

A MULTI-CHANNEL
**MARKETING
WORKBOOK**

TABLE OF CONTENTS

3	INTRODUCTION
4	PRE-WORK CHECKLIST
5	YOUR BUYERS' MULTI-CHANNEL LIFE
6	CHOOSING YOUR CHANNEL OPTIONS
6	TRADITIONAL CHANNELS
7	EVENTS
8	PRINT
9	TELEVISION
10	DIGITAL CHANNELS
11	WEBSITE
12	BLOG
13	EMAIL
14	MOBILE
15	MOBILE APP
16	PAID SEARCH
17	RETARGETING AND REMARKETING
18	REVIEW SITE
19	SOCIAL NETWORKS
20	LINKEDIN
21	FACEBOOK
22	TWITTER
23	GOOGLE+
24	INSTAGRAM
25	PINTEREST
26	SLIDESHARE
27	CONCLUSION



INTRODUCTION

Marketing in today's environment is challenging. Buyers are exposed to thousands of brand messages, have endless product options, and complete the majority of their research online. To effectively market in this dynamic and noisy environment, marketers need to adapt and shift their strategy towards engagement marketing—marketing that talks to a buyer in a personalized way, considering who they are, how they act, and where they are over time. Implementing an engagement marketing strategy is about creating cross-channel relationships instead of shouting your message broadly.



You have probably heard the buzz building in the marketing community about multi-channel marketing. Implementing a multi-channel marketing approach in your campaigns and programs will help you be where your buyers are, which is essential in order to stand out in a crowded market. Each piece of the buyer's experience should be consistent and complementary. That means you have to think about all of the channels where your potential or current customers engage.

In fact, implementing a multi-channel approach has become a necessity. According to a recent Experian QAS® survey, 36% of U.S. organizations interact with customers and prospects in five or more channels. But we know that as you face the challenge of engaging your buyers effectively, the idea of doing more, or even doing the same in new places, can feel overwhelming. So, we're here to help you navigate through the buzz so you can get straight to the action.

Use this workbook to make your marketing more effective by ensuring that you are considering and leveraging the right channels for your business and for each of your marketing programs and campaigns.



Before you jump into evaluating channels and creating a multi-channel engagement strategy for your programs and campaigns, lay the foundation for success by completing the following pre-work checklist.

- IDENTIFY WHO YOU SELL TO**
 Do you have multiple buyer segments? For example, do you market to a specific type of consumer or segment a small or medium businesses? Such as create a buyer persona for each segment.
- IDENTIFY THE RIGHT MESSAGE AND CONTENT**
 Map this to the buying stages you have identified for your buyers.
- UNDERSTAND YOUR BUSINESS GOAL AND OBJECTIVE FOR EACH PERSONA**
 What path does each persona take when making a purchase?
- DETERMINE HOW YOU WILL MEASURE SUCCESS**
 Make sure you have clear objectives and that your programs can be measured from the beginning to the end.
- PICK THE RIGHT ENGAGEMENT MODEL FOR YOUR BUSINESS AND YOUR BUYERS**
 You will most likely use different marketing methods for each persona. For example, if you sell to large enterprises, you may engage in account-based marketing. Depending on your organization, you could have multiple models to choose from.
- DEFINE AND SELECT YOUR CHANNEL MIX**
 For example, if you have a high volume of inbound Web traffic but struggle with conversions, you could align your channel tactics to address that issue.
- UNDERSTAND YOUR BUYERS' STAGE**
 Does a buyer purchase your product or service immediately or does it take several months?
- TEST AND ITERATE**
 Know how you plan to test your success and define your iteration intervals.

2

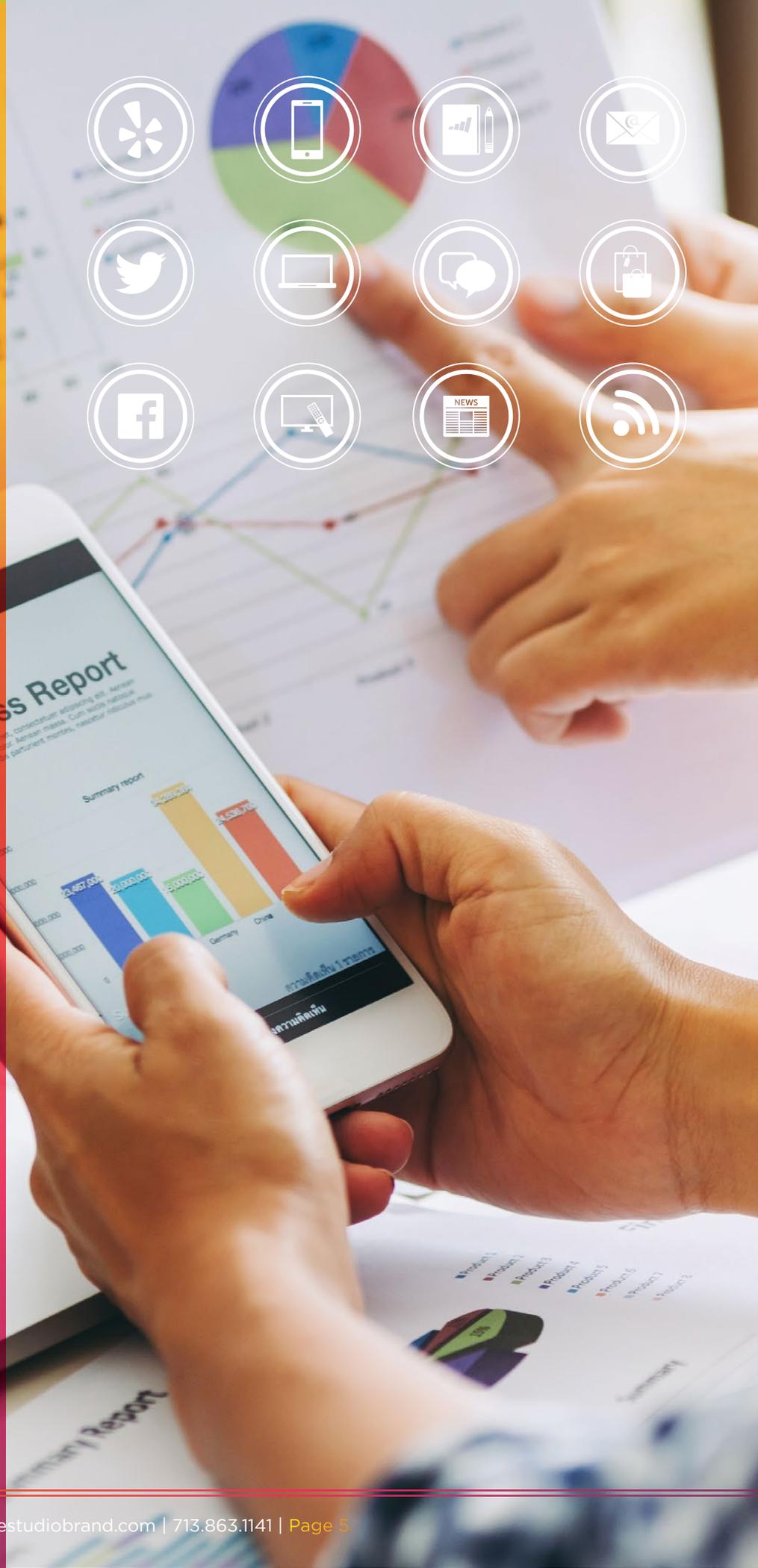
CHOOSING YOUR CHANNELS

Promoting your programs and campaigns across channels can feel a bit like guesswork without a plan. Get the most out of your efforts by creating a specific, multi-channel plan for each individual campaign with associated goals.

