

VERSION 2.0  
JUNE 26, 2018

Test Company Logo

**TEST COMPANY MARKETING  
PROCEDURES PLAYBOOK**  
DELIVERABLES AND ASSIGNMENTS

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## TEST COMPANY MARKETING PROCEDURES PLAYBOOK

### OVERVIEW

This document is designed to outline the marketing for Test Company Services.

#### Key Marketing Activities:

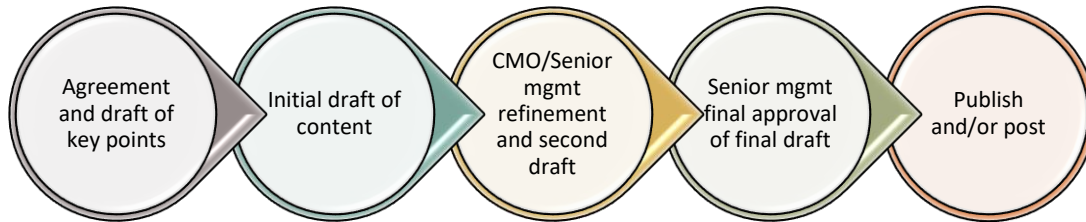
- ❖ Work with the Founder and Business Development team to refine the content marketing strategy for lead generation and brand building
- ❖ Manage creation and execution of content marketing campaigns including 2 emails per month and 2 articles or white papers per month for the target audiences
- ❖ Manage and deliver the website updates monthly to include new events, articles, and other news
- ❖ Innovate current content marketing to improve open rates, client engagement, and new prospect lead generation
- ❖ Provide monthly KPI reporting for marketing metrics to be presented in a monthly strategy session
- ❖ Conduct weekly marketing meetings to collaborate with the sales team and founder
- ❖ Outline the strategies and tactics to grow the business in alignment with the longer term goals for the new product go to market strategy and ongoing client acquisition and retention

#### Key segments:

- ❖ Approval and Distribution Process
- ❖ Content Development
- ❖ Social Media Management
- ❖ Event Management
- ❖ Email Campaigns
- ❖ Marketing and Sales Integration
- ❖ Reporting and Communications

### APPROVAL AND DISTRIBUTION PROCESS

The approval and distribution process for all content follows a similar process.

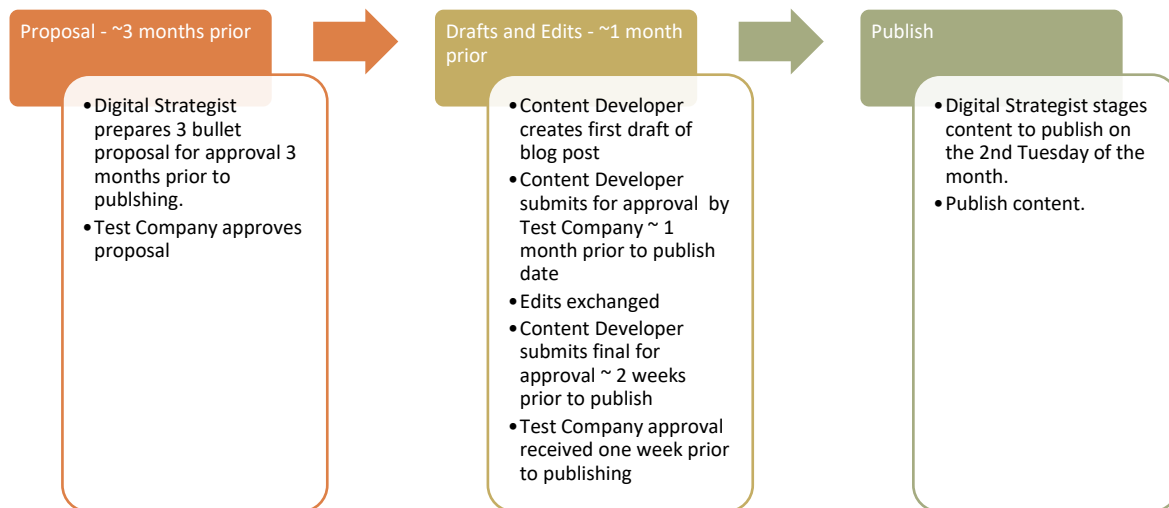


The distribution mechanism used is typically email. The reviewers are usually the CEO and the CMO. Occasionally the reviewers include the Director of Sales or other subject matter experts.

