



MASTERING MARKETING

A Workbook for Outdoor Rec Businesses

This workbook belongs to:



Bold and brilliant ideas may inspire you to leap before you look.

~

Never fear, the ground will rise up to meet you.

MASTERING MARKETING: A Workbook for Outdoor Recreation Entrepreneurs

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KEY:



Do together in class.



Do at home, in preparation for class.



Do during a 1-to-1 session.





Marketing in a Wild World: Explore a Favorite Brand

Sometimes it's easier to analyze someone else's marketing strategy. Take a minute and pick a company or brand you like - that is in a different industry than your own.

Company you picked: _____

Visit the company's website, YouTube, and Facebook or Instagram page.

In pairs, answer the following questions about each of the brands you chose:

1.) Note two types of customers the brand seems to target. Why do you say these two customer segments?

2.) What are the core messages you see for each of these segments?

3.) What **feeling** is the company selling to these segments? Is it the same feeling for both? Why do you say this?

4.) What three words describe the company - from the marketing communication you have reviewed?

Now, repeat this exercise with a brand you admire in the outdoor recreation sector.

*"People don't buy what you do, they buy why you do it."
— Simon Sinek*





Case Study: Your Company, Your Brand

In pairs, visit your websites, YouTube, Facebook, Instagram pages, or similar.

In pairs, answer the following questions about your companies:

1.) Note two types of customers the brand seems to target. Why do you say these two customer segments?

2.) What are the core messages you see for each of these segments?

3.) What **feeling** is the company selling? Why do you say this?

4.) What three words describe the company - from the marketing communication you have reviewed?

"Startups are a race against time."





Marketing in a Wild World: Your Goals

Marketing goals drive a firm's marketing strategy. Most businesses revisit their marketing goals at least quarterly, updating goals based on customer feedback, web and social media analytics, and emerging trends.

We hope your goals will change and evolve over the course of the next few weeks. For now, take a moment to jot down your goals.

A few ideas to get your creative mind kick-started:

- New knowledge and skills
- Number of newsletter subscribers
- Facebook followers or social media engagement
- In-bound Sales Leads
- Conversion Rate

Over the next 2 weeks:

1.)

2.)

Over the next 3 - 6 months:

1.)

2.)

"Good marketers see consumers as complete human beings with all the dimensions real people have." – Jonah Sachs





Core Messages: Customer Segmentation

"Everyone is not your customer." – Seth Godin

Small businesses and startups alike have limited marketing budgets and therefore need to focus marketing resources on customers most likely to buy their services and products.

The old way of doing customer segmentation is by demographics. And some of this information may be useful. However, by and large, most marketers today will suggest small business owners shape their marketing strategies around segments defined by shared values, characteristics, identities, and needs.

Spend 20 minutes making a list of your most recent 10 or so customers. Place these in a table and add information next to their names including:

- How they found out about your business (channel)
- Why they bought your product/service (need/pain)
- What feeling they hoped to experience while/after buying from you

CUSTOMER	CHANNEL	NEED/PAIN	FEELING
Silvia Smith	our website	family outing for various ages	relief - easy to find something to make everyone happy

What commonalities are you seeing? What questions would you ask your customers to more accurately develop and sort customers into segments?



Visit [Hubspot.com](https://www.hubspot.com) for an excellent article on Customer Segmentation.





Crafting Your Core Messages

Core messages should resonate with your customers - and be somewhat tailored to various segments. Thinking about your customer segments, work through these two challenges.

Segment 1: _____

What are they seeking to feel when they buy your product/service?

What kind of image would convey this feeling? Who is in the image?

What three words - single words - grab their attention? "Fun" or "safe" or "rewarding".

Do you have customers (big brands or well-known people) who use and trust your brand? Can you/do you refer to them in your marketing?

Does the buying process reflect your brand?

Segment 2: _____

What are they seeking to feel when they buy your product/service?

What kind of image would convey this feeling? Who is in the image?

