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Marketing Kit

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- Create winning promotions and campaigns
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Alexander Hiam

Author of Marketing For Dummies



Marketing Kit

FOR

DUMMIES®

3RD EDITION

by Alexander Hiam

Author of Marketing For Dummies



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About the Author

Alex Hiam is the best-selling author of *Marketing For Dummies* and *The Portable MBA in Marketing*, as well as numerous books on management and leadership. He is the founder of INSIGHTS for Training & Development, which provides management, customer service, and sales force training to client companies throughout the world. He also designs and publishes training materials and curricula used by the in-house training departments of many companies and government agencies. You can find descriptions of his firm's marketing and sales products and services at www.insightsformarketing.com.

Alex gives keynote addresses on topics ranging from marketing for breakthrough performance to effective leadership in business to how to negotiate with sharks. He received his BA from Harvard, his MBA from U.C. Berkeley, and was a full-time faculty member of the U Mass Amherst business school when his children were younger. Now he devotes his time to consulting, speaking, and running his own firm, where he often gets the chance to apply the principles of "streetwise" marketing himself as well as write about them for his many readers.

Alex's marketing-related consulting and training work includes leading product and branding brainstorm sessions, consulting on business and marketing planning, helping to motivate salespeople, and performing communications audits for clients. When not at work, Alex sails his ketch, the Blue Moon, throughout the waters off the East Coast of the United States.

Dedication

To the wonderful children who enrich my life and make me proud: Noelle, Eliot, Paul, and Sadie. And to Deirdre, the wonderful woman who makes it all worthwhile.

Author's Acknowledgments

Thanks to my able staff and associates for all their contributions to this book and the Web site that supports it, especially to Stephanie Sousbies, who runs my business on a daily basis so that I don't have to and can write books instead.

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Finally, a word must be said about my readers. Thanks to all of you who have gotten in touch over the years to share your enthusiasm and great stories of marketing success! There are so many of you out there, working hard to bring about good results, often on a limited budget. Your creativity, hopefulness, and professionalism are the raw ingredients of great marketing. I hope your associates, employers, and customers appreciate all you do.

Publisher's Acknowledgments

We're proud of this book; please send us your comments through our Dummies online registration form located at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

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Introduction

What can you do today to boost sales, attract new customers, and retain old customers? Well, for starters, you can read this book and make a commitment to work on your marketing program! In *Marketing Kit For Dummies*, 3rd Edition, I provide information, resources, and tools for the active marketer, salesperson, or manager. Furthermore, you get the benefit of an accompanying CD-ROM that's chock-full of templates for making plans, sales projections, surveys, and coupon profitability analysis, to name just a few of the goodies I put on there for you.

About This Book

Marketing Kit For Dummies, 3rd Edition, covers a wide range of subjects and offers a lot of help to anyone in business, including

- ✔ Simple, powerful templates and general rules for writing a marketing plan or ad campaign and budgeting your expenses
- ✔ A collection of advertising templates, brochure templates, and even templates for letterhead and business cards
- ✔ Insights on how to successfully close the sale through improved sales or marketing techniques
- ✔ A mini-library of professional photographic images for cost-saving designs
- ✔ Plenty of ideas, examples, tips, and templates to make your sales and marketing materials look great — and function well, too
- ✔ Neat marketing software I created to help you do the chores of good marketing quickly *and* well
- ✔ Plenty of hands-on tools and activities — many of which I borrowed from high-level corporate training events and workshops — to help you boost your own performance in sales and marketing

I wrote *Marketing Kit For Dummies*, 3rd Edition, for all of you who want to take responsibility for any aspect of sales or marketing in your organization — whether that organization is a small one-person operation, a large multinational corporation, or a public sector or nonprofit organization.

Marketing Kit For Dummies, 3rd Edition, focuses on helping readers communicate better with customers. Whether person-to-person, through a letter, the telephone, a brochure, a Web site, or any other medium, your customer communications play a vital role in the success of your business. I've cued up an immense amount of information, resources, and templates to help you improve your customer communications and your overall business image. Have a peek at the contents of the CD to see what I mean! (But be sure to use this valuable CD — just a peek won't do — because using it correctly can make the difference between a profitable business and no business.)

Conventions Used in This Book

When reading this book, be aware of the following conventions:

- ✓ Web sites and e-mail addresses appear in `monofont` to help them stand out.
- ✓ Any information that's helpful or interesting but not essential appears in sidebars, which are the gray-shaded boxes sprinkled throughout the book.
- ✓ Whenever I introduce a new term, I *italicize* it.
- ✓ CD files are numbered, with the first two digits designating the chapter they support and the next two digits indicating the order in which I refer to them in the chapter.

