



**BLUE SKY**  
marketing

# **Blank Canvas Marketing Planning and Budgeting**

**"If you don't know where  
you're going, any road'll  
take you there"**

Cheshire Cat in Alice in Wonderland

# You're Not Alone

85%

Of small- to mid-size companies operate from a budget only — without a written plan to accompany it.

# Goal Setting

# Business Knowledge Check-in

- 2018 Revenue Goals
- 2018 Marketing Budget
- Product / Services: Changes planned?
- C-Suite's metrics for measuring marketing success
- Sales Team's Initiatives for 2018

# Document What You Know

- Existing Customers (per product)
  - Demographics: Geography, Age, Gender
  - Psychographics
- Any big initiatives planned in marketing?
  - New Website? New Branding?

# Assess Your Brand

## STRATEGY



## TOOLS





# Analyze & Benchmark



# CRM / Automation Tool

- Best source of data on what drives sales
- Don't have one?
  - Interview sales people or customer service for insights

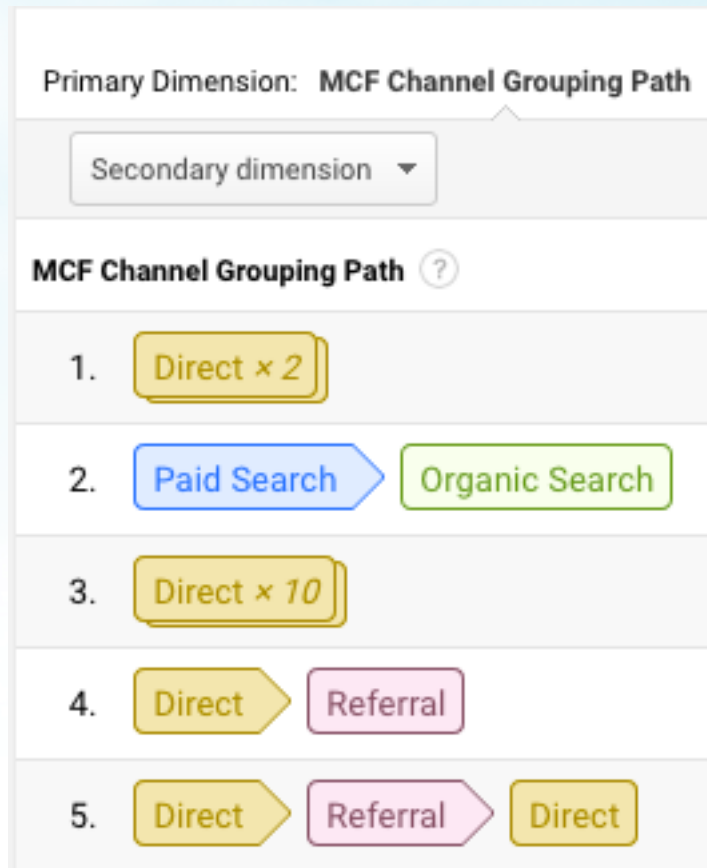
# Google Analytics: Know Your Top 5

Traffic Sources >  
Sources > Source  
Medium

- |    |                        |
|----|------------------------|
| 1. | google / cpc           |
| 2. | google / organic       |
| 3. | facebook / click-ad    |
| 4. | facebook / carousel-ad |
| 5. | (direct) / (none)      |

