CHASE ◈
for BUSINESS®

Participant workbook

Marketing in a digital world

How to get noticed and build community online

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This is your moment

Customers are going online to find businesses like yours: Be there to take advantage of the opportunity.

20% **eCommerce's projected share of total retail sales by 2024**

Source: "US eCommerce Forecast Revised Upward, 18% Growth Expected in 2021," Insider Intelligence, June 9, 2021.

This is a time of transformation. How people shop and do business has changed dramatically. How we think about ourselves as consumers and community members is taking on new dimensions. For business owners, this is a time of unprecedented opportunity.

Customers want more than a product or service. They want to connect to communities and to see their dollars do good. That's why so many people are using apps and websites to support businesses. But how do you stand out?

Digital marketing tools and online spaces allow you to tell your story and to reach customers in your own unique way. When you put yourself and your business forward with confidence, you can help build loyalty and help attract new customers.

Contents

Your unique business

How you show up is as important as *where*.

Every business has its own flavor. Effective marketers embrace that uniqueness and cultivate it through their branding and marketing strategy

Branding matters

No matter how small or new or niche your business is, it has a brand. A brand is what people think or feel about your business. It's what they say when someone asks, "Have you heard about that place?" It's what keeps people coming back or what makes them walk away.

Think about where your brand is today. Packaging, advertisements, customer service, how your product or service works, what other people are saying online or in community — the whole experience. Is your brand working for you? What are you known for? What do you do better or differently than your competitors? What can you do to change perceptions or create a better experience?

Digital marketing can help you build your brand, but offline experiences are just as important. In fact, your digital marketing depends on your business already having a brand foundation to build on. When an email or ad reaches a customer, they're not only considering what you've offered but also checking it against what they believe about your business.

What brands do you love?

In the Advancing Black Entrepreneurs session titled "Your Next-Level Business: Building a Foundation That Lasts," we created a quick exercise to help you think about why you love the brands you love. Visit chase.com/business/next-level-biz to give it a try.

What do you want people to believe about your brand?

Every brand is a story. The strongest brands tell a story that resonates with the values and hopes of their customers.

Think about the stories you love. A character wants something or sees a wrong that needs to be put right. They go on a journey. They face obstacles. They make progress and eventually triumph. And because you've been by their side every step of the way, you triumph.

What journey are you and your business on? What problem did your business set out to solve? How did you get to this point, and where will you go next? The story of how you are building your business can communicate so much about what your business means to you and your employees, your customers and your community.

Start with purpose, mission and values

Your brand story should communicate the purpose, mission and values of your business. Writing statements for each is a good way to get started. In "Your Next-Level Business: Building a Foundation That Lasts," there's an activity to help you articulate what makes your business special. You can complete this exercise at chase.com/business/next-level-biz.

This, not that

Opposites help us see a range of possibilities and pinpoint where we want to land. Consider the terms below, and mark a spot on the continuum that represents the concepts your brand gravitates toward. Then look for patterns. Has a theme emerged?

Brand personality

Classic	Modern
Mature	Youthful
Serious	Playful
Literal	Abstract
Precise	Free-flowing
Mainstream	Funky
Established	Fresh
Nostalgic	Futuristic
Methodical	Fast-paced

TIP When you're considering your options, commit to a side. A brand that tries to be everything to everyone can appear inauthentic or unfocused.

Have a strategy

A strong marketing strategy is a mix of intuition, creativity, number crunching and the discipline to see your strategies through from start to finish.

Many marketers use the "7 P's" to develop their strategy.

1. **Product**: You need a great product that solves a problem for your customers. Successful marketing convinces people that your product is the right solution.

2. **Price**: A good product at the wrong price won't sell, no matter how good your marketing is.

3. **Promotion**: Creative marketing can help your product or service get noticed.

4. **Place**: Customers don't always shop around. Sometimes they take the first product that meets their needs. That's why product placement and business location are so important.

5. **People**: Outstanding customer service and your team's ability to communicate what makes your product or service great can make all the difference for a rising business.

6. **Process**: Get your product or service to people quickly and efficiently so that they're more likely to be repeat customers.

7. **Physical experience**: Packaging, how your product feels, the impression your business leaves behind after every interaction — these physical elements need to be analyzed and planned for. No detail is too small.

✎ Worksheet (approx. 30 minutes)

What are your customers thinking?

An empathy map can help you better understand who your customers are and how they experience the world. Think about the customers who come to you the most, and answer the questions below with them in mind. You can use the chart on page 9 to jot down notes for each section. Consider creating additional empathy maps for other types of customers.

1. Empathize with your customer.

Who is the person you want to understand?

What situation are they in?

What is their role in the situation?

2. Find out what they need to do.

What do your customers need to accomplish?

What decision(s) do they need to make?

How will you know they were successful?

3. See what your customers see.

What do they see in the marketplace?

What do they see in their immediate environment?

What do they see others doing?

What are they watching and reading?

4. Hear what your customers say.

What have you heard them say?

What can you imagine them saying?

5. Understand what your customers do.

What might they do in a typical day?

What behavior have you observed?

What can you imagine them doing?

6. Listen for what your customers hear from others.

What are they hearing others say?

What are they hearing from friends?