1. The Digital Strategists creates the initial key points document and emails it to reviewers.
2. The document is agreed upon and the content developer creates the initial draft of the content.
3. The content developer submits the initial draft to the reviewers.
4. The reviewers edit the document necessary. The reviewers return the document with edits and comments to the content developer.
5. The content developer creates a final draft and emails it back to the reviewers for the final approval.
6. After the content is approved, the Digital Strategist stages and/or publishes the content.

### APPROVAL PROCESS

The process for publishing blog posts takes about three months from start to finish.



## CONTENT DEVELOPMENT

Content development includes blog posts, social media focused on LinkedIn, Emails, and whitepapers or other articles.

Content for Test Company consists of a monthly blog post with a supporting LinkedIn post for both Vice President's account and the Test Company account. There is also an email that is sent promoting the latest blog post.

In addition, Test Company sponsors approximately one event per month. These events are created and the guest lists maintained on the WordPress website using Formidable Forms. Prepare promotional LinkedIn posts and an email for events as well.

Click for more information on [Events](#).

Click for more information on the [Social Media](#) processes.

### Blog Post

- LinkedIn post - Vice President
- LinkedIn post - Product Launch
- Promo Email

### Event

- LinkedIn post - Vice President
- LinkedIn post - Product Launch
- Promo Email

## BLOG POSTS

Blog post topics are typically determined three months in advance. Posts can be pulled from any number of sources:

- News of the day, such as changes in laws governing small business
- Questions that current clients are asking or that are trending in the industry
- Event support. For example, choose a topic that supports the next event being held
- Evergreen content. Content that is always pertinent and hasn't been covered yet.

The Test Company staff helps determine the blog topics. The Digital Strategist proposes the topics and the Test Company staff helps to clarify the subject matter.

## AUDIENCE

The audience for this content is Test Company's partners, including tax and legal professionals, as well as business owners and CEOs involved in the supporting businesses.

## COMMUNICATIONS CALENDAR

All content and communications are added to the communications calendar by the Digital Strategist.

Add the data to the Content Summary Excel spreadsheet. Using the cell reference function, load the data into the individual months. Update the calendar weekly as tasks are complete or updated.

## GOOGLE CALENDAR

Update the Test Company Google calendar to reflect the submission, approval, and publishing deadlines. As the deadlines are met, update the calendar item to reflect the status. For example, add the word “Done” to the title of the calendar item when approval is complete.

## IMAGES

The Content Developer finds an appropriate image. Use a feature image on the blog post as well as the social media posts. Find an appropriate free image at any one of the many free stock photo sites.

- Unsplash.com
- Pixabay.com
- AllTheFreeStock.com

Better than stock photos, actual photos of events and the Test Company team are more relatable. If possible, use images taken by and for Test Company.

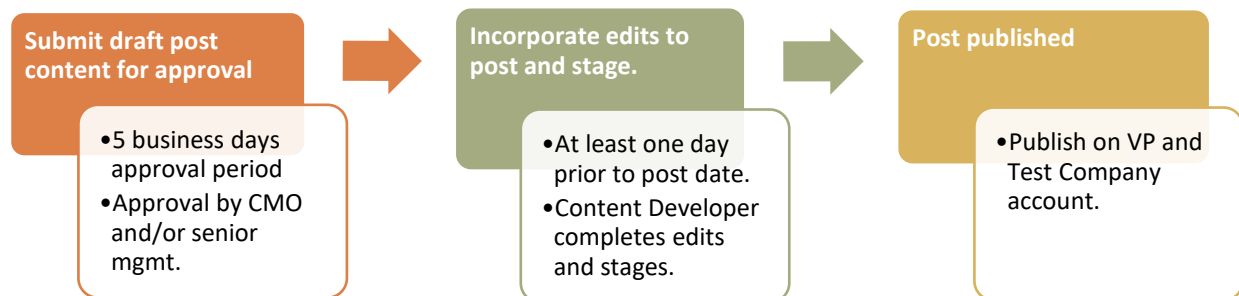
## SOCIAL MEDIA MANAGEMENT

Currently, social media posting is primarily LinkedIn posts to 2 accounts: Vice President’s personal account and the Test Company account.