To help you get started, we've created a comprehensive list of channels and a checklist to help you evaluate whether a channel fits your audience, your specific program, and your campaign goals.

TRADITIONAL CHANNELS

Traditional channels often take a mass-marketing approach to addressing a buyer audience and can sometimes be hard to measure. It's important that the results that traditional channels drive are in line with your program or campaign goals. Traditional channels can be a powerful way to augment your marketing campaigns and are still a worthwhile tool in your marketing toolbox.



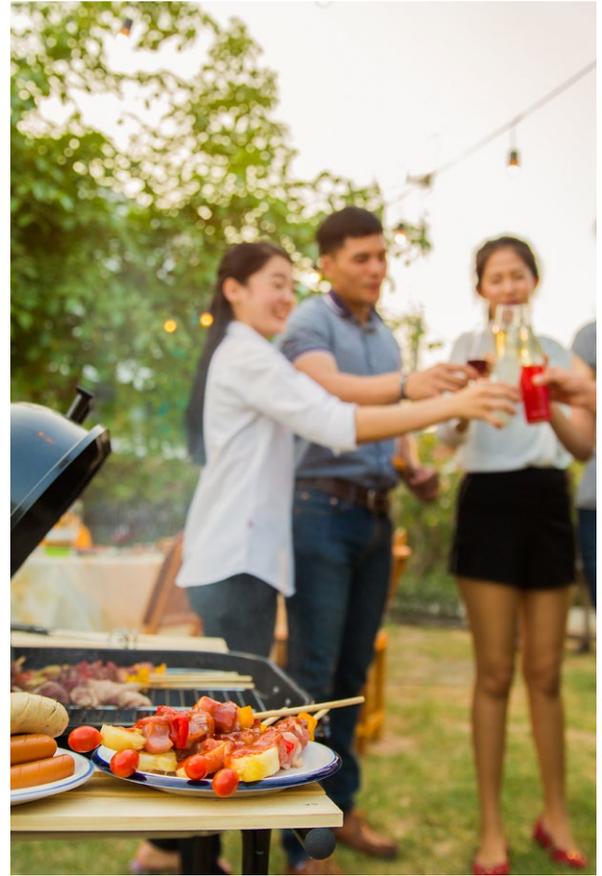
TRADITIONAL CHANNELS

EVENTS

Events usually have a targeted list of attendees with a specific set of interests. Whether you are hosting a small webinar, a large-scale international trade show, or a private executive function, event marketing can be a powerful way to stand out and bring your brand to life. Gauge whether your program or campaign resonates with the targeted audience and their interests and determine how you can engage them before, during, or after the event.

Is your event part of a larger program or campaign, or is it the focal point? Based on your response, determine how you can use your event presence to support your program goals and how you can use other channels to support your event. For instance, maybe you have just released a new ebook. Consider if it makes sense to provide event attendees with either printed or electronic copies.

Before you get started, it is important to define your metrics for success for the event and its expected impact on the campaign or program.



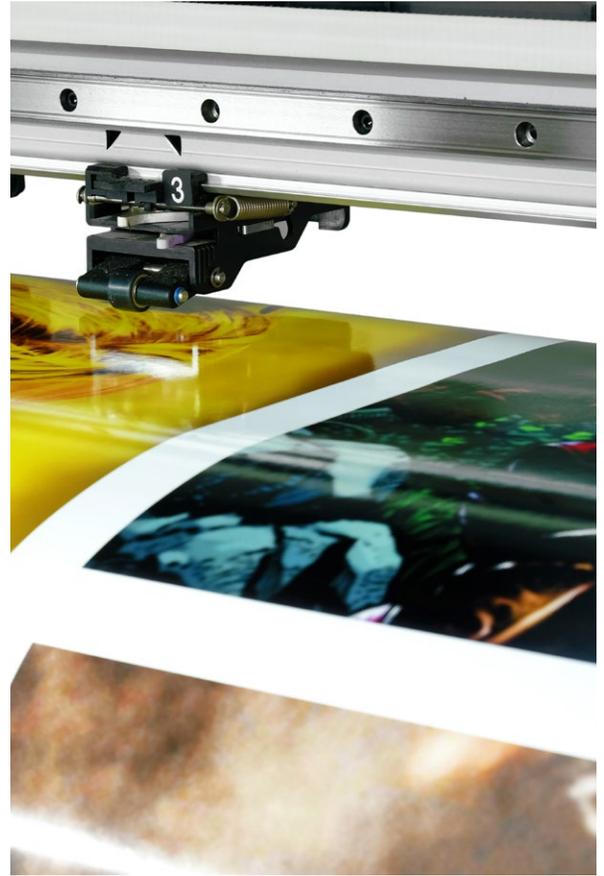
YOUR EVENT PLANNING WORKSHEET

EVENT DATES	
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	

TRADITIONAL CHANNELS

PRINT

Print media, such as an advertisement in a magazine or newspaper or a direct mail campaign, is another way to reach a large audience. Depending on the outlet, this could be more targeted or very broad, and the design can range from highly visual to only text copy. For example, think about a full-page editorial advertisement versus a mailed invitation to an event. Print offers a large variety of options that serve a range of objectives. Like any channel, to find success, make sure that you have identified your metrics before you get started—maybe it's reach, impressions, or engagement with an offer—since this is a more traditional channel.



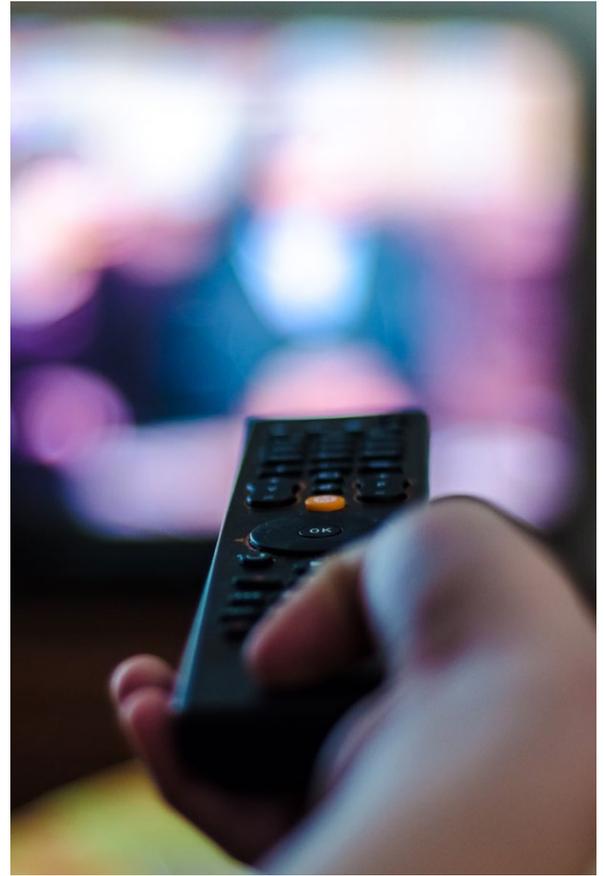
YOUR PRINT PLANNING WORKSHEET (Complete one for each type of print media)

