

# MAXIMIZING RESULTS & ROI



**PROMAX**

promax training & consulting

*the difference between*

**HELPING  
SELLING**

is just two letters

**H**ELP**I**NG

**S**ELL**I**NG



# EDUCATE

*yourself*

*clients*



A close-up photograph of a man with dark, curly hair and large, round black-rimmed glasses. He has a wide-eyed, surprised expression, with his mouth slightly open. His right hand is raised near his face, with fingers slightly curled. The background is plain white.

**Why buy  
from YOU?**

**5 Ps of  
MARKETING =**



**ADVERTISING = FUTURE SUCCESS**

# ADVERTISEMENTS FAIL

*because of improper planning*

## **Ineffective advertising campaigns:**

- are poorly prepared and executed at the wrong time.
- are too short in duration.
- use the wrong media to serve the advertising goals.





# ADVERTISEMENTS FAIL

*because they lack creativity*

**Ineffective advertising campaigns fail to:**

- attract attention.
- speak the target audience's language.
- entice people with an effective message or offer.





**Added to these challenges,  
some representatives:**

- ✖ fail to set and manage expectations.
- ✖ sell products to reach personal sales goals.

**PLUS**

- ✖ The client does not internally support the ad efforts.

**Pre-existing marketing conditions may also prevent success such as a poor location, pricing strategy or inferior products.**



# CONSUMER PURCHASE FUNNEL / PATH TO PURCHASE



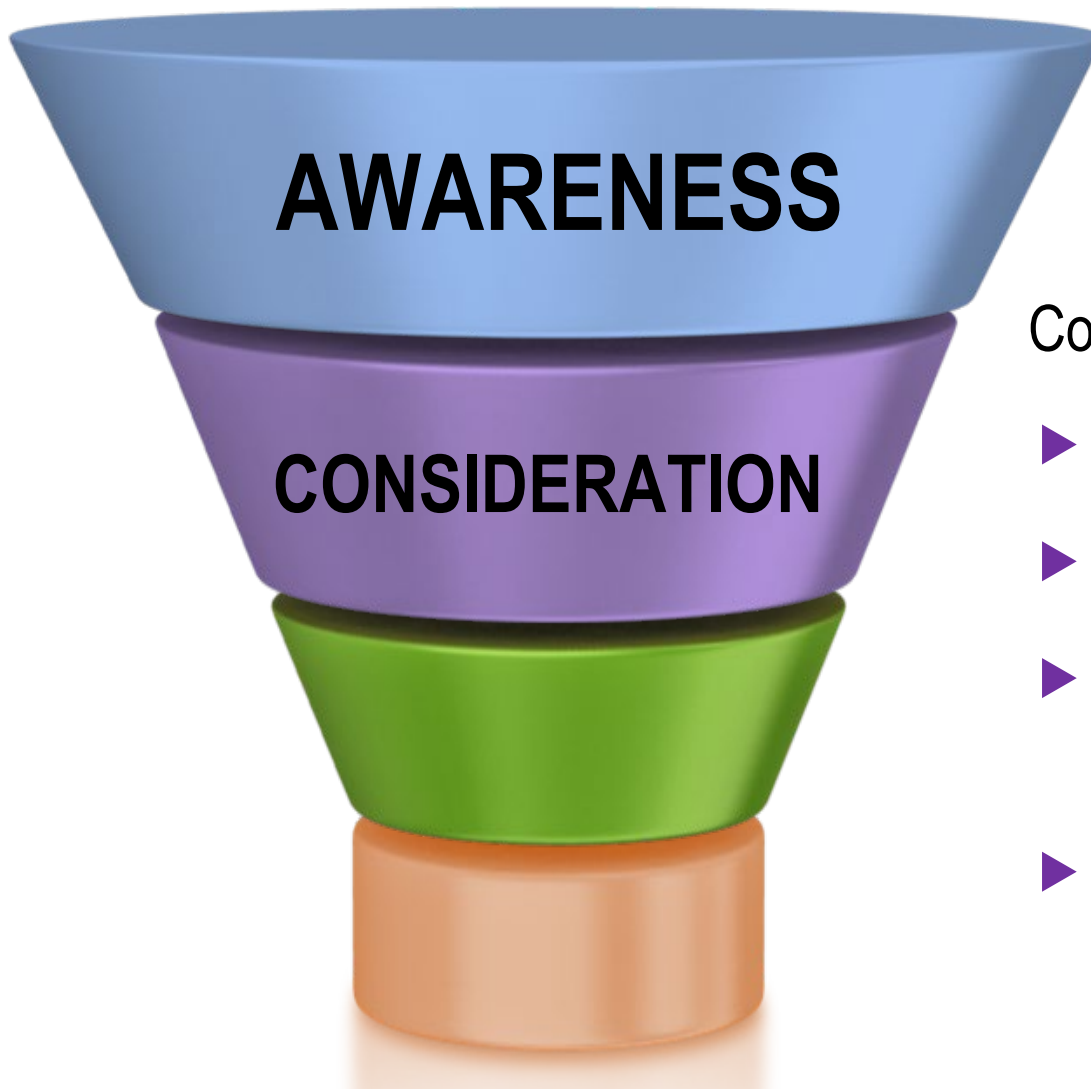
- ▶ Information is shared
- ▶ Consumer becomes aware of the advantages of the product, service or brand.

