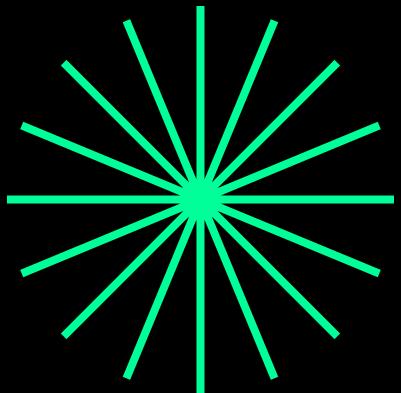


# IT ALL STARTS WITH A PLAN



A roadmap to media in advertising

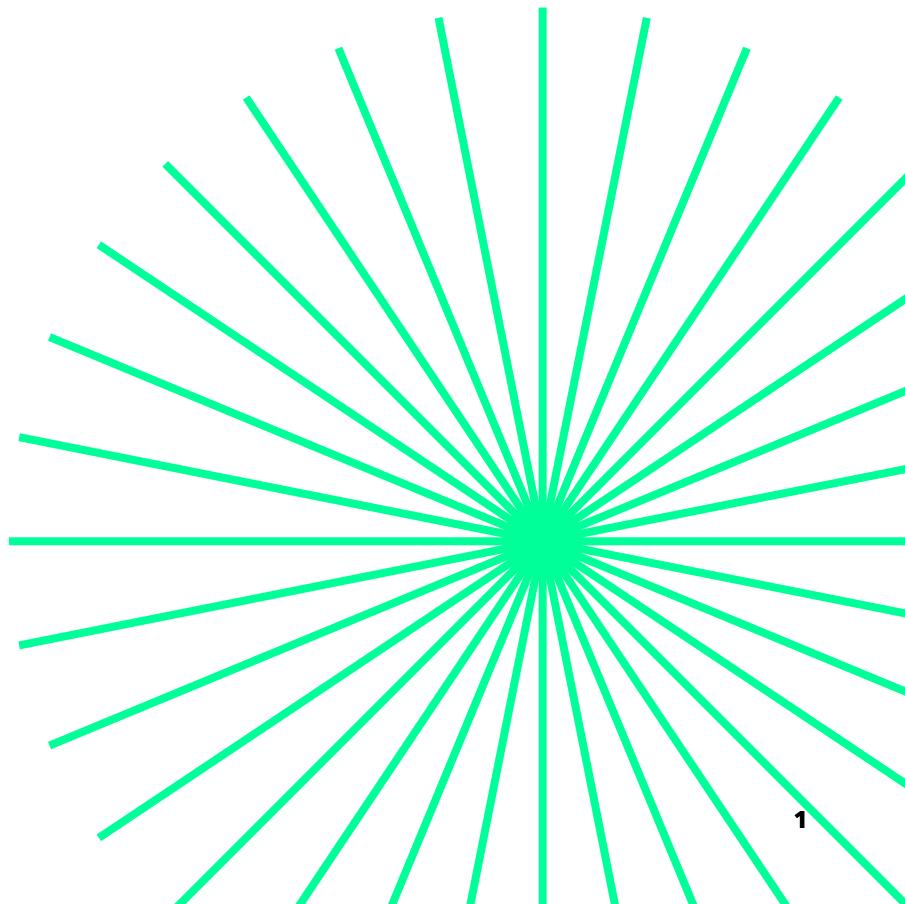


FIELDTRIP

# Welcome.

**Nobody knows your brand like you do. The challenge is getting your audience to have that same level of familiarity and comfort with your product or service. Whether you're looking to ramp up sales, attract new leads, or make your brand a household name, advertising can be the key to getting there. We've made it our mission to help you meet your goals, but taking the first step is always the hardest, so let's do it together.**

**(FAIR WARNING, WE'VE GOT A LOT OF ANALOGIES COMING YOUR WAY)**



# Let's start at the beginning.

So you have a brand, but what have you done with it? There are different actions you can take, each with varying levels of importance based on what you are looking to achieve.

- **BRAND DEVELOPMENT**, for example, is everything that people see and hear from you including (but not limited to) your visual identity, voice and tone, messaging, values, and mission.
- **MARKETING** covers all internal and external efforts you put toward your brand, including every touchpoint that influences a customer's relationship with you. For example, what a sales rep says when answering the phone, the "thank you" email the customer gets after buying something, point-of-sale signage, and so on.
- **ADVERTISING** is the intentional messaging and actions over a specific period of time driving a target audience to the desired goal you have, like buying more of a product or ordering more of a service.
- **MEDIA** consists of the channels you use to promote your brand and deliver your messaging. Choosing the right placement can get your message exactly where you want it to go and deliver results.