TYPE	
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	

TRADITIONAL CHANNELS

TELEVISION

Television has the benefit of mass appeal. According to a Nielsen report, the average U.S. buyer watches four or more hours of television each day and 99% of homes have at least one television set. This makes television a viable option for marketers looking to reach the masses. With television, marketers are able to target their audience based on demographics and choose their timing based on television ratings during a specific time period. Television strategies can be costly and time-consuming to do correctly, so make sure that it fits your budget and your goals and that it tightly aligns to your audience.



YOUR TELEVISION PLANNING WORKSHEET

PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	

3

DIGITAL CHANNELS

Digital channels leverage the power of the Internet and its detailed tracking, targeting, and measurement capabilities. Digital channels often are flexible and adaptive, allowing a marketer to craft very specific and targeted campaigns.

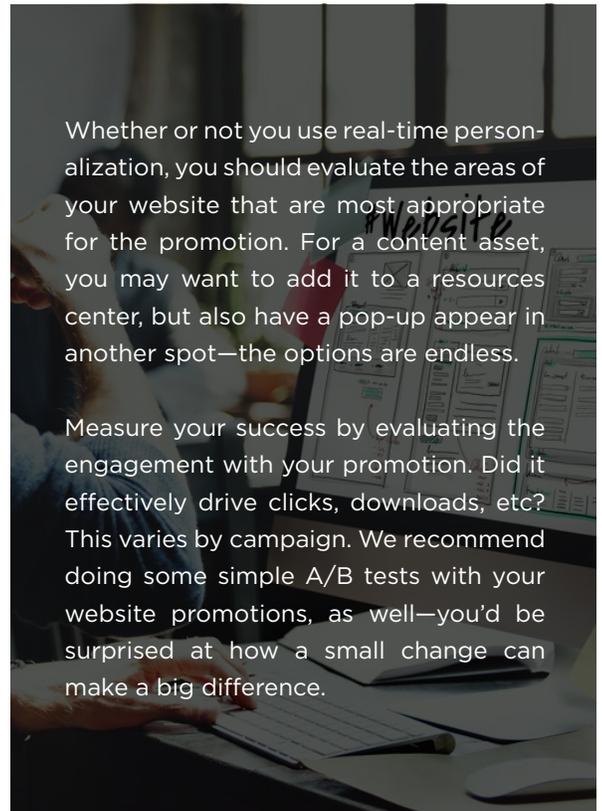


DIGITAL CHANNELS

WEBSITE

Your website is one of the best “owned” (entirely controlled from end-to-end by your brand) distribution channels that you have. It is a critical part of your communication to customers and potential customers. You are totally in control of the message and the experience on this channel. And there are so many different ways that you can use your website to promote a program.

Consider implementing real-time personalization, a tool often offered as part of your marketing automation software, that allows you to deliver a personalized and relevant experience to your Web visitors, which will maximize your buyers’ time on your site. Using real-time personalization software allows you to immediately detect your visitor’s attributes and then present him or her with relevant copy, imagery, calls to action, and content, making your campaign promotions much more effective.



Whether or not you use real-time personalization, you should evaluate the areas of your website that are most appropriate for the promotion. For a content asset, you may want to add it to a resources center, but also have a pop-up appear in another spot—the options are endless.

Measure your success by evaluating the engagement with your promotion. Did it effectively drive clicks, downloads, etc? This varies by campaign. We recommend doing some simple A/B tests with your website promotions, as well—you’d be surprised at how a small change can make a big difference.

YOUR WEBSITE PLANNING WORKSHEET

PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
MATERIALS DEADLINE	
LAUNCH DATES	
TESTS	

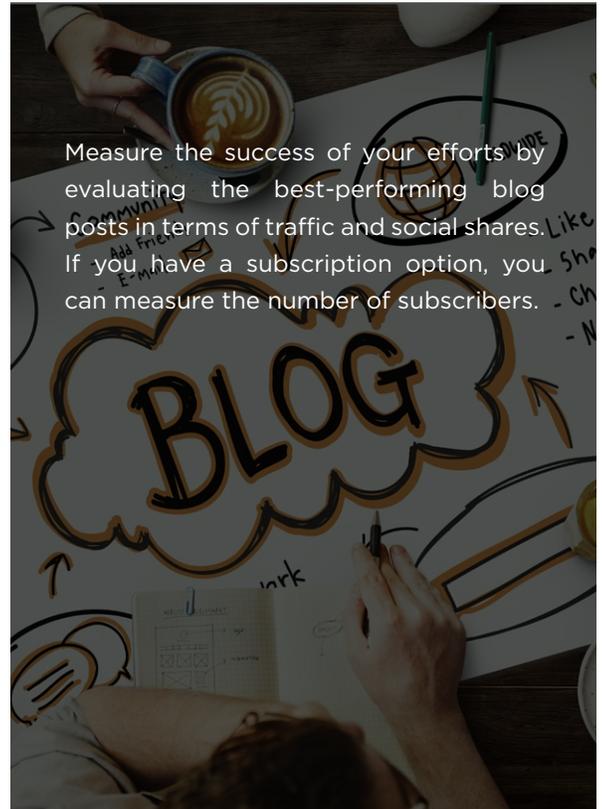
DIGITAL CHANNELS

BLOG

A blog is a smart way to produce relevant content about multiple topics for all of your potential and current customers. Your blog is short-form content that can be an effective way to drive demand and engage your audience before, during, or after your campaign.

When planning your blog promotions, keep in mind that your blog content is typically early-stage and educational. If you decide to use your blog as part of your promotional plans, it is best to focus your posts on early-stage offers to be appropriate for the audience and their expectations.

Blogs are incredibly popular on social sites because of their short, easy-to-consume format, so maximize your reach by adding some paid promotion behind your posts. High-performing posts can be transformed into other types of content assets, like cheatsheets or ebooks.



Measure the success of your efforts by evaluating the best-performing blog posts in terms of traffic and social shares. If you have a subscription option, you can measure the number of subscribers.

