



Strategic Marketing Recommendations

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(herein referred to as "the marketing team")
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2019 Marketing Recommendations

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EXECUTIVE SUMMARY

The leadership team at Heritage Harbor has done an outstanding job developing the brand story for *Living the Harbor Life*. Both the Executive Document created in Q4 2018, and the new website launched in Q1 2019, convey the extraordinary amount of passion and dedication the team has for Heritage Harbor's past, present and future, and for the surrounding area known as Starved Rock Country. We applaud you for your hard work, the well written pictorials, the visual presentations, and the superior photography used to promote the community.

The purpose of this document is to provide specific recommendations to expedite a "positive return on investment" for Heritage Harbor's marketing and advertising budget for 2019 and beyond. The pages that follow, present the Initial Priorities that we believe should be considered for immediate implementation. Specific details and guidelines for the tasks noted as priorities are also included.

As a result of our onsite visit and subsequent research and assessments, the marketing team has prepared details and recommendations for the following:

PRIMARY OBJECTIVES:

- Attract, engage and nurture new and existing prospects to foster the sale of 38 sales in 2019.
- Re-Energize the market position of Heritage Harbor as the premier resort marina community on the Illinois River, featuring beautiful new homes and vacation rentals, located in historic Ottawa, a short driving distance from the Chicago metropolitan area, with amenities and activities for all lifestyles and stages.

INITIAL PRIORITIES: (see pages 9-12)

- Conduct a **sales process assessment** to obtain feedback for improvement, coaching and/or training. (pg 9)
- **Clean and Append the existing database** of inquiries/prospects in preparation to obtain their level of interest and to re-engage them in the sales process. (pg 9-10)
- **Launch a lead nurture and lead response program** to continue nurturing leads once they've been re-engaged and nurture new leads to take an on-site tour with the sales team. (pg 10-12)
- **Implement recommended adjustments to the community website.** (supplement: Website Review.)
- **Implement recommended improvements to digital advertising** (pg 15-29)

MARKETING OBJECTIVES

- A. Attract, engage and nurture new and existing prospects to foster the sale of 38 sales in 2019.
- B. Emphasize the vision of Heritage Harbor: to offer residents and guests the ability to enjoy an active lifestyle along the Illinois River, with easy access to on-site area amenities, plus the ability to connect with nature, friends and family, the peace and tranquility of the river, the enjoy the inherent social opportunities of the community, and more.
- C. Introduce and sustain awareness of Heritage Harbor among the target audiences by leveraging the favorable, historic Ottawa location, community amenities, lifestyle and the variety of floor plans that are available.
- D. Drive qualified homebuyers, currently living within a 100 mile radius, to the community's online marketing platforms which include: a (recommended) lead generating landing page, the community's new website and multiple social sites. (Facebook, Pinterest, YouTube, etc.)
- E. Focus on the target audience of those age 45-65, singles or couples, with and without children, seeking a weekend getaway with intentions of moving full time and/or already looking to make Heritage Harbor their full-time residence.
- F. Target Chicago suburban areas include LaSalle, Plainville, Joliet, Utica, and Naperville.
- G. Launch a Realtor focused communications campaign
- H. Enhance the resident referral program

MARKETING STRATEGIES

- A. Develop and execute a marketing campaign focused on the new product line/floorplans, resort lifestyle, nearby and on-site amenities and benefits of living at Heritage Harbor.
- B. Continue to improve the current website to include “best practices” for organic SEO, and easy access to content that conveys the lifestyle and home styles available at Heritage Harbor.
- C. Plan and implement a comprehensive advertising and communications campaign utilizing the recommended improvements to the internet marketing, social media initiatives.
- D. Utilize public relations, onsite events, realtor outreach and more to reach prospective homebuyers in the targeted areas and their influencers.
- E. Review and update print ad messaging and collateral materials to ensure the primary focus promotes the resort-lifestyle along the Illinois River, residential living (new homes and cottages), and all the on-site amenities just steps away from their new home.
- F. Utilize the existing testimonials and gather new testimonials from homeowners for use in the creative campaigns, social media content and on the website.
- G. Market to real estate agents who are working with buyers both in the immediate local area as well as buyers who are looking to move from the Chicago suburbs.
- H. Host on-site events allowing potential buyers to experience the resort-style lifestyle and interact with current owners/residents.

MARKETING TACTICS

A. Advertising

All marketing and advertising activity will direct the audience(s) to the Heritage Harbor website, as well as the proposed landing page, and will encourage them to schedule a tour of the community.

The media mix will include targeted online ads, display/re-marketing ads and geo-fencing tactics; organic and paid social tactics; direct mail, e-mail nurture, newspaper, magazine; and online directory listings based on their benefit to organic web searching.

Primary target audience for Heritage Harbor are couples and singles age 45 to 65 who are:

- a) currently living within 50 to 75 miles of the Ottawa area and wish to experience full-time resort-style living
- b) currently living within 100 miles who are planning to retire and stay within the state of Illinois

Secondary target audience includes couples and families who are:

- a) looking for a second home to enjoy on weekends and vacations that is convenient to their current home
- b) looking for a rental investment that they can also enjoy on weekends and vacations that is convenient to their current home

Additional target audience

Real estate professionals who are working with any of the above-mentioned buyers

B. Creative Approach

To meet the real estate sales objectives, all messaging, imagery, and creative should maintain a laser-focus on why a homebuyer would want to buy and live at Heritage Harbor. We recommend selecting 3 signature images to be repeatedly used in print and digital advertising specifically for promoting lifestyle, location, and product. Repetition of a limited number of visuals enhances retention and recall the brand. Themes we recommend be highlighted within the advertising messages are:

- c) Lifestyle, relaxation, serenity, and tranquility
- d) Appeal of community to family & friends (including making new friends)
- e) Amenities and activities to foster healthy living
- f) Easy access to local amenities including medical facilities
- g) Learning new things, giving back, volunteering and fulfilling purpose/needs

C. Direct Mail

We recommend considering 4 to 6 targeted direct mail drops throughout the year to support on-site events and to create/maintain awareness of Heritage Harbor.

D. Communications & PR

The intent of a structured Communications and PR program is to create and sustain awareness with the immediate Ottawa vicinity and targeted Chicago suburban markets within a 100-mile radius. The published content would highlight the Heritage Harbor lifestyle, variety of homes and floor plans, amenities, special features (marina) and other major selling points. We recommend a variety of topics of interest to engage local and regional media, to gain publicity, and to influence traffic to the website and welcome center. Published PR also enhances branded internet searches.

By taking advantage of recent interest and increasing awareness of Starved Rock Country and also to connect with potential buyers, the publicity program for Heritage Harbor can easily blend into the overall PR that the Chamber, downtown Ottawa, Starved Rock Country and beyond are implementing.

E. Sponsorships & Community Outreach

Stay engaged with the local Chamber of Commerce and Ottawa Economic Development team to discuss how to be more integrated in the overall marketing plans for Ottawa to gain exposure to guests visiting the area or looking to buy a primary or second home at a resort community like Heritage Harbor.

Search out events that can be sponsored by Heritage Harbor such as:

- a) After Hours events, Golf and Boating events
- b) Heritage Corridor Convention and Visitors Bureau
- c) Ottawa 2 Rivers Winefest – held at the beginning of June in historic Ottawa
- d) Illinois River Winery Festival – held May – October in Starved State Park/Utica
- e) Vintage Illinois – in held mid-September at Matthieson State Park/Utica
- f) Heritage Corridor Ale Trail

F. Realtor Outreach

As relationships continue to be established within the local Realtor community, including those in the Chicago area, we recommend the following:

- a) A list of all real estate agents who have sold or shown a home or lot at Heritage Harbor should be imported into Infusionsoft for follow up.
- b) A monthly email communication to Realtors at large reminding them of Heritage Harbor's offerings – lifestyle, on-site amenities and the ability to build your dream or purchase a move-in ready one.
- c) Weekly office visits to select real estate offices providing breakfast and the opportunity to continue relationship building and keeping them aware of happening on property.
- d) Quarterly on-site realtor events allowing them to experience living at Heritage Harbor and keeping the community top-of-mind when working with buyers
- e) An incentive package for both realtors and their buyers should be put in place to quickly sell and close the remaining spec homes and could foster presales for Pinnacle Point.

