

25 STEPS FOR 2025

BUILD A WINNING MARKETING STRATEGY



Sutherland
Weston



PHASE 1

Setting the Strategic Foundation

1. Define Business Goals

Clear business goals are the foundation of an effective marketing strategy. They set the direction, provide focus, and ensure every marketing effort is purpose-driven. Without clear goals, your marketing risks becoming scattered, wasting time and resources. Goals keep your team aligned and give you measurable benchmarks to assess progress and success.

- ✔ **Identify primary business objectives for 2025.** These should reflect what you want your business to achieve, such as increasing revenue, expanding market share, launching a new product, or entering a new market. Think big but stay grounded in reality.
- ✔ **Set 3-5 specific, measurable goals.** For example, instead of simply saying, “increase revenue,” refine it to: “Increase revenue by 20% by Q4 2025 through new customer acquisition and upselling to existing clients.” This clarity helps you plan actionable steps.
- ✔ **Prioritize goals based on impact and feasibility.** Some goals will deliver a higher ROI or are more achievable within your current capacity. Focus your resources there while keeping long-term ambitions in mind.

2. Translate Goals into Marketing Objectives

Business goals provide the destination, while marketing objectives map out how to get there. Think of marketing objectives as the action plan that bridges the gap between ambition and execution. They define the specific actions and outcomes that your marketing efforts need to achieve to support overarching business goals. Without clear objectives, it’s like setting out on a road trip with no map—directionless and frustrating.

Defining SMART (Specific, Measurable, Achievable, Relevant, Time-bound) objectives helps focus marketing efforts and ensures alignment with broader business ambitions.

- ✔ **For each business goal, create a SMART marketing objective.** A good marketing objective directly supports your business goal and includes specific, measurable elements. For example, if your goal is to “increase revenue by 20%,” a marketing objective might be: “Generate 500 new qualified leads through digital advertising by Q3 2025.” SMART objectives clarify the “what” and “how” for your marketing efforts.
- ✔ **Set KPIs to track progress.** Key Performance Indicators (KPIs) like lead conversions, website traffic, or social media engagement provide measurable benchmarks. These help you monitor whether your marketing objectives are on track to achieve your business goals.
- ✔ **Ensure objectives are aligned with each business goal.** Every marketing objective should tie back to your business goal, ensuring your efforts remain focused. If a proposed marketing activity doesn’t support a broader goal, it’s likely a distraction and should be reconsidered.



PRO TIPS:

Break It Down, But Keep the Big Picture

You may need multiple objectives to reach a single business goal, and that’s okay—progress often happens step by step. Identify small, trackable milestones that signal forward motion, but don’t get lost in the minutiae. Remember, Rome wasn’t built in a day, but it also wasn’t built by counting nails! Aim for objectives that show tangible progress toward your larger vision, so each step feels purposeful and keeps you on track for success.

And remember, no one’s ever upset about expanding their goal because they hit their original target ahead of schedule!



Elizabeth Sutherland, APR

3. Assess Capacity

Having the right resources is critical for successful execution. A great marketing strategy can falter without the capacity to implement it effectively. Assessing your team's skills, availability, and tools ensures you're not over-promising or over-stretching. This step helps you plan realistically, avoid bottlenecks, and identify where investments in resources or training may be necessary.

- ✔ **List current team skills and identify gaps.** Start by cataloging the skills your team already brings to the table, such as content creation, social media management, or data analytics. Then identify gaps that may limit your ability to execute (e.g., lack of video editing expertise or advanced SEO knowledge). This clarity can guide hiring decisions, training opportunities, or outsourcing needs.
- ✔ **Estimate team hours available for new initiatives.** Determine how much capacity your team has beyond existing responsibilities. Are they already stretched thin? If so, consider reallocating tasks, postponing less-critical initiatives, or bringing in temporary support to prevent burnout and ensure quality.
- ✔ **Audit existing tools and identify new resources needed.** Review your current technology stack—tools like your CRM, email marketing software, or project management platform. Are they meeting your needs? If not, identify gaps and explore options for upgrading or expanding your toolkit to support your goals effectively.