# Let's start at the beginning.

Just like building a house, there's definitely a process, and you can't move in before you pour the foundation. With that in mind, we put together a little list that encompasses your brand's marketing foundation (ok, no more building analogies).



## BRAND FOUNDATION

**Having a strong brand is an important first step to communicate and connect with your target audience.**

- |   | Totally got this covered | Not bad, but could do better | Definitely needs some work |
|---|--------------------------|------------------------------|----------------------------|
| → Do you have a full brand identity, including logo, typeface, color palette, imagery, illustration style, etc.?                    | <input type="radio"/>    | <input type="radio"/>        | <input type="radio"/>      |
| → Do you have a brand platform, possibly containing core values, a mission or vision statement, position, personality, and essence? | <input type="radio"/>    | <input type="radio"/>        | <input type="radio"/>      |
| → Have you identified your company's target audience?   | <input type="radio"/>    | <input type="radio"/>        | <input type="radio"/>      |

## GOOGLE PRESENCE

**Leverage Google's free business platforms to be visible to consumers who are doing online research.**

- |  |                       |                       |                       |
|--|-----------------------|-----------------------|-----------------------|
| → Do you have a Google My Business account?  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| → If yes, do you have all the information filled out accurately? I.e. business hours, location, website information, photos, description | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| → Are you encouraging customers to leave Google Reviews?   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

## WEBSITE PRESENCE

**When people find you, what they see has a direct impact on how they get to know you.**

- |   |                       |                       |                       |
|---|-----------------------|-----------------------|-----------------------|
| → Is your content clear and accurate to your brand and offerings?                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| → Is your contact information easy to find? Can someone reach out to you if they need to? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| → Have you mapped your consumer's purchase process or journey?                            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| → Does your website work on desktop, mobile, and tablet?                                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| → Do you have Google Analytics installed to monitor performance?                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

# Let's start at the beginning.

Totally got this covered      Not bad, but could do better      Definitely needs some work

## CUSTOMER COMMUNICATION

*Outside of paid media, your internal team must nurture leads from the first to last touchpoint.*

- Do you have an email workflow? For example, when your customers join your mailing list, do they get an automated personal thank you email? When they take the desired action, are consistent follow-up communications planned?
- Do you have a responsive customer service plan? If your service or product requires additional action like phone conversations or online chats, be prepared to have a quick response time.
- How do you answer the phone? Greet the customer? Handle the sale? Ask for reviews? Plan and practice for every touch point.

## INFORMATION CONSISTENCY

*If your company has multiple listings online (and offline) make sure the information is consistent and accurate.*

- Do you have an online referral and listing service? What information do you provide?
- Is your business information complete on all social channels? Is it accurate?
- Do you list contact information on your website?