What You're Not to Read

For those among you who just want to get down to business, you can safely skip the sidebars and still get all the info you need.

Foolish Assumptions

I hate to make assumptions about people I don't know, but, dear reader, I did have to assume a few things about you when writing this book. Hopefully at least one of these assumptions applies to you:

- ✓ You're a marketer, salesperson, or at least someone interested in marketing.

- ✔ Your business isn't as successful as you'd like it to be, and you want to know how you can fix that.
- ✔ You know what you need to do to improve your marketing program, but you want someone to walk you through the necessary planning and actions.
- ✔ Or maybe you aren't sure what to do; you need to do some planning or develop a winning strategy.

How This Book Is Organized

Marketing Kit For Dummies, 3rd Edition, consists of 19 chapters and a CD-ROM that has examples, templates, forms, and software organized to support and extend each chapter's coverage. Here's how I organized all this great information.

Part I: Tools for Designing Great Marketing Programs

Things go better when you have a plan in mind. In marketing, this plan can be as simple as a back-of-the-envelope program using the Five Ps (product, pricing, placement, promotions, and people), which I cover in Chapter 1. Or it can be as complex as a detailed, systematic audit of all marketing activities, followed by a carefully written plan and a spreadsheet-based budget to go with it. I cover all these options in Part I, and I include the templates needed to take the sting out of designing a good program that boosts sales and profits. In fact, this book's planning templates are easier to use and more professional than any of the software programs I have evaluated — and those all cost a great deal more than this book.

Part II: Advertising Management and Design

Ads are often the key element of a marketing program, and in this part, I share insights, how-to tips, and tools to help you design winning ads for your campaign. Advertising needs to start with a good plan and affordable budget, which I cover in Chapter 4. Then you have to actually design hard-hitting ads that draw attention to your message and produce leads and sales. These challenges are covered in Chapter 5.

Part III: Power Alternatives to Advertising

Advertising is costly. In this part, I show you how to get your message across and generate leads and sales in creative ways that cost less than traditional advertising. Sometimes something as simple as a really well-designed business card is the secret to winning business and boosting sales. Newsletters, publicity, catalogs, logos and letterhead, and other marketing elements may also boost your sales. Check out this part if you want to save money on expensive advertising or just to make sure that you're doing these essentials as well as you can.

Part IV: Honing Your Marketing Skills

Some important skills are involved in doing good marketing. For example, you need to do market research to find out what customers want and how to sell better than your competitors do. And communicating well is obviously important in marketing, so I cover writing in this part as well. The star of this section is that secret ingredient that transforms ordinary marketing into the stuff of brilliant breakthroughs: creativity. I include a chapter that shares many of the techniques and tools from my firm's corporate creativity workshops to help you make sure that you get that special leverage that only creativity can provide.

Part V: Sales and Service Success

Sales and marketing: That's what people usually say, separating these two intertwined activities in an artificial way. I don't really know where selling stops and marketing begins. In every successful business I've seen, the two activities work hand in glove to signal new customers to the door, serve current customers, and thank past customers for their business in such a way that they feel good about coming back again. So this part on how to do great sales is an important complement to the other parts of the book. Use it to make sure that you're finding and closing as many good leads as you possibly can. Or use it to diagnose or improve any sales process, because there's often room for improved performance.

Part VI: The Part of Tens

This part covers several topics that may give you winning ideas for your marketing program. Take a look at the collection of winning marketing strategies in Chapter 17 — maybe one of them will work for you! I also cover ways to

cut costs and increase the return of your marketing investment in this part. And last but definitely not least, I've collected simple ideas for using the Web to boost sales and leverage your marketing program.

And don't overlook the Appendix, which explains how to use the CD, or the CD itself. It's attached to the inside back cover of this book.

Icons Used in This Book



I occasionally use icons to flag certain passages. Here's what the icons mean:

This icon points out good ideas and shortcuts to make your life as a marketer easier.



Any information that's especially important and worth remembering gets this icon.



This icon points out mistakes and pitfalls to avoid. Whatever you do, don't skip these paragraphs!



This icon highlights a method or approach that has been used successfully in real life.



When you see this icon, you know that an accompanying example, form, or spreadsheet is available on the CD that comes with this book.

