

March 8, 2018  
Small Food Conference

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## **MARKETING PLAN BASICS**

**Tools and templates to  
create a simple,  
actionable marketing plan  
for your business.**

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## WHAT WE DO

Our goal is simple – to help passionate farmers and food artisans build lasting, profitable, locally-focused businesses. We accomplish this by working alongside our clients. No stuffy business plans that get thrown on the shelf, never to be looked at again. We have real-world experience and bring that to our work everyday. We have walked a mile in your shoes and understand first-hand the challenges facing small businesses. We are results-oriented, and our work is about actionable steps to make your business stronger and more profitable.



### Advising + Coaching

It is true that it's lonely at the top. Our business owner/organizational leader advising and coaching provides lasting results through a relationship built on trust, honest communication and consistency.



### Hands on Help + Project Management

Sometimes, advising isn't what you need, sometimes you need someone to get in there and get it done alongside you.



### Small Business Bookkeeping

Bookkeeping that actually helps you manage your business, not just figure out your taxes.



### Interim/Virtual Management Team

When your organization is in a period of growth and change, you sometimes need multiple levels of support to navigate change successfully



Helping passionate farmers and food artisans build lasting, profitable, locally-focused businesses.

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# AGENDA

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- Big Picture Marketing
- Designing the Plan
- Planning + Timing
- Campaign Development
- Building the Calendar
- Executing



# BIG PICTURE MARKETING

The first question of any endeavor -  
*What's my marketing message?*

## STRATEGY

- Business Objectives
- Marketing Challenges



## VALUE PROPOSITION

- Segment the Market
- Target Your Customer
- Position Your Product

## EXECUTION

- Product
- Place
- Promotion
- Price



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***A value proposition is a positioning statement that explains what benefit you provide for who and how you do it uniquely well.***

***It points to the problem you solve, and why you're distinctly better than the alternatives.***

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# PUTTING A PLAN ON PAPER

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8 Step Process  
and a Template



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# HOW TO START PLANNING

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*Why do entrepreneurs  
dread marketing?*

What are we afraid of?

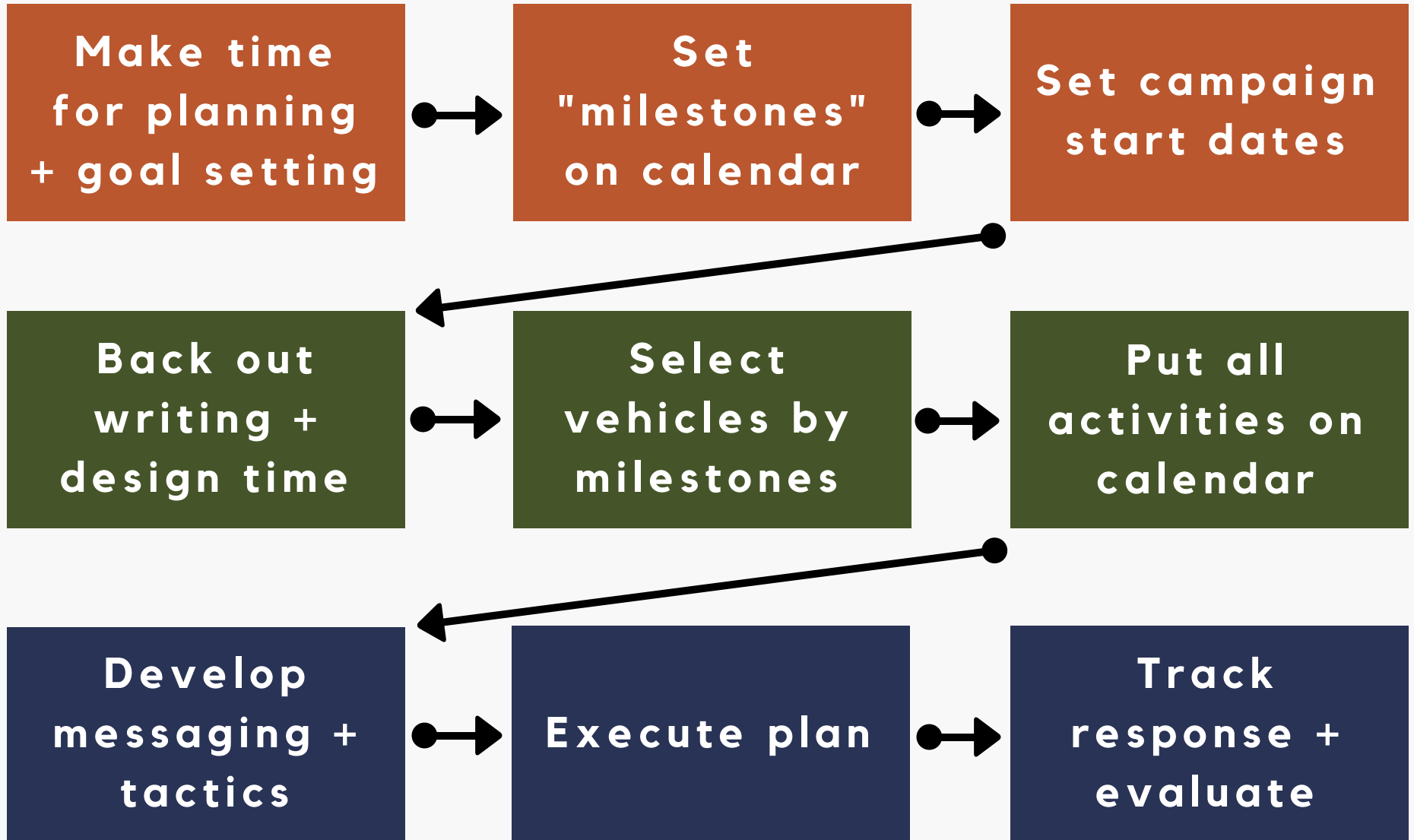
What is there to lose?