4. Identify Target Audience & Create Personas

Your audience determines the success of your strategy. Without a clear understanding of who you're talking to, even the best-crafted campaigns can miss the mark. By diving into the needs, behaviors, and preferences of your audience, you can create messaging and campaigns that resonate deeply, fostering engagement and loyalty.

- ✔ **Analyze current customer data to define key demographics.** Start by reviewing data you already have—purchase histories, website analytics, social media insights, and CRM information. Look for trends that reveal who your core audience is (e.g., age range, geographic location, buying patterns).
- ✔ **Segment your audience based on shared characteristics.** Break your audience into smaller, distinct groups that share common traits, such as interests, behaviors, or challenges. This segmentation allows for more targeted and effective messaging.
- ✔ **Create 3-5 detailed buyer personas.** Personas should be as vivid and human as possible. Go beyond demographics to include attitudes, motivations, challenges, and preferences. For example, instead of "Sarah, a 35-year-old professional," think "Sarah, a 35-year-old project manager who values time-saving solutions and enjoys discovering new productivity tools."



PRO TIPS:

Capacity Planning Goes Beyond Marketing

Assessing your capacity isn't just about supporting your marketing goals—it's essential for scaling your entire business effectively. If you typically need 12 weeks to bring on new technical staff, plan ahead to avoid having clients wait for service. Consistently meeting customer needs without delays builds trust and loyalty, while setting poor expectations or leaving clients hanging can turn them away. Keep an eye on both current bandwidth and future growth to ensure you're always ready to deliver.



Shelley Sund

Download our [persona worksheet](#) to make this process just a bit easier for you and your team!



Elizabeth Sutherland, APR



PRO TIPS:

The More You Know, The Better!

Combine qualitative and quantitative insights for the most accurate picture of your audience. Surveys and interviews reveal the “why” behind behaviors, while analytics provide the “what.” Together, they give you the full story, helping you craft messaging and campaigns that truly resonate.

Don't Forget to Take Action!

Use the SWOT to guide actionable decisions. For instance, if a weakness is “limited marketing expertise,” and an opportunity is “a growing digital audience,” the action could be “invest in digital marketing training or hire specialized staff.” The goal isn't just to list insights but to make them work for you.

5. Conduct Research on Audience Preferences

Data-driven insights make marketing more effective. Understanding your audience's behaviors and preferences is like unlocking a cheat code for success. It allows you to identify what resonates, what doesn't, and where to focus your efforts for maximum impact. The more you know, the better you can tailor your messaging and campaigns to drive sales.

- ✓ **Use surveys or interviews to collect data on audience needs and behaviors.** Direct input from your audience is invaluable. Create short, focused surveys or set up interviews to uncover their preferences, challenges, and motivations. For example, ask what type of content they find helpful or what factors influence their buying decisions. This qualitative data provides context to complement your analytics.
- ✓ **Leverage analytics tools for behavioral insights.** Tools like Google Analytics, social media insights, or email marketing platforms can reveal how your audience interacts with your brand. Look for patterns in website behavior (e.g., pages with the most views, drop-off points in the sales funnel) or content performance (e.g., highest engagement posts).
- ✓ **Analyze responses to refine messaging and content.** Synthesize your findings into actionable insights. For example, if analytics show high engagement with “how-to” blogs but survey responses indicate a need for more detailed examples, refine your content strategy accordingly.

6. Perform SWOT Analysis

A SWOT analysis helps you see the big picture. It's a strategic tool that highlights what you do well, what needs improvement, and what external factors could help or hinder your success. A clear understanding of strengths, weaknesses, opportunities, and threats allows you to prioritize focus areas and allocate resources effectively. It's a strategic map that guides your decision-making.

