PLOTBOX
Serving Better Together.

MARKETING TOOLKIT

Build a pre-need marketing strategy.

Contents

Introduction

The purpose of this toolkit is to provide a framework to help you shape, define and refine your pre-need marketing strategy.

No two strategies will be the same, just like no two pre-need programs are the same.

In this way, our aim is to provide you with a guide - some 'food for thought' that will allow you to generate the ideas, messages and tactics that will help you to maximize your strategy and start generating more leads.

From planning to execution and through to evaluation - define your audience, how you'll reach them and how you'll know if you've been successful.

Planning.

Set your goals.

Before doing anything else, it's important to have a clear idea of what you want to achieve. In the case of your pre-need marketing strategy, these could be to generate more leads, raise awareness or drive conversions.

Having clear objectives is important for a number of reasons - they help keep your efforts focused and provide a way of measuring how successful you've been.

Objectives work best if they're both specific and measurable - and to use that term familiar to many - they should be SMART:

Specific, Measurable, Achievable, Relevant and Time-bound

SMART goals help to ensure that your marketing strategy is more results-focused, allow you to track your progress, manage your time, maintain motivation and foster accountability.

Use the template on the next page to define and communicate your SMART goals to your team.

| INSIGHT
Be clear from the outset on why you're doing what you're doing. Align your goals to your broader company objectives and ensure you have a way of measuring success.

S
Specific
Be as clear and specific about what you want to achieve to provide focus and direction.

M
Measurable
Make goals measurable so they can be easily tracked and allow you to determine if they have been achieved.

A
Achievable
Make goals realistic and attainable given available resources, timeframe and budget.

R
Relevant
Align with broader goals, ensuring they are focused on what matters.

T
Time-bound
Set a specific time-frame - one that is realistic but creates a goal to work towards.

Smart goal template.

SPECIFIC

MESURABLE

ATTAINABLE

RELEVANT

TIME-BOUND

Carry out a SWOT analysis.

A SWOT analysis is a good starting point in creating a strategy that captizalies strengths and addresses weakness, is based on informed decisions about the market, and and allocate your resources effectively.

For pre-need, examples of strengths could be your unique selling points, your range of services, those things that set you apart from your competitors; Weakness may be a lack of budget or resources; Opportunities may include new services ro service enhancements that align with evolving market trends; while Threats may include things such as better competitor offerings, changing economic landscapes or shifting consumer preferences.

Bearing that in mind, think how those may apply to your specific circumstances and note below:

STRENGTHS	WEAKNESSES

OPPORTUNITIES	THREATS

Identify your target audience.

Who do you want to reach?

Fundamental to your outreach strategy is understanding who your target audience is, where they are and what drives them.

Market research will help you to determine demographics such as age groups, cultural backgrounds and geographical locations.

Researching customer needs and preferences will help you to understand motivating factors and what influences buying decisions - what services or features are most important to them and how you can address any specific pain points in processes relating to end of life planning.

Together, that information will allow you to:

- **Provide offerings that align with preferences**
- **Tailor your communication, messages and strategies**
- **Focus on the most relevant and receptive audience**
- **Determine the most effective marketing channels**
- **Anticipate needs and provide relevant information**
- **Become more adaptable to market trends and changing needs**

| **INSIGHT**
Utlize the data you have from existing customers - data on demographics, backgrounds, interment preferences etc.
Use that information to help complete the picture.

Create a buyer persona.

A buyer persona is a semi-fictional representation of the ideal customer, and creating a persona is a useful understand your target audience.

Identifying and articulating demographics, unique characteristics, interests, motivators, challenges and pain points can help you to tailor your content and messaging and develop your offerings to meet the specific needs, behaviors and concerns.

Consider the problems they're trying to solve and how you can help them.

Here's an example, use this as your starting point to create your own personas using the templates on the next page.

Rachael

Demographics

Age: 40
Gender: Female
Location: Suburbs
Income: Middle-class

Bio

A married mother of two, values family and wants to ensure their wellbeing after she's gone. Takes on responsibility of future planning.

