertake in order to achieve these goals/objectives?

|  |  |
| --- | --- |
| Item | Activity |
| *Example* | *Each quarter, boost one of our Facebook posts which focusses on services to people with multiple sclerosis in the region with a focus on the age/gender profile and interests consistent with this type of person.* |
| 1 |  |
| 2 |  |
| 3 |  |

## Marketing budget

List out the key activities you are going to do in order to promote the organisation to potential new clients. Make an assessment of what you think each will cost and include that in the table as well. Some may be a one-off cost (that can be included in the Sub-total column), and others might be something you do on a monthly or quarterly basis, such as advertising.

An example is included in the table below.

|  |  |  |
| --- | --- | --- |
| Activity | Unit and unit rates | Subtotal |
| *Example: Run campaigns on Facebook to boost posts with an aim of attracting new clients* | *4 posts x $200 each* | *$800* |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
|  | **TOTAL** |  |

# Sources of information

* Customer Journey Canvas: Designabetterbusiness
[**https://www.designabetterbusiness.tools/tools/customer-journey-canvas**](https://www.designabetterbusiness.tools/tools/customer-journey-canvas)
* How to create a marketing budget?

CBB Foreword post: <https://www.cbb.com.au/2020/02/27/measure-roi-with-a-zero-based-marketing-budget/>