And what's to be gained?





# OUTLINE FOR YOUR MARKETING PLAN





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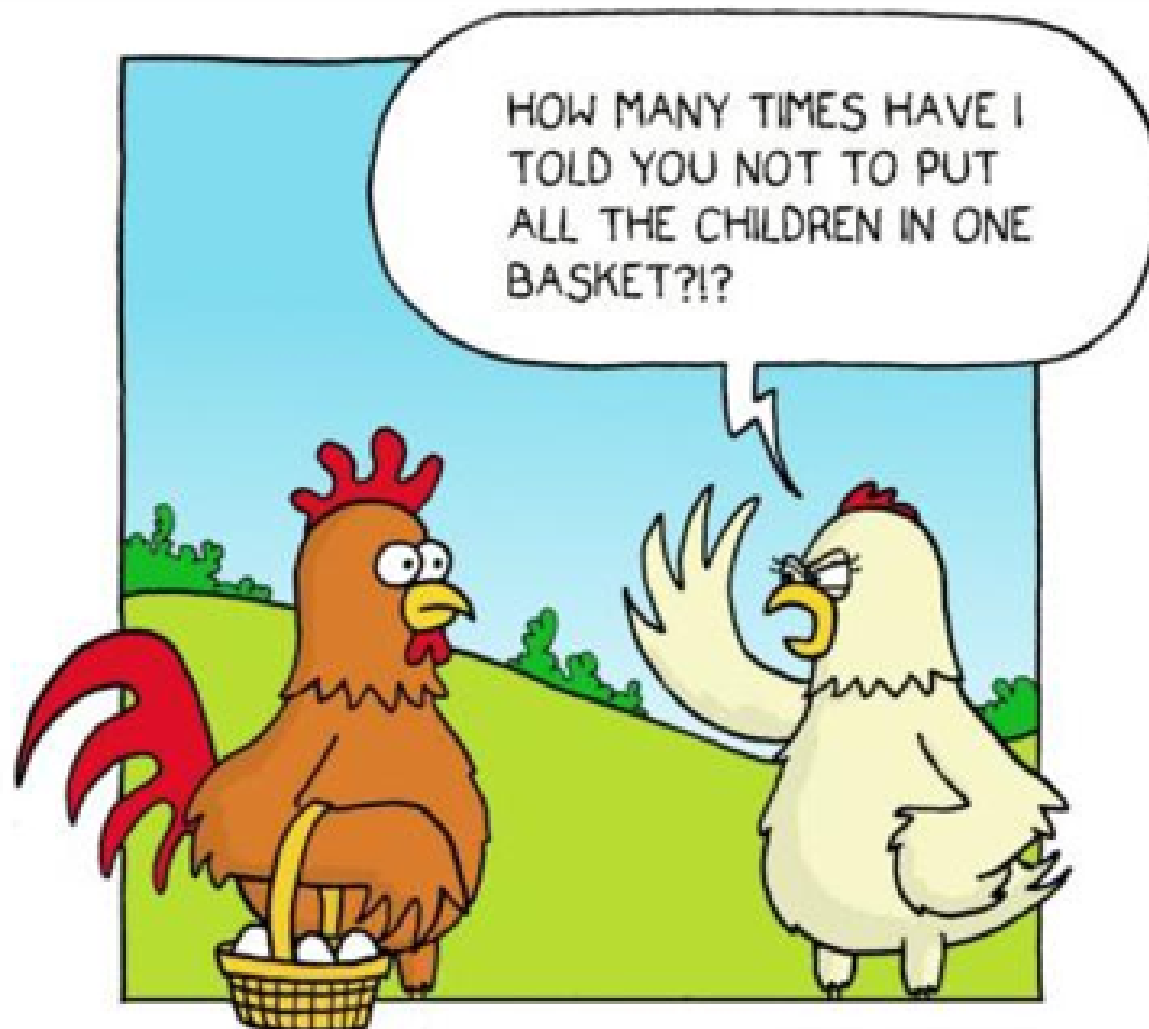
## STEP 1