Typical LinkedIn posts include posts promoting the monthly blog post and a post promoting an event where Vice President or a member of the Test Company staff is speaking or that Test Company is hosting.

The posts are sent to all followers to both accounts.

For each LinkedIn post, the standard approval period is 5 business days. If the post is promoting the latest blog post, it is acceptable to submit the LI post with the final draft of the blog post for approvals. This means the LI post would be submitted about 2 weeks prior to publishing.



Tips for good LinkedIn posts:

- Have a headline.
- Use an image.
- You can only use one hyperlink per post. Ensure the link has a good picture. If the picture isn't adequate, find and upload a better picture.
- Use short, snappy sentences and incorporate a thoughtful remark designed to invite comments and shares.

## EVENT MANAGEMENT

Test Company hosts and/or sponsors events periodically during the year. Typically, there is one event per month.

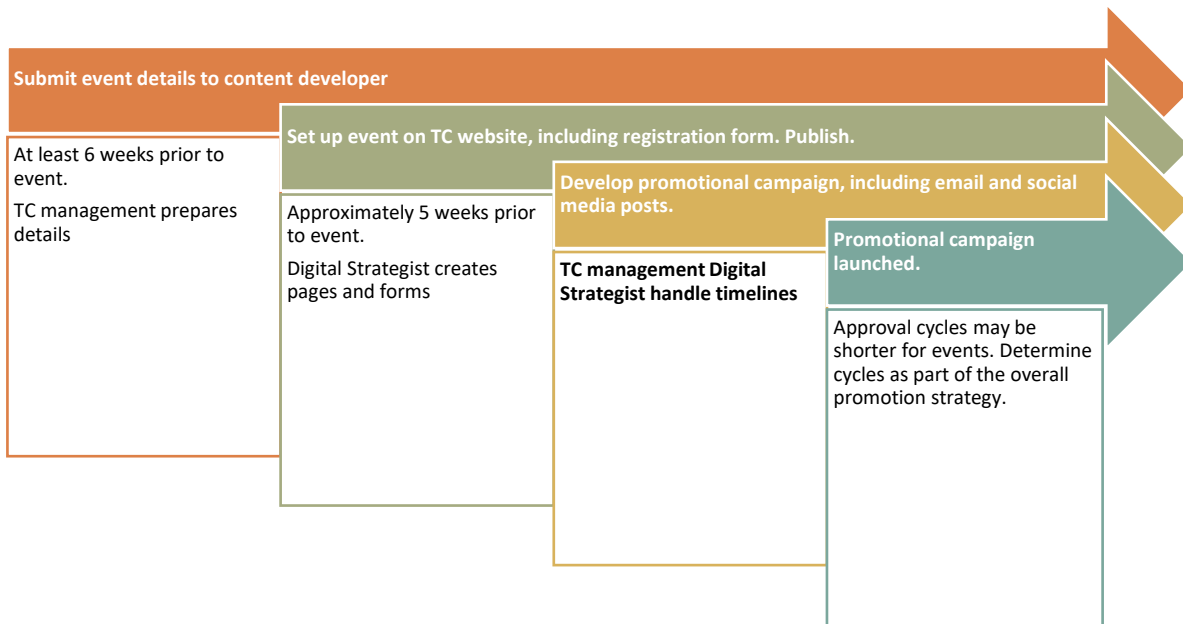
Each event has specific criteria. In addition, the registration lists are created and maintained through the Test Company website.

## EVENT ROLES AND RESPONSIBILITIES

Task	TC Management	Digital Strategist	Third Party Administrators
<b>Event Details</b>	Forward the details, including dates, times, locations, and guest restrictions	Receives the details and any art used in the promotion of the event	If applicable, forward the details of the event to management
<b>Event Registration</b>	Provide guest restrictions – confirm logistics	Create an event on TC website, including a registration form. Send registration list via email to TC management each week. Send final list 2 days prior to the event.	If a third party is handling the guests, it may be appropriate to send the guest registration to them as well. Check with TC management.
<b>Event Promotion</b>	Provide approvals per content approvals flow.* Provide names of specific mailing lists if the entire list is not invited.	Incorporate edits and reviews from TC management and send email, post social media updates	
<b>Event Materials</b>	Responsible for event materials, including name tents, place cards, presentations, and handouts.	May be asked to assist with content creation. By request only.	