Where to Go from Here

The beauty of this book is that you can skip to any section or chapter as you desire. You can certainly read the book from cover to cover, but you don't have to. Start with whatever topic is most important to you and don't forget to use the accompanying tools on the CD.

I encourage you to start using the ideas and tools from this book right away to improve your marketing and boost your sales. I also encourage you to tap into the supporting Web site, www.insightsformarketing.com, to take full advantage of all your resources as a reader of one of my books.

And if you want even more information and advice about marketing principles, check out my other book *Marketing For Dummies*, 2nd Edition (Wiley). You certainly don't *need* both books, but they do complement one another nicely, and there is virtually no overlap in their contents.

Part I

Tools

for Designing

Great Marketing

Programs

The 5th Wave

By Rich Tennant



In this part . . .

I equip you with tools and ideas for improving your marketing and boosting your sales. I also share the secret of successful marketers — how they find their marketing zone, the formula that makes it easy to produce growth and control marketing costs. Then I help you control your marketing costs and develop your marketing plans.

Need a marketing plan? Honestly, everybody does, but most people dread the challenge of creating one. Probably the best feature in this part is the template and instructions for preparing your own marketing plan in Chapter 2. I include a really cool set of templates: a Word file that you can customize for the text portion of your plan and Excel spreadsheet templates that you use for your sales projections and marketing budget. I must be out of my mind to give these things away (my competitors charge hundreds of dollars for template software like this), so take advantage of it before I come to my senses!

Chapter 1

Boosting Your Business with Great Marketing

In This Chapter

- ▶ Finding the zone
 - ▶ Committing to low-risk, flexible marketing methods
 - ▶ Boosting your marketing skills
 - ▶ Examining the Five Ps: Product, price, placement, promotion, and people
 - ▶ Marketing with imagination
 - ▶ Reaching your marketing zone
-

Marketing can't be reduced to formulas. Not completely. There is always a little magic in it. The magic comes from a mix of imagination, know-how, and experimentation. Gradually, as you work with these three powerful tools, you will develop your own formulas.

Did I say marketing can't be reduced to formulas? That isn't entirely true. Your marketing — the specific methods *you* develop to boost *your* sales and improve *your* profits — will eventually crystallize into a tried-and-true formula that works for you. But this formula will be unique to your business, and you can't copy it from anyone else. In this chapter, I help you work on your formula — the formula that will put you in your marketing zone with reliable results from an efficient, effective marketing program.

The goal of this chapter is to put you in your marketing zone.

Finding Your Marketing Zone

Your *marketing zone* is the right combination of strategies and tactics to bring you all the business you need (see Figure 1-1). Finding your zone means exploring marketing options until you develop a formula that really works, a formula that you can rely on with only minor adjustments from time to time.

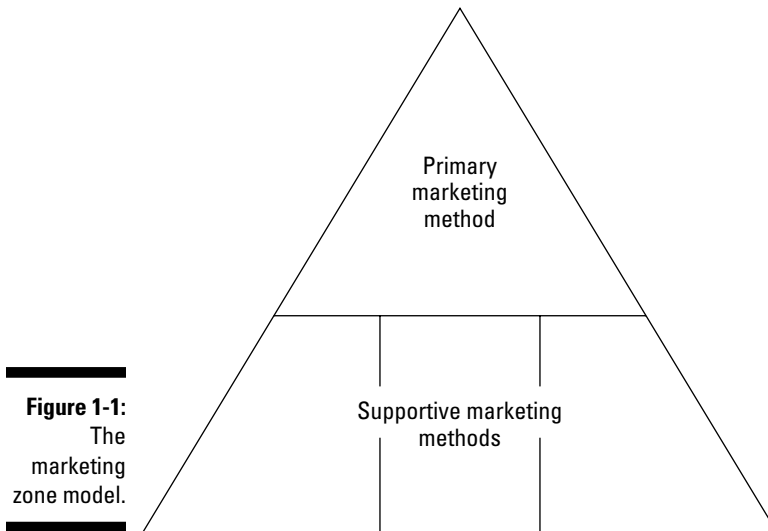


Figure 1-1:
The
marketing
zone model.

Businesses that are in their marketing zone are able to count on a healthy flow of sales, which allows them to be forward thinking. These businesses are covering the basics so that they can focus on what exciting new things to do next.