Goals / Motivations

To create a sense of security and peace of mind for her family, motivated to leave a legacy of love and care.

Challenges / worries

Worries about the emotional wellbeing of her family after she is gone, but is concerned about the financial aspects of pre-need planning.

Common objections

May hesitate due to the emotional weight of the decision and may have concerns over afforability.

Interests

Sarah is actively involved in the community, regularly attending social events, spends a lot of time on facebook catching up with friends and family.

Buyer persona template.

Name:

Demographics:

Age:
Gender:
Location:
income:

Bio

Goals / Motivations

Challenges / worries

Common objections

Interests

Name:

Demographics:

Age:
Gender:
Location:
income:

Bio

Goals / Motivations

Challenges / worries

Common objections

Interests

Define your methods of market research.

There are a number of ways you can carry out the market research that will help to inform your strategy. Which of them you choose may of depend on the resources you have available and who you want to target.

Before starting, determine the audience for your research - this could be current customers, potential customers within a specific geographic area, or a broader demographic group. Here are some some examples. Feel free to add any of your own that work for you.

Market research checklist:

Methodology	Tick
Online / written surveys	
Online / written questionnaires	
Personal interviews	
Focus groups	
Online market research	
Data analysis	
Website analytics	

Establish your value proposition.

Why should your customers choose you?

Establishing a value proposition will help you to clearly communicate the benefits and value of your services to your customers. It's what sets you apart from your competitors, and provides a compelling reason to choose you.

It should speak directly to the needs, desires, challenges and pain points of your customers and clearly articulate how it meets those needs and solves their problems.

Importantly, it will help you to craft your marketing content and messages, as well as helping your marketing strategies to become more focused and targeted.

Consider:

- **Your audience, their needs, challenges and pain points**
- **Your unique selling points - what sets you apart**
- **The value of your services - highlighting emotional, financial, practical benefits**

With that mind, brainstorm some ideas with your team. Once you have a clear idea of your value proposition, write it below:

Our Value Proposition

Execution.

Outline your key messages.

Before we get to the practicalities of how, where and when you will communicate with your audience, it's important to establish your key messages. These should clearly articulate your value proposition and speak directly to the needs of your target audience.

They're important for a number of reasons: they help to establish a clear and consistent voice across all marketing channels helping to build trust and credibility, they can help to create an emotional connection and provide confidence in buying decisions, and importantly, they provide and opportunity to educate and inform on the benefits of pre-need planning.

Ensure they:

- **Resonate with your audience**
- **Reflect the unique selling points and core benefits of your services**
- **Are clear and compelling**
- **Are consistent across your marketing channels**

Use the sheet on the next page to brainstorm with your team and have try crafting 3 of your main key messages below:

KEY MESSAGE #1

KEY MESSAGE #2

KEY MESSAGE #3

Key messages brainstorm.

Define your marketing channels.

Where and how will you promote your services?

Which channels you use to promote your pre-need offering will be determined by a number of factors, including where your audience consumes its media, where and how they look for and research goods and service options, as well as your budget and the resources you have available.

Be sure to continually monitor and evaluate the performance of each of your channels to determine which resonate most effectively with your audience, and don't forget to analyze your competitors' strategies. Together this will help you to adapt and refine your own tactics and adjust your marketing mix to optimize the promotion of services.

A mix of both traditional and digital platforms is best to ensure you reach as wide and audience as possible, with multiple opportunities and touch points to engage with you.

A mix of channels also provides the opportunity to tailor your messages to the preferences of the audience on each platform. Here's a quick checklist to get you started:

| INSIGHT
When people are searching services online make sure they find you.

Ensure that your website is optimized using keywords and a range of educational and informative content that uses relevant search terms.

Traditional	Tick	Digtal	Tick
Brochures		e-newsletters	
Magazines		Social media	
Newsletters		Website	
Direct mail		Search Engine Optimization	
Local newspapers		Paid online ads	
Leaflets		Customer testimonials	

Identify lead generation opportunities.