What three words - single words - grab their attention? "Fun" or "safe" or "rewarding".

Do you have customers (big brands or well-known people) who use and trust your brand? Can you/do you refer to them in your marketing?

Does the buying process reflect your brand?





Create a Draft Marketing Message

We invite you to draw! Or make a collage. Or create a graphic in Canva. But, make sure you capture the feeling, words, and where they can buy your product/service.

"Speak to your audience in their language about what's in their heart." – Jonathan Lister





The Numbers That Matter

Marketing effectiveness can be measured. You know that from watching your revenue go up or down! But there are several numbers you can track that will help you make data-driven decisions to ensure your revenue keeps going up. These include:

- 1.) Emails opened, In-coming Calls, Website Visits, Newsletter Opens, Clicks, Forwards
- 2.) Conversion
- 3.) Cost of Customer Acquisition (CoCA)
- 4.) Return on Marketing Spend (ROI)
- 5.) Customer Retention Rate
- 6.) Lifetime Value of Customers

Before we meet together in class, gather as much data as you can to figure out for your business each of the above numbers.

Emails, Calls, Visits, Opens, Clicks, Forwards

How many people make inquiries about your product/service to you monthly?

~ By phone

~ By email

How many people visit your website daily? Weekly?

How many new people "like" your Facebook page weekly/monthly?

How many new people comment on your Instagram posts weekly/monthly?

If you send a newsletter, how many people open it, click on links, forward it to others?

Which content seems to engage people the most?





The Numbers That Matter, continued...

Conversion

*People who bought after seeing my targeted
Facebook advertisement*

*People who saw my targeted
Facebook advertisement*

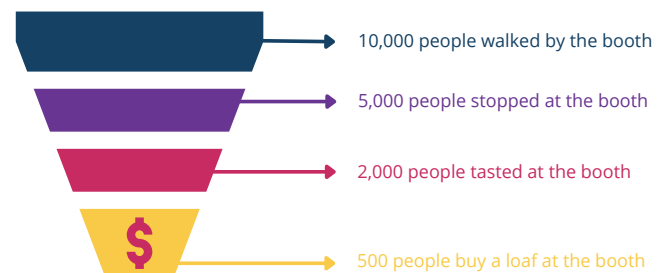
$$\frac{150 \text{ people paid me after seeing the ad}}{4,562 \text{ people saw the ad}} = 3.2\%$$

How many potential customers become paying customers after engaging with your brand?

How many people, as a percentage, who click on your website, end up buying from you?

How can you increase the Conversion Rate of customers moving through your sales funnel?

Draw your sales funnel and estimate conversion.



$$\text{Conversion rate} = 500/10,000 = 5\%$$



The Numbers That Matter, continued...

Cost of Customer Acquisition (CoCA)

Next, what are all the marketing and sales costs you have to cover to get your product/service into the hands of your customer and be paid?

Item	Cost
Staff time (marketing, booth)	8 hrs * 18/hour = \$144
Website & Images	\$350
Social Media Ads	\$225
Transportation	\$35
Farmers Market Booth Fee	\$325

Assume 500 Customers
\$1,079 total cost/ 500
\$2.16 cost per customer if 500 buy

Your Biz's CoCA

Item	Cost

Many entrepreneurs underestimate the entire CoCA and the time it takes to reach and sell to customers. How can you decrease time to sell (decrease your sales cycle) and increase conversion rates?

"Just because you can measure everything doesn't mean that you should." – W. Edward Deming





The Numbers That Matter

1.) Emails, Calls, Visits, Opens, Clicks, Forwards

2.) Conversion

3.) Cost of Customer Acquisition (CoCA)

4.) Return on Marketing Spend (ROI)

5.) Customer Retention Rate

6.) Lifetime Value of Customers

"Marketers have to stop reporting on activities and start reporting on business outcomes." – Allen Gannett





Channels

In-bound Marketing: When people reach out to you.

Channels on which you receive in-bound marketing.	Customer segment associated with each channel.	Conversion Rate
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Out-Bound Marketing: When you reach out to people.