- ✓ **List internal strengths and weaknesses.** Reflect on what's within your control. Strengths might include a loyal customer base, a strong brand reputation, or a talented team. Weaknesses could be limited resources, skill gaps, or outdated technology. A realistic assessment will provide a solid foundation for planning.
- ✓ **Identify external opportunities and threats.** Look at factors outside your control that could influence your strategy. Opportunities might include new market trends, untapped customer segments, or advancements in technology. Threats could include economic downturns, new competitors, or changing regulations.
- ✓ **Visualize findings to prioritize focus areas.** Create a clear, visual representation of your SWOT analysis (e.g., a four-quadrant grid) to see everything at a glance. This helps you identify areas to capitalize on (e.g., leveraging strengths to seize opportunities) or mitigate (e.g., addressing weaknesses to counter threats).

7. Develop a Unique Selling Proposition

Your Unique Selling Proposition (USP) is what sets you apart. And highlights why customers should choose your brand over competitors. It's the foundation of your messaging and helps you carve out a distinct space in your industry. A strong USP not only attracts attention but also builds trust and loyalty by communicating clear value.

- ✔ **Define what sets your product/service apart.** Start by identifying the key features, benefits, or values that differentiate your offering. Focus on what matters most to your target audience.
- ✔ **Craft a concise USP statement.** Your USP should be clear, compelling, and memorable. Think of it as your elevator pitch—short enough to be understood instantly but powerful enough to stick.
- ✔ **Test the USP with trusted clients and refine based on feedback.** Once you have a draft, share it with a few trusted customers or team members to gauge their reaction. Does it resonate? Is it clear? Use their insights to refine your message until it captures the essence of your brand and speaks to your audience's needs.



PHASE 2

Choosing Marketing Channels & Setting Tactics

8. Select Marketing Channels

The right channels connect you with your audience. Not every marketing channel will be effective for every business, so it's crucial to focus on those where your audience spends their time. Choosing the right mix of channels maximizes your reach, ensures your efforts are targeted, and avoids wasting resources on platforms that don't deliver results.

- ✓ **Identify 3-5 primary channels based on audience preference.** For example, a B2B business might focus on LinkedIn and email marketing, while a B2C company might find success with Instagram and TikTok. Selecting a manageable number of channels allows you to focus your efforts without spreading yourself too thin.
- ✓ **Allocate time and resources to each channel based on potential impact.** Rather than dividing your budget or time equally, prioritize channels that offer the best ROI. For example, if 70% of your leads come from email marketing, it makes sense to dedicate a larger portion of resources there.
- ✓ **Set initial benchmarks for success on each platform.** Establish measurable goals like engagement rates, website clicks, or lead conversions. These benchmarks will help you assess what's working and make data-driven adjustments.

9. Set a Budget

A well-defined budget optimizes your resources and avoids overspending. Your marketing budget acts as the backbone of your strategy, determining what you can realistically achieve and ensuring resources are used wisely. By planning your spending strategically, you can focus on high-impact channels while staying agile enough to adapt to new opportunities.

- ✓ **Review past spend and set a preliminary budget.** Look at what you spent in the previous year and evaluate ROI for each channel or tactic. This historical data will give you a baseline for what worked, what didn't, and where adjustments are needed. If you're starting fresh, use industry benchmarks as a guide.
- ✓ **Allocate funds across chosen channels and key tactics.** Prioritize investments in channels that align with your audience and objectives. Be intentional—overloading too many channels can dilute your effectiveness.
- ✓ **Keep 10-15% of the budget flexible for adjustments.** Marketing trends, unexpected opportunities, or underperforming tactics can arise throughout the year. Having a flexible portion of your budget allows you to pivot quickly without derailing your overall plan.



PRO TIPS:

Set Resource Percentages and Bold, Achievable Benchmarks

When allocating resources across channels, consider setting percentages instead of hard hours or dollar amounts. This flexible approach adapts easily to changes and helps balance your investment without locking you into specifics. And as you establish benchmarks, aim for targets that push you to stretch but are still realistic—bold, yet attainable. Setting achievable goals keeps momentum high; there's nothing more satisfying than hitting your benchmark by August and raising the bar!



Elizabeth Sutherland, APR

Don't Just Set It and Forget It!

Remember to measure progress regularly, so you can reallocate funds to the channels or campaigns driving the best returns.