As well as utilizing range of marketing channels discussed, there are a number of other lead generation opportunities that can form part of your marketing strategy.

Here are a few ideas, you can log some of your own on the following page:

Webinars and online events

These provide an opportunity to educate your audience about pre-need planning, while registrations allow you to capture leads and follow up post event.

Local events or presentations

Attend local community events or host your own onsite - deliver presentations to educate and inform on the benefits of pre-need planning, and provide one-on-one consultations.

Community partnerships

Explore partnership opportunities within your local community - offer to conduct informal sessions or to provide resources and information.

| INSIGHT
Ensure you have the systems and mechanisms in place to nurture your leads once they've been collected, with follow ups through personalized communication. Do you use CRM tools? If not, now may be the time to consider how they can help you to build and nurture relationships.

Lead generation opportunities.

Name of event	Where	When

Partnership opportunities – local organizations list

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Evaluation.

Track and measure results

How do I know if I have been successful?

Having the mechanisms in place to evaluate the success of your marketing strategy is important for a number of reasons.

In the first instance, they will tell you if are meeting your goals and objectives. Importantly, they will also help provide you with crucial insights - determining what's working well and what isn't. In this way, identifying the strengths and weaknesses of your efforts will ultimately help you to focus your efforts, and allow for a more targeted approach:

What's resonating with your audience, what channels are working best for you, what messages are driving conversions, what types of activities are generating most leads?

The mechanisms you put in place for evaluating your marketing strategy will ultimately provide you with a benchmark against which your performance can be measured, so it's important that the metrics you have in place reflect your objectives. Consider tools such as website analytics, CRM data, sales reports or social media metrics to gather data.

Here are a few key actions to think about - tick them off as you carry them out:

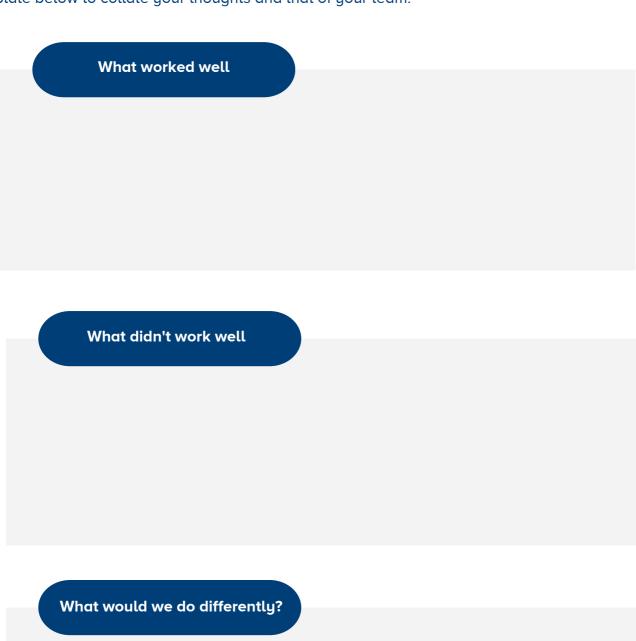| Action	Tick
Define your Key Performance Indicators (KPIs)	
Identify your tracking mechanisms	
Specify data sources and data collection methods	
Carry out a return on investment analysis	
Create a schedule for analyzing and reviewing data	
Outline steps for analyzing and interpreting data	
Adjust and optimize strategy	

Actionable planning.

Based on evaluation insights, what actions will you take to optimize your efforts?

Action	Timelime
eg. focus on leveraging social proof via customer testimonials	3 months

Identify key learnings

Determining a set of key learnings is integral to the evaluation process. It's important to take lessons learned and use those to refine and improve what you do in the future. Following any project - whether a single event, or a specific campaign, reflecting upon and asking yourself a few simple questions can help to ensure that your marketing efforts are as effective as possible. Use the template below to collate your thoughts and that of your team:

What worked well

What didn't work well

What would we do differently?

Found this toolkit useful?

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