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### *Commit to Planning*

- Decide to take action
- Set goals around a clear offering
- Create a plan with many "baskets"
- Write it down
- Break it down into layers and actions
- Make "to-dos" on your calendar
- Seek advice and resources
- Be creative and have fun
- Don't give up - be persistent
- Reward yourself






You should not concentrate all your resources and prospects in one single thing. If you do, you risk all your efforts on one opportunity.

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# STEP 2

# Marketing Milestones



**Summer  
CSA  
Signup  
Opens**

**Summer  
CSA Shares  
Begin:  
Hit Sign  
Up Goal**

**Local Food  
Festival:  
Demo Event**

**Fall Market  
Season:  
Pumpkins +  
Hayrides**





## STEPS 3 + 4

### *Start Dates + Lead Time*



**Set your  
milestone  
events**

**Consider  
campaign  
lead time**

**Work  
backwards  
to start  
date for  
campaign**

**Work  
backwards  
to  
campaign  
design**

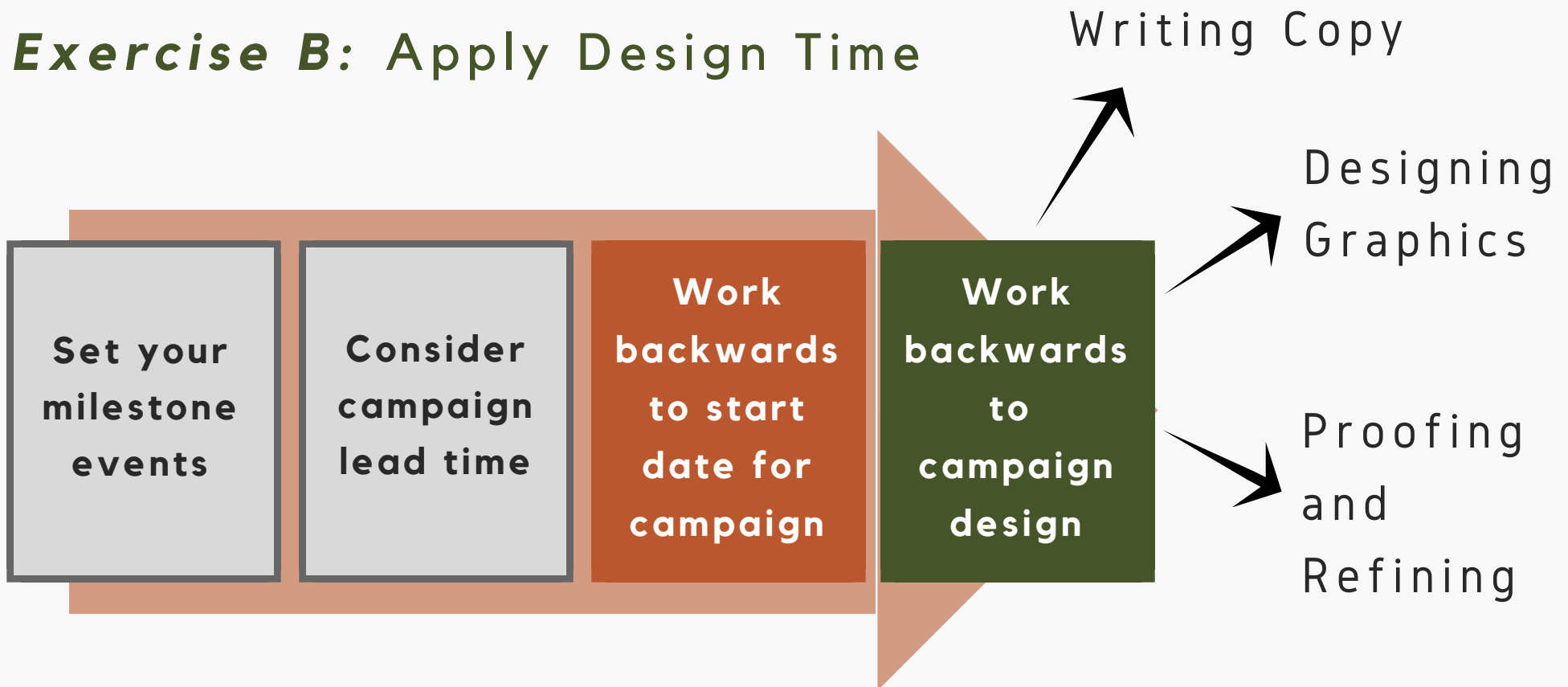
## STEPS 3 + 4

### *Apply to Your Calendar*



**Exercise A: Apply Start Dates**

**Exercise B: Apply Design Time**



# RECAP + NEXT STEPS

## *Steps 1-4: Planning + Timing*

What do we need to achieve and when do we need to do the work?

### PLANNING & STRATEGY WORKSHEET

Marketing Milestone / goal	Timeframe for goal	Length of Campaign	Start Date	Lead Time Needed	Planning Kickoff Date



**RECAP +  
NEXT STEPS**

***Steps 5-8: Campaign  
Development +  
Execution***

Exactly how are we doing the marketing work, who's doing it, and where will be interacting with our audience?

**Campaign Development**

- Marketing Mediums & Vehicles
- Frequency of Communication
- Content Strategy & Creation

**CONTENT DEVELOPMENT & MESSAGING WORKSHEET**

Campaign	Vehicle	Message	Frequency	Specific Storylines





# EXAMPLE

## Campaign Design

### Goal

Drive more nursery engagement and ultimately sales

### Vehicles + Post Types

- Tip of the week (FB)
- Promos (FB, IG)
- Email Coupon offer
- List this week's sale in the community newsletter

### Scheduling

Create a calendar of topics + administrators

### Writing + Posting

Execute the calendar



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## STEP 5

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### *Select Vehicles for Campaign*