G. Local and Regional Media Reach

There are numerous print and digital media outlets that can reach potential buyers and allow us to promote full-time living, weekend living, on-site events and the marina life at Heritage Harbor. The goal is to find the best mix for maximum exposure within allowable budgets. The following are initial ideas for consideration, some of which you may already be utilizing. If so, we would like to review the ad layout and messaging for continuity with the recommended approach described throughout this plan.

Ottawa/Utica/LaSalle county – immediate area

Shaw Media Group offers various media vehicles including:

- The Times, a broadsheet daily newspaper with capabilities of Sticky Notes, M, T, W, Th, Sat run dates. Wednesdays are EMC (extra market coverage) days
- Special sections or tabs featuring Senior Living, Retirement Communities, Spring Lawn & Garden, Menu Guide, Holiday Gift guide throughout the year
- Starved Rock Country Magazine – 60+-page glossy quarterly magazine
- Starved Rock Country Homes – publishes 2nd Sunday of each month

Aurora – Kane County

- The Beacon-News – a local daily newspaper part of the Chicago Tribune family
- Daily Herald - is a daily newspaper serving suburban Chicago and part of the Paddock Media Group providing local community, regional and national news delivered each morning to the doorstep.

Geneva/St. Charles/Batavia – Kane County

- Numerous local events worth exploring for sponsorship opportunities or advertising
- Kane County Chronicle a Shaw Media Group weekly newspaper providing local news delivered by postal service on Thursdays.
- KC Magazine - A monthly glossy lifestyle magazine devoted to life in the region, Kane County Magazine is delivered by U.S. Post Office to Kane County Chronicle subscribers. This niche publication reaches affluent, educated women.
- 2019 Geneva Concours d'Elegance – special feature magazine/program. Classic Car enthusiasts will gather together again this year in Geneva, Illinois and view a beautiful collection of antique, classic and modern automobiles. Participants from all over the Country display their prized automobiles on Third Street, hoping to be awarded one of the coveted "Benz" Trophies.
- Neighborhood Tourist – a magazine designed to help people explore the many opportunities for entertain and excitement available no more than a short drive from their own front doors. Inserted into the Joliet Herald News, Kane County Chronicles
- Chicago Tribune – Geneva Festival of the Vine – special section inserted into the CT paper in September.

Joliet – Will County

- *The Herald-News* is a daily newspaper headquartered in Joliet, Illinois, United States. It serves the Joliet, Will County and Grundy County areas, and is owned by Shaw Media
- *Daily Southtown* is part of the Chicago Tribune Media group published M-F and Sunday with south suburbs 3 zones on Sunday. Includes Joliet and other prime communities north and east towards Chicago.
- *Neighborhood Tourist* – a magazine designed to help people explore the many opportunities for entertain and excitement available no more than a short drive from their own front doors. Inserted into the Joliet Herald News, Kane County Chronicles

Plainville – Will County

- *Pioneer Press* – a weekly community newspaper within the Chicago Tribune Media Group, publishes on Thursdays
- *Pioneer Press Your Health* - special section w/in the paper in September
- *Daily Herald Business Ledger* – a monthly publication that provides access to the executive readers and decision makers at suburban Chicago area businesses with editorial coverage including Cook, Dupage, lake, Will, Kane & McHenry counties.

Naperville – Will & Dupage Counties

- *Daily Herald* is a daily newspaper serving suburban Chicago and part of the Paddock Media Group
- *Naperville Sun* is a local newspaper served Naperville, Illinois and published three days a week, Wednesday, Friday and Sunday. It was founded in 1935 and now is owned by [Chicago Tribune](#) Media Group.
- *Naperville Magazine* as sister publication to *Chicago* magazine, *Naperville* magazine is the premier lifestyle living publication showcasing the growing vitality of Naperville and the surrounding western suburbs.
- *Daily Herald Business Ledger* – a monthly publication that provides access to the executive readers and decision makers at suburban Chicago area businesses with editorial coverage including Cook, Dupage, lake, Will, Kane & McHenry counties.

Other Media Options

Chicago Tribune – New Homes Marketplace –targeted for builders and new home buyers. NHM is a tab section that runs within the Thursday Homes edition and features articles about trends in new home development and buying. Zoned 3 ways: N/NW, W/Near Est, and City/S/SW

Chicago Tribune – Primetime – an award-winning broadsheet section that reaches the affluent, active Baby Boomers, adults age 50+ with buying power. Offers full run and zoned distribution. 7x/year.

Chicago Tribune – Senior Housing Guide – special section inserted in the Chicago Tribune paper in April & August

Lakeland Boating Magazine – 8.75" x 10.75" magazine printed 11x/year covering the Great Lakes region, the largest boating market in the country. Offers traditional print, website advertising and weekly e-Newsletter options. Within the print option there exists display, Marine Marketplace & Lakeshore Life advertising opportunities. Subscriber base of 42K

Recommend a rotation of print and website/e-newsletter advertising.

- Print advertising w/in the Lakeshore Life section – June, August, October 2/3 page
- Website – Home page ad – July, September, Nov/Dec, leaderboard or box
- Weekly e-Newsletter - 1 week/month, June – Dec, middle leader board ad

Great Lakes Scuttlebutt Magazine – gloss magazine printed 6x/year with over 25-years' experience and huge distribution network reaching marinas, yacht clubs, marine stores, and marine-based businesses in coastal communities along Lake Michigan, Lake Huron, Lake St. Clair, Lake Erie, Lake Superior, and Lake Ontario with print and digital magazine versions, distributed at more than 35 boat shows throughout the Great Lakes region and reaching over 100,000 active boaters with print & digital magazine plus weekly e-newsletter.

Heritage Corridor Convention & Visitors Bureau - <http://www.heritagecorridorcvb.com/Home>

- Research opportunities to advertise in e-newsletter and/or magazine

Boat Shows

- Chicago Boat Show - Spring

Phase One: 6-8 Weeks

A. SALES PROCESS ASSESSMENT

Our Sales Training Specialist will conduct a Three Day Visit for Needs Analysis, Discovery, and Information Gathering. All three days will be full 7 hour days to get the most out of the visit. All previously developed summaries, reports, etc. will be reviewed in advance. Report of findings to be provided within one week of the visit.

Day 1: Interview with Developers of Heritage Harbor and key personnel to understand the history of the community; to identify the key pain points and issues for the Community; and to gain insight on the capabilities of the team and key personnel within the organization.

Day 2: Tour with current Sales Manager and possibly Construction manager to gain knowledge of area and to get a visual of the community and nearby Ottawa. Uncover specific challenges, pinpoint perceived issues, and identify enablers and barriers to success.

Day 3: Present assessment of research based on interviews and on-site tours; confirm observations with Developer prior to making recommendations; brainstorm solutions and adjust recommendations based on feedback.

B. DATABASE CLEANSE & APPEND

The Heritage Harbor sales team has begun the process of tagging contacts in the database with A, B or C status. The Append process allows the team to identify and prioritize viable leads, segment the list even further, and then reach out to the leads by phone and email to update their level of interest and to re-engage them in the sales process.

“Appending” will use three national consumer database systems to research the following data points about each lead: age, household income, current address, length of residence at that address, and phone number. Additional data points may be requested such as: matching an email to a postal address, and/or matching a postal address to an email. The process does not guarantee every data point per lead; however, the amount of information gained is always substantial enough to warrant the effort. The cost of appending a list is varied based on the size/condition/validity of the list.

Once the list is cleaned and segmented within the CRM, we recommend a 3-part email series that can be sent to all prospects in the current database. Those emails will have 3 different call to actions:

- Download floor plans (community brochure)
- Join us on-site
- Sign up for our newsletter

The resulting responses will allow the on-site sales team to focus their efforts on leads that have a higher likelihood for conversion.

C. LEAD NURTURE AND RESPONSE PROGRAM

Lead Nurture via email marketing is a critical component of the Marketing and Sales funnel and the most efficient way to build a relationship with a prospective buyer. It allows you to understand and address the prospective buyer's core needs (what they need to be fulfilled to be ready to buy) and allows for a two-way conversation.