# Go a Step Further

Conversions >  
Multi-Channel Funnels>  
Top Conversion Paths



# Acquisition and Conversions

|   | Acquisition |  |             | Conversions            |  |              |
|---|-------------|--|-------------|------------------------|--|--------------|
|   | Sessions ↓  | % New Sessions ↓   | New Users ↓ | Goal Conversion Rate ↓ | Goal Completions ↓   | Goal Value ↓ |
|   | 16,048      | 53.92%   | 8,653       | 52.55%                 | 8,434  | \$0.00       |
| 1 <span style="color: #0070C0;">■</span> Display        | 6,744       | <div style="width: 53.92%;"><div style="width: 53.92%;"></div></div> |             | 9.89%                  | <div style="width: 9.89%;"><div style="width: 9.89%;"></div></div>     |              |
| 2 <span style="color: #0070C0;">■</span> Organic Search | 2,611       | <div style="width: 16.27%;"><div style="width: 16.27%;"></div></div> |             | 142.93%                | <div style="width: 142.93%;"><div style="width: 142.93%;"></div></div> |              |
| 3 <span style="color: #0070C0;">■</span> Social         | 2,340       | <div style="width: 14.58%;"><div style="width: 14.58%;"></div></div> |             | 12.56%                 | <div style="width: 12.56%;"><div style="width: 12.56%;"></div></div>   |              |
| 4 <span style="color: #0070C0;">■</span> Direct         | 1,349       | <div style="width: 8.41%;"><div style="width: 8.41%;"></div></div>   |             | 87.84%                 | <div style="width: 87.84%;"><div style="width: 87.84%;"></div></div>   |              |
| 5 <span style="color: #0070C0;">■</span> Paid Search    | 1,035       | <div style="width: 6.45%;"><div style="width: 6.45%;"></div></div>   |             | 129.28%                | <div style="width: 129.28%;"><div style="width: 129.28%;"></div></div> |              |
| 6 <span style="color: #0070C0;">■</span> Email          | 817         | <div style="width: 5.09%;"><div style="width: 5.09%;"></div></div>   |             | 60.95%                 | <div style="width: 60.95%;"><div style="width: 60.95%;"></div></div>   |              |
| 7 <span style="color: #0070C0;">■</span> (Other)        | 809         | <div style="width: 5.04%;"><div style="width: 5.04%;"></div></div>   |             | 62.79%                 | <div style="width: 62.79%;"><div style="width: 62.79%;"></div></div>   |              |
| 8 <span style="color: #0070C0;">■</span> Referral       | 343         | <div style="width: 2.13%;"><div style="width: 2.13%;"></div></div>   |             | 61.81%                 | <div style="width: 61.81%;"><div style="width: 61.81%;"></div></div>   |              |

# Social Media Insights

Your Fans

Your Followers

People Reached

People Engaged

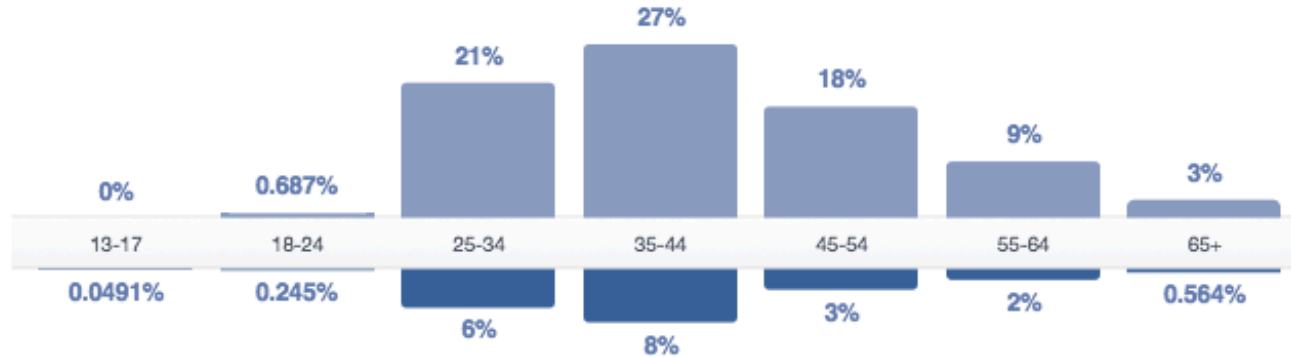
Aggregated demographic data about the people who like your Page based on the age and gender information they provide in their user profiles.