# CONSUMER PURCHASE FUNNEL / PATH TO PURCHASE



**CRITICAL STEP!**

# CONSUMER PURCHASE FUNNEL / PATH TO PURCHASE



Consumer:

- ▶ Evaluates options
- ▶ Acquires information
- ▶ Reviews facts, figures and customer feedback
- ▶ Compares alternatives

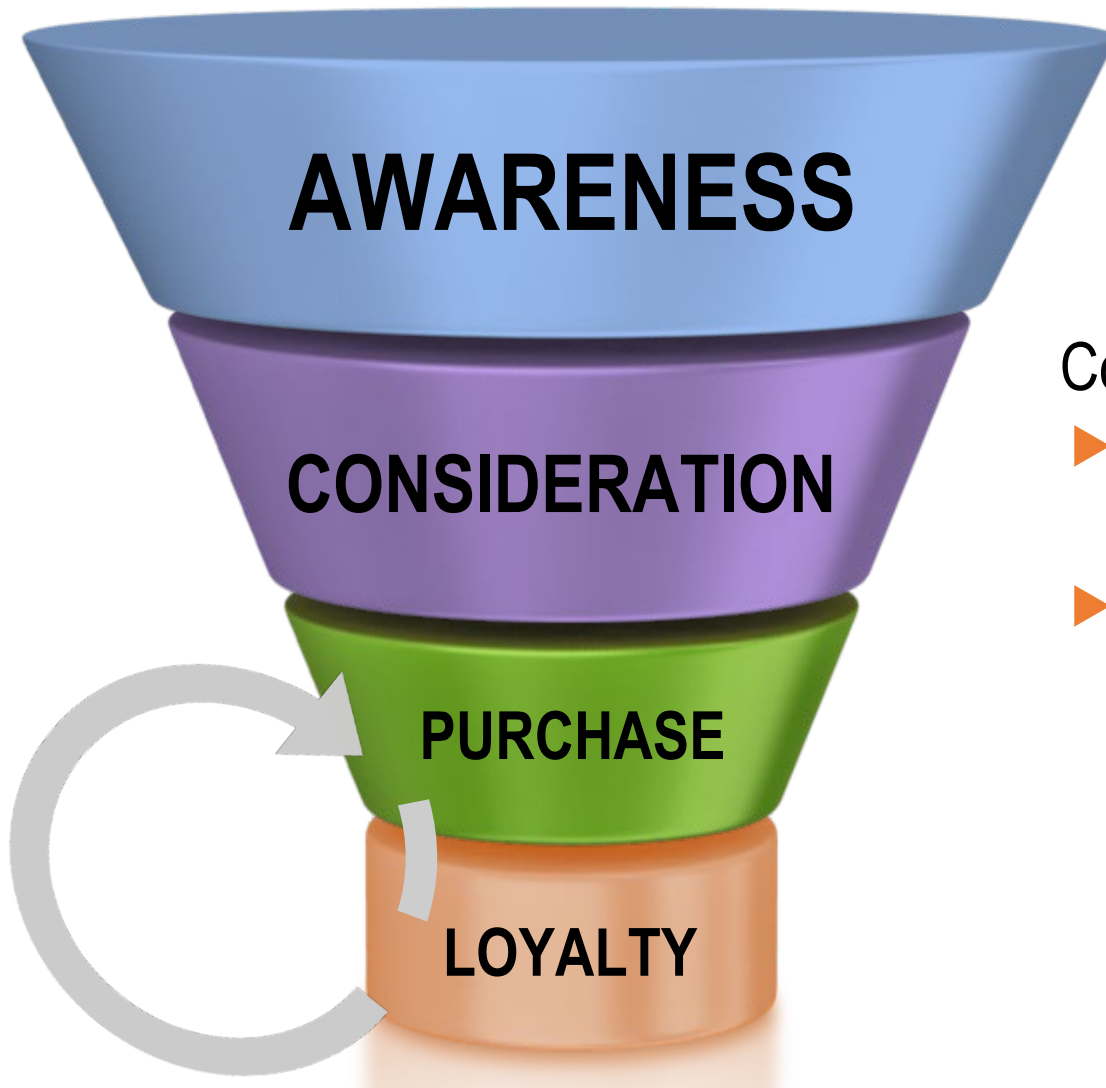
# CONSUMER PURCHASE FUNNEL / PATH TO PURCHASE