- **60% of all digital leads are never followed up on.**
- **Businesses that focus on nurturing leads increase sales by 35%.**
- **An average customer requires 8-9 touch points before they are willing to convert.**

There are three important components in a Nurture Program:

- **Building a bridge between Marketing and Sales** by ensuring a consistent marketing message is delivered seamlessly while complementing and enhancing the current sales process.
- **Automation of the email content** so that the time burden is removed from the sales team while also ensuring the optimal customer experience.
- **Establishing the foundation of trust** and confidence in your brand by communicating with prospective buyers in a timely and relevant fashion.

Initial Recommendation: Three workflows and a lead cleanout mini-series.

Each of these workflows would include up to 10 emails:

- Ideal Living and other show leads
- Boat Show Leads
- General Inquiries
- Lead Clean Out (mini workflow)

The Automated Lead Nurture service should include three phases followed by on-going monthly optimization.

- 1. Nurture Program Planning** – During the on-site visit, the marketing team met with key stakeholders to identify the optimal customer journey and to map out an experience plan wherein we defined the customer touch points, both automated and personal, via phone or visit. Note: The Customer Journey Map is included in the Appendix.

The next step is to document the nurture workflows and create the content outlines needed to support the optimal nurture program. These efforts should focus on getting a lead to either attend a tour, open house, or scheduled event. Automated lead nurture helps to move the lead to tour. Once a tour has occurred, it is assumed the sales team will handle the nurture activities using best practices provided as part of the sales training.

- 2. Content Development** – Once the workflows and content outlines are created, the content needed to support the nurture program should be developed. This content which includes as many as 40 individual emails (10 x 4 workflows) will use existing available materials, appropriate downloads or videos in the emails. An HTML email template may also need to be built within Infusionsoft to be used for all email content.
- 3. Program Setup** – Once the workflows are documented, templates created, and content is developed, Scott Stroud will implement all of the emails, workflow, and triggers within the CRM.

On-Going Monthly Optimization and Fresh Content – Once the initial nurture program is setup, the program should be optimized monthly to evaluate workflows, triggers, email content, and timing to ensure the system is operating at top efficiency. In addition, up to two additional time-sensitive emails should be planned per quarter to be customized based on local events, time of year, incentives, or other relevant happenings.

LEAD RESPONSE

Once the Automated email Lead Nurture is in place, we recommend leveraging Immersion Active's Lead Response services. This service focuses on converting inquiries into on-site tours. A central point of contact will be provided to answer specifically incoming calls from phone numbers used for marketing and advertising, and for those who submit online forms. This service ensures each lead receives timely attention and provides a faster, more personalized interaction which can increase the probability of the prospect becoming a viable lead for the sales team.

Our Lead Response Specialists will answer questions, enroll the inquiring prospect into the CRM's automated lead nurture program, and initiate a personalized email and phone call follow-up plan. This high-touch process, coupled with an automated email nurture program, can significantly reduce the contact-to-commitment time, thus delivering to the sales team a prospect who is farther along in their journey to buy.

Option: Tour Scheduling Pilot

As an added value, the marketing team is offering Heritage Harbor the opportunity to participate in our tour scheduling pilot program, free of charge for the first 3 months. This service allows our Lead Response Specialists to actually schedule prospect tours for your sales team, getting the lead even farther down the funnel, and most importantly, getting the tour scheduled while the lead is hot.

Through this program, our team will coordinate with your sales team to develop a shared calendar that can be used for tour scheduling. Once a tour is scheduled, the response specialists will notify the sales team via email and text.

The automated lead nurture program will already have a nurture series in place to remind the prospect of their tour and to give them additional information as the tour date nears. It will be the sales team's responsibility to update the CRM to indicate if the tour occurred. After which additional automated emails can be put in place to capture no shows, etc.

D. IMPLEMENT ADJUSTMENTS TO WEBSITE

Heritage Harbor has launched a beautifully designed website that utilizes outstanding photography, creative pictorial text and attractive page layouts to deliver the brand story.

The marketing team has identified opportunities to implement “best practices” for improved organic search content and the overall ease of access to information about the lifestyle and home styles available at Heritage Harbor.

Please refer to the “Website Review” document provided in the Appendix.

E. IMPLEMENT IMPROVEMENTS TO ORGANIC AND PAID DIGITAL ADVERTISING TACTICS

The following pages provide details and recommendations to significantly increase the effectiveness of and ROI of the online presence for Heritage Harbor. This section addresses opportunities to improve both non-paid (organic) and paid digital activities on the following platforms: Facebook, Instagram, Pinterest, YouTube, Paid Search platforms (ie: Google, Bing), and online Directories.

The following section provides very specific steps that should be implemented right away for immediate improvement and measurable results.

ORGANIC SOCIAL MEDIA

Social Media Landscape: Goals, Audience, Voice and Tone

Industry research shows that with nearly all generations of home buyers, their first step taken was to look online for properties. Finding their first home, or their next home, involved detailed research before engaging with a sales agent or broker.

How exactly are prospective home buyers researching?

We all understand the personal nature of buying a home. It isn't about buying a *house*. It's about buying a *home*. A place where you will live and create memories. Home buyers ultimately have core needs that need to be met during their home purchasing journey. They are looking for ways to connect - to the community, the location, the home - and to envision what their life would be like living in that home within that community, without feeling the pressures they may perceive when working more personally with a sales agent.

A 'best practice' approach today is to leverage social media as a way to provide support, resources and information regarding your homes and your community living. It's a way to have a critical two-way conversation, on the buyers' terms. Focused on the buyers' needs.

The 2018 Home Buyer and Seller Generational Trends Report states that leveraging social media is about focusing on a four-pronged approach: > **Paid Social** Advertising [discussed in the Paid Lead Generation section], > **Organic content**, > **Boosted content**, and a > **Response strategy**.

How you use this approach to engage and connect with your prospective buyer is critical to building trust and confidence in your community, and ultimately building the relationship between your community and the buyer, by fulfilling their core needs.

The strategic approach to effectively using social media efforts to building a relationship with the buyer, is by finding the right approach:

- To the type and style of relevant social content - with a focus on driving conversations and engagement with your social audience
- To understanding and driving opportunities to boost your content outside of your current social following to expand your content reach
- To timely and effective response

The value of this approach of connecting with prospective buyers and even current residents is the ability to build strong relationships. The value to you as a community is relationships you build fosters the ability to sell your community to others.

It is critical for success to establish specific goals, by each social channel. The goals will drive the direction and ultimately justify the value of building these relationships, thus offsetting the cost of the social investment.

For Heritage Harbor, we recommend an active presence in the following channels:

- Facebook
- Instagram
- Pinterest
- YouTube
- Twitter
- LinkedIn

SOCIAL MEDIA BEST PRACTICES FOR HERITAGE HARBOR

- Build on voice and tone per channel - to increase engagement, grow reach
- Define appropriate content frequency per channel - per expectations of a home buyer
- Create strong social content strategy - combined with existing content model [which showcases the personality of the community well]
- Define and implement social response processes
- Build on existing content to create more resource content, more opportunities for engagement and connecting with the prospective buyer
- Post content on social channels more frequently [time of day and frequency of content specific to each channel is addressed in recommendations below]

Homebuyer Social Research/Social Media Facts

Based on a survey conducted by Immersion Active (Online Habits of 55+ Homebuyers):

- 88% of 55+ homebuyers use Facebook.
- Consumers of all ages, but especially 55+ homebuyers, rely on Facebook as a referral source and research engine to help them learn about new and exciting brands.
- Facebook's algorithm have made it imperative that brands engage in "conversations," not just post content on an on-going basis. Facebook even gives you a responsiveness score.
- 78% of 55+ homebuyers that use Facebook want information 1-3 times a week on that channel.
- Regardless of inquiry source, the majority of prospective homebuyers are happy if you respond to them within 1 working day.

Current State of Social Presence

To date, Heritage Harbor has established a social presence in the aforementioned social channels, and is posting relevant content for followers and subscribers. The Heritage Harbor team has made good use of photography and have a relatively large video library on YouTube.

The existing social channels provide a strong foundation. Key types of community personality content for Facebook should be continued, but supplemented with resources, interactive and brand social content.