YOUR BLOG PLANNING WORKSHEET

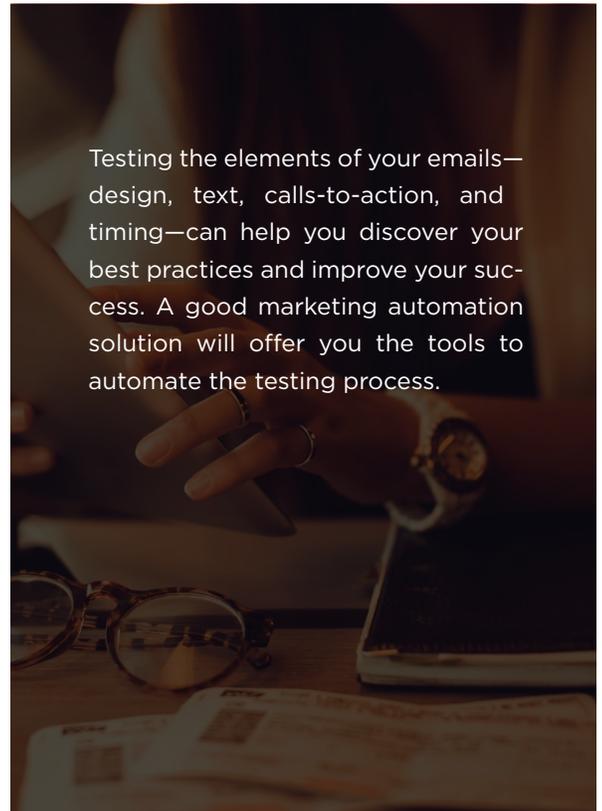
PERSONA	
MESSAGE	
OFFER	
GOAL	
METRIC	
PUBLISHING DATE	

DIGITAL CHANNELS

EMAIL

Email is often the most popular way for marketers to communicate with their audience. Email is extremely flexible in terms of design, copy, and audience segmentation. This flexibility allows a marketer to shape the message to fit the target audience's preferences. Email can support your program objectives across other channels—getting the word out about events, encouraging mobile app downloads, and following up after a purchase.

Using email to serve your business before, during, and after a campaign increases your likelihood that a buyer sees your program and message. Because email can be used in such a variety of ways, it's important to define the purpose of each email and set metrics accordingly.



Testing the elements of your emails—design, text, calls-to-action, and timing—can help you discover your best practices and improve your success. A good marketing automation solution will offer you the tools to automate the testing process.

YOUR WEBSITE PLANNING WORKSHEET

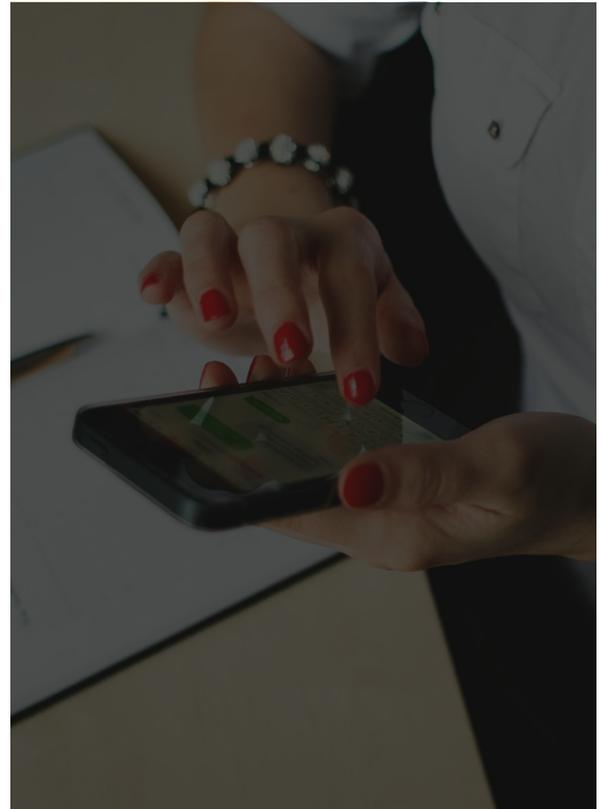
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
LAUNCH DATES	
METRICS	
TESTS	

DIGITAL CHANNELS

MOBILE—TEXT/SMS

Making your campaign or program mobile-ready can be a critical component of success. Today's buyer leans heavily on his or her mobile device to consume information and to interact and engage with brands. Not only do you want your emails and landing pages to be mobile-optimized, you may also want to consider incorporating text messaging (SMS) to help get your campaign in front of your buyer audience instantly.

A text message (SMS) is a short message that is sent to an opted-in contact. It has the advantage of opening a line of communication rather than an alert-style notification, which prompts action but not interaction. A text message can deliver the same type of content as a push notification, but can also start a conversation with the recipient, so be ready to follow up with replies so you can continue the conversation.



YOUR MOBILE PLANNING WORKSHEET

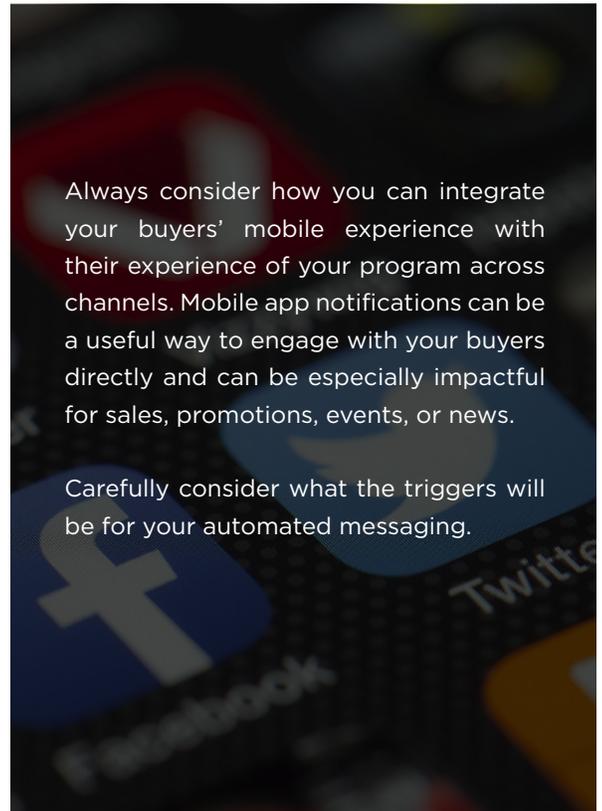
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	

DIGITAL CHANNELS

MOBILE APP

Marketers should also evaluate if a mobile app would be an appropriate way to support their campaign or program goals. Utilizing a mobile app offers marketers the ability to deploy in-app messages and push notifications.

Push notifications and in-app messaging capabilities are installed as part of a mobile app on a user's phone. Once the app is installed, marketers can use the push notification functionality to 'push' messages and alerts to the mobile device user, whether or not the app is in use. In-app messages allow marketers to deliver a message to the user while they are in the app, engaging with the content. This can be an effective way to encourage users to engage with specific parts of the application and continue to lead them down a designated path.