Consumer experience includes:

- ▶ Website
- ▶ Personnel
- ▶ Product / Service

# CONSUMER PURCHASE FUNNEL / PATH TO PURCHASE



Consumer:

- ▶ Becomes a regular customer
- ▶ Shares positive reviews



- ▶ Increase the number of shoppers to your business or website.
- ▶ Encourage customers to buy and to buy a lot when they shop.
- ▶ Invite people to return and buy again in the future.
- ▶ Encourage shoppers to recommend your business to other buyers.

#### 1. INCREASE THE NUMBER OF SHOPPERS TO YOUR BUSINESS OR WEBSITE

- ☐ Consistently advertise your unique product or service offerings to a significant number of potential customers with adequate frequency to stimulate action.
- ☐ Select "hot" selling products or services to include in your advertising.
- ☐ Include a full assortment and variety of products or services and ensure sufficient inventory and personnel to assist all customer requests.
- ☐ Make sure the message, offer or price is competitive and compelling, and the terms easily understood.
- ☐ Coordinate your online efforts to mirror your traditional advertising campaign.

#### 2. ENCOURAGE SHOPPERS TO INCREASE THEIR SPENDING

##### Offer Assistance and Recommendations to Each Shopper

- ☐ Provide guidance and suggestions for additional purchases based on personal experience, popular items and customer feedback.
- ☐ Share product and service information, as well as compare and contrast options.

##### Display Items to Maximize Sales

- ☐ Prominently display advertised products in a desirable manner with easy access.
- ☐ Display accompanying products together to encourage multiple and add-on sales.

##### Create Signs to Guide Buyers

- ☐ Use signs to describe and identify advertised products to peak interest and to ensure they are easily located.
- ☐ Make sure signs communicate the price and savings of the products or services offered and their unique features and benefits.
- ☐ Ensure all advertising and signage is consistent in theme and color incorporating your business's style and promotional theme.
- ☐ Print many generic "sale" and "as advertised" signs so they can be recycled for future promotions.

#### 3. INVITE SHOPPERS TO RETURN TO YOUR BUSINESS AND BUY

- ☐ Include an incentive at the end of each transaction (coupon, discount card, frequent purchase incentive, etc.) to encourage future purchases.
- ☐ Collect information about your customers: names, street and email addresses, preferred products, as well as phone numbers to use for future marketing efforts.
- ☐ Stay in touch with customers to keep them aware of new or special products or services and regularly invite them to shop your business.
- ☐ Thank every customer within two days of their purchase with a phone call, note or email. Include an offer for them to purchase again and/or encourage them to refer others to you.
- ☐ Promote your brand by displaying your logo and brand benefits throughout the store, on bags, employee shirts, cards, racks, signs and automobiles.