The content of your current posts make good use of Facebook embedded videos (rather than linking to YouTube video) and uses real people and residents in the photos. There is some opportunity to increase the stickiness of your posts.

SOCIAL MEDIA RECOMMENDATIONS:

To take your social media content to the next level and build on the existing social content, we recommend the following:

Increase your Facebook channel reach to have the ability to connect with more prospective buyers, as well as to connect to existing community advocates who can act a personal referrer to Heritage Harbor.

Key attributes to increasing reach include:

- Develop and post more relevant content
- Use a variety of content styles and content topic categories that encourage engagement
- Boost organic content outside of the current, existing Facebook followers network for Heritage Harbor
- Track trends in content engagement to understand best time to post per your audience needs
- Increase the stickiness of your social content. Continue to expand the stickiness/engage-ability of your content by asking property owners to share their videos, asking questions for them to respond to, etc.

For example: one of your recent posts features video footage from Zip Chicago and says *“Here’s a snippet of what you could be (doing) in a few weeks time.”*

To increase engagement and encourage users to respond to your post, an alternative phrase would be: *“What does your dream day in Starved Rock Country look like?”*



Reach and Search Rankings

In addition to setting a goal of increasing your reach, Facebook content can play a significant role in your organic search rankings. Your Facebook page already appears fourth in organic search results for your **branded keywords “Heritage Harbor Ottawa”**

Heritage Harbor Ottawa – Real Estate, Marina and Vacation Rentals
<https://www.visitheritageharbor.com/> ▼
Harbor Life. Welcome to **Heritage Harbor**, a resort community built around a vibrant marina on the Illinois River. A place where neighbors are friends, visitors are ...
[Marina](#) · [Harbor Life Blog](#) · [About](#) · [Community](#)

Heritage Harbor Resort & Marina | Enjoy Illinois
<https://www.enjoyillinois.com/explore/listing/heritage-harbor-resort-and-marina-1> ▼
Vacation Rentals » Heritage Harbor Resort & Marina ... place to park your boat for the season, or just some fun on the water, **Heritage Harbor Ottawa** offers it all.

Heritage Harbor - Ottawa Real Estate - Ottawa IL Homes For Sale ...
https://www.zillow.com/ottawa-il/heritage-harbor_att/ ▼
Zillow has 8 homes for sale in **Ottawa IL** matching **Heritage Harbor**. View listing photos, review sales history, and use our detailed real estate filters to find the ...

Heritage Harbor - Home | Facebook
<https://www.facebook.com> > [Places](#) > [Ottawa, Illinois](#) > [Real Estate](#) ▼
★★★★★ Rating: 4.6 - 119 votes
Heritage Harbor, Ottawa, Illinois. 5827 likes · 11 talking about this · 6743 were here. **Heritage Harbor Ottawa** is the Midwest's premier Marina Resort...

RECOMMENDATION: Improve your search engine ranking for non-branded keywords.

Understand the organic and paid search keywords, as well as how people search and navigate your website, and strategically incorporate those keywords or phrases naturally into your social content posts to optimize the SEO boost from each post.

It is critical to have a combined organic SEO strategy along with paid search ads, to ensure you are getting the highest quality search results and optimal click-through rate.

The first 5 organic results in search engines account for 67.6% of all clicks, with the remaining 32.2% going to paid search.

SOCIAL RESPONSE

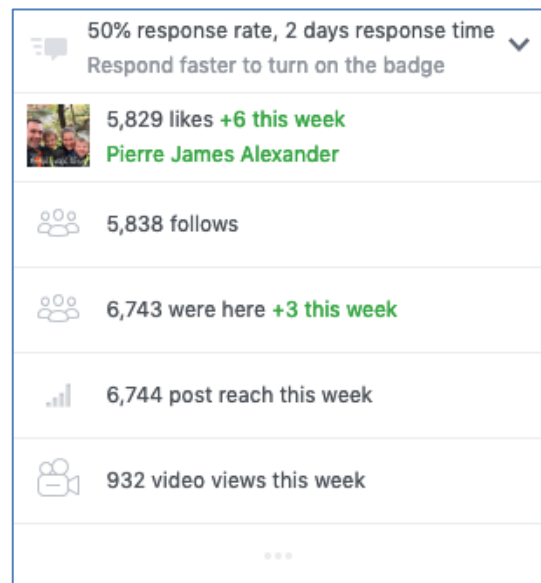
Note: the value of “reach” is important. Reach is defined as how many people see your content, both paid and organic. While the number of followers you have contributes to your overall reach, the engagement with social media channels [content likes, shares, comments] is the true measure of success. Individuals who share your content, are endorsing your content to their friends and families.

As we have highlighted, the **Facebook responsiveness score** is one of the factors used to determine who and how many people will see both your paid and organic content.

Creating moments for engagement, begins with creating relevant content with which buyers wish to engage.

Currently, Heritage Harbor’s responsiveness score is 50% with an average of 2 days for a response. We believe with our support, we can help Heritage Harbor increase its responsiveness score to build more trust with the brand.

Facebook’s transparency to social users can build or break the trust a consumer has with a brand. Social content consumers look to see if a brand is responding, how timely they are responding, and if the answers real, not automated generic answers.



FACEBOOK RESPONSE RECOMMENDATIONS:

Create and implement a response strategy that includes the following:

- Regular monitoring of your Facebook channel. Best practices and recent research indicates monitoring at least once per day. Develop a series of Frequently Asked Questions (FAQs) that can be used to consistently answer questions and continue to build this list as additional questions arise. This approach allows for faster turnaround, but it is critical to ensure post responses stay personal.
- Personalize the answers to questions - always addressing the question directly.
- Learn from the questions and take those learnings to create and publish additional relevant content for your buyers.
- Increase and maintain content frequency to 3 times per week

- Due to Facebook algorithms, not all content posted is always seen by all of your followers - so more content, more relevant content is critical.
- Increase your posting frequency to at least 3 times per week for scheduled posts and then supplement that with ad hoc posts as opportunities arise. Generating this volume of content requires the development of an editorial calendar, content development in advance, and scheduled content posts.

INSTAGRAM

Since Instagram is part of the Facebook platform, many of the same limitations and opportunities exist within this channel. Heritage Harbor's beautiful photography provides a perfect opportunity to take full advantage of the key characteristic of Instagram. Photography as a way to break through the social content noise.

RECOMMENDATIONS:

- Increase social content posting frequency
- Develop hashtag strategy specific to IG and ensure that they are quality hashtags (1-3 hashtags is ideal for engagement and reach)
- Take advantage of feed and stories - especially for video
- Shorten descriptions to increase engagement
- Ensure a response strategy is in place



PINTEREST

Pinterest plays an important role in a 55+ homebuyer's journey during the inspiration and aspiration phase. The same is true for homebuyers in any age demographic when it comes to vacation and second homes. Homebuyers often scour Pinterest looking for ideas and concepts, and these pins can play an important role in organic content as well.



Based on our current evaluation of your Pinterest page, it appears that the last pins were added 5 years ago. Therefore, we recommend that, just like Facebook and Instagram, a regular schedule be put in place to add content to your channel. We recommend 1-2 new pins a week, as a minimum.