YOUR MOBILE APP PLANNING WORKSHEET

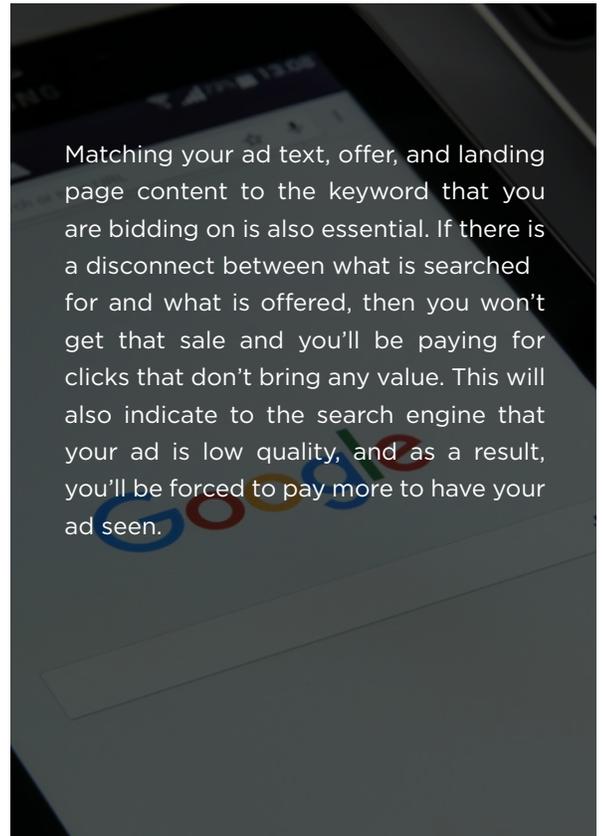
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
NOTIFICATION TRIGGERS	

DIGITAL CHANNELS

PAID SEARCH

Paid search, also known as pay-per-click (PPC), is a channel that you should consider utilizing across your campaigns and programs. Paid search ads appear at the top of search engine results, and in some cases along the right-hand side. Paying to appear in these areas ensures that your website, or specific web pages, can be easily found by people that are actively searching for your brand or product. Paid search ads help you quickly target your most valuable audience since they are seeking you out, as opposed to channels where you reach out to them.

When selecting keywords to bid on, make sure to include your brand name as well as those of your competitors. You can't, and shouldn't, mention your competitors in your ad text, but appearing beside them will ensure that buyers who are only familiar with your competitors will discover you. It may seem strange to bid on your own name, but when a buyer searches for your name or term, you don't want your competitors' listing appearing above your own.



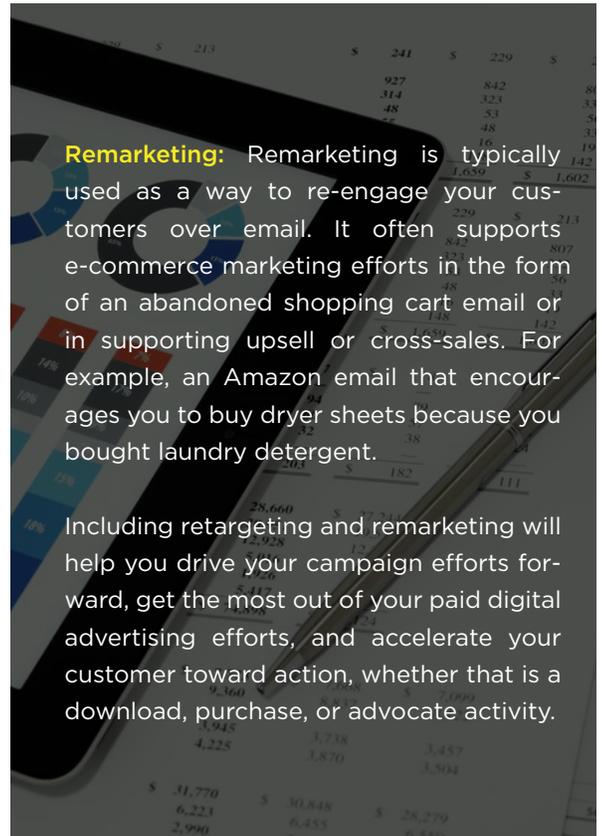
YOUR PAID SEARCH PLANNING WORKSHEET	
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
LAUNCH DATES	
TESTS	

DIGITAL CHANNELS

RETARGETING AND REMARKETING

Retargeting and remarketing are important to think about if your business uses any of the digital channels covered previously. Both retargeting and remarketing give your business and campaign a way to offer messages tailored to user activity across the Web. Often confused as the same thing, let's examine the differences and similarities between retargeting vs. remarketing.

Retargeting: Typically, retargeting follows unknown and known users across the Web with targeted online ads, like display ads. Targeting for unknown users begins once they are cookie'd after leaving your website. After the cookie is in place, you are able to market to them wherever they are across the Web—this is the key benefit of retargeting. Retargeting for known users allows you to customize your message to be extremely personal and relevant to your customer's persona and activity online.



YOUR RETARGETING AND REMARKETING PLANNING WORKSHEET

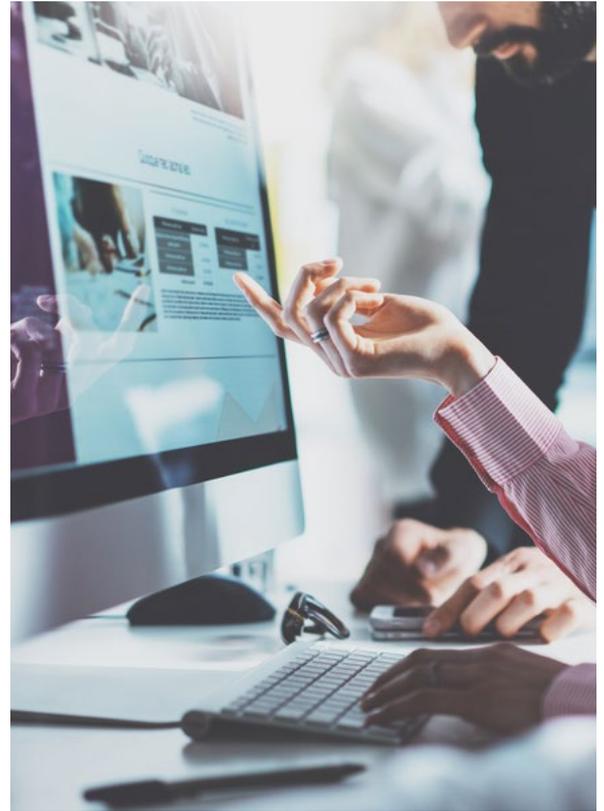
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
LAUNCH DATES	
TESTS	

DIGITAL CHANNELS

REVIEW SITES

Today's buyers look for the advice of their peers prior to making a purchase or even engaging with a business or brand. Leveraging the power of peer reviews delivers a no/or low-cost brand lift and increased brand authenticity. Because your audience's peers have nothing to gain by recommending a product, their word-of-mouth endorsement is one of the most powerful forms of advertising.

Ask your customers to review you periodically. You can ask them as part of a customer communication, as a part of an advocacy program, or when you or your team has a positive interaction with a customer.