## SOCIAL CHANNELS

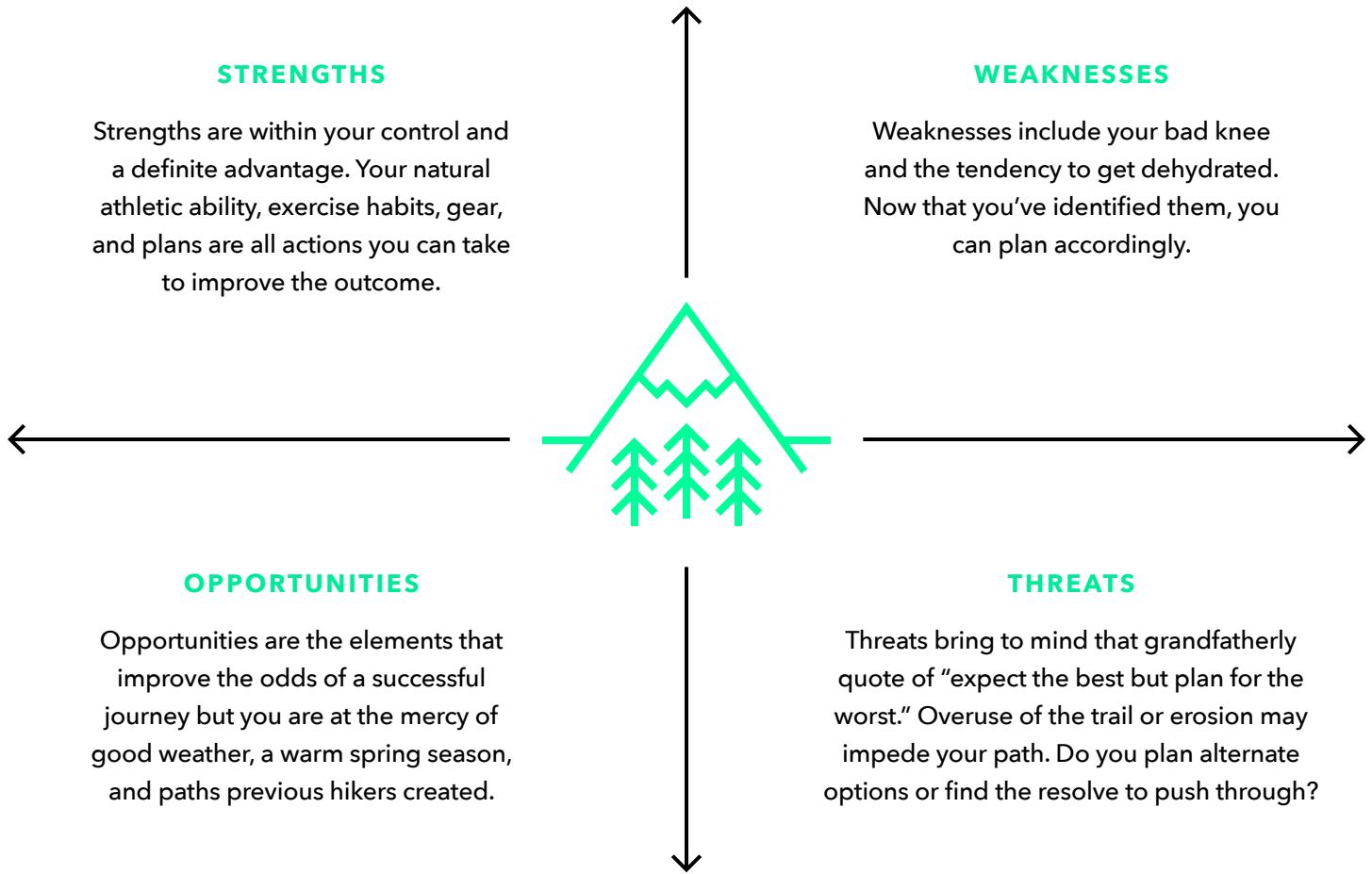
*If you are running paid social campaigns, the organization's presence should be strong on those channels as well.*

- Are you on the appropriate channels? i.e. Facebook, Instagram, Pinterest. *Note: you do not need to be on every social channel, just the ones that make sense for your brand. Where do your consumers naturally spend their time and how will they want to interact with your brand?*
- If a consumer's first touchpoint with you is one of your social channels, does it position your brand well?

# Understanding the Landscape.

Before you begin, it's best to evaluate the competitive landscape of your business by looking at your competitor's internal factors (Strengths and Weaknesses) and external factors (Opportunities and Threats), also known as SWOT. This level of preparation may seem simple and obvious but many brands fail to do it correctly, if at all.

→ Okay, analogy time again: we're going to hike up the SWOT mountain. This journey is about the balance of internal versus external attributes against strengths and weaknesses.



# Understanding the Landscape.



So what does it look like? Take three competitors and spend some time researching their business. They could be brands with similar offerings or it could even be a company or service unrelated to yours but that competes for your customer's time and money. By seeing what they do and do not offer their customers, this exercise will help you identify areas of opportunity and improvement for your business.

## COMPETITOR #1:

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

## COMPETITOR #2:

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

## COMPETITOR #3:

STRENGTHS

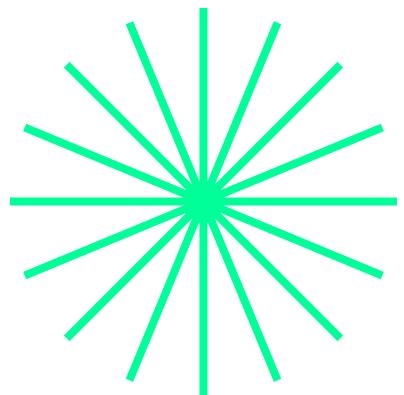
WEAKNESSES

OPPORTUNITIES

THREATS

# Ready. Set. Goals.

Where do you see yourself in 5 years? If you know what you're trying to achieve it's easier to determine the type of help needed from your marketing to meet your goals. Some will be supported with ongoing efforts, while others will require increasing the frequency over a shorter period of time. Different targets will also need different measures of success. It's vital to establish what that success looks like from the very beginning.



**What kind of business results do you think an advertising campaign can achieve for you?**

**When growing a relationship with your audience, what do you want it to look like?**

**How will you measure that?**

# Ready. Set. Goals.

Success can be measured in different ways depending on the desired consumer action.

## Awareness Campaign

Utilize mass reach to educate and change behaviors or drive brand awareness to a new market.

- A company has an important message they want to get in front of a lot of people simply to inform or educate, for example a public service announcement.