Channels via which you send out-bound marketing.	Customer segment associated with each channel.	Conversion Rate
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

YOUR NOTES and OBSERVATIONS:

"If you have more money than brains, you should focus on outbound marketing. If you have more brains than money, you should focus on inbound marketing." – Guy Kawasaki



Facebook

- 1.) Open your business's page
- 2.) Drop down menu -
"In Facebook" or in "Meta Business suite"
choose Facebook
- 3.) Write something. Have a call to action! A link, a click, a "conversion action".
Keep it brief. Use core messaging images and words (values, feelings, vibe). Use hashtags.
- 4.) Add to your Post - upload your new Canva design.
- 5.) Click "Post"!

Challenge:

- ~ Open the Meta Business Suite and Planner Tab. Schedule the Post you just made to go up tomorrow.
 - ~ Now, try to add a "moment" related to a local event
-

Instagram

- 1.) Open Instagram - business page
- 2.) Click on the + in top right corner
- 3.) Click Post from dropdown
- 4.) Add your design or image from your photos
- 5.) Filter or edit if you like
- 6.) Add your caption. Have a call to action! "Link in bio".
Keep it brief. Use core messaging images and words (values, feelings, vibe). Use hashtags.

Note: Instagram tends to have more fun, light feeling to it than other platforms.

Suggestion: Use your smart phone for more options when posting to Instagram.

Challenge:

- ~ Share your Post to Your Story
- ~ Add a link in your Post and then add a gif
- ~ Create a highlight



Channels

In-bound and Outbound Marketing "Audit"

Work with our marketing expert to review two or three channels - related to your goals - where you want to make improvements.

1.) Select two of your goals and identify which customer segments, channels campaigns, or channels these are related to.

Goal 1 _____

Goal 2 _____

Channel 1 _____

Channel 2 _____

Channel 3 _____

ACTION ITEMS & NOTES:





Design Made Easy

~ Canva Deep Dive Activity

1.) Convert the message you created (pages 9 and 10) into a Facebook or Instagram. Choose one platform.

~ Use the "Photos" and "Elements"

~ Use text and change fonts

~ Try out "Templates" - they make you look like a pro!

2.) Share to yourself - download - email

3.) Send your photo/Canva design to yourself and save on your desktop/phone

4.) Open your chosen social media platform

Some Terminology

Facebook

~ Posts

~ Livestream

~ Story

~ Events

Instagram

~ Posts

~ Story

~ Reel

~ Live

YouTube

~ Livestream

~ Video

~ Channel





Website Design

Audit Another's Website - take five minutes to review each other's website.

Consider:

~ The three Core Messages I see are:

~ The feeling I have:

~ The Call to Action that I noticed first - or that compelled me to act:

~ One area/text/image that could be a bit better is:

~ Based on your website, a change I want to make to mine is:





Facebooks Ads: Deep Dive

Facebook ads can target specific geographies, ages, genders, interests, jobs, life milestones, everything. Yep, kinda scary - but great for small business owners! :-)

Boosting Posts

Follow along and build a Facebook ad.

- 1.) Choose a recent post you did.
- 2.) What's your goal? Options...
- 3.) Select the button.
- 4.) Audience: create new ones - useful if you will target this segment again.

Work through the targeting. Find a targeted location (for example, Boulder, Colorado) and find people who are interested in hiking or hunting, recently started a family, and want outdoor experiences and vacation ideas within driving distance.

- 5.) Choose your duration.
- 6.) Adjust your budget.
- 7.) Placements - add to Instagram and Facebook Messenger if you want to.
- 8.) Post!

Creating Campaigns

Ideal for general brand recognition.





Instagram Ads: Deep Dive

Facebook ads can target specific geographies, ages, genders, interests, jobs, life milestones, everything.

Boosting Posts

Follow along and build a Facebook ad.

- 1.) Choose a recent post you did.
- 2.) What's your goal? Options...
- 3.) Select the button.
- 4.) Audience: create new ones - useful if you will target this segment again.