Women

■ 79%  
Your Fans

Men

■ 21%  
Your Fans



# Email Reporting

- What gets opened?
- What gets clicked?
- What subject lines worked best?
- What brings in revenue?
- Assess Email Frequency Impact on Stats Above

# What's Working?

- Create “piles” based on metrics
  - Ditch It
  - Works Well
  - Can't Live Without

# Look Sacred Cows!





# Consider Options

The Fun Part

# List All Items

- No budget allocation or priorities yet
- Brainstorm-level
- Layer in Events or Seasonal Promotions

| <Client Name> 2018   |     |     |     |
|--|-----|-----|-----|
|  | Jan | Feb | Mar |
| <b>Promotions</b>  |     |     |     |
|  |     |     |     |
| <b>PPC Campaigns (Search, Display, Remarketing, Gmail)</b> |     |     |     |
| AdWords (Google and/or Bing)                               |     |     |     |
|  |     |     |     |
| <b>Display Ad Programs</b>                                 |     |     |     |
| Pandora  |     |     |     |
| Other Ad Networks  |     |     |     |
|  |     |     |     |
| <b>Social</b>  |     |     |     |
| Facebook Ads   |     |     |     |
| Pinterest Paid Pins  |     |     |     |
| Twitter  |     |     |     |
| Instagram  |     |     |     |
| Yelp!  |     |     |     |
| LinkedIn   |     |     |     |
|  |     |     |     |
| <b>Video</b>   |     |     |     |
| YouTube  |     |     |     |
|  |     |     |     |
| <b>Email Marketing</b>                                     |     |     |     |
| Paid Email: 3rd Party Consumer                             |     |     |     |
|  |     |     |     |
| Paid Email: 3rd Party Realtor                              |     |     |     |
| BDX Connect Realtor Program                                |     |     |     |
| Houston eFlyer Realtors                                    |     |     |     |
| iBuilder   |     |     |     |
|  |     |     |     |
| <b>Real Estate Industry</b>                                |     |     |     |
| NewHomeSource.com Takeover                                 |     |     |     |
| BDX Featured Community Listing                             |     |     |     |
| Realtor.com  |     |     |     |
| Zillow / Trulia  |     |     |     |
| NewHomesDirectory.com                                      |     |     |     |

# Campaign and Marketing Plan

## CUSTOMER ACQUISITION

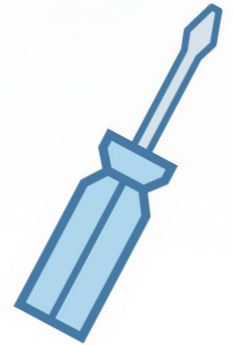


# Staying Current on Best Practices

- Search Engine Land
- Social Media Explorer
- Moz.com
- AMA.org
- MarketingSherpa.com
- ThinkWithGoogle.com

# Budget Tools

- <https://www.smartsheet.com/12-free-marketing-budget-templates>



# Prioritization

The “Not So Fun” Part

# Remember those “piles”

- Allocate based on what worked
- Layer in new media (maybe new to you)
- Set aside contingency funds for testing

# Document Tactical Goals

- Channel: Digital marketing
- Platform: Facebook
- Tactic: Lead Ads
- Ad Spend: \$2,000/month
- Goal: 500 clicks, 50 lead forms (conversions)



# Align Goals to Tactics and Audiences



# Fill in Monthly Budget

- You have a list of tactics
- You have a list of seasonal or other priorities
- Layer in your spending based on what program is supporting

# Content Production Costs

- Every channel has a cost.
- Factor this into your plan.



# In 2018, 30% Should Go to Digital

Forrester Research

# YMMV: Ratios Recommended

- 15% Search engine marketing, including SEO/SEM, requires the most significant online spending.
- 10% Display advertising, like banner ads and re-targeting.
- 5% Social media marketing and advertising.