RECOMMENDATION: Expand on the current 12 boards to include the following:

- Current real estate for sale
- Floorplans for new neighborhoods and homes
- Red Dog Grille
- Starved Rock Country outdoor activities
- Home Decor Ideas

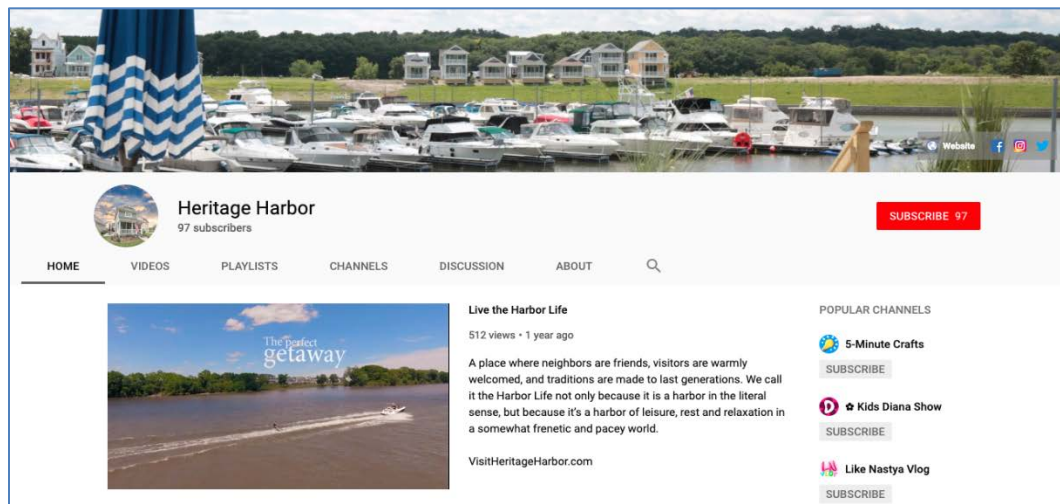
YOUTUBE

Currently there are over one billion users of YouTube who are watching over a billion hours of video per day. With YouTube being the second most used search-engine that provides invaluable opportunities for organic SEO ranking. The platform provides an extremely cost-effective broadcast channel with the ability to segment and track performance.

Heritage Harbor has created a video presence on YouTube that includes key videos that will connect with viewers. There is enormous opportunity for Heritage Harbor to organically increase SEO with optimizations and additions to their current video library and video descriptions.

We recommend the following IMMEDIATE actions to optimize the current content, and encourage the use of this strategy moving forward:

- Add keywords to every video that is currently listed on the site as well as adding keywords to the main page description. This helps with YouTube search and with SEO.
- Preface a link with a CTA: ex: "To rent this home, go to <https://www.visitheritageharbor.com> or call 1-815-433-5000"
- Remove broken links - there are several links to 404 error pages
- Remove or correct videos with out of date branding. (they can just be set to "private" and be repurposed later)
 - The following video has a working link in the description, but the video has the URL "DiscoverHeritageHarbor.com" *rendered into the actual video*, and that URL no longer works. <https://youtu.be/vEX02K-vVGI>
 - This video has a clickable a URL that is different, but works thanks to redirects. It in the description so it is easily fixable https://youtu.be/iSiUnUHx_Cw
- Ensure the phrase "Heritage Harbor" is at the beginning *or* end of every video title. Examples:
- *Vacation Rentals - Heritage Harbor, Ottawa, IL*
- *Live the Harbor Life | Heritage Harbor, Ottawa IL*
- Avoid using a street address as a title for a video and ensure that the phone number, address and working link to the main website are in the description of every single video. YouTube needs the *full* URL including the https:// to be an "active" link that one can click on youtube. Use: <https://www.visitheritageharbor.com>
- Set channel likes and history to "private"

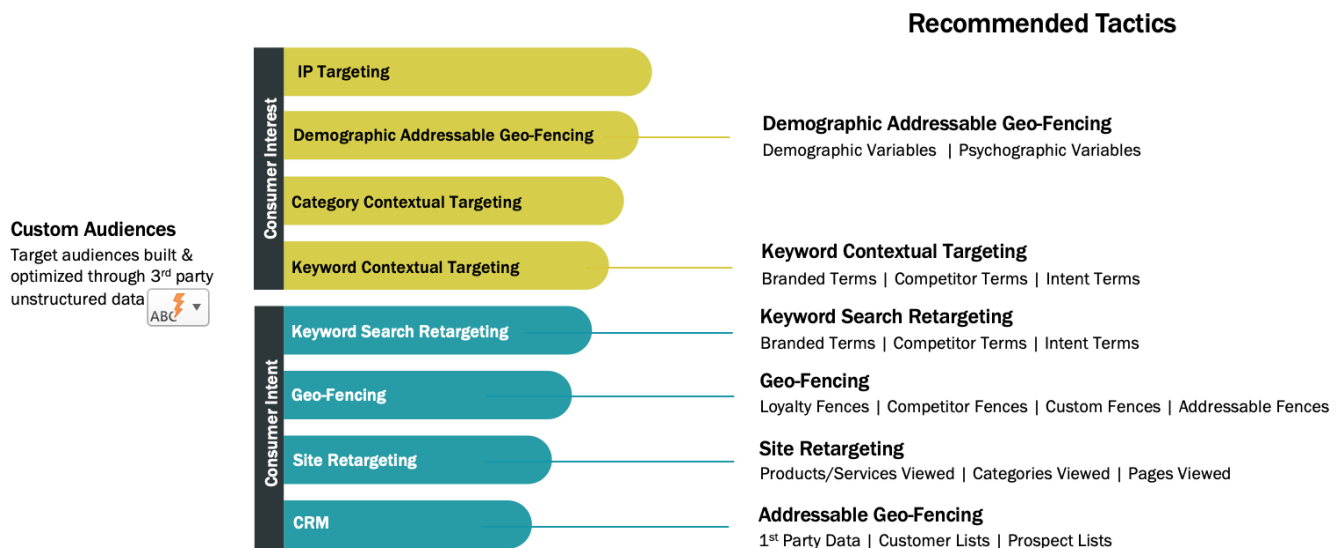


PAID DIGITAL ADVERTISING

Heritage Harbor has allocated a significant budget for digital advertising which includes paid ad spend for the Marina, Red Dog Grill, Cottage Rentals and Homes for Sale.

We recommend continuing lead generation and brand advertising efforts through Paid Search and Facebook/Instagram **with refinement in messaging and creative**. We also highly recommend the use of a lead capture landing page for optimal conversion.

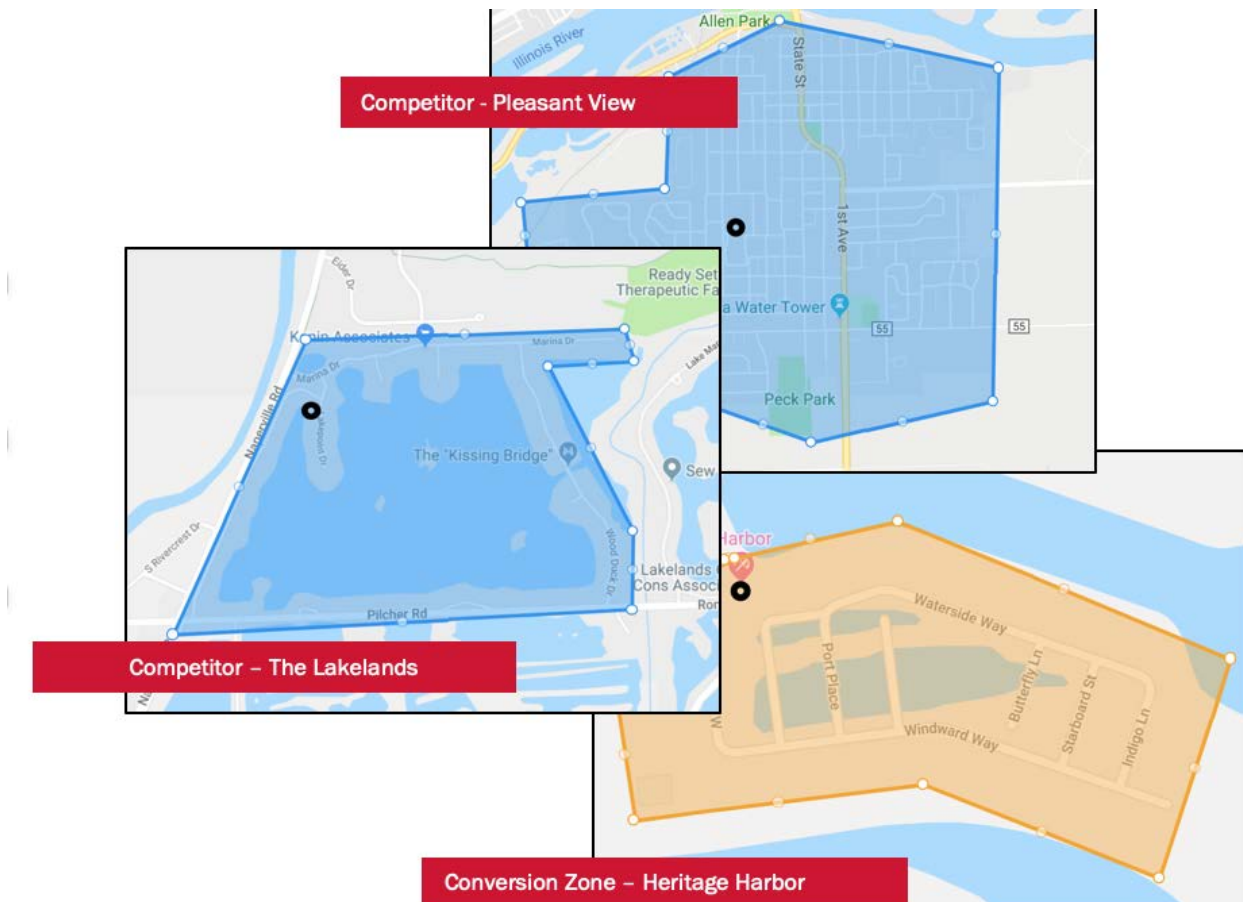
As a compliment to Heritage Harbor’s current paid advertising, we recommend shifting dollars into the use of unstructured data to layer in a more hyper targeted approach. Paid Search and Facebook spend could be further optimized to allow for additional funds to be redirected to these tactics. This will allow for specific and highly targeted campaigns to run for all facets of business at Heritage Harbor with transparent reporting and continual optimization for highest conversions.