Work through the targeting. Find a targeted location (for example, Boulder, Colorado) and find people who are interested in hiking or hunting, recently started a family, and want outdoor experiences and vacation ideas within driving distance.

- 5.) Choose your duration.
- 6.) Adjust your budget.
- 7.) Placements - add to Instagram and Facebook Messenger if you want to.
- 8.) Post!

Creating Campaigns

Ideal for general brand recognition.





LinkedIn Ads: Deep Dive

LinkedIn ads are mostly targeting viewers based on career-related interests and habits.

Boosting Posts

Follow along and build a LinkedIn ad.

- 1.) Choose a recent post you did.
- 2.) What's your goal? Options...
- 3.) How Your Audience is Selected

Work through the targeting. Browse for an industry, title, etc and NOTE that you can exclude people based on location/industry, etc.

- 4.) Automatic audience expansion - lets the AI choose how to target the ad.
- 5.) Start and end date.
- 6.) Set Lifetime Budget.
- 7.) Preview
- 8.) Boost!

Twitter Ads: Deep Dive

Bottom of Post

- 1.) Hit "promote" and then hit "get started"
- 2.) What's your goal? Options...
- 3.) Work through the targeting
- 4.) Duration
- 5.) Set Daily Budget
- 6.) Preview
- 7.) Create promotion!





Customer Relationship Manager "CRM"

How do you collect customer / partner / vendor contact information currently?

How might using a CRM improve your sales?

*Visit [Zapier.com](https://zapier.com) to
learn more about CRM*



Newsletters

The best newsletters . . .

If I were to send a newsletter I would be able to dedicate _____ hours per month to it.

The value my newsletter could share with readers would be . . .





Google Analytics

Some Terminology

Users

Sessions

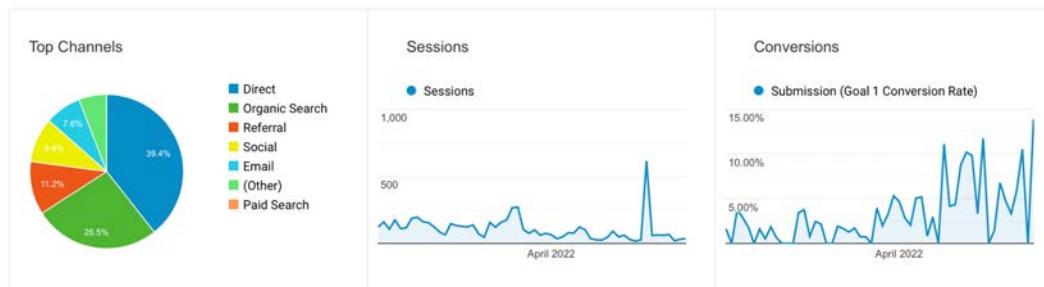
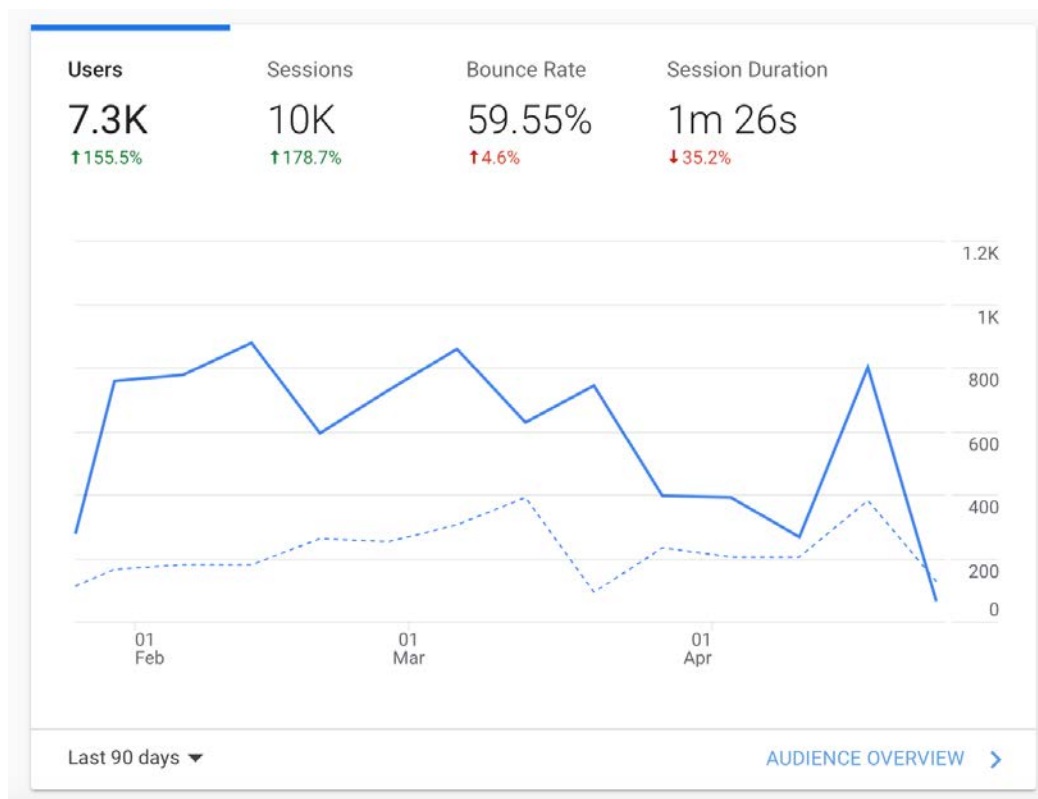
Bounce Rate