### MEASURE OF SUCCESS:

- number of people reached

## Desired Action Campaign

Education is also the major factor of this campaign, but the education piece must be anchored with media and messaging that drive action.

- A company has an important message or goal they want to communicate to the masses, however, the desired response is a soft sell like signing up to be a volunteer or signing up for an email newsletter.

### MEASURE OF SUCCESS:

- an increase in volunteers, free resource downloads

## Direct Response Campaign

Campaign that drives immediate results, typically sales efforts.

- A business wants to sell products very quickly and make a profit, but they have a storefront they need customers to visit. This company will also have an established brand or product need.

### MEASURE OF SUCCESS:

- increased foot traffic to brick and mortar

## Direct to Consumer Campaign

All online brands with no physical presence in the market. This campaign will only drive e-commerce sales but will need some brand awareness to build relationships with customers.

- A company that only has an online presence but runs a mix of education and product messaging to build trust in order to make a profit from sales.

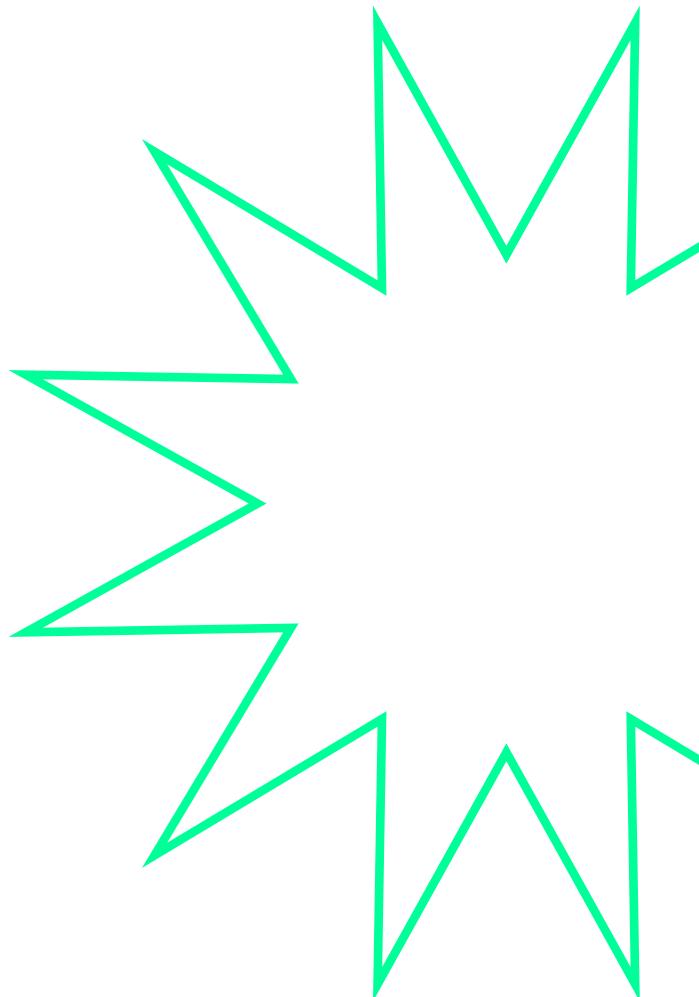
### MEASURE OF SUCCESS:

- increased e-commerce sales

# Moola, Cash, Benjamins: Your budget.

Politics. Religion. Budget. The holy trinity of things we don't like to discuss in public, yet here we are asking you to breach one of them. What's your budget? We know the answer isn't always black and white, but it may be the most crucial aspect of how you move forward.

Can you imagine going on one of those HGTV house hunting shows and not having a budget? A three-bedroom, two-bath home could be \$200,000 or \$500,000 depending on the location, upgrades, and lot size. Establishing a budget, in the beginning, sets you and your realtor up for success. Same with your advertising, the budget is everything and it comes first not last. A solution can be met at different degrees, but ultimately your budget sets the tone for the whole campaign.



# Moola, Cash, Benjamins: Your budget.

## QUESTIONS TO THINK THROUGH YOUR BUDGET:

### **What is your estimated revenue for the time period? Are you planning for the year or a quarter?**

(Don't make the mistake of limiting your revenue growth to the exact advertising dates as it takes time to create momentum and a successful campaign will continue to produce results after the ads stop . . . for a while.)

### **Are you a growing or established company?**

New and growing companies need to be at the higher range of the budget 10 to 20% of revenue and established businesses at 5-10% for consumer products and 2-5% for business to business efforts.

### **How does your budget compare to your competitors and your business category?**

Explore white papers from trade associations and third-party sources.