The standard timeline for event content is as follows:

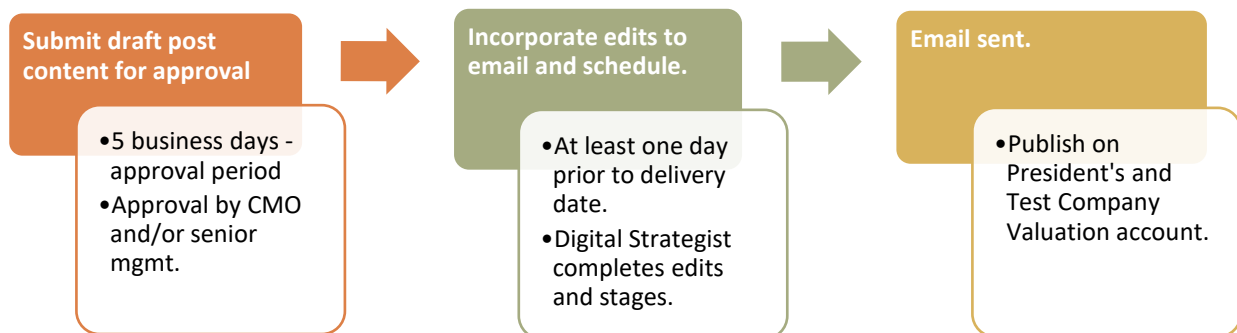


### EMAIL CAMPAIGNS

Currently, there are two emails sent each month in support of Test Company content and events. These emails are created and sent through the Test Company Constant Contact account.

The mailing lists are also maintained in Constant Contact.

Here is an overview of the approval process for email campaigns.



Each email campaign has its own approval cycle. Here is the standard cycle.

**EMAIL CAMPAIGN COMMUNICATION TABLE**

	<b>Draft Submitted Date</b>	<b>Recipients – Mailing List</b>	<b>Approved by Test Company</b>	<b>Publish Date</b>
<b>Blog Post Email</b>	10 business days prior to delivery	Entire list	At minimum one day prior to delivery	Same day as blog post published
<b>Event Promotion Email</b>	5 business days prior to delivery	Determined by the event.	At minimum one day prior to delivery	Within one business day of email approval.

**MARKETING AND SALES INTEGRATION**



- ❖ Salesperson - Enter business cards into Salesforce as a contact. Include the email list name in the appropriate field.
- ❖ Salesperson - Enter contacts from website notifications. These contacts are downloaded into Salesforce.
- ❖ Office manager - Enter the business cards collected by the President into Salesforce.
- ❖ Office manager – Run the Salesforce managers’ report for contacts, sorting and filtering by the list. Upload to Constant Contact each Friday.

## REPORTING AND COMMUNICATIONS

### KPI REPORTING

Complete KPIs monthly, drafting the report for review by Marketing Director by the end of the first week of the following month.

Typically, this report is presented at the client meeting on the third Wednesday of the month. Use the report from the prior month as a template.

Current slides and their data sources include:

Slide Title	Information Source
Best Converting Campaigns	Google Analytics, Constant Contact, and LinkedIn.
Overall Email List Growth	Constant Contact
Individual Email List Growth	Constant Contact
Email Effectiveness Trends (prior 3 months)	Constant Contact
Email Trends	Constant Contact
Website Statistics – Page Views by Referral Sources	Google Analytics
Website Statistics – Traffic Sources	Google Analytics

This report is stored in Dropbox under Test Company->KPIs

### MEETINGS AND COMMUNICATIONS

Currently, the CMO is on-site at Test Company on Wednesday.

On the first and third Wednesday of each month, Marketing Director, Vice President, and the Digital Strategist meet for one hour to discuss Test Company overall marketing strategies as well as strategies and questions around upcoming events.

The Digital Strategist prepares an agenda for this meeting and submits the agenda to Marketing Director on the Friday prior to the meeting. After approval, the Digital Strategist sends the agenda to Vice President and Sales Director no later than Tuesday prior to the meeting.

The Digital Strategist takes notes and distributes those notes to the meeting invitees within 48 hours of the meeting.