YOUR REVIEW SITE PLANNING WORKSHEET

(Complete one per site)

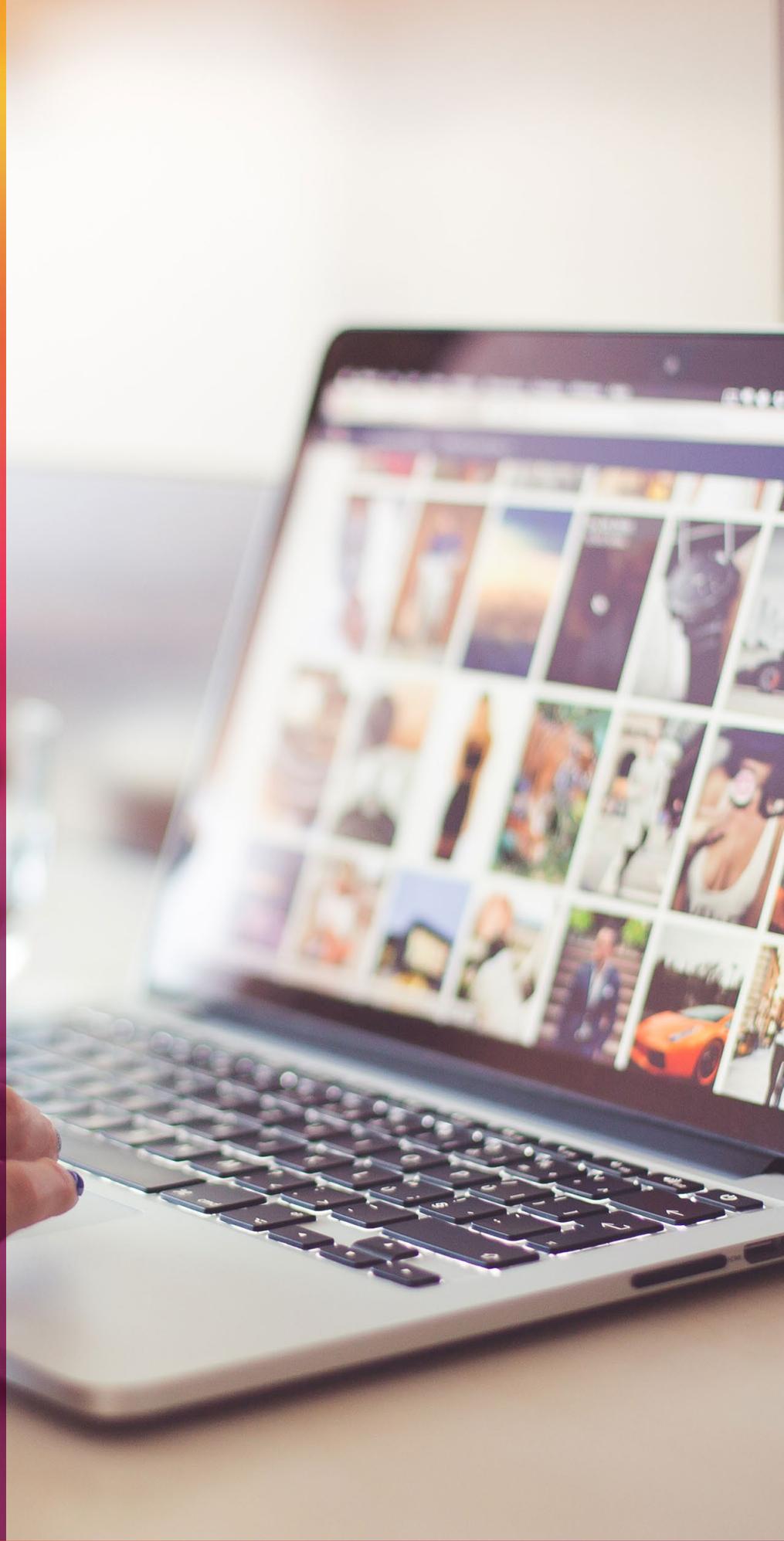
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	

4

SOCIAL NETWORKS

Using social media to amplify the reach of your brand and programs isn't groundbreaking anymore. Social channels should be a part of your mix for promoting your brand, nurturing and expanding your current fanbase, increasing lead generation, and engaging your market.

It is also very important to understand which social channels your target audience prefers and interacts with. There are specific audiences for each social channel, so you'll want to make sure that you offer valuable content.



SOCIAL NETWORKS



LINKEDIN

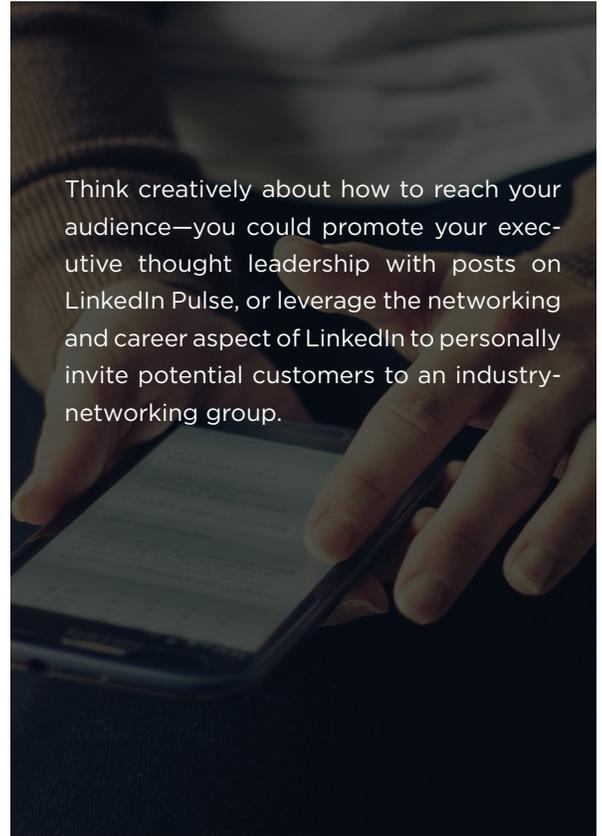
LinkedIn goes beyond personal profiles and status updates—it's a great resource for networking, influencer relationship building, publishing, and community building. Because users visit the site for work-related purposes, LinkedIn lends itself to business topics and allows brands to develop a face and a personality. LinkedIn offers a variety of ways for brands to connect with a business audience:

Company pages: a branded page displaying company information, images and posts

LinkedIn Pulse: a publishing platform

Groups: provide like-minded people a place to have discussions on a particular subject (this is a great place to have candid conversations with peers)

Advertising: promoted posts and traditional display ads



YOUR LINKEDIN PLANNING WORKSHEET

PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
LAUNCH DATES	

SOCIAL NETWORKS

FACEBOOK

Facebook boasts the largest user base of any social network, so it's easy to understand why you should consider a presence there for your campaign. It offers the opportunity to connect with your buyers in a more fun and casual environment and it can be good to take advantage of that by adding more fun elements to your campaign, like photo caption contests, memes, and other creative promotions. Keep in mind that your campaign promotion will pop up between photos from your fan's recent vacation, so it needs to be highly visual and engaging.