10. Create a Marketing Calendar

Consistency drives momentum. A well-planned marketing calendar ensures your efforts are organized, timely, and aligned with your audience's needs. By outlining activities in advance, you can make the most of key opportunities, avoid last-minute scrambles, and maintain consistent engagement across channels.

- ✓ **Identify key dates.** Start by noting significant dates for your business, such as product launches, seasonal trends, holidays, or industry events. Understanding when your audience is most active or likely to engage (e.g., Black Friday for retail or tax season for financial services) ensures your campaigns hit at the right time.
- ✓ **Outline campaign themes.** Build campaigns around those dates, focusing on themes that resonate with your audience. For example, a local gym might promote “New Year, New You” campaigns in December and January and “Summer Ready” content in April and May.
- ✓ **Set up a content calendar.** Break your marketing calendar into a content schedule, including blog posts, social media updates, email campaigns, and ad placements. Include key deadlines, such as when content needs to be drafted, reviewed, and published, and schedule regular check-ins to evaluate performance and make adjustments.

11. Develop Core Messaging & Calls to Action

Clear messaging and CTAs guide the customer journey. Your messaging shapes how your audience perceives your brand, while calls to action (CTAs) inspire them to take the next step. Together, they create a seamless path that moves prospects from awareness to conversion. Effective messaging and CTAs address your audience's needs, build trust, and drive results.

- ✓ **Draft key messages for each audience segment.** Tailor your messaging to reflect the unique needs, preferences, and pain points of your audience. Clear, relatable messages make your brand more engaging and memorable.
- ✓ **Write CTAs for various touchpoints.** Each CTA should align with its specific goal and placement. For instance, “Subscribe for Updates” works well in newsletters, while “Shop Now” is ideal for product pages. Keep CTAs direct, action-oriented, and tied to a clear benefit.
- ✓ **Test CTAs with sample groups and optimize for clarity and impact.** Use A/B testing to compare variations of your CTAs and identify what resonates best with your audience. For example, does “Learn More” outperform “Get the Details”? Small tweaks can lead to significant improvements in engagement and conversions.



PRO TIPS:

Use this ready-to-go marketing calendar, or modify it to make it your own.

Make Your Calls to Action Really Work for You!

Your CTAs should inspire action without feeling pushy. Focus on the value you're offering rather than the action you're requesting. For instance, “Start Your Free Trial Today” highlights the benefit (a free trial) rather than just the action (starting now). The more your audience sees the payoff, the more likely they are to click.



Makaila Hickey

12. Design Visual Elements

Visuals are the first impression of your brand. Your visuals often speak before your words. Strong, consistent visuals create immediate recognition, build trust, and reinforce your brand identity. Whether it's a logo, social post, or email header, every visual element should align with your messaging and reflect the essence of your brand.

- ✔ **Audit current brand visuals for consistency.** Take a close look at your existing assets—logos, color schemes, fonts, and imagery. Are they consistent across platforms and campaigns? If not, address inconsistencies to create a cohesive visual identity.
- ✔ **Design or update graphics for upcoming campaigns.** Tailor your visuals to the themes and goals of your campaigns. For example, a holiday promotion might include festive elements within your brand's color palette, while a product launch could focus on clean, modern visuals to highlight innovation.
- ✔ **Ensure visuals align with messaging across platforms.** Your visuals and messaging should work together seamlessly. If your tone is playful, your visuals should reflect that with vibrant colors and dynamic designs. If your tone is professional, opt for clean lines and polished layouts. The synergy between words and visuals strengthens the overall impact.

13. Leverage SEO

SEO increases your visibility in search engine results. When done well, search engine optimization ensures your content is discovered by the right audience at the right time—when they're actively searching for solutions you offer. Optimizing your website and content improves discoverability, drives organic traffic, and builds long-term visibility without relying solely on paid ads.

- ✔ **Perform keyword research using tools like Google Keyword Planner.** Start by identifying terms and phrases your target audience is searching for.
- ✔ **Identify 5-10 focus keywords and incorporate them into content.** Once you have a list, strategically integrate those keywords into your website's key areas, including page titles, headings, meta descriptions, and body text. Don't overstuff—focus on natural placement to maintain readability and avoid penalties from search engines.
- ✔ **Regularly update website content based on SEO performance.** SEO isn't a one-and-done effort. Use tools like Google Analytics or SEMrush to monitor your rankings and traffic.



