

MARKETING YOUR SMALL BUSINESS

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Our Marketing Goals

1. **Client retention.**
2. **Increase client spend.**
3. **Gain new clients.**

Who has time for another TPS report?



Tools that we use that make this easier

Client Heartbeat

Campaign Monitor

- Promotions
- Automated Monthly E-mails

Hootsuite

Website best practices (#thanksgoogle)

The Basics

Short, 4 question survey

Rates our business on: partnership, accuracy, helpfulness, and promptness

Benchmarks ratings to industry standards

Can personalize questions BUT then you miss out on the benchmarking feature

Can choose between twice a year/once a year frequency (we actually do this quarterly)

Add your company logo

Brand colors

At the very least, it's a regular communication from your company that requires little to no effort. There's zero content creation - all that you need to do is import your customers once and then hit send

Client Heartbeat



Highly customizable

Brand Settings

Company Logo

 creativearc

 Choose An Image

Company Brand Color



#F21111

Save Settings

Personalized e-mails

Email Settings

Send Email as

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Initial Heartbeat Wording

I was wondering if you could assist us. We have recently started using a Customer Satisfaction Monitoring tool called Client Heartbeat which is designed to allow us to monitor and constantly improve the level of service we provide to our clients. It only takes 10 seconds to fill out, so if you could take a look and assist us, it would be most appreciated.

This is the what a customer receives for their first ever Heartbeat

Subsequent Heartbeat Wording

It's time for us to be sending our quarterly Client Heartbeat requests. As you'll recall, this is a program that tracks our customers' satisfaction every quarter. It takes less than 10 seconds, and we use this heavily to track our team's performance. If you could take a few seconds to submit your scores, it would be most appreciated.

This is the text for every Heartbeat after the first

We need to talk...



After you receive feedback

All of the feedback you receive is private, initially.

- Good reviews - leverage them on Google or public platform
- Poor reviews - we all get them - often they are expected, but occasionally it's a surprise.

**Campaign Monitor (or mailchimp,
constant contact, etc.)**

Automated Email Marketing Services

Content can come from:

- Blog
- Paid content creation
- Borrowed/forwarded content from Google/EE/etc., with a note customized from your firm.

Other than content, all you need is a contact list, which you've already pulled together from campaign monitor, right?

Decide on the frequency that fits your content and clients (ours is set monthly, which encourages (forces) me to blog at least once/month so I know there will be content to send out).

Promotions

We try to run one annual promotion encouraging an upgrade for our clients

- Design refresh
- Mobile upgrade
- Website consultation
- EE3 upgrade

Simple ways to keep our clients thinking about what's next, and our firm.

Sent via Campaign Monitor.

#thanksgoogle

We pushed SSL a bit after Google announced higher rankings for secure sites back in the spring

But, that really teed up the opportunity for us this fall

Drip campaign:

- Blog
- Campaign monitor e-mail
- Auto e-mail with content from blog
- Mail merge e-mail from Paul

HootSuite

Social media

Scheduling posts across multiple platforms

Use to connect with clients, potential clients, lost clients

Keeps us in front of our clients, gives us a platform to brag/cross-market

I hope no one feels like Milton ...



THANK YOU!