#### 4. ENCOURAGE SHOPPERS TO RECOMMEND YOUR BUSINESS TO OTHER


- ☐ Encourage customers ~ at your store, in your invoices or online ~ to post positive comments on your website, a review site or on social media.
- ☐ Incorporate ongoing referral programs as a part of your marketing strategy.



# *vital media planning info*



If you do not have this information  
you cannot prepare an effective media plan.



*If you fail to set  
measurable goals  
you may be setting  
yourself up for churn.*

**Key metrics needed to set, manage and measure expectations:**

1. Current average sale
2. Current average # transactions per month
3. # of transactions desired per month
4. Desired customer action after ad exposure (shop, call, visit website)
5. Conversion rate (percent of shoppers to buyers)
6. Measurement of success (how they will measure success)
7. Monthly advertising budget (to determine ROI)



CLIENT	
ACCOUNT EXECUTIVE	

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
<b>C</b>	<u>Current Situation</u>	<ul style="list-style-type: none"> <li>▪ Company changes &amp; challenges</li> <li>▪ Internal marketing implemented to accompany the campaign</li> <li>▪ Employee involvement in promotional efforts</li> </ul>			
<b>A</b>	<u>Attribution + Ad Performance</u>	<ul style="list-style-type: none"> <li>▪ Metrics &amp; optimization of the campaign</li> <li>▪ Schedule review</li> <li>▪ Creative evaluation</li> </ul>			
<b>R</b>	<u>ROI &amp; KPIs</u> (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>▪ Review Results - ROI &amp; KPI</li> <li>▪ New measurements needed</li> </ul>			
<b>E</b>	<u>Expectations for Future</u>	<ul style="list-style-type: none"> <li>▪ Sales trends</li> <li>▪ Next steps</li> <li>▪ New creative</li> <li>▪ New solutions/strategies</li> <li>▪ Future goals (ROI + KPIs)</li> <li>▪ Future internal marketing</li> </ul>			
<b>!</b>	<u>Additional Info</u>	<ul style="list-style-type: none"> <li>▪ Invoicing process</li> <li>▪ Industry data to drive business</li> <li>▪ Community events and opportunities</li> </ul>			



CLIENT	
ACCOUNT EXECUTIVE	

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
C	<u>Current Situation</u>	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>			
A	<u>Attribution + Ad Performance</u>	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>			
R	<u>ROI &amp; KPIs</u> (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			

**PLAN DISCUSSIONS IN ADVANCE**

**DOCUMENT ON THE FORM**

**PLACE IN THE CLIENT'S FILE**



# EACH MONTH DETERMINE PERTINENT DISCUSSIONS



ACCOUNT EXECUTIVE

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
<b>C</b>	<b>Current Situation</b>	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>			
<b>A</b>	<b>Attribution + Ad Performance</b>	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>			
<b>R</b>	<b>ROI &amp; KPIs</b> (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			
<b>E</b>	<b>Expectations for Future</b>	<ul style="list-style-type: none"> <li>Sales trends</li> <li>Next steps</li> <li>New creative</li> <li>New solutions/strategies</li> <li>Future goals (ROI + KPIs)</li> <li>Future internal marketing</li> </ul>			
<b>!</b>	<b>Additional Info</b>	<ul style="list-style-type: none"> <li>Invoicing process</li> <li>Industry data to drive business</li> <li>Community events and opportunities</li> </ul>			