Make sure that you post the right balance of helpful, promotional, and fun posts. To help negotiate this balance, employ the '411 rule,' which states that for every four early-stage, snackable, and informative pieces of content you provide, you should have one soft-sell offer, like a third party review, and one hard-sell offer, like a demo.

Another important aspect to include in your posts, whether you're supplementing them with paid promotion or not, is a

strong visual. Facebook users respond to and engage with visual content at a higher rate, so be sure to include a compelling visual with all of your posts. Facebook native video is another option that capitalizes on the hyper-visual nature of the platform. For instance, if you are running a campaign for an event, consider creating a custom visual to use on Facebook.

Facebook offers a variety of targeting options, like promoted posts and targeted Facebook ads, as ways to promote your brand and campaigns on their platform. Facebook campaigns are organized to help you drive your goals, whether that is conversions and leads, or engagement (such as a 'like'). And, like all of your campaigns, be sure to run simple tests to evaluate their performance—it can be surprising how a small change makes a significant impact on your results.

YOUR FACEBOOK PLANNING WORKSHEET

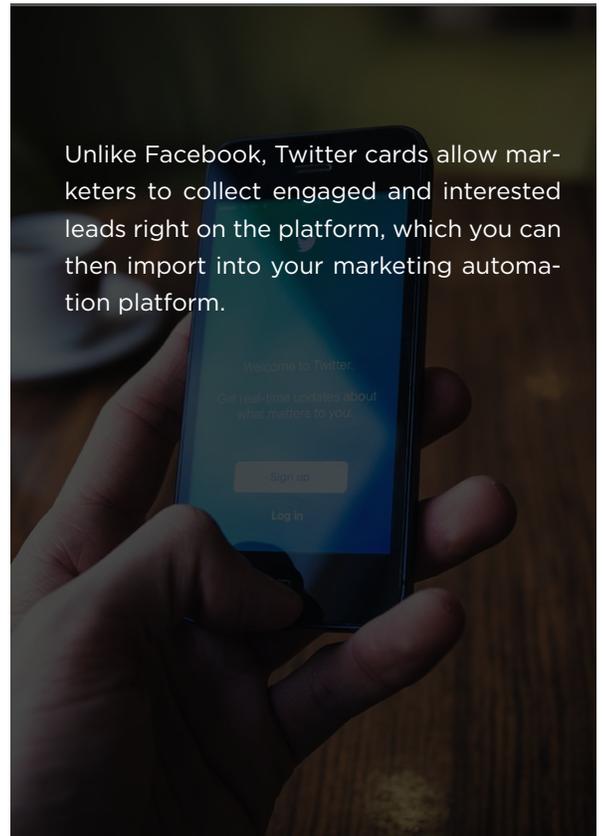
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
LAUNCH DATES	

SOCIAL NETWORKS

TWITTER

Twitter has exploded into a virtual news hub—a vibrant community where businesses can generate leads, thought leaders can discuss relevant industry topics, and everyday citizens break news stories as they develop. If Twitter is a moving river, plan your presence accordingly. You don't want your posts to be the stick you throw into the river that gets swept away quickly, never to be seen again. Try to have a consistent presence, which will ensure that more people see your posts. With any social platform, being consistent, relevant, relatable, and reliable is key. Stick with what you know.

Like other social networks, Twitter offers a variety of ways for a marketer and a brand to advertise to a target audience. They offer promoted tweets, promoted accounts, and Twitter cards—a multi-functional ad unit that can be used for lead generation. Like the advice for Facebook, these ads do best when they are paired with a compelling visual and tested to optimize their performance.



Unlike Facebook, Twitter cards allow marketers to collect engaged and interested leads right on the platform, which you can then import into your marketing automation platform.

YOUR TWITTER PLANNING WORKSHEET

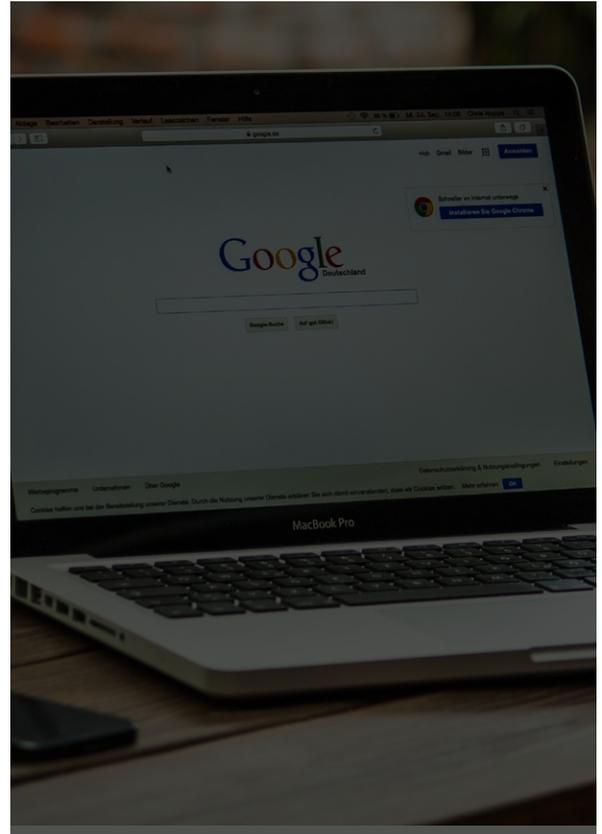
PERSONAS	
MESSAGES	
OFFERS	
GOALS	
METRICS	
LAUNCH DATES	
TESTS	

SOCIAL NETWORKS

GOOGLE+

Google's flagship social network has a huge amount of users because, let's face it, it's Google. Google+ credentials are the same as a user's Gmail and YouTube login. Google+ plays a major role in SEO and can support your SEO strategy.

It offers a great way to host and record live Google Hangouts (which can be uploaded to YouTube) and to claim your authorship of online articles. Build your presence on Google+ and expand your network by adding users to your circles, posting frequently to help users find you and learn about your brand, and soliciting users to submit Google reviews.



YOUR GOOGLE+ PLANNING WORKSHEET

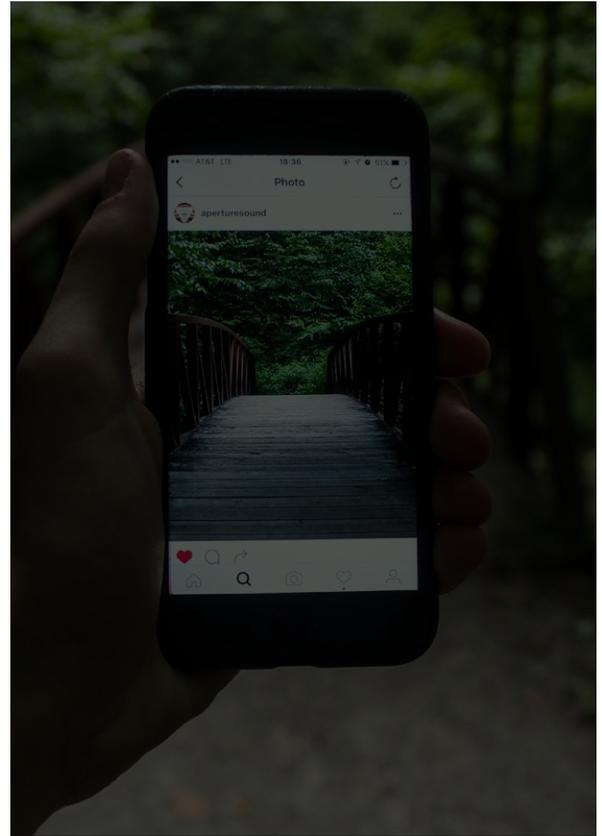
PERSONA	
MESSAGE	
OFFER	
GOAL	
METRIC	
LAUNCH DATE	