PRO TIPS:

Create a Visual Style Guide for Consistency

Consistent visuals are key to building brand recognition and trust. Develop a style guide that defines logo usage, color schemes, typography, and image styles, ensuring every design element aligns with your brand's personality and messaging across all platforms. This guide will streamline the design process for campaigns and help maintain a cohesive look in every piece of content.



Sherado Sands

It About What They Want, Not What You Sell

Focus on user intent, not just keywords. Search engines prioritize content that matches what users want to find. For example, someone searching for "how to improve SEO" is likely looking for actionable tips, not a sales pitch. Create content that solves their problems and keeps them engaged—this boosts rankings and builds trust over time.



Jeff Dreher

14. Utilize Social Media

Social media connects you directly with your audience. It's a powerful tool for fostering relationships, driving brand awareness, and encouraging conversions. By meeting your audience on the platforms they frequent most, you create opportunities to build loyalty and strengthen your brand's presence.

- ✓ **Identify 2-3 core platforms based on audience activity.** Not every platform is right for your business. Prioritize the platforms that align with your goals and focus your energy there.
- ✓ **Plan content mix (Culture, Community, Commerce) for each.** Successful social media strategies balance different types of content. Educate your audience with how-tos, promote your offerings with targeted campaigns, and engage them with interactive posts like behind-the-scenes videos. Tailor the mix to each platform's strengths and your audience's preferences.
- ✓ **Set engagement goals and adjust as needed.** Establish metrics to measure success, such as likes, shares, comments, or click-through rates. Remember, social media is dynamic—being responsive to trends and feedback keeps your content fresh and impactful.

15. Implement Email Marketing

Email marketing is a powerful tool for lead nurturing and customer retention. Unlike many other channels, email offers a direct line to your audience, allowing you to deliver personalized, timely content straight to their inbox. With the right strategy, you can use email to build relationships, encourage repeat business, and guide prospects down the sales funnel.

- ✓ **Segment contacts based on behavior or demographics.** The key to effective email marketing is relevance. Use behaviors (e.g., past purchases or website activity) or demographics (e.g., location, age) to ensure each group receives content tailored to their needs.
- ✓ **Develop targeted email sequences for each segment.** A one-size-fits-all approach rarely works. Instead, create sequences that align with the audience's journey. For instance:
 - **Welcome Sequence:** Introduce your brand and highlight key offerings.
 - **Nurture Sequence:** Provide valuable content that builds trust and keeps your audience engaged.
 - **Re-engagement Sequence:** Win back inactive subscribers with exclusive offers or fresh content.
- ✓ **Track metrics to refine future emails.** Monitor key performance indicators (KPIs) such as open rates, click-through rates (CTR), and conversions. Low open rates might signal issues with your subject lines, while low CTRs could indicate that your content or CTA isn't resonating. Use A/B testing to optimize these elements and improve performance over time.

16. Invest in Paid Advertising

Paid ads increase your reach, connecting you with targeted audiences across platforms.

They allow you to put your message directly in front of the right people at the right time, driving awareness, engagement, and conversions.

- ✓ **Set budget and targets for paid ads.** Start by defining clear goals for your campaigns—whether it's generating leads, increasing website traffic, or boosting sales. Allocate your budget strategically, focusing on platforms and ad types that align with your audience and objectives.
- ✓ **Design ad creatives and experiment with A/B testing.** Strong visuals, compelling headlines, and clear CTAs are critical for ad success. Create multiple variations of your ads and run A/B tests to determine which combinations resonate most with your audience. This approach helps improve results over time.
- ✓ **Monitor ROI and adjust budgets based on performance.** Track metrics like cost-per-click (CPC), click-through rate (CTR), and return on ad spend (ROAS) to assess your campaign's effectiveness. Shift your budget toward high-performing ads and consider pausing or revising those that underperform.