## ***Marketing Vehicle***

A marketing vehicle is a specific tool for delivering your advertisement to a target audience.

They are particular channels within a medium that you use to get your message across.

Marketing vehicles are contained within marketing mediums. Whereas a medium is the general method of communication (such as radio, magazines, or social media websites), a vehicle would be the specific station, publication, or website that you advertise with.



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# MARKETING MEDIUMS

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# MARKETING VEHICLES

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## *Email*

Service Providers:  
Constant Contact  
+ MailChimp



*Why is email marketing our most powerful tool?*

- You already have a relationship with the customer. They've invited you into their inbox. They're listening.
- You're in control of the message, timing, and who's in the loop.
- It is the best return on investment for the cost.

*What's the biggest challenge of email marketing?*

***Building your list!***

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# MARKETING VEHICLES

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## *Social Media*

Facebook Page  
Likes Don't Mean  
Higher Sales

*Facebook engagement is not a revenue producing strategy...*

But it's a great way to:

- Illustrate your value proposition with creative posting
- Connect and solidify relationships with customers you already have
- Network with other farmers
- Publicize promotions to encourage higher foot traffic at markets

*While Facebook popularity isn't something you can take to the bank, it has value with regard to staying visible to your consumers.*



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# MARKETING VEHICLES

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## *Social Media*

Images,  
Personality, and  
Footage

## *Social Media Best Practices*

- Memes and images are essential to getting attention
- Make those first few words irresistible and keep the post short
- Choose a specific audience any time you boost a post or create an ad
- Footage and videos get the most traction
- Tag anyone and everyone related to a post
- Pick your custom hashtag and use it every time BUT also get creative with other hashtags to add personality
- Decide what you want your "voice" to be and stick to it - Funny? Sarcastic? Sweet? Or informative?