GEO-FENCING & TARGETING

RECOMMENDATION: Custom audiences give you the ability to only target customers that you know have been in a location that is relevant to your business or product for up to 30 days after they last visited. What makes this different:

- Built on programmatic infrastructure for superior scale
- Advanced precision with unstructured data
- Geo-Fences can be drawn in custom shapes
- No minimum fence size
- Cross-device delivery in-app and in-browser
- Measure foot traffic conversions with custom attribution settings
- Determine which foot traffic was naturally converted vs. influenced by an ad with Geo-Conversion Lift metrics



Roughly, 98% of consumers will leave a website without converting. Re-engage those consumers with a completely new level of performance and insight by targeting them as they surf the web after visiting your website.

ADVANCED SITE RETARGETING

RECOMMENDATION: Use 3rd party unstructured data as a compliment to current paid retargeting and remarketing efforts. What makes it different:

- Ability to enable bidding, reporting, and optimization down to the smallest data element such as products, categories, or even pages viewed
- Enhanced ROI due to element-level marketing as compared to group-segment level marketing
- Access to inventory from all major exchanges
- Tag management capabilities, allowing a single tag on universal footer
- Audience expansion capabilities

Heritage Harbor
HOME ABOUT COMMUNITY MARINA COTTAGE RENTALS REAL ESTATE CONTACT

User visits your website and browses for various products/services.

Segment Management

Tags Segments

New Segment

Segment Name
Segment Name

Enable matching against any URL

Segment Rules
Users will be added to this segment when the URL they visit matches one of the following rules:

Define how the URL domain and URL path are combined

http(s):// example.com

Connect with dynamic

Tag Management Capabilities

Keyword level bidding, conversions, insight

C	D	E	F	G	H	I	J	K	L	M
Keyword	Impressions	Clicks	CTR	Platform Cost	Search Cost	Geographic Co	Media Cost	CPM	Total Spend	ECPC
medical doctors	304357	85	0.000279	0.851632	0.851632	0.170349	1.532936	3.406581	1036.816787	12.197845
dentist finder	298861	150	0.000502	0.844484	0.844484	0.168907	1.520050	3.177980	1009.540288	6.230130
medicaldaily	287877	278	0.000969							
dental websites	72978	35	0.000478							
medical doctor	66938	34	0.000508							
doctor directory	56972	28	0.000491							
biomedical	49804	12	0.000241	0.859038	0.859038	0.171822	1.546271	3.436169	171.134973	34.261248
lnextgen	37917	24	0.000633	0.8227	0.8227	0.164536	1.48087	3.290889	124.780655	5.199194
cps	36844	13	0.000353	0.843267	0.843267	0.168638	1.517889	3.373137	124.279862	9.559989

DEMOGRAPHIC DIGITAL GEO-FENCING

RECOMMENDATION: Target physical addresses with a digital medium using the most precise address-level geo-targeting solution used to build an audience based on plat line data. Addressable Geo-Fencing can be used both as a stand-alone tactic and to improve the results of addressable TV campaigns, direct mail campaigns, and other marketing efforts that target specific households. Use 1st party data or we can curate a list for you based on demographic or psychographic variables.

What makes it different:

- Highly precise targeting based off of plat line data from property tax and public land surveying information.
- Highly scalable. Up to 1 MM physical addresses can be targeted per campaign.
- Improved reach over IP-based solutions.
- Provides foot traffic attribution. Conversion Zones can be used to track uplift in foot traffic.
- Improves performance of addressable TV, direct mail, and other campaigns that target specific households by extending their reach, improving their frequency, and providing attribution.
- Personalized creative capabilities based on address level intelligence.
- Granular reporting of campaign performance based on ZIP+4.
- Cross-device capabilities.
- Audiences are updated on a daily basis.

PAID FACEBOOK ADS

Heritage Harbor has a strong audience of women ages 45-54 with the potential to increase engagement and likes through paid lead generation efforts that will complement and enhance organic content.

RECOMMENDATION: Continue to use Facebook for Lead Generation with refinement of targeting, message and creative.


Heritage Harbor has used a significant amount of segmentation in paid Facebook efforts. Targeted audiences should be broad enough to reach potential prospects who may be interested in the property, but also to avoid a frequency rate that becomes a turn off to the end user.

RECOMMENDATION: If the goal is to capture lead information to build your database of contacts, the actual ads should either be a Facebook lead-ad (an ad in which lead information is captured within the platform) or link to a conversion optimized landing page.

This graphic represents a **sample Paid Facebook Ad** that has SEO rich messaging. Our testing indicates that this ad would reach approximately 200k people using targeting of Facebook users who live near Ottawa between the ages of 40-65+ with interests in boating and weekend getaways.


The targeting for this ad is broad enough to ensure potential reach will not be hindered by too much frequency. The call to action is clear and the description in the main text includes enough information to spark curiosity for the user to want to learn more.

Paid Facebook efforts will also result in greater reach in organic efforts, especially if there are response processes in place for any comments or questions that are asked on the paid ad.



Heritage Harbor
 Sponsored · 🌐

Located less than 90 minutes from Chicago, our community is close to everything but far from ordinary. We offer low-maintenance riverfront homes that are perfect for weekend retreats or year-round living. Build your dream home in an incredible outdoor recreation region rich in history, nature, and adventures.



EXPLORE.VISITHERITAGEHA...

Live the Harbor Life |
Download Brochure

LEARN MORE

PAID SEARCH ADS

In the current Paid Search strategy, a significant amount is being spent on bids for main brand terms. We see extensive opportunity to divert those funds to targeted search ads and organically increase SEO. Currently, Paid Search spend is primarily focused on Broad Match, Broad Match Modifier and Phrase Match buys. It is essential to ensure that negative keywords are being maintained, continual testing of multiple expanded text ads in every ad group as well as inclusion in all ad extensions.

Ad Content	Acquisition					Behavior		Conversions	
	Clicks	Cost	CPC	Users	Sessions	Bounce Rate	Pages / Session	General Form Filled (Goal 2 Conversion Rate)	General Form Filled (Goal 2 Completions)
	7,705 % of Total: 26.81% (28,742)	\$13,594.83 % of Total: 24.22% (\$56,120.25)	\$1.76 Avg for View: \$1.95 (-9.64%)	4,015 % of Total: 5.68% (70,630)	4,577 % of Total: 5.06% (90,377)	53.68% Avg for View: 58.35% (-7.99%)	2.67 Avg for View: 2.52 (6.21%)	0.13% Avg for View: 0.19% (-29.90%)	6 % of Total: 3.55% (169)
1. Heritage Harbor	4,840 (62.82%)	\$8,312.62 (61.15%)	\$1.72	2,524 (62.21%)	2,925 (63.91%)	50.84%	2.97	0.14%	4 (66.67%)
2. Vacation life you want	2,112 (27.41%)	\$3,716.91 (27.34%)	\$1.76	1,173 (28.91%)	1,271 (27.77%)	57.36%	2.24	0.08%	1 (16.67%)

RECOMMENDATION

Ensure that ads are pointing to an active webpage and set a goal for conversion in Google Analytics. Currently, the Active Retirement Campaign (Paid Search Expanded Text Ad) has an average cost per conversion of \$194. That is well above industry average for click thru conversion. The ad is sending viewers to a webpage that has a “404 error: Page Not Found”

(<http://www.visitheritageharbor.com/active%20adults/>)

RECOMMENDATION

Incorporate the word ‘family’ into keywords.