What are they hearing from colleagues?
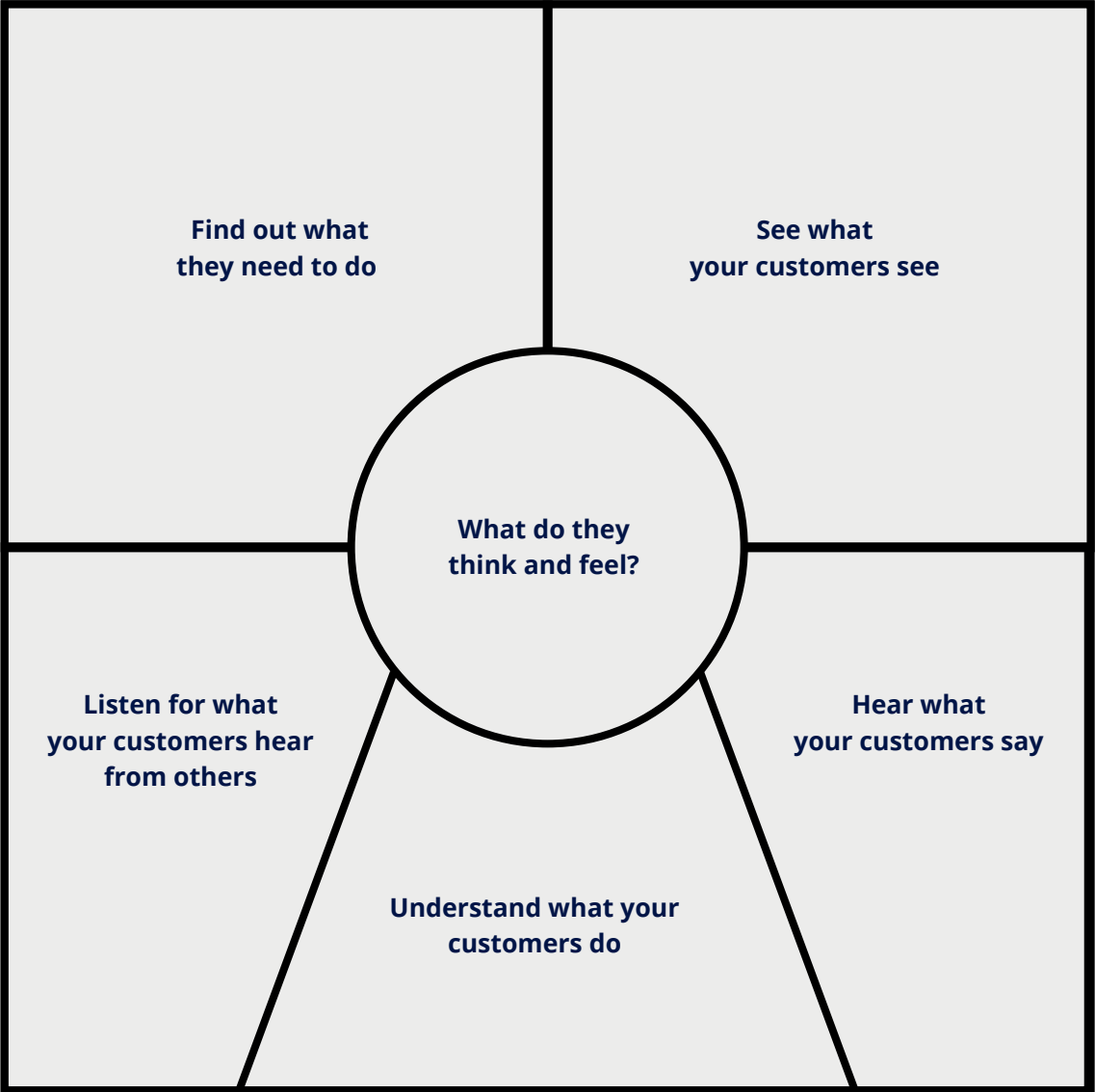
What are they hearing second-hand?

7. What do they THINK and FEEL?

Pains

– What are their fears, frustrations and anxieties?

Gains

– What are their wants, needs, hopes and dreams?

What other thoughts and feelings might motivate their behavior?

Empathize with your customer

Find out what
they need to do

See what
your customers see

What do they
think and feel?

Listen for what
your customers hear
from others

Hear what
your customers say

Understand what your
customers do

Where your customers are

Be online where and when your customers need you.

Every day, countless social media posts and webpages go live, newsletters are emailed, videos are uploaded, promotional texts are sent and products go up on eCommerce sites.

You can't be everywhere at once, but you can find pockets of opportunity. The key is knowing where your people are, how they use digital spaces and what sparks their interest.

Website: Your online hub

People search Google for websites about 5.6 billion times per day.[1] If you need to find a business, Google is the place to look. In fact, if a business doesn't have a professionally designed, up-to-date website, searchers might think the business isn't reputable and click away.

Think of your website as the online hub of your business. Anything about your business that might be useful to your customers should probably be on your website. Social media posts, emails, videos and more can then point people to this core content where you can "convert" their interest into action — a sale, a consultation or other goals.
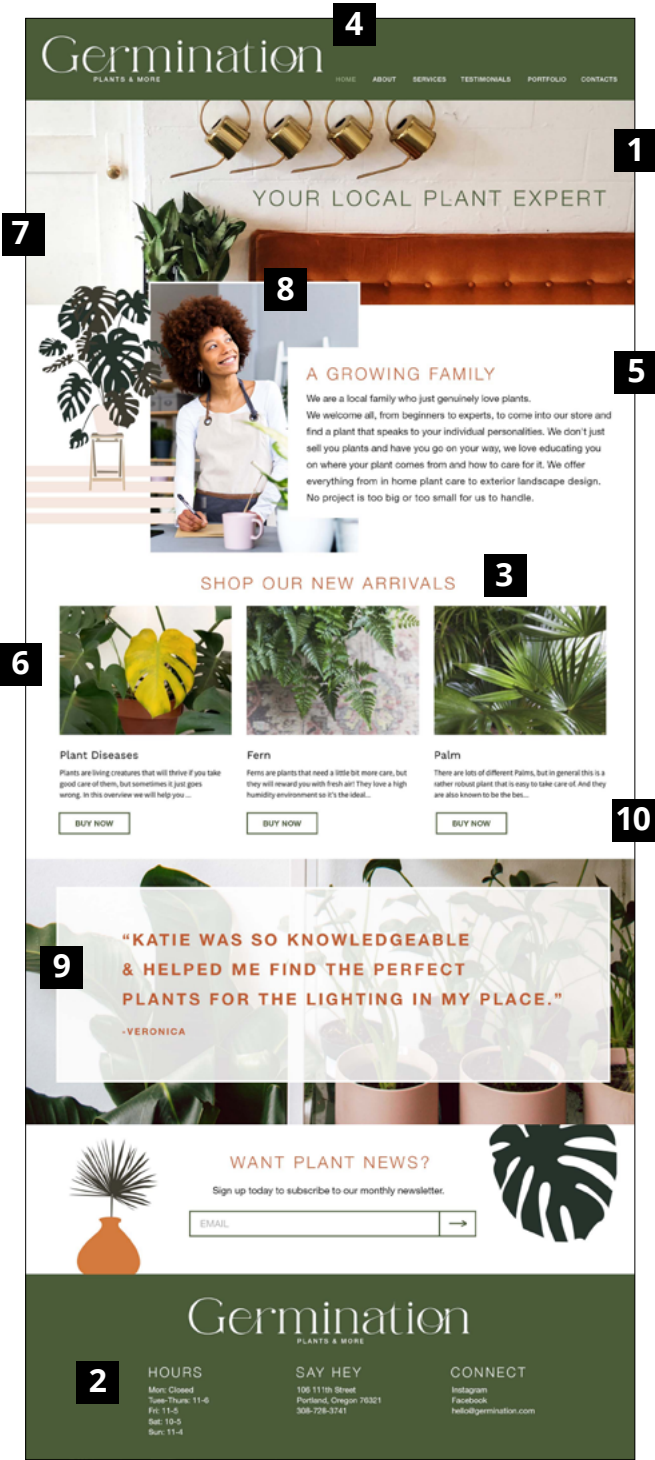
What does a professionally designed website look like?