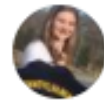
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# MARKETING VEHICLES

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## *Social Media Example*

Yeehaw Farm Page  
Almost 11K Likes



**Yeehaw Farm**

February 18 at 9:59am · Instagram · 🌐

Yes, Stella, I hear you.

I will have a talk with winter and spring to see if they can work something out.

Anything for you, Stell.

#cowsofinstagram #snow #again #ithoughtspringwashere #bitchycows



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# MARKETING VEHICLES

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## *Directories* *+ Events*

### ***Directories***

- Get listed!
- Local First Arizona, Farmer's Pal, Eat Wild
- What else in your area?

### ***Events***

- Participate and track metrics
- Look sharp! Booth design and visual marketing
- Community festivals, Industry Orgs





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# MARKETING VEHICLES

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## *Community + Referrals*

### ***Community***

- Be visible!
- Flyers, posters, talks, blogs
- R+E Institutions, shops, day care, garden clubs

### ***Referrals***

- Create your offer and promote the program
- Make it easy to share and engage with experience

***Referral marketing generates customers who have higher lifetime values, are more loyal, and contribute higher margins per year than other customers.***



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# MARKETING VEHICLES

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## *Low Cost Marketing*

- Advertising
- Search marketing
- Regular tune ups of your website and materials
- General "soft" marketing like customer service

### ***Whatever your strategy is...***

- Track responses
- Evaluate your campaign
- Re-tool and improve



# STEP 6

## Put activities on a calendar planner

Marketing Calendar Template						
Category	Vehicle	Quantity	Content	Task	Lead	Per Platform Notes
<b>MAY</b>						
<b>Week 1</b>						
Special Notes/Themes	List themes to follow for the week.					
Social Media	Facebook	1/day	see Special Notes/Themes and/or unique selling points and messaging in a shared Google doc	Create 1 month's worth of social media content for approval by Owner; allow Owner 1 week to review; enter posts for review in a shared Google doc	Marketing Assistant	Note here any changes/challenges/suggestions for upgrades, etc.
Social Media	Instagram	3-5/week	need semi-regular content from internal employees/crew; see Special Notes/Themes	Repurpose Facebook photos with new captions/angles; share photos as provided; plan some posts in advance based on Special Notes/Themes for the week or month	Marketing Assistant	
Website		1/month	Fresh, up-to date on all pages. Widgets are relevant. Platform for purchasing is functional.	Review content to identify what needs to be refreshed	Marketing Assistant	
Email	General	1/month	personal update from Owner + monthly market dates + events + blogs + recipes + specials/discounts; other announcements as needed; see Special Notes/Themes	Create 1 email for Owner to approve; prepare at least one week before due to send out	Marketing Assistant	
Email	Markets	1-5/week	recipe + market date reminder + other announcements as needed; see Special Notes/Themes	Create 1 email for Owner to approve; replicate to reflect various markets/dates/times once approved by Owner; replicate email and schedule all with corresponding image/links; prepare at least 3 days in advance	Marketing Assistant	
Blogging	Website	1/month	Choose engaging content that let's your consumer in on an industry secret or helps them connects with you.	Draft blog using pre-determined prompt/suggested content for Owner's approval; prepare for review a week before publishing; 4 per year to be submitted from professional external source, rest done internally by Marketing Assistant	Outsourced	
Events	Varies	1/month	see Special Notes/Themes	speeches, tastings, festivals, etc.	Varies	
Other	Varies	1/month	see Special Notes/Themes	Update listings	Marketing Assistant	



# STEP 7A

## Messaging to content development

**THIS IS A TEMPLATE. FILL IN YOUR OWN!!!**

Campaign	Messaging	Frequency
Mission & Values / USP	pasture raised	weekly
	organic	
	sustainable	
	what else???	
Product	In the Kitchen	2x monthly
Other selling activities	Did you know	as opportunities with events arise
Public Events	Festivals & Events & Markets	see storylines
Wholesale/Retailers (if applicable)	Wholesale promotions	as launching or delivering
Grow my interactions	Interaction Builders	seasonally