17. Incorporate Video Content

Video fosters engagement by making your brand more relatable. As one of the most versatile and engaging content types, video helps you connect with your audience on a deeper level. Whether it's a product demo, a behind-the-scenes look, or a brand story, videos can capture attention, build trust, and inspire action.

- ✓ **Identify 2-3 video topics.** Focus on topics that align with your audience's needs and your marketing goals. For example:
 - **Product Demos:** Showcase how your product works and the benefits it provides.
 - **Brand Story:** Share your company's mission, values, and journey to build emotional connection.
 - **Customer Testimonials:** Highlight success stories to build credibility and trust.
- ✓ **Outline a video schedule, including live or recorded formats.** Decide which topics are best suited for live videos (e.g., Q&A sessions, product launches) versus pre-recorded formats (e.g., tutorials, testimonials).
- ✓ **Track video performance metrics to optimize content.** Monitor key metrics such as views, watch time, and engagement (likes, shares, comments). Use this data to identify what's working and refine future videos. For example, if viewers drop off at the 30-second mark, you may need to make your content more concise.



PRO TIPS:

Don't rely solely on polished, high-production videos.

Watch the [pro tip video](#)



Ric Tyler



PHASE 3

Customer Engagement & Lead Generation

18. Develop Lead Generation Tactics

Lead generation expands your customer base, giving you fresh opportunities to convert. It's the first step in building relationships with potential customers. Effective lead generation provides value upfront, creating a win-win where your audience gets something useful, and you gain a chance to nurture them into loyal customers.

- ✓ **Create gated content to capture leads.** High-value content, like eBooks, whitepapers, or webinars, is an effective way to attract leads. The key is to offer something your audience finds genuinely valuable in exchange for their contact information. For example:
 - **eBooks or Guides:** Provide actionable insights or strategies relevant to your audience.
 - **Webinars:** Offer in-depth expertise or live Q&A opportunities. Make sure the content is tailored to your audience's needs and aligns with your business goals.
- ✓ **Design landing pages optimized for conversions.** A well-designed landing page is crucial for capturing leads. Focus on:
 - A clear and compelling headline.
 - Minimal distractions, such as navigation links.
 - A simple form that collects only essential information (e.g., name, email). Pair the page with a strong CTA like "Get Your Free Guide" to drive action.
- ✓ **Set up tracking for lead sources and conversion rates.** Use analytics tools to monitor where leads are coming from (e.g., social media, email campaigns) and how well your landing pages are converting.



PRO TIPS:

Choose Gated Content Wisely!

Not all lead generation tactics need to be gated. Consider offering free, ungated content as a teaser to build trust, then guide your audience to gated offers for deeper engagement. This creates a natural progression and reduces friction while still capturing high-quality leads.



Elizabeth
Sutherland, APR

19. Implement a Customer Retention Plan

Retention is as important as acquisition. While acquiring new customers can be exciting, keeping your existing customers happy and engaged is often more cost-effective and profitable. Loyal customers not only bring repeat business but also become ambassadors driving word-of-mouth referrals.

- ✓ **Design loyalty programs or exclusive offers for existing customers.** Reward your best customers with perks that make them feel valued. Examples include:
 - A points-based rewards system where purchases earn discounts or freebies.
 - Exclusive access to new products, services, or events before the general public.
 - Personalized offers based on past purchases, making them feel uniquely recognized.
- ✓ **Set up regular touchpoints.** Consistent communication keeps your brand top-of-mind. Examples include:
 - **Monthly Newsletters:** Share updates, tips, and special offers.
 - **Personalized Discounts:** Offer birthday or anniversary discounts.
 - **Follow-ups:** Check in after purchases to ensure satisfaction and encourage feedback. These touchpoints show customers you're invested in their experience, not just their wallet.
- ✓ **Track retention metrics.** Monitor key indicators like:
 - **Repeat Purchase Rate:** The percentage of customers who make multiple purchases.
 - **Churn Rate:** The rate at which customers stop doing business with you. Use this data to identify trends and opportunities for improvement.