Each business will approach its website differently. For example, an accounting website might have a tax calculator on its homepage, or a paint store might feature a color-comparison tool. Here are a few basic elements every website needs:

1. **Value proposition**: The first thing a visitor should see is a brief statement on the value your business delivers to customers. Some businesses can say it all in a catchy slogan, while others need a little more space. Make sure your value proposition is short, clear and bold.

2. **Address, contact information and hours**: Many businesses include this information at the bottom of every webpage so that it's easy to find.

3. **Up-to-date information**: If your website includes old hours, products you no longer carry or other outdated information, customers will be frustrated. They might even think you've gone out of business.

4. **Streamlined navigation**: Think about what your customers want most, and make sure it's easy to find on your website. A streamlined navigation bar with a handful of important categories can help customers focus on what to do next. Many websites include subcategories that appear when a user hovers over the text.

5. **More information about you**: Your website is a great place to tell your story. Customers want to know who they're doing business with, and we all like a success story. But don't go overboard. The primary focus should be on what your customer wants or needs.

6. **Mobile friendliness**: Mobile searches consistently make up more than half of all web searches.[2] If people have to shrink or enlarge your page to read the text or scroll left and right to see your content on their devices, they're likely to feel that clicking on your website was a mistake. Most website templates now offer responsive design that reformats your website based on the screen size so that your website always looks good on a laptop, tablet or phone.

7. **Accessibility compliance**: The internet is a basic necessity for nearly everyone. That's why it's important to design your website with all ability levels in mind. In fact, businesses can be sued if their website is not compliant with the Americans with Disabilities Act. The W3C Web Accessibility Initiative has developed international accessibility standards for the web to help you stay compliant.

8. **Images of people**: The human brain processes images faster than text, and we're especially drawn to images of people. Your website should include many prominent images of people, and your homepage should feature at least one person from your target audiences.

9. **Testimonials**: Many people will learn about your business for the first time via your website. Customer testimonials can do a lot to build trust.

10. **Shoppable experience**: How easy is it for customers to buy what they want? The less they have to scroll and click, the more focused they'll be on completing the purchase.

1. "25 Google Search Statistics to Bookmark ASAP," HubSpot, June 9, 2021.
2. "Mobile Search — Statistics & Facts," Statista, April 29, 2021.

TIP
If you have time, write regular blog posts that are interesting or useful to your customers. Along with providing valuable content for your audience, blog posts also can boost search traffic to your website, position you as a thoughtful leader and build a community around your brand.

Tools for building a website

You don't need advanced technical skills to build a website, although it can help to know a little of a website coding language such as HTML. Many site-building services offer an all-in-one system that walks you through selecting a template and building a design, choosing a host and registering your domain, and then publishing your website to the internet. Here are a few of the most popular services.

Squarespace

Squarespace is known for providing templates to build stylish, user-friendly websites. According to the Squarespace website, its online store option does not charge transaction fees (although credit card processors may still charge fees). This could save you money compared with other website options, depending on the size and volume of your eCommerce transactions. If your visual brand is important to you, Squarespace might be at the top of your list.

Wix

Wix claims to be one of the most popular website providers in the world, thanks to its AI-powered builder that automates much of the process. However, Wix also offers the flexibility to hire a developer to create a custom site that uses advanced applications such as JavaScript. One thing to keep an eye on is pricing. Wix limits data, so if you want to upload a lot of images or expect thousands of website visitors per day, you could find yourself getting bumped up to a higher pricing tier.

Weebly

According to Weebly, its website-building tool is easy to use but powerful. You can create a large website with many pages and elements, and Weebly claims its builder is faster than other builders. Best of all, Weebly's website lists a free option, which offers full eCommerce capabilities, SEO tools, and chat and email customer support.

WordPress

Building a website with WordPress can be slightly more challenging than with the other providers, but the advantage is the huge community of WordPress developers who have created add-ons that enable your website to do more. From SEO help to security tools to social media integration, there are thousands of ways WordPress add-ons can improve your website.

Shopify

If your business needs to focus on eCommerce, Shopify is a global leader in eCommerce websites and marketing. Shopify guides you through every question you need to consider before putting your products online, and its shopper interface is designed to move customers toward completing a purchase.

BigCommerce

BigCommerce positions itself for medium and large online sellers with a wide array of tools for setting up your eCommerce website. For example, the platform has apps that can help you place your products on eBay, Google Shopping and Amazon. According to the BigCommerce website, it also does not charge its own transaction fees. It even has a deal with PayPal to reduce the payment system's transaction fees.

LEVEL UP

Double down on the mobile experience

We all like how useful apps can be, but most of us don't want to download an app for every business. Technically, savvy web developers can make your website look and function a lot like an app, even though it's accessed via a web browser. This kind of website is called a progressive web app.

Social media: Keeping it real with your customers

Nearly all your customers are on at least one of the following: Facebook, Twitter, Instagram, TikTok or LinkedIn. And many others regularly visit Pinterest, Reddit, YouTube, Discord and other sites. Each platform has its own culture and "rules" about how you show up in those spaces. Unless you have a full-time social media staffer, you can't be everywhere. You have to choose.