Session Duration

Acquisition

Behavior

Reports





Google Analytics

Challenge 1

Challenge 2

Challenge 3

Challenge 4





Social Analytics

Some Terminology

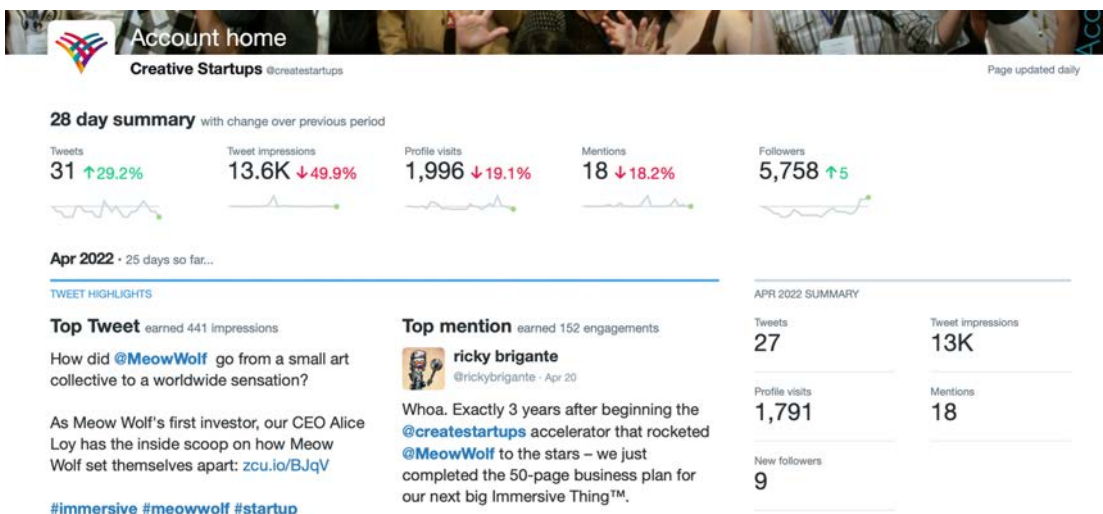
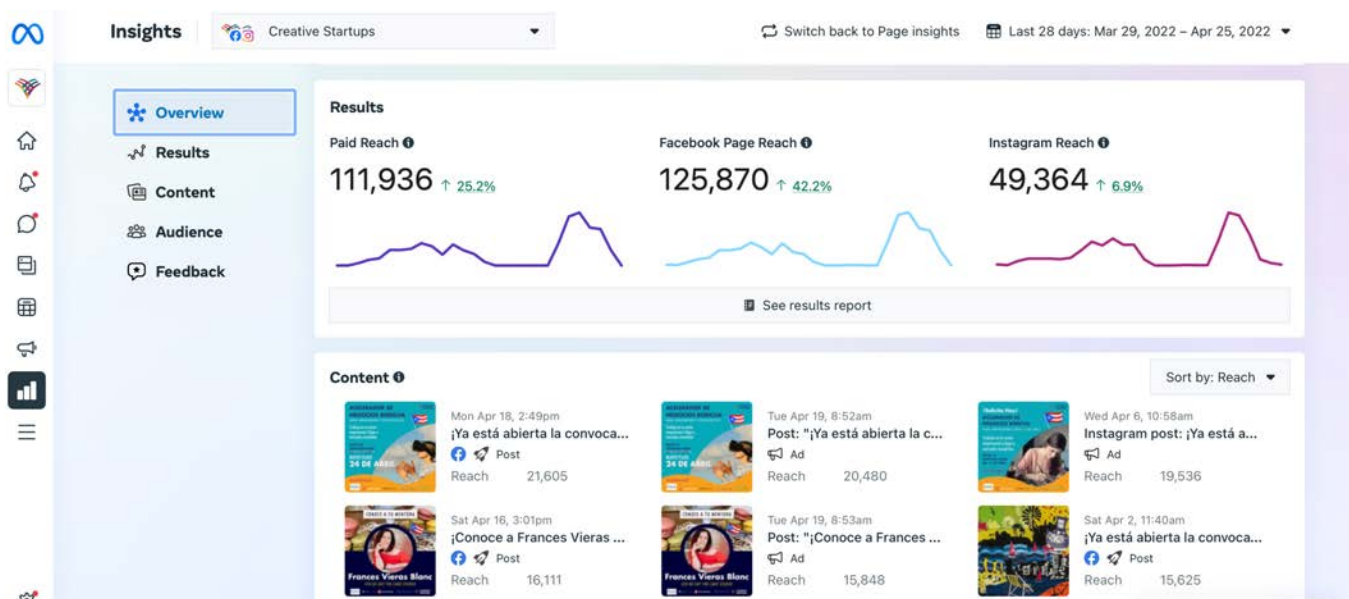
Reach

Impressions

Engagement Rate

Click through Rate

Reports





Social Analytics

Challenge 1

Challenge 2

Challenge 3

Challenge 4

Challenge 5





Scheduling and Auto-posting

Meta Business Suite

- ~ Free
- ~ Go in to Planner (same tab as Insights)
- ~ Provides suggestions to improve outcomes

Schedule two posts!

Hootsuite

~ Has great info - FREE

- ~ Cost for lowest plan \$49/month
- ~ Does all social platforms including YouTube, Pinterest - up to 10 accounts
- ~ Aggregates inbound messaging
- ~ Provides suggestions to improve outcomes
- ~ Can be tied in to Canva

Later.com

- ~ Cost for lowest plan \$15/month - limited # of posts and no analytics
- ~ Does all social platforms including Tok Tok! YouTube, Pinterest - up to 10 accounts
- ~ Aggregates inbound messaging
- ~ Provides suggestions to improve outcomes
- ~ Can be tied in to Canva



Goals Check

Revisit the goals you set for yourself at the beginning of the course.

Goal 1: You have learned or gained . . .

Goal 2: You have learned or gained . . .

Over the coming 3-6 months you will work toward learning / gaining / doing:

What new knowledge did you gain in creating messaging?

How do you understand customer segmentation differently now?

What tools will you use (analytics, Canva, auto scheduling, or others, from this course?

What

NOTES & MUSINGS





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