SOCIAL NETWORKS

INSTAGRAM

Instagram has steadily gained a stronger foothold as a solid social media platform for brands. Using images (video and still), copy, and hashtags, Instagram helps brands engage with customers solely through creative visuals. Instagram allows a limited number of paid advertisements, but Instagram sponsored posts are among the most expensive social ad options.

A good way for brands to leverage the platform is through crowd-sourcing photo submissions and running comment or 'regram' contests (posting a photo you want your users to share or 'regram' in order to enter the contest). Because it's more visual, you need to consider if it is a good fit for your brand and how your buyer audience will react to seeing your brand there.



YOUR INSTAGRAM PLANNING WORKSHEET

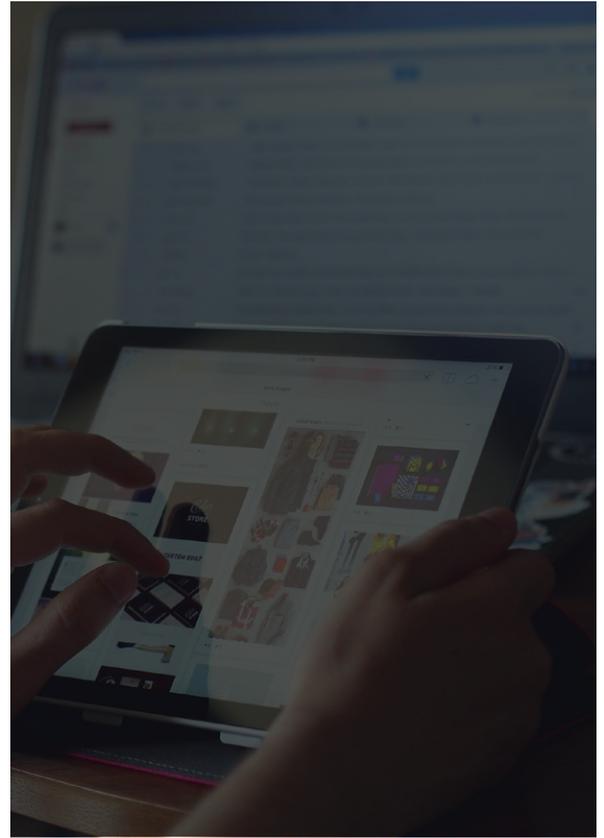
PERSONA	
MESSAGE	
OFFER	
GOAL	
METRIC	
LAUNCH DATE	

SOCIAL NETWORKS

PINTEREST

Another highly visual social media platform, Pinterest's digital 'pin boards' allow users to capture and save images and their associated URLs by 'pinning' them to a designated board. Pinterest can help you drive engagement and sharing, and ultimately lead to purchase. Like Instagram, the key to success lies with interesting visuals and good supporting content. Pinterest offers marketers flexibility—you have the option of producing original content or creating a curated 'pin board' experience for your audience.

Pinterest is a great place to run contests that engage users with your brand images and content. Because of the way Pinterest works, it is a social network ripe for marketers to build a solid presence and find success. Make sure that your audience would expect to see your product, content, or brand on Pinterest, which is not typically a repository for business articles.



YOUR PINTEREST PLANNING WORKSHEET

PERSONA	
MESSAGE	
OFFER	
GOAL	
METRIC	
LAUNCH DATE	

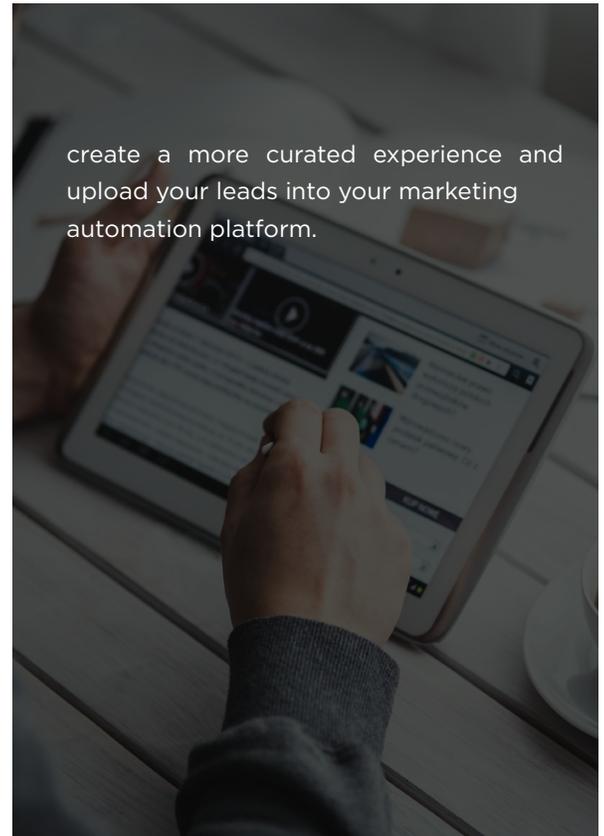
SOCIAL NETWORKS

SLIDESHARE

Users are inundated with text, which means that marketing professionals can't rely solely on whitepapers and blog posts to reach their audience. SlideShare is another visual social platform where marketers can upload and share slide-deck presentations, infographics, documents, and some video on any topic.

To get the most out of SlideShare, make sure you optimize your content for search by choosing keywords and descriptions that support the asset, but also address your target audience.

Before you upload your slide deck, make sure that you consider your privacy options—to have a public or private presentation, whether you want your content to be downloadable, and whether you want to include a form to collect viewer's contact information. Lead generation, analytics, branding control, and removal of other advertising is available with a SlideShare Pro-level account package. You can



create a more curated experience and upload your leads into your marketing automation platform.

YOUR SLIDESHARE PLANNING WORKSHEET

PERSONA	
MESSAGE	
OFFER	
GOAL	
METRIC	
LAUNCH DATE	



CONCLUSION

After reviewing this workbook, we hope that building a multi-channel strategy for your programs and campaigns seems much more feasible. Use this workbook to guide your planning and practice a multi-channel approach with your marketing. With time, this thinking will become second nature and you will have an eye for which channels work best for your audience.



DIGITAL MARKETING SOLUTIONS AND RESOURCES
FOR SMALL TO MEDIUM BUSINESSES ON A BUDGET.

WEARESTUDIOBRAND.COM | 713.863.1141