For example, a dental practice has worked out, through several years of experimentation, a formula that is based on friendly service (from the person who greets you through the person who treats you), a good location, and regular customer contact via phone calls and postcards. These three elements constitute their marketing program. (The primary element of their marketing is their friendly service and great staff; the secondary elements are their location, calls, and mailings.) The practice knows how much it needs to spend to sustain this program and get consistent results. The business is profitable and successful. Now the practice can think about opening a branch office, or adding another dentist, or expanding into orthodonture, or any number of ideas that can grow the business beyond its current base. But until the dental practice had worked out its basic marketing formula and entered its marketing zone, starting any new initiatives would have been foolhardy.

How do you know you're in the zone? In your marketing zone, you should find that

- ✓ **You get reasonably consistent results every time you use a marketing tool.** For example, if you do a mailing, you should be able to predict within 10 percent how many responses you'll get.

- ✔ **You operate in the black.** Your marketing activities should return a profit. Successful marketing can be defined as any marketing that reliably returns more in profits than it costs to do.
- ✔ **You should know what your top three to five marketing activities are and how to do them well.** And you should probably be investing close to half of your marketing spending in the single most effective marketing activity.

When you have satisfied these three requirements, you'll know you've found your marketing zone. The searching is over! Now you just need to work on repeating the formula with small improvements and watch your sales and profits grow.



No formula works forever. Eventually, you'll begin to find that results are slipping or profits are shrinking. If performance deteriorates, you'll need to search again. Perhaps it's time to alter your formula and update your plans. Should a new lead marketing method replace your old one? Do you need to make a major change in one or more of your top five marketing tools? Take a close look and be prepared to spend time and effort revitalizing your zone if performance slips and you no longer can say "Yes" to the three indicators described in the preceding list.



For example, Corporate Apparel Unlimited (CAU) of Anderson, Indiana, exemplifies a contemporary approach to selling customized clothing for team use and business promotions. Traditionally, such firms always used a color catalog as their primary marketing tool, with a call service center and smaller direct mail pieces in secondary place to support it. But when CAU started in 2000, it redefined the formula with a well-designed, informative, interactive Web site as its primary marketing tool. By now, most of its competitors have had to switch to the Web as their lead marketing tool, too. (See www.cauinc.com for a great example of how these products are now marketed.)

Pinpointing Your Top Three Sales and Marketing Tools

If your business has been operating for a year or more, then you're probably doing one or more marketing activities that work fairly well. Start by examining the methods that have been most productive for you so far and see whether you can refine them to make them work even better.



Your past experience is your most powerful source of information about what your top marketing tools should be.

Next, take a calculated look at other businesses. Start with your most successful competitors (but don't try to copy businesses that are more than three times your size, as their budget puts them in a different marketing class and you probably won't be able to afford to use their formulas right now). A good idea is to search for a successful similar company in another region and then study what they do. This approach isn't out and out copying; it's *benchmarking* (or learning from others' successful examples), which takes advantage of the fact that ideas are free and anyone can try them.



Don't copy the text or art of their marketing materials directly — those are copyrighted. Only benchmark general ideas — for example, if they use a large display ad in the Yellow Pages, try the same strategy with an ad of your own.

After you've examined similar businesses for marketing ideas, take a look at dissimilar ones. Sometimes the best ideas come from outside your industry.



For example, the owner of a small company that makes fishing lures was inspired by a friend who wrote a blog about business insurance and how to buy and use it. Nobody in the fishing equipment field was writing blogs, but obviously they were an up-and-coming marketing medium, so he started blogging and soon had more orders than he could fill. His blog became his lead marketing tool, and he supported it with a Web site, a traditional printed catalog, and a toll-free number for people who wanted to order by phone. This marketing zone formula worked well, and the business grew without high-cost, traditional marketing. His more traditional competitors advertised in magazines, but his unique formula worked just as well and cost much less. (See Chapter 9 for advice on using newsletters and blogs to grow your business.)

Change your mix until you get a formula that is predictable and highly profitable. Often, when I look at marketing plans, I find myself suggesting that the current lead marketing tool be demoted to secondary status, and a new tool put in top place. Be willing to experiment until you find a lead marketing method that really pulls its weight.



Here's a great example of the search for a successful marketing formula: A friend of mine who owned a landscape firm was doing a mix of residential and commercial work for office buildings and stores. Her business struggled with marginal profits until a large, stable, profitable contract with a big office building pointed the way toward a lucrative marketing zone. Now she avoids residential customers and instead focuses on making sales calls to commercial property owners and managers who can commit to large annual contracts. She sells using a professional-looking sales binder with testimonial letters from customers and a detailed listing of service and price options. Gone are the small, low-profit accounts. Now she has a dozen annual contracts that support a staff of ten and provide a healthy profit. She pays her staff well and