# Moola, Cash, Benjamins: Your budget.

## QUESTIONS TO THINK THROUGH YOUR BUDGET:

### **What internal metrics will demonstrate advertising performance?**

Map them out, in detail, and with current data. For example, 10 website form fills yield 3 qualified sales appointments with 2 proposals and 1 closed sale with an average value of \$5,500.



### **What advertising mediums will deliver impact to your sales process and where can you create new avenues for revenue?**

Prioritize the tactics by the anticipated impact.



### **How aggressive do you want to be and how confident are you in your homework?**

This is the proverbial gut check that has probably led to your budget estimates in the past. Keep the instinct but verify it against the data.



# Set Your Sights.

Your target audience is a very specific group of people most likely to engage with your brand or purchase your product or service. They are a key component of a successful marketing and advertising effort.

Identifying your target audience can sometimes trip people up. We've noticed that many confuse target personas with a campaign target audience. That broad brand-wide approach doesn't always hit the specific goals that a campaign may be aiming for. Rarely will you be able to say something that speaks to everyone equally. But, if you focus on a specific portion of your overall audience, you'll find it easier to directly speak to them and meet their needs.

## → SELECT A TARGET PERSONA

Most companies have different benefits or products that appeal to a larger audience. Your audience may include several segments that together help you achieve an overarching goal. To identify the broad audience, focus on a specific need you are trying to fulfill outside of traditional demographic information. Think about the cultural attributes of this broad audience. How do they spend their time? What are they interested in? Based on the answers to these questions you will identify the attitudes that align target audiences. These attitudes inform the media tactics and make the creative message meaningful.

## → CAMPAIGN TARGET AUDIENCE

Picking a single persona within your brand audience brings the best results. The more focused, the better as you can shape the message and the media tactics to fit.

**This is an evolving process, so know that things change from campaign to campaign as you learn more.**

# Set Your Sights.

## Target Persona

- Remember, focus on cultural attributes, what is the why behind your consumer's behaviors?
- Is your ideal customer upscale or are they budget conscious?
- How would you describe their shopping attitude in 3 words?
- Is your ideal consumer undergoing a major life change?
- What does their typical day to day look like? How can your product/service integrate seamlessly?
- Use these thought starters to build a broad persona, from top to bottom including job, lifestyle, habits, familial structure and important background information.

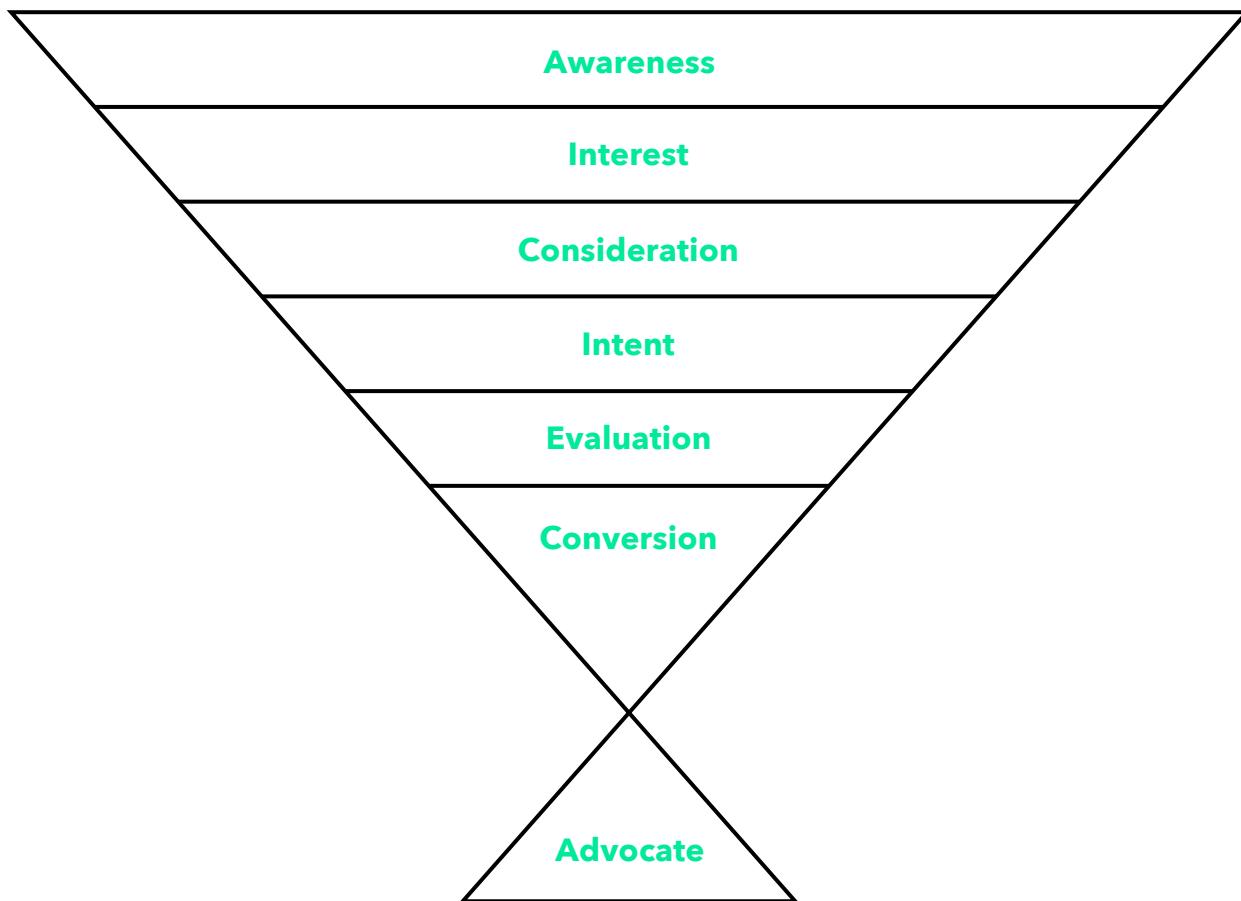
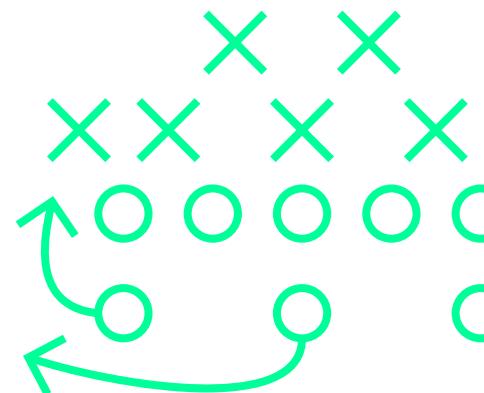
## Campaign Target Audience