Where do your customers spend time on social media? Which social platforms match the vibe of your business? For example, if you're a B2B company, LinkedIn is the place to be. But if you're selling trendy apparel, LinkedIn is not where you want to invest your time. Instagram or TikTok might be your showroom.

When selecting social platforms to invest in, ask yourself:

- What do your customers like to do online? (Hint: Check the empathy map you created.)
- What reinforces your brand image?
- Which platforms can help you meet your business goals?
- What can you offer via social media that gets prospective customers interested or excited?
- What social platforms are your competitors on?
- Where can you put in the time needed to be an active participant?
- What will be fun?

The social media landscape is always changing

Do you remember Myspace? What about iTunes Ping? Social media platforms rise and fall each year, so don't try to chase every social trend. Jump in where your community will be there to meet you, and keep an eye on how platforms evolve. What social media platforms provide is always changing. So are attitudes or perceptions of the platforms. What's important is to be involved and connected where and how your customers want you.

TIP Create moments. How can you authentically shape an experience? How can you tap into what your customers are seeing and feeling in the world right now? There's no guarantee that you'll go viral, but if you put yourself out there, you have a chance.

Worksheet (approx. 10 minutes)

Find the right social media apps for your business

Review what's unique about each social platform, and select the attributes that best match your brand and overall business strategy. Note that these platforms are constantly changing, and it can be helpful to revisit your assumptions periodically.

	Facebook	Twitter	Instagram	LinkedIn	TikTok	Pinterest	YouTube
Who are they?	Largest group is 25–35 years old (older in the U.S.) Almost 90% of daily users are outside the U.S. and Canada	Largest audience is under 30 70% are male Almost half have a college degree	About 2/3 are 18–34 Just over half are female 9 in 10 users follow a business account	Professionals and business-minded people 40 and older	60% are 16–24 60% are female	More than 40% are 25–34 60% are women	All ages Slightly more men than women
Why do people come here?	Stay connected with friends and family	Participate in public conversations	Share photos and videos	Network, learn about industries and best practices	Share videos of singing, dancing and comedy sketches	Find ideas and inspiration	Entertainment, news and how-to videos
What performs best?	Photos, videos and event announcements	Threads, GIFs and videos	High-quality photos, lifestyle content	Business practice insights	Responses to trends	Positive lifestyle content	Informational content
What are its limitations?	Severely limited reach unless you pay for ads	280 characters	Limited text and ability to post links	Not very social	Limited text and ability to post links	Limited text and ability to post links	Expectation for more polished videos
How often per week should you post?	1–4 times	5–10 times	7–10 times	1–2 times	1–3 times	5–10 times	1–2 times
How can you build an audience?	Pay to boost posts	Use hashtags and participate in conversations	Post often, use hashtags and create striking visuals	Add contacts and engage with content posted by others	Jump into trends and connect with influencers	Create searchable descriptions and post often	Optimize for search and post consistently

Source: "100+ Social Media Demographics That Matter to Marketers in 2021," Hootsuite, January 27, 2021.

How to be successful on social media

You've chosen a few social platforms. That's a great start. Now it's helpful to think a little more about what social media is. The platforms create virtual spaces, but social media is really about people. They're coming to interact, find out something new and keep up with friends, family and community. They want to feel connected. How can you facilitate connections to your business and between people?

- **Create a calendar.** Your personal social media might be where you put random thoughts out there, but your business pages need to be more strategic. Know your goals, and map them out on a calendar that shows the arc of your posts through a week, month, quarter or year.

- **Experiment with timing and frequency.** Are your customers up all night? Is lunchtime their phone time? Do you have customers on the other side of the world? Most brands post between 10 a.m. and 4 p.m. because that's when the average person is most active, but your customers might not be average. Find out what works for them, and build from there.

- **Be yourself.** Nobody wants to read corporate language such as "leveraging resources" or "gathering learnings" in their social media feeds. Let your personality and that of your business come through. (But always double-check that you're not going to embarrass yourself or your business before you post.)

- **Amplify community.** At its best, social media is a place where people celebrate each other, learn new things and have a few laughs. You can bring good vibes to your feed by shouting out neighboring businesses, partners, community groups and customers — especially when they're good customers.

- **Give more than you take.** Your social feeds can't be "Buy! Buy! Buy!" People know you want to sell your product, but they're coming on social media for what you can do for them. If you're only selling, you'll struggle to win over new customers.

- **Ask customers to follow you on social media.** You'd be surprised by how many loyal, happy customers just don't think to do it.

- **Be memorable.** Feeds move fast. A powerful image or a few words that resonate will get customers to slow down and think about your brand before moving on.

Jessica Spaulding
Owner, Harlem Chocolate Factory
Chase for Business customer

How to manage your social media apps

If you're on more than one social media platform, it can be helpful to use a social media management tool to monitor engagement, create new posts, schedule future posts and set up automations in one place.

Some social media management tools — such as Hootsuite, Buffer and Agorapulse — offer a free version for individuals or small teams. Choose the tool that best matches how you and your team use social media.

If you aren't interested in another online account, you can manage your social media posts in a spreadsheet. In fact, many businesses that use social media management tools also have a master spreadsheet to help them plan weeks and months in advance and to see the rhythms of their posts over time. A planning spreadsheet can be organized by day or week and might include sections for each social media app and rows for copy, images, campaign labels and strategy notes.

You can manage your online reputation

We all make mistakes. And anyone can be targeted by a smear campaign from a disgruntled acquaintance, customer or employee. Professional reputation management services can help you push negative stories or comments to the bottom of customer search results and keep the focus on what's positive about you and your business.

What to know about paying for social media

The early days of Facebook were exciting for business owners. A page with 1,000 followers would show up in nearly every follower's feed, and engagement was high. Today, social media platforms have created complex algorithms to regulate how often your post appears. In general, posts with more likes and shares get sent to more followers' feeds, but the algorithms are also there to help the platforms make money. If your page doesn't pay to "boost" a post, relatively few followers will ever see it unless it goes viral.

On the plus side, social media ads are inexpensive. For example, a boosted post on Facebook typically costs about $7 per 1,000 impressions (number of times the post shows up in a feed), and you can target your boosts to individual Facebook users or followers by location, education level, gender and more. Targeted social media ads are especially useful if you want to expand your customer base or shift into new markets.