20. Establish PR and Outreach Goals

PR and media outreach elevate brand awareness and credibility. A strong PR strategy helps position your brand as an authority, connecting you with new audiences and strengthening trust among existing ones.

- ✓ **List key media outlets or influencers to approach.** Identify publications, blogs, podcasts, or social media influencers that align with your target audience and industry. For example:
 - Local or regional media
 - Trade publications
 - Influencers with authentic engagement and a following that matches your audience.
- ✓ **Create a PR calendar, scheduling press releases or announcements.** Plan your outreach around key moments, such as:
 - Product launches or events.
 - Milestones (anniversaries, awards, or partnerships).
 - Seasonal trends or timely topics in your industry.
- ✓ **Track coverage and engagement with media contacts.** Use tools to monitor where and how your brand is being mentioned. Metrics to track include:
 - The reach of articles, mentions, or features.
 - Engagement, such as comments, shares, or backlinks from media coverage. Maintain a relationship with media contacts by following up with thank-you notes or updates to keep your brand top-of-mind.



PRO TIPS:

Aim high, but set reasonable expectations!

With so many local, regional, and national media outlets, it is easy to get excited and start dreaming of your big new thing or a star employee being featured on The Today Show. While it's certainly okay to reach for the stars and aim for the best national exposure, don't minimize the value of seeing exposure on everything from statewide TV to local weeklies and blogs. Recognizing the value of every media outlet, while appreciating how many story pitches any outlet receives any given day can help you appreciate a successful pitch turned into a nice story for your business or organization.



Dan Cashman

21. Gather Feedback

Feedback is essential for continuous improvement. Listening to your customers aids in refining your offerings and messaging. Their insights highlight what resonates, what doesn't, and where you can deliver more value.

- ✓ **Develop a survey for customer feedback on product/service quality.** Create a short, targeted survey to capture insights about their experience. Questions might include:
 - “What did you love most about [product/service]?”
 - “What could we do to improve your experience?”
 - “Would you recommend us to a friend or colleague? Why or why not?” Keep it concise to maximize participation.
- ✓ **Follow up with clients for testimonials or success stories.** Reach out to satisfied customers for a deeper look at their experience. Ask open-ended questions like:
 - “How has [product/service] helped you achieve your goals?”
 - “What specific results have you seen since working with us?” Use their words to craft compelling testimonials, quotes, or case studies (with their permission, of course).
- ✓ **Use feedback to improve offerings and adjust marketing messaging.** For example, if customers frequently request a feature, consider adding it to your roadmap. Similarly, use positive feedback to refine your messaging, highlighting aspects customers find most valuable.



PHASE 4

Partnerships, Training, & Competitor Analysis

22. Explore Partnerships with Influencers

Influencers expand your reach by endorsing your brand to a trusted audience. A well-chosen influencer can introduce your brand to potential customers with built-in credibility. Strategic partnerships create trust and drive engagement more efficiently than many traditional advertising methods.

- ✓ **Identify influencers with overlapping audiences.** Look for influencers who align with your brand values and speak to your target audience. Consider:
 - Industry experts or thought leaders with strong credibility.
 - Niche influencers with highly engaged audiences, even if their following is smaller.
 - Avoid focusing solely on follower count—prioritize authenticity, relevance, and engagement metrics.
- ✓ **Outline partnership types.** Tailor collaborations to suit both the influencer's style and your campaign goals. Examples include:
 - **Sponsored Content:** Influencers create posts, videos, or stories highlighting your product or service.
 - **Co-Hosted Events:** Partner on webinars, live streams, or in-person events to reach new audiences.
 - **Product Reviews or Unboxings:** Leverage their honest feedback to build credibility and showcase real-world use.
- ✓ **Set clear goals for each collaboration.** Define what success looks like before starting. For instance:
 - **Reach:** How many people do you want to see the content?
 - **Engagement:** Are you aiming for likes, comments, or shares?
 - **Conversions:** How will you measure sales, sign-ups, or other direct outcomes? Clear goals keep both parties aligned and ensure you can measure the partnership's impact.



PRO TIPS:

Think Beyond Social Media!