# Did she say 30% to Digital?

## Alphabet Inc Class A

NASDAQ: GOOGL - Oct 30, 1:56 PM EDT

1,028.18 USD ▼5.49 (0.53%)

1 day 5 day 1 month 3 month 1 year 5 year max



|      |          |           |         |
|------|----------|-----------|---------|
| Open | 1,029.16 | Mkt cap   | 707.42B |
| High | 1,039.83 | P/E ratio | 35.04   |
| Low  | 1,022.33 | Div yield | -       |

Google Finance - Yahoo Finance - MSN Money

Disclaimer

## Facebook, Inc. Common Stock

NASDAQ: FB - Oct 30, 1:56 PM EDT

179.42 USD ▲1.54 (0.87%)

1 day 5 day 1 month 3 month 1 year 5 year max



|      |        |           |         |
|------|--------|-----------|---------|
| Open | 179.26 | Mkt cap   | 521.01B |
| High | 180.69 | P/E ratio | 38.97   |
| Low  | 177.61 | Div yield | -       |

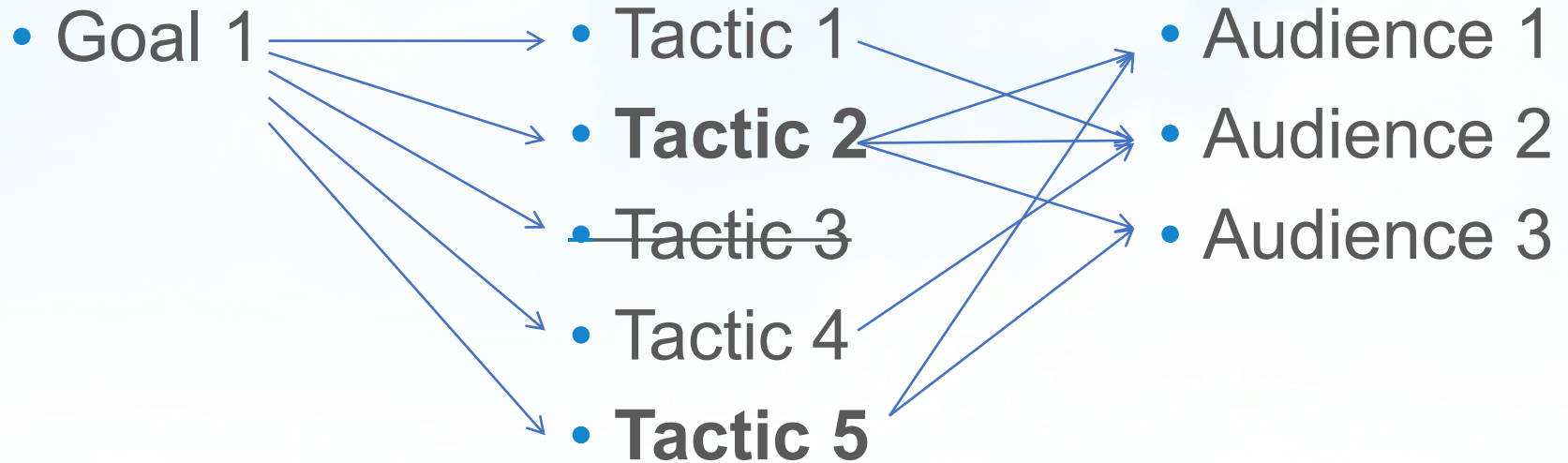
Google Finance - Yahoo Finance - MSN Money

Disclaimer

# Whittling Budget

- Remember “alignment”?
- Use it to identify the best cuts

# Align Goals to Tactics and Audiences





# Important Rules for Choosing

- “Because everyone else is” is **not** a case
- “Because I like the sales person” is **not** a reason
- I’m afraid to try it



# Sharing can be Scary

But You Need Buy-In

# Plan Review and Maintenance

- Review plan in detail
- Set cadence to reviewing plan and progress
  - Be ready to shift gears as behaviors change.

The background of the image is a bright blue sky filled with soft, white, fluffy clouds. The clouds are scattered across the frame, with some appearing more prominent than others. The overall tone is light and airy.

**Q&A**