In general, many brands have found success on Facebook and LinkedIn with ads designed to generate leads. On Instagram, ads promoting products can boost sales. And on Twitter, an ad might help increase awareness of your brand.

LEVEL UP

Find your influencers

On Instagram and TikTok, influencers drive tastes and grow trends. Do you know people with a big following among your target audience? The biggest influencers will want to be paid to rep your brand, but others might mention your business in exchange for free products or services.

Email marketing: Showing up right on time

The rise of social media was supposed to mean the death of email marketing. Instead, email marketing continues to be a reliable method of digital communication for many organizations and businesses.

To send marketing emails, you need an email marketing system. This is a type of software that allows you to design and send emails with discount codes, new product releases, contests, business updates, community news and more to hundreds or thousands of people at once. Some businesses produce a regular newsletter that includes all of the above in one message. Regardless of the kinds of messages you send, make sure to have a consistent strategy and provide value. Here are a few additional tips:

- **Focus on the open**. Even though email is incredibly useful, most recipients will keep scrolling. How do you get them to click? Start with a compelling subject line. Engaging subject lines that don't feel like clickbait but do offer a little suspense can boost open rates a lot. Also pay attention to how you show up in the "From" section. Is it a generic sender or a person (or organization) that your customers want to hear from?

- **Develop a call to action**. Every email should have one main goal and a CTA, otherwise your customers can get lost in the weeds of your message. Make your CTA clear and specific. For example, "See what's hot for spring" is more effective than "Learn more." It's helpful to test different approaches to learn what works best with your audience.

- **Personalize your message**. Many email marketing tools allow you to insert tags that pull information about the recipient from your database and include it in a message. Even small personalizations can translate into higher open rates and more sales.

- **Create FOMO**. No one wants to feel like they're missing out on a great deal or a bit of fun. Can you develop a strategy that gets people excited for the next email?

46% Consumers who believe email is the best channel for company contact, preferring it almost twice as much as any other channel.

Source: "Consumer Email Tracker 2020," Data & Marketing Association, January 23, 2020.

Popular email marketing software providers

It can be overwhelming to sort through all the email marketing system providers, especially if you're also considering a customer relationship management system to store and manage current and prospective customer information. Many CRM systems include a built-in email tool, which lets you keep all customer data in one place without exporting it or struggling with integrations that don't move data easily.

Before you select an email marketing system, make a list of your requirements and look carefully at what each system offers. Here are a few well-known providers.

Mailchimp

According to Mailchimp's website, a business with fewer than 2,000 contacts can create and send emails via Mailchimp for free. The free version also includes simple automations and the ability to create landing pages. Paid versions allow you to create customer journeys that include automated messages, customized templates, eCommerce pages and digital ads.

Constant Contact

Like Mailchimp, Constant Contact strives to be an all-in-one email marketing, website and eCommerce service for growing businesses. It doesn't have a free version, but its "Email Plus" package offers a wide range of templates; the ability to create polls, surveys and coupons; and a strong reputation for reliably landing messages in recipients' inboxes (versus spam folders).

HubSpot

HubSpot is a lot more than an email tool. It's a complete digital marketing platform with a sophisticated CRM system. It's a system that takes training to use, and HubSpot even offers a certification to help marketers take full advantage of its system. The starter package is relatively affordable, but you'll need to spend thousands per year to tap into its full range of features.

Campaign Monitor

If you use Shopify, Campaign Monitor integrates well with the eCommerce platform. It also offers a visual journey builder that can help you see how your potential customers move from interest to purchase and can detect broken links before you send your message. Campaign Monitor believes its pricing is competitive at about 2,000 contacts, but it doesn't offer features such as landing pages and survey forms.

ActiveCampaign

Many veteran marketers turn to ActiveCampaign for more sophisticated list management, automation, reporting and deliverability. Of course, this increased sophistication comes at a price. ActiveCampaign is more expensive than Mailchimp, Constant Contact and Campaign Monitor, but the difference is smaller than you might expect.
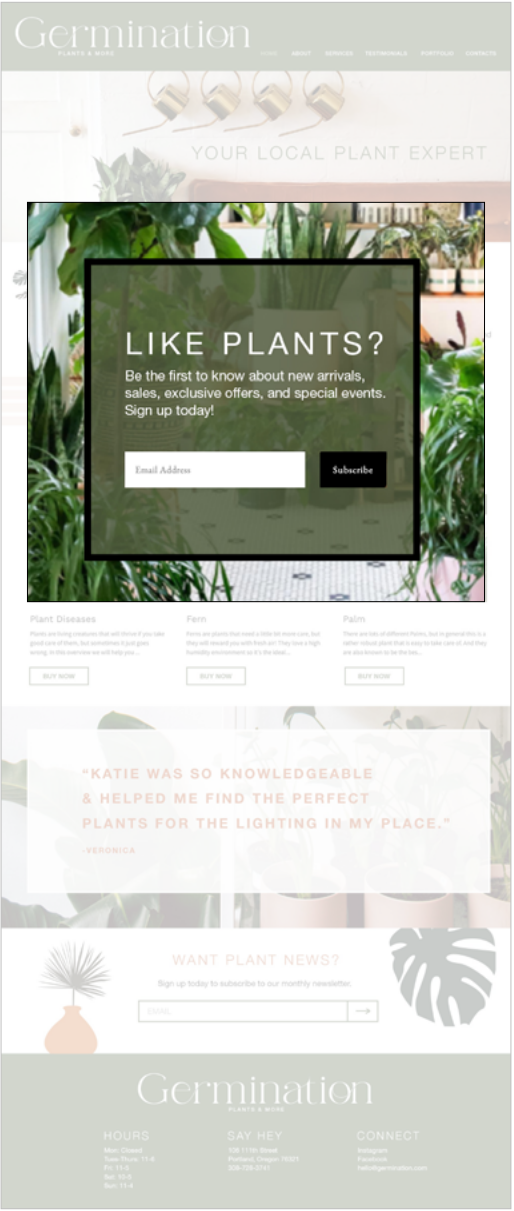
Capturing email leads

The most valuable email addresses you can collect are leads — addresses that a customer gives to you. In fact, mass emailing people who did not opt in to your email list can jeopardize your ability to send email at all. If enough people flag your emails as spam, your domain will be blocked and even loyal customers won't see your emails.