- Describe specific demographic traits including age, gender, geographic location. Are there common geographical traits?  
**Age:**
- Gender:**
- Geographic location:**
- Geographical traits:**
  - What activities or interests do they have?
  - What are the most common shared attributes?
  - What details describe the audience you do not want to reach?

# Just the Right Mix (of Media)

Alright, if you didn't like the hiking or real estate metaphors, here's a sports one: think of your next campaign as one game out of the entire season. And in order to be successful within that game, you need a variety of plays and tactics. If your entire game plan relies on one strategy, you become predictable and easily defeated. A winning team needs a robust playbook.

The same rules apply to your advertising. Your goals will determine the correct mix of media tactics and messaging. It's a delicate balance of understanding your target audience, where they are in their purchase journey, and how to make it easy for them to take action. Let's break it down.



# Just the Right Mix (of Media)

Your advertising will shepherd potential customers from one phase to the next.

To move consumers through the different stages you must meet your audience where they are.

Purchasing Stage	Consumer Mindset	Advertising Purpose
Awareness	Unaware of your company what it does or that a solution even exists	Reach as many people as possible to generate interest in your brand or product
Interest	The idea of making a future purchase is noted and your company is on a mental shopping list of possible options	Start educating consumers on the benefits of your brand or product
Consideration	The want or need for purchase is becoming concrete and preparation begins.	Introduce product or brand during consumers research cycle
Intent	The emotional part of the purchase cycle is now joined by the mind's need to rationalize the purchase	Buying or engaging is very likely, increased brand frequency and awareness
Evaluation	Options are vetted and if your brand has created emotional value before this stage, the odds are in your favor.	Secure interest in brand or product
Conversion	The decision is made and the path to making the purchase needs to be clear and problem-free	Entice the desired action taken by the target audience
Advocate	What happens after the purchase determines if you will have a repeat customer or even better an ambassador who promotes on your behalf	Utilizing current and past customers as brand ambassadors (i.e. reviews, promo codes, link sharing)

# Just the Right Mix (of Media)

This mix of media falls into two primary categories, traditional and digital, each with unique advantages.

## Traditional Media

Tactics include television, radio, billboards, direct mail, and print.

- Best for high-funnel audiences driving awareness and reach
- Audiences are typically defined by geography (city, zip code) or demographics (age, income, homeownership)
- Primarily used for its reach power and ability to hit the masses
- Even with the rapid growth of digital media, audiences of all ages still typically consume several hours of traditional media daily

## Digital Media

The list of tactics is too long to list, but common forms include search engine marketing (SEM), social media, digital display, geofencing, and many more.