# STEP 7B

## *Storylines by messaging and campaign*

Nursery Promos	garden tip of the week (annuals / perennials)
	promotions / sales
	veggie garden tip of the week
	<b>P</b> new arrivals (2+)
	<b>P</b> new planted items (ex. shoes, moss balls)
	nursery services promo (custom boxes, curb appeal, etc)
	quick facts (ex. Did you know that kiwi trees will produce fruit in PA?)
	<b>P</b> something beautiful
	<b>P</b> Sunday fun day





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## **STEP 8**

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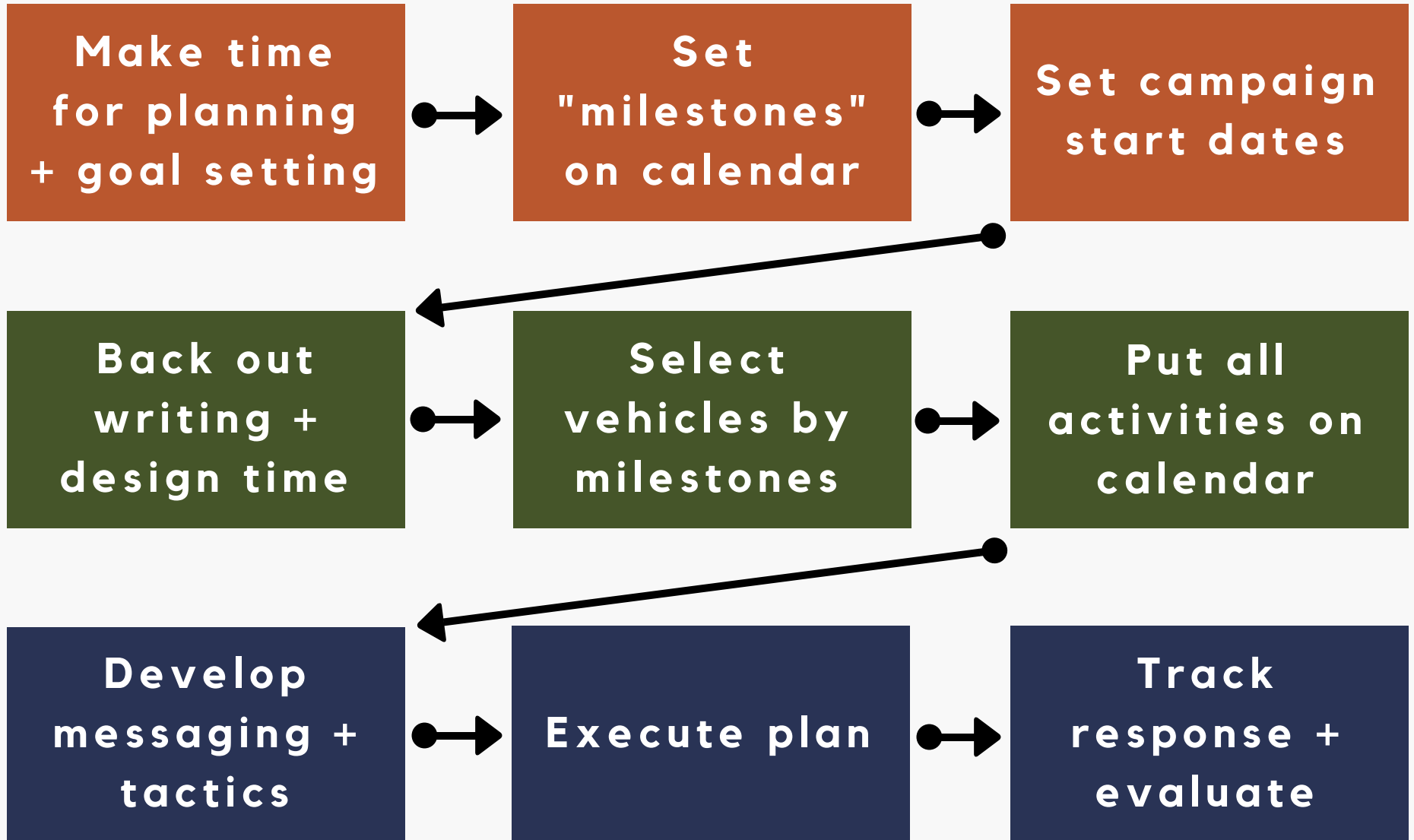
***Be Seen***

***Be Heard***

***Execute Your  
Calendar Plan***



# SUMMARY REVIEW





***Get in touch!***

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**THANK YOU!**

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