To capture email leads, you need to ask for them and get consent for ongoing communications. But how? Here are a few strategies:

- Create a pop-up on your website that asks people to sign up for a newsletter or email updates.
- Offer giveaways that customers can get only if they share contact information.
- Encourage followers on social media to sign up for discounts or special offers.
- Give customers the option to join your email list at time of purchase.
- Create valuable tools or resources that people can get only if they share an email address.
- Hold a contest and collect contact information when people enter.
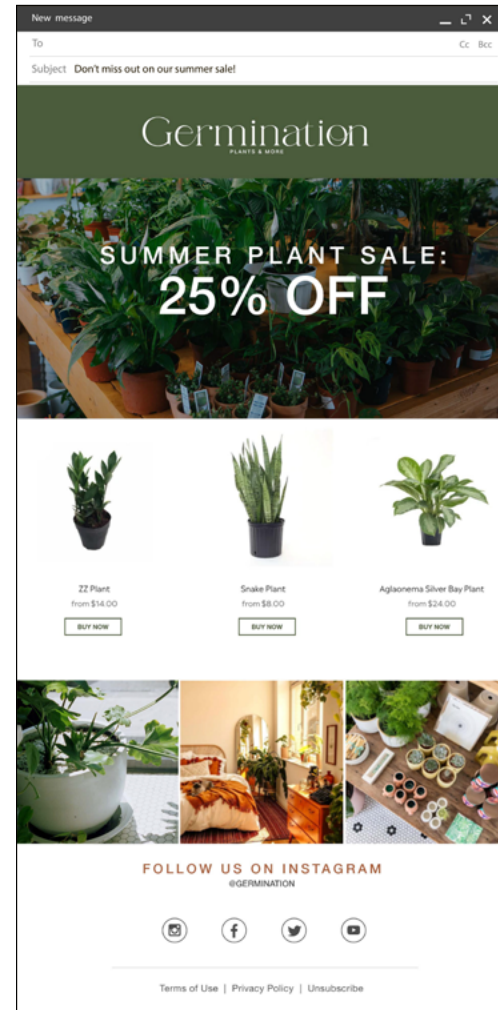
Nearly every email marketing system makes it easy to create email sign-up forms. Some only store that information in the email system's database, but others can integrate with your CRM system, allowing you to track different kinds of customer information and tie them to an email address.

How to be successful with email

You have email addresses. You have a few ideas for the kinds of emails you want to send. But how do you make sure people actually read and respond to your emails?

- **Segment and target your audience.** With a segmented list, you can send targeted offers that address the specific needs of a group of customers. Many email marketing systems have built-in tools that make it easy to create and populate segmented contact lists.

- **Make it valuable.** The more you focus on what your customers are interested in, the more your emails will be read.

- **Develop a cadence.** If your emails come every week on the same day and at roughly the same time, customers will anticipate them.

- **Work on timing.** Experiment to see what time of day people are most likely to open your emails, and don't forget to consider time zones.

New message

Subject: Don't miss out on our summer sale!

Germination

PLANTS & MORE

SUMMER PLANT SALE: 25% OFF

ZZ Plant — from $14.00 — BUY NOW
Snake Plant — from $8.00 — BUY NOW
Aglaonema Silver Bay Plant — from $24.00 — BUY NOW

FOLLOW US ON INSTAGRAM
@GERMINATION

Terms of Use | Privacy Policy | Unsubscribe

More online spaces to consider

There are so many ways to reach customers. What other approaches fit your strategy?

- **Review sites**: Monitor reviews on Google, Yelp, Angi and other sites, and offer proactive responses to negative reviews and gratitude for positive ones.

- **Digital ads**: Search engines and media sites make their money on digital ads. Is there a website or group of websites where you can target potential customers?

- **Videos**: You can post videos on your website, on social media platforms and in advertisements. This is one reason why 87% of video marketers say video delivers a positive return on investment.[1]

- **Texting:** Nearly everyone has a phone by their side at all times. Timely marketing messages such as special offers or discounts can help a campaign gain momentum.

- **Delivery apps**: Food businesses have found that it pays to pay attention to their business name on delivery apps. Descriptive names such as Tasty Burger or Dim Sum Stop tend to be more popular.

- **Amazon**: It's the biggest eCommerce platform in the U.S.[2] You don't have to go all in on Amazon — the terms don't always favor business owners — but a presence there can be helpful.

1. "Video Marketing Statistics 2021," Wyzowl.
2. "Amazon Dominates US Ecommerce, Though Its Market Share Varies by Category," eMarketer, April 27, 2021.

Maximizing your online spaces

Take a holistic approach to save time and money while improving results.

A century ago, the rule of marketing was that you had to reach a customer seven times before they would buy. In today's crowded media landscape, that number is probably a lot bigger. How can a growing business keep attracting attention?

SEO: Be found online

Search engine optimization means making sure your website appears near the top of search results when people want to find businesses like yours.

What matters most are keywords — the words people use when they search for businesses like yours. Search engines give preference to websites that use those words effectively.

Titles, headers and description tags are prioritized in most search engines, so it's smart to focus there first. But make sure you're not "keyword stuffing." Every line of text on your website should be readable. For example, if a page description says, "Boots heels flats sandals shoes socks laces footwear," a search engine is going to read your site as a possible scam and move it way down in the rankings. A better description might be something like, "Need footwear for spring? We have boots, heels, flats and more." The text in the body of your page can then reinforce your keywords and include other words that your customers might use when searching for your products.

Beyond using keywords, you can improve your search rankings with backlinks — other websites that link to your website. Backlinks not only can improve traffic to your website but also show search engines that your website is reputable and trusted by others. To increase backlinks, consider asking friends and partners to post a link to your website. Writing articles for trade websites, engaging in philanthropy and participating in community activities can also create opportunities for backlinks.

Creating a Google My Business profile and keeping it updated is an SEO strategy that can deliver big return on investment. This is the box that appears with a map when you search for businesses. According to Google, a complete Google My Business profile will give Google users information and can help your business get more space on a search page.

Remember the Yellow Pages?