- Strongest for mid and low funnel stages as data is leveraged to find the ideal target audience
- In addition to geographic and demographic traits, both online and offline behaviors of internet users are used to pinpoint individuals on internet-connected devices
- Offers an instant path to purchase for e-commerce focused brands

# Just the Right Mix (of Media)

## Evolution of Media Consumption

Each media tactic serves a unique purpose. Consumers take in media in bits and pieces and often in a passive manner. The modern mind is often paying attention to more than one internet-connected device at a time or doing its best to multi-task. Those distractions are your competition, and frequency across all your media is needed to make your message stick. A smart investment is a mix of traditional tactics to fill the top of the funnel and digital tactics that drive a consumer to take action.

### LET'S THINK ABOUT YOUR AUDIENCE

**My audience is currently at \_\_\_\_\_ stage**  
**and I want to move them to \_\_\_\_\_ stage.**

# What works? What doesn't?

Every marketing or advertising campaign must be measured. Using the goals you set way back at the beginning, develop specific metrics called key performance indicators (KPIs) that you're working to achieve throughout the campaign. By tracking your KPIs you can determine if you're hitting the mark or where adjustments are needed.

Your measurements depend on your business goals and media tactics. The data is plentiful and can easily be overwhelming. Your success is tied to the type of campaign and a commitment to knowing your numbers.

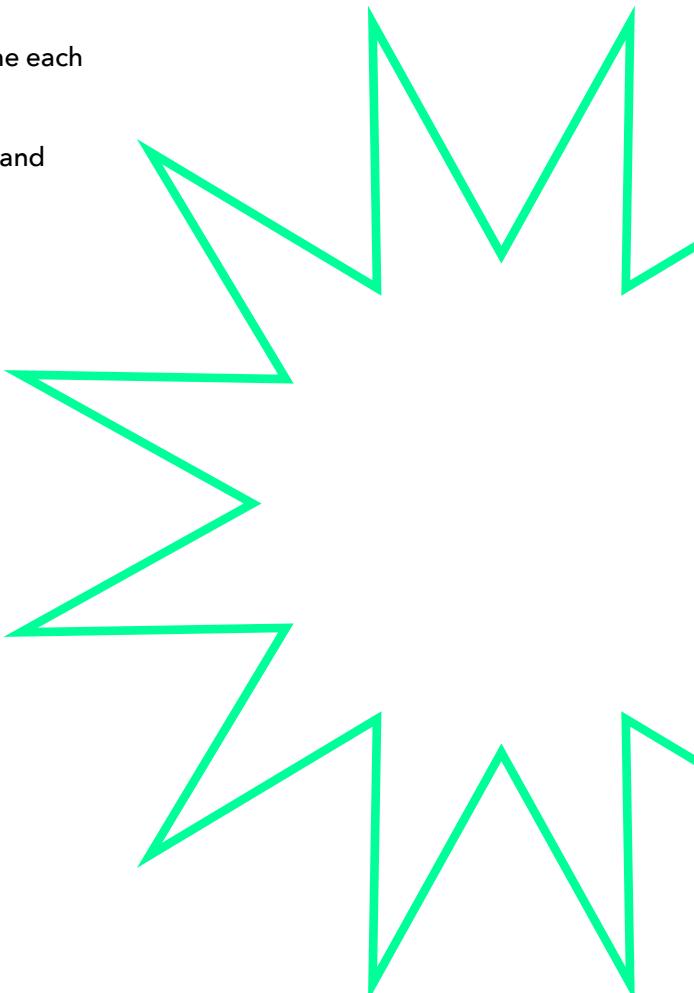
→ Let's return to the various stages of the consumer mindset and examples of measurements for each stage.

Purchasing Stage	Measurement	Examples
Awareness	How many people see or hear your message?	Brand recall, rating points, readership, impressions
Interest	What actions indicate the audience is taking note of interest in your category?	Keywords, sites visited, interest metrics, increase interactions with your brand
Consideration	What behaviors indicate the consumer is ready to start shopping or research?	Branded internet searches, related purchases, programs or publications selected
Intent	How willing is the target audience to connect with your company?	Website visits, social media likes, branded content consumption, email opens, consumer actions
Evaluation	How many times did your company have the opportunity for a sale?	Door counts, shopping carts, incoming leads, phone calls, proposals generated, social media engagements, competitors visited
Conversion	Of all the opportunities, how often did you make the sale	Sales revenue, units sold, average ticket, shopping cart conversion, customer count, offer redemption
Advocate	How happy is your customer, and for how long?	Google reviews, NPS score, loyalty program use, referrals

# What works? What doesn't?

With tactics and numbers flying everywhere, it is easy to slip up or miss something. Follow these best practices to avoid common mistakes.