Heritage Harbor is currently not ranked for “Family Getaways Illinois,” “Family Getaways Chicago,” or “Family Getaways Starved Rock”

Incorporate the word ‘home’ into every ad.

Heritage Harbor is currently not ranked for “vacation home Illinois” or “vacation home chicago,” or for “riverfront living illinois,” “waterfront il,” “Starved Rock Country”

Below are two sample paid search ads we created to illustrate how keyword focused text can be used in Paid Search to promote the benefits of living at Heritage Harbor.

Heritage Harbor | New Homes in Ottawa, IL | Live the Easy Life

Ad visitheritageharbor.com/Ottawa-IL

Discover Life that's Close to Home, Close to Family, and Far Beyond Your Expectations. Home Sites, Single-Family Homes, Vacation Cottages, Townhomes & Condos. Live the Dream!

Heritage Harbor | New Home Options in Ottawa, IL

Ad visitheritageharbor.com/Ottawa-IL

The Harbor Life is Close to Everything but Far From Ordinary. Come Live the Easy Life! Shopping, Dining, Events, the Outdoors. The Things that Make You Feel Alive? They're Here.

ONLINE DIRECTORIES

Heritage Harbor has already taken an important step in improving its positioning within online directories by securing a placement on PrivateCommunities.com. This directory, and others like it, offer a strong secondary source of leads because these directories often appear in the top organic search positions, for both branded and non-branded keywords.

In addition to the Private Communities listing, we recommend Heritage Harbor pursue these additional directory listings: BDX, Google, Google Places, Yelp,

BDX Listing Platform - Heritage Harbor already has a listing on this platform; however, it is outdated and currently points to a 404 error page (See screenshot on next page. This is likely due to the launch of the new website).

BDX is the exclusive listing platform for the most trafficked new home site in the U.S.,

NewHomeSource.com. Listing with BDX also includes listing syndication to over 250 real estate websites including **Realtor.com**, **Homes.com**, and **Redfin.com**. Their listing package includes the ability to update your listings through an XML feed or by manually updates. You can create a community page w/ individual listings, community info, images, maps, contact info, lead form, etc.

NewHomeSource New Homes Why Buy New New Home Guide Sign In

Heritage Harbor Ottawa Development Corp. New Homes in Ottawa

You found our Heritage Harbor Ottawa Development Corp. plans in Ottawa, IL. There's lots of builder jargon out there, but if you are in the market, then it's best to know a few terms. Homes for sale come with many names. Quick delivery homes are often referred to as spec homes or inventory homes. You can move into these pretty quickly since they are either standing inventory or already under construction. Plans are unbuilt floorplans that you can have built just for you. Some people refer to them as models, but whatever you call them, they often come in several design variants called elevations. The same plan can look very different with brick, siding or stone exteriors, but the entire outline can change from one elevation to the next. This view on New HomeSource shows all the Heritage Harbor Ottawa Development Corp. plans and inventory homes in Ottawa

New Homes > Illinois > Chicago Area > Ottawa Clear all filters

Distance 25 Mile Radius
Ottawa, IL

Price
Min: No Min
Max: No Max

Beds & Baths
All Bedrooms
All Bathrooms

Schools
All School Districts

More
Builder: Heritage Harbor Ottawa Development Corp.

Communities & Homes **Custom & On Your Lot** **Builder Directory** View on Map

View Communities **View Homes**

Quick Move-In **Hot Deals** **Model Homes** **Ready to Build** **2 Homes** **Sort by: Default**

Other Homes for Sale

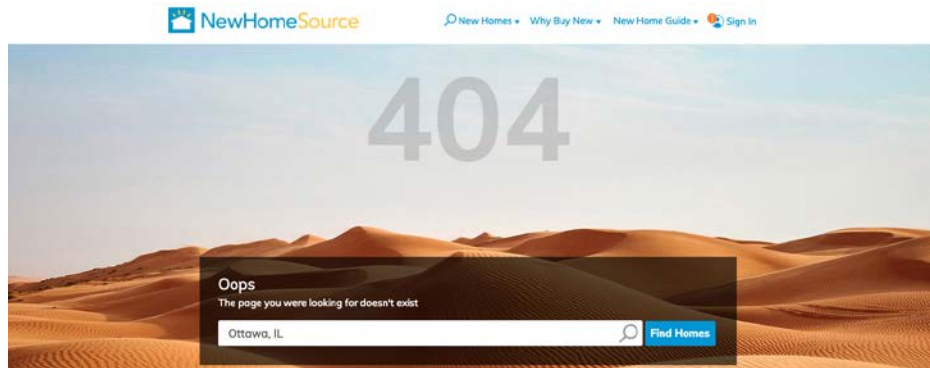
Unit G - End Unit

Heritage Harbor/Adventure Townhomes **From \$229,900**
Ottawa, IL 61350 Map **2 Br 2 Ba 1 Gr 1,628 sq. ft.**
No photo available View Details >

View Chicago Homes >

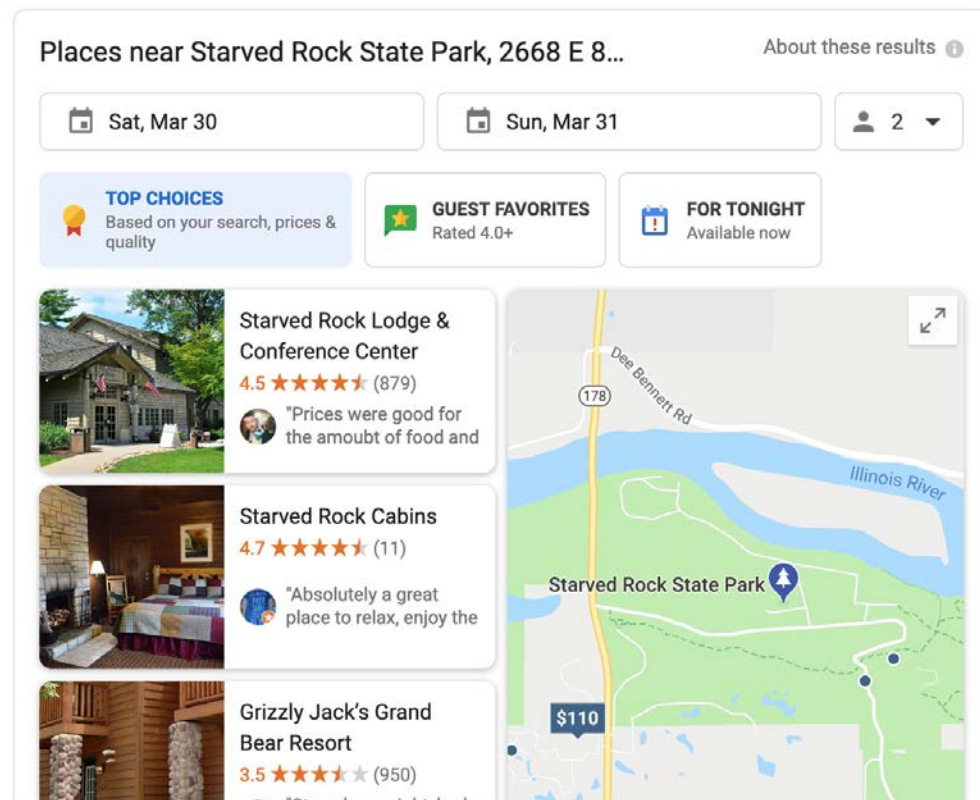
Homes From **\$165K to \$686K** **Pulte Homes**