Before the whole world went online, every business was in the Yellow Pages. Today, Google is a more powerful tool than that printed directory ever was. In seconds, any customer has access to page after page of information about you and your competitors. And unlike in the Yellow Pages, you can move up and down in search results based on how you manage your website, which is why it's important not to let your website get buried far down in search results.

TIP
More than half of people surveyed said that voice was one of their top three ways to search. This means that phrases and keywords that match how people talk are increasingly important to include in website text.[1]

1. "Mobile Voice Usage Trends in 2020," Perficient, June 30, 2020.

Homework (approx. 30 minutes)

SEO jump-start

Get started with SEO by researching keywords, checking the speed and mobile friendliness of your page, and analyzing backlinks.

Keywords

Keywords are the building blocks of every SEO strategy. But how do you find the right words? Start by brainstorming. Type a basic description of your product or service with an asterisk at the end into a Google search bar. The asterisk tells Google that you're interested in similar words or phrases. Google will automatically create a dropdown list of what to search.

> ✎ Write down any words or phrases that describe your product or service.

Repeat this process with other terms, and write down what seems useful. If you have a Google Ads account, you can use its Keyword Planner to see monthly search volumes for each term. Other useful SEO tools include Semrush, Moz and Screaming Frog.

Homework (continued)

Site performance

Is your website mobile-friendly? Find out with Google's Mobile-Friendly Test Tool.

Does your website load quickly? If not, it can affect your search performance. Run a speed test with PageSpeed Insights, and get suggestions for making it faster.

Backlinks

Find out who's linking to your top competitors by entering a competitor's URL into the Moz Link Explorer.

> ✎ In Moz, sort the "target" to "this root domain" to see every page that links to the site. Do you notice any pages that could be linking to your website or have new ideas for backlinking sites? Write them here, and then get to work asking for backlinks.

Automation: Do more with less

Automation allows you to keep marketing your products or services without spending a lot of time on each message. The most common approach is email automation, but automated messages can be used with texting, chatbots and social media. Automated messages can include:

- **Welcomes**: Greet new subscribers or followers with a message and something special such as a discount code or a giveaway.

- **Reminders**: Is there an event or a sale your customers won't want to miss? Or maybe they've scheduled a consultation, and you want to make sure they have the information they need.

- **Drip campaigns**: Often your customer will take some warming up. The idea of a drip campaign is that you build interest progressively through a series of messages. For example, you might send a welcome message, followed by a helpful guide a week later, then a message in week three requesting an appointment.

- **Requests for feedback**: Soon after a customer has worked with you or made a purchase, send a brief survey or include links to review sites asking for feedback.

- **Recommendations**: If you have a CRM system that can track customer data closely, you might send a message with products or services you recommend based on previous purchases.

- **Celebratory occasions**: If your CRM tracks personal information about your customers, use it to send personalized messages on birthdays, anniversaries or graduations. Acknowledging special occasions can show your customers that you care.

Multichannel marketing: Keep the momentum going

Make the most of your efforts. Repurpose blog posts and other content in multiple spaces:

- Link to it on social media.
- Include an excerpt in an email.
- Post it as a tweet thread.
- Use a lead capture form on blog and other webpages.
- Include images from your blog post on social media.

An effective marketing strategy takes advantage of the opportunity to use marketing content again to reach new audiences in new ways.

A CRM system can help you automate custom messages to your customers.

TIP

Image marketing and building community

As a business owner, you have many ways to build community. What's important is showing up for your people.

In March 2020, Greg Tillery, the owner of We Dat's Chicken & Shrimp in New Orleans, shut down to help limit the spread of COVID-19. But he still had a refrigerator full of food. Rather than let it go to waste, he cooked it all and fed firefighters, trash collectors and anyone in his community working hard to keep the city running. This sense of community is in Tillery's blood, but he also found it was good business. People remembered him, and they remembered his restaurant.

It took months before Tillery reopened. In the meantime, he made seasonings and stocked them in New Orleans grocery stores. It didn't take long before he noticed his restaurant brand popping up on social media.

"People tagged me on Instagram all the time," Tillery recalls. "They'd say, 'The restaurants were closed, but I made my own Wuzzam Wings.'"

Tillery also shared his journey on Facebook. He talked about what it took to reopen and the lessons he learned after a difficult year. His openness only won him more fans.

As of June 2021, his restaurants were running at 100% and he'd even opened two new locations in Texas.

"People have been cooped up in the house for a year," says Tillery. "They want to go out and eat."

Every business has the potential to create its own unique community. Like Tillery, you might create community by supporting essential workers. You can also promote the creativity and good work of your customers by sharing their social media posts in your marketing (with their permission, of course). Sometimes all it takes is having a little fun.

Events, meetups, charity events, contests and other interactive experiences can connect customers to each other. It's important to ask for customer feedback and input and to acknowledge how much they mean to your business. However you choose to build community, what's important is that it comes from a sincere desire to make meaningful connections with people — that they're your first priority.

Analyzing and adjusting

Find out whether your digital marketing is working and how to shift strategies as you go.

Congratulations! You've done a ton of work to set up your business for success online. With what you've learned so far, you're already in a strong position to pull ahead of the competition.

But is now the time get content? No.

One big advantage of digital marketing is that it can produce a lot of data. Effective marketers use this information to adjust their strategies and keep moving forward.

Defining your goals

To measure your success as a marketer, you first need to define what success means. Many people use the SMART system to help them set goals.

- **Specific**: Your goals need to be focused. "Make everyone love my brand" is too big. But a goal such as "25% more people read my emails" is specific enough to put into action.
- **Measurable**: Set goals that you can get data for so that you know when you've met your goal and when you've fallen short.
- **Achievable**: Another problem with the "make everyone love my brand" example is that it's not achievable. Think smaller. Look for potential wins, and when you get there, move the bar higher.

- **Relevant**: You can have fun with marketing, but also try to set goals that align with your overall business strategy. If your efforts don't in some way help you sell more products or grow your client base, you're probably not pursuing a relevant goal.
- **Time-bound**: Goals are about measuring progress. A time frame can help you see how far you've come and what's reasonable to expect next.

Establishing metrics

Let's review some of the most common marketing metrics.