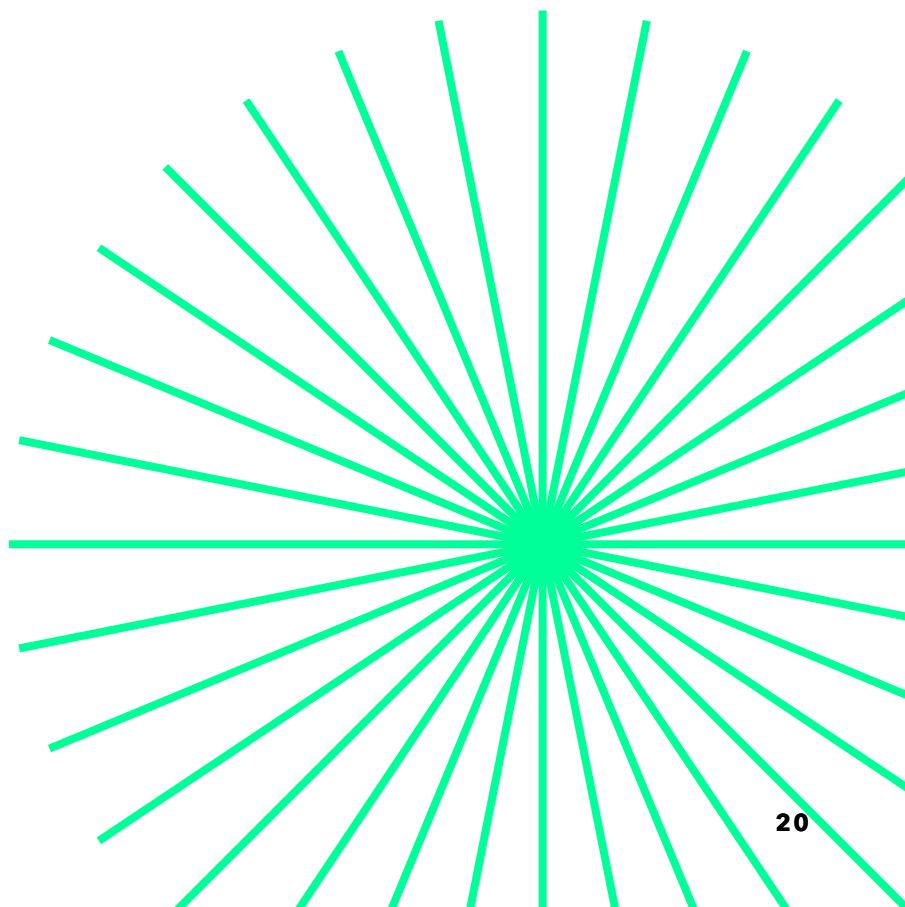
- Establish a baseline. Collect the data for the current state of your business at every point.
- Push beyond tracking vanity metrics like impressions, clicks, or the number of commercials and identify tangible metrics such as form completions, the number of phone calls, and dollars generated.
- Setup and test all tracking infrastructure prior to the campaign start as retroactive data is difficult to track.
- Don't switch objectives mid-campaign. This limits your ability to make data-driven decisions.
- Vet the KPIs internally and with your marketing partner before the advertising begins. Identify an owner of each data point and outline each tactic, what will be tracked, and how often it will be reported.
- Create and publish a scorecard. This keeps everyone accountable and puts the goal front and center.



# Just the Beginning.

Creating an effective media plan includes everything we've discussed so far, but while this creates a strong foundation, you're not quite done yet—deployment is the final step. By leveraging your target audience, creating achievable goals, setting a budget, and putting it all into practice, you'll be well on your way to achieving those results.

You only know what you know, and you're off to a good start, but this is just the first step. If any, or all of this seems overwhelming, it may be time to bring in reinforcements. A good marketing partner will work hard, hand-in-hand with your team to identify the sweet spot that will drive the most success for an ongoing advertising campaign. The best leaders are the ones who surround themselves with experts, and in media the mistakes can be costly, but easily avoided with an experienced specialist by your side.



# FIELDTRIP

**Every business is on a journey. We help define the path—by showing clarity, reducing noise, and connecting the dots.**

**Our mission is to build intelligent, design-focused solutions for inspiring businesses, unique products, and brave people. We elevate our clients and our industry by creating strategies and remarkable work that make it possible for brands to reach their full potential while investing in those who inspire the change. Our work creates experiences that connect, motivate, and inspire taking everyone to a better place.**

**Whether you need help thinking through the questions posed in this workbook or you are ready to pull the trigger on a media campaign, we're here to help.**

→ [wearefieldtrip.com](http://wearefieldtrip.com)