When we say "influencers," think beyond social media personalities. Authentic influencers are individuals respected within your industry or sector—those with real, earned authority and deep connections to your target audience. These might be experienced professionals, thought leaders, or even niche experts whose insights and opinions carry weight.



Makaila Hickey

23. Invest in Training & Development

Marketing is constantly evolving, making training essential. Staying ahead requires more than just keeping up—it means proactively building skills and expertise. Continuous learning ensures your team is adaptable, confident, and capable of leveraging the latest tools, trends, and strategies to deliver outstanding results.

- ✓ **Assess training needs in areas like analytics, social media, and content.** Start by identifying skills gaps or areas for growth. Ask:
 - What tools or platforms are we underutilizing?
 - Are there emerging trends (e.g., AI-driven marketing, video production) that we should embrace?
 - Which skills do team members feel would enhance their performance?
- ✓ **Schedule team training sessions on emerging tools or trends.** Bring in experts, attend workshops, or leverage online courses to upskill your team. Focus on practical, actionable training, such as:
 - Advanced analytics techniques for deeper audience insights.
 - Social media strategies tailored to platform-specific algorithms.
 - Creative content development, like video storytelling or interactive media.
- ✓ **Set individual and team growth goals.** Encourage each team member to set personal development goals alongside broader team objectives. For example:
 - An individual goal might be mastering a new software or earning a certification.
 - A team goal could be increasing campaign ROI by improving collaboration and expertise.

24. Monitor Competitors

Competitor analysis provides perspective. Knowing what your competitors are doing helps you stay ahead of the curve, refine your strategy, and uncover opportunities to differentiate. By monitoring their moves, you can identify what resonates with their audience, what's missing, and how to position your brand more effectively.

- ✓ **Regularly review competitors' content, ads, and customer feedback.**
 - **Content:** What topics are they covering, and how are they framing them? Are there gaps you could fill or unique perspectives you can offer?
 - **Ads:** Analyze their messaging, visuals, and calls to action. Which platforms are they using, and how often do they run campaigns?
 - **Customer Feedback:** Look at online reviews, testimonials, or social media mentions. What do their customers praise or criticize? This can provide valuable insight into their strengths and weaknesses.
- ✓ **Identify gaps or opportunities to differentiate.** Use your analysis to spot areas where your competitors are falling short. For example:
 - Are they neglecting a specific audience segment?
 - Is their messaging too generic or outdated? These gaps present opportunities for your company to stand out by offering a fresh perspective or solving an unmet need.
- ✓ **Track any shifts in their strategies and adjust accordingly.** Competitors will evolve, and so should your strategy.



PRO TIPS:

Competitor Analysis Worksheet

Don't just look at what your competitors are doing—analyze why it's working (or not). The "why" helps you understand audience behavior and refine your approach, rather than simply reacting. Remember, the goal isn't to copy but to carve out your unique position in the market.

Use our [competitor analysis worksheet](#) to help develop your insights!



Elizabeth
Sutherland, APR



PHASE 5

Evaluation & Optimization

25. Review & Revise the Strategy

Evaluation is the final piece of a strategic plan. Regular assessment and optimization ensure your marketing strategy remains relevant and effective.

- ✓ **Track monthly performance for each objective and channel.** Set up a dashboard to monitor key metrics for your campaigns, such as website traffic, lead conversions, or social media engagement. Regular tracking ensures you catch underperforming tactics early and adjust before wasting resources.
- ✓ **Conduct quarterly reviews to assess progress toward business goals.** Take a step back every quarter to evaluate the big picture. Are your marketing objectives still aligned with your overall business goals? If you're exceeding benchmarks, consider scaling up successful tactics. If you're falling short, use the data to identify what's not working and recalibrate.

Our free Q&A session is designed to help you bring the insights from our **25 Steps for 2025 Marketing Playbook** to life. Get expert tips, answers to your questions, and practical advice on how to apply these strategies to your business. Whether you're tackling marketing solo or have a team behind you, this is your opportunity to dive deeper, gain clarity, and set up for real results. Sign up today to join our next live Q&A and take the first step toward transforming your marketing efforts.

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