Google Analytics

Google offers a tool to help you analyze your website traffic. The challenge with Google Analytics is that there's so much data it's hard to know what's important. Here are a few of the data points that you might want to pay attention to.[1]

- **Average session duration**: The amount of time the average visitor spends on your website
- **Pages/session**: The average number of pages visitors see per session
- **Referrals**: External websites where visitors clicked on a link to arrive at your website
- **Bounce rate**: When a visitor comes to your website and then clicks away without taking any action, such as visiting a second page or filling out a form
- **Conversions**: When a website goal is reached; can include a sale, the completion of a lead form or any other goal you might have for website visitors
- **Demographics**: Visitor categories that Google tracks, including age, gender (only male or female) and interests (such as food, sports or technology)

Email analytics

What can you track in your email marketing system?

- **Contacts**: The number of people with email addresses stored in your email marketing system
- **Open rate**: The percentage of email recipients who opened an email
- **Click-through rate**: The percentage of email recipients who clicked on a link in your email — an important indicator that your email CTAs are working
- **Conversion rate**: What happens after an email recipient clicks (This is easier if your landing pages are provided by your email marketing system, but many CRM systems can also track this information.)
- **Sharing rate**: The percentage of people who forward your email or share it on social media
- **Unsubscribes**: The number of people who opt to be removed from your email list

1. Google Analytics is always changing and evolving. For the latest tools and terms, visit marketingplatform.google.com/about/analytics.

Social media analytics

Every social platform tracks engagement differently, but the concepts are similar. To see analytics on Facebook, Instagram, LinkedIn and Pinterest, you'll need to set up a business profile. On Twitter or TikTok, any profile can see analytics, but there are a few steps needed to begin tracking them.

- **Post reach**: The number of times a post appears in a subscriber feed
- **Applause rate (e.g., likes)**: The percentage of people who "liked" your content compared with the total number of followers
- **Amplification rate (e.g., shares)**: The percentage of people who shared your post compared with the total number of followers
- **Engagement rate**: All interactions (likes, shares, comments, etc.) per post compared with the total number of followers
- **Follower growth rate**: The number of followers compared with the follower count at a previous time
- **Click-through rate**: The percentage of post viewers who clicked on a link
- **Conversion rate**: The percentage of post viewers who took a specific action after clicking on a link in a post

Test your SEO

Google Search Console is a free tool designed to help you see how your website appears in Google searches. It explains the basic concepts powering Google's search engine, provides traffic and backlink data, alerts you to fixes that can improve performance and can help you troubleshoot usability issues.

Other kinds of marketing data

You can learn so much from your customers.

- **Online surveys**: Want to know what your customers think about your marketing and outreach? Ask them. Even short surveys can tell you a lot about how you're doing.
- **Net promoter score**: On a scale of 1 to 10, ask your customers whether they'd recommend your business to friends, family or colleagues. The average of the answers is your net promoter score. This measurement allows you to see how strong your brand is right now and to track its momentum over time.
- **ROI**: It's tricky to track the return on investment for branding, but in campaigns where you're driving toward a specific type of conversion, such as a sale, you can do a simple calculation: Profit on campaign sales/Campaign marketing costs x 100% = ROI.

Establish a learning culture

All the data you collect needs to be analyzed by you and your team so that you can make adjustments that improve your results. Here are a few ways you can build a culture that puts your marketing data to use.

- **Collect data at regular intervals.** You can't analyze what you don't have. Making data collection a habit is the most important step in establishing a learning culture.

- **Maintain "clean," useful data.** Data that is inconsistent or full of duplicate entries won't help you make good decisions.

- **Create a dashboard where you can see all of your metrics in one place.** This allows you to both see a big picture and drill down into specific details.

- **Regularly share with your team what you're learning.** It can be helpful to socialize information throughout your business and discuss it. What insights emerge? What ideas can help you market your business more effectively?

- **Encourage experimentation.** Don't be afraid to try new approaches. You might find a major opportunity this way.

Have you tried A/B testing?

A/B testing allows you to test two approaches to an email, social media post or other content. It works best when you test only one variable, such as a subject line or an image. Most email and social media management systems have built-in A/B testing capabilities that make it easy to compare your results.

Benito Reyna
Owner, Amigo's Pottery
Chase for Business customer

Homework (approx. 15 minutes)

Create a dashboard

Once you know what data you want to track, it's helpful to have a dashboard where you can see it all in one place.

There are software tools you can use to create dashboards, but these often require a lot of technical skill. A simpler approach is to create a spreadsheet dashboard. This will require you to manually move data into the spreadsheet, but in Microsoft Excel or Google Sheets, you can create graphs that help you visualize your progress. This approach also gives you a document that can help you lead strategy and accountability meetings.

This exercise can help you get started on your dashboard and create processes for keeping it updated.

Get started

List up to 10 metrics you want to include in your dashboard.	Which 3–5 metrics should be represented by a graph?

List the types of reports, or data downloads, you'll need to run to collect the data. For example, if you're interested in a lot of email data, you'll need to download one or more reports from your email management system. How often will you need to run the reports, and who will run each report?

Type of report	How often	Who

How often will you meet to review the dashboard?

Last step

Create calendar invites for you and your team to collect data, update the dashboard and meet to discuss the numbers.

Own your digital spaces

Now's the time to claim your space online.

New apps and marketplaces have emerged to help customers find businesses like yours. This is your time to take full advantage of the opportunity.

A savvy marketing strategy that puts forward what makes you and your business unique can put you ahead of the competition. Your confident, authentic voice is what your business needs. You + Strategy = Growth. Go get it.

✎ Worksheet (approx. 5 minutes)

Your progress report

Let's look at some of the good work you've done today and what's ahead for you and your business.

Branding

✎ How would you describe your brand today?

✎ What can your brand become within the next three years?

✎ Worksheet (approx. 25 minutes)

Digital marketing spaces

On a scale of 1 to 7, rank the importance of the following digital marketing spaces for your business this year:

_____ Website

_____ Social media
    What is your top social media site?

_____

_____ Email

_____ Paid advertising

_____ Text messages

_____ Online reviews

_____ eCommerce sites such as eBay and Amazon

Maximizing your spaces

✎ Which of your business's digital spaces best support each other?

✎ What will you do this year to maximize the value of each digital space?

Analyzing and adjusting

✎ What are the top five things (insights or data points) you want to know about your marketing over the next year?

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