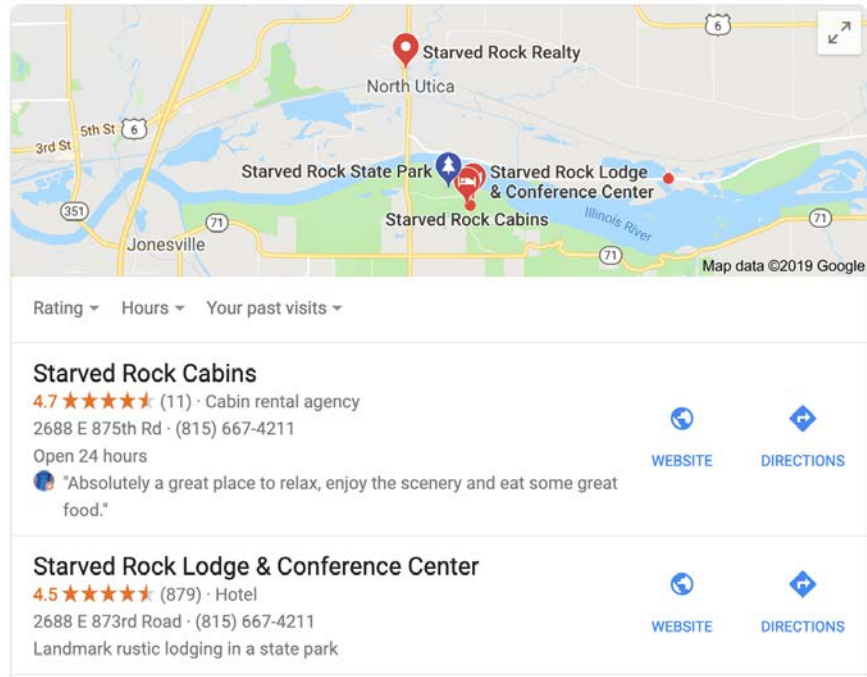
Below is a screenshot from BDX



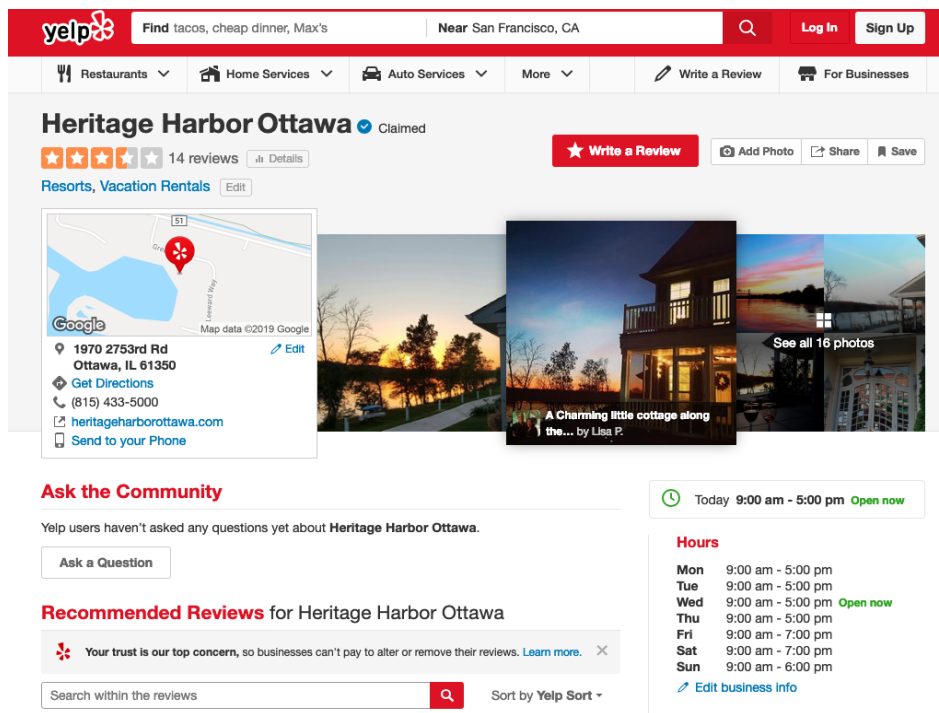
RECOMMENDATION

Update all Google listings with keywords to allow for additional display on Google Places. When searching “Starved Rock Country Rentals” Heritage Harbor ranked 6th on the page. Updates are needed for Google Places listing. (Same applies to searches for “Starved Rock Country Homes” and “Starved Rock Homes” - see Google Map listing screen shot on next page)





RECOMMENDATION: Update Yelp Listing by soliciting reviews and adding additional photos. This will improve the rating (currently 3.5). It is also important to “claim the page” as the business owner (if not already done) and respond to reviews and comments that are left on the listing page.



Sales and Marketing Collateral

The marketing team has prepared a draft mock-up of a “community lifestyle brochure” that incorporates all aspects the brand story of living the “Harbor Life.” (also presented in the Arrival Experience supplement). The proposed design would reduce the number of collateral pieces needed and would provide a user-friendly, consolidated vehicle for conveying the community’s messages about Harbor Life (lifestyle); community and local amenities/attractions (location); and general information about the homes and neighborhoods (product). We recommend that the specific details pertaining to the marina, water sports, and vacation rentals be presented separately.

For continuity with the website: “Live the Dream” is featured on the front panel over a beautiful image of the Illinois River. (this image should be considered as one of the frequently used signature images). To tie into the writing on the website about the location offering a place to call home, close to family, for all ages; we have utilized a stylized graphic for the heading: *Discover LIFE Close to HOME, Close to FAMILY, Far Beyond Your Expectations*. (This same text graphic is presented as a wall display in the recommendations for the Welcome Center.)

This type of brochure is highly recommended for consolidating the community story into one easy to absorb collateral piece. The information is general enough in tone and specifics that the shelf life of such a piece is much greater. It can literally become a “coffee table” item that prospective buyers keep, refer to frequently, and share with family and friends.

The marketing team as included samples of digital and social ads and will provide recommendations for print ads once a print strategy is confirms.

A note regarding lifestyle and product messaging: to attract and appeal to an older buyer market (aka: active adult 55 and older), careful review and a few adjustments to the messaging and images of people will need to be implemented. (see Personas supplement)

Age-targeted Personas for Lead Generation

The “personas” supplement provides several examples of how we recommend incorporating very specific keywords in digital advertising to attract the 55 and older demographic.

Builders Guild Collateral

Although the Executive Document created in q4 2018 is quite extensive and beneficial for an investor or builder to receive, we recommend creating a much smaller builder-specific piece that invites a potential builder to join the Heritage Harbor Builders Guild. This piece can be used by the existing listing agency, the marketing team, and others to help connect with potential builder partners.

Activities Calendar and Club List

The events calendar on the new website does a great job of positioning Heritage Harbor as an active, engaging community with social opportunities practically every night of the week. In addition, the content about the local area and the Harbor Life Blog gives prospects even more ideas about how to enjoy the community and surrounding area.

Recommendation: to enhance the activities content add a list of clubs and organizations available both at Heritage Harbor and within the local community. We know that many prospective residents may be looking for ways to volunteer or get more involved in the local community, so providing this list would just enhance the variety of content already available.

Resident Referral Program

Heritage Harbor's "Share the Awesome" referral program handout should be revised to have similar messaging as is on the website.

Resident Ambassadors

Currently owners are your best source for referrals. Any resident who has been quoted on the website or filmed for a testimonial video should be added to a Resident Ambassadors list. This group is highly valuable to the continued growth of the community. After the referral program handout is reprinted, consider sending the new piece to this group with a very sincere 'thank you' for their previous praise of the community.

Public Service Award Program

During our visit to Heritage Harbor, we discussed the benefits of targeting public service retirees such as police, fire, and rescue personnel because of their need to stay in state after retirement in order to receive their full retirement benefits. To that end, in addition to considering them as a potential target segment in our advertising, we recommend that Heritage Harbor implement a Public Service Award program.

This program can be as simple as offering a discount on the lot purchase, which can also be passed through as a discount on the overall home purchase should the prospect decide to purchase a home rather than just a lot. The discounted amount would be determined by Heritage Harbor, but we would recommend a range somewhere between \$2,500 - \$4,000.