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
C	Current Situation	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>	<p><i>Remind the client about the four advertising goals, the internal marketing they planned before the campaign's launch and the importance of their team's involvement.</i></p> <div> <div>BIZ TIPS</div> <div>INTERNAL MARKETING STRATEGIES</div> <div>to achieve the four goals of advertising</div> </div> <ul style="list-style-type: none"> <li>► Increase the number of shoppers to your business or website.</li> <li>► Invite people to return and buy again in the future.</li> <li>► Encourage customers to buy and to buy a lot when they shop.</li> <li>► Encourage shoppers to recommend your business to other buyers.</li> </ul> <div> <div>1. INCREASE THE NUMBER OF SHOPPERS TO YOUR BUSINESS OR WEBSITE</div> <ul style="list-style-type: none"> <li>□ Consistently advertise your unique product or service offerings to a significant number of potential customers with adequate frequency to stimulate action.</li> <li>□ Select "hot" selling products or services to include in your advertising.</li> <li>□ Include a full assortment and variety of products or services and ensure sufficient inventory and personnel to assist all customer requests.</li> <li>□ Make sure the message, offer or price is competitive and compelling, and the terms easily understood.</li> <li>□ Coordinate your online efforts to mirror your traditional advertising campaign.</li> </ul> <div>2. ENCOURAGE SHOPPERS TO INCREASE THEIR SPENDING</div> <div>Offer Assistance and Recommendations to Each Shopper</div> <ul style="list-style-type: none"> <li>□ Provide guidance and suggestions for additional purchases based on personal experience, popular items and customer feedback.</li> <li>□ Share product and service information, as well as compare and contrast options.</li> </ul> <div>Display Items to Maximize Sales</div> <ul style="list-style-type: none"> <li>□ Prominently display advertised products in a desirable manner with easy access.</li> <li>□ Display accompanying products together to encourage multiple and add-on sales.</li> </ul> <div>Create Signs to Guide Buyers</div> <ul style="list-style-type: none"> <li>□ Use signs to describe and identify advertised products to peak interest and to ensure they are easily located.</li> <li>□ Make sure signs communicate the price and savings of the products or services offered and their unique features and benefits.</li> <li>□ Ensure all advertising and signage is consistent in theme and color incorporating your business's style and promotional theme.</li> <li>□ Print many generic "sale" and "as advertised" signs so they can be recycled for future promotions.</li> </ul> <div>3. INVITE SHOPPERS TO RETURN TO YOUR BUSINESS AND BUY</div> <ul style="list-style-type: none"> <li>□ Include an incentive at the end of each transaction (coupon, discount card, frequent purchase incentive, etc.) to encourage future purchases.</li> <li>□ Collect information about your customers: names, street and email addresses, preferred products, as well as phone numbers to use for future marketing efforts.</li> <li>□ Stay in touch with customers to keep them aware of new or special products or services and regularly invite them to shop your business.</li> <li>□ Thank every customer within two days of their purchase with a phone call, note or email. Include an offer for them to purchase again and/or encourage them to refer others to you.</li> <li>□ Promote your brand by displaying your logo and brand benefits throughout the store, on bags, employee shirts, cards, racks, signs and automobiles.</li> </ul> <div>4. ENCOURAGE SHOPPERS TO RECOMMEND YOUR BUSINESS TO OTHER</div> <ul style="list-style-type: none"> <li>□ Encourage customers – at your store, in your invoices or online – to post positive comments on your website, a review site or on social media.</li> <li>□ Incorporate ongoing referral programs as a part of your marketing strategy.</li> </ul> </div>		
A	Attribution + Ad Performance	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>			
R	ROI & KPIs (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			
E	Expectations for Future	<ul style="list-style-type: none"> <li>Sales trends</li> <li>Next steps</li> <li>New creative</li> <li>New solutions/strategies</li> <li>Future goals (ROI + KPIs)</li> <li>Future internal marketing</li> </ul>			
!	Additional Info	<ul style="list-style-type: none"> <li>Invoicing process</li> <li>Industry data to drive business</li> <li>Community events and opportunities</li> </ul>			

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
C	Current Situation	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>			
A	Attribution + Ad Performance	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>	<p><i>Review the metrics at every meeting.</i></p> <p><i>In the first meeting, remind the client that the campaign will take time to build momentum.</i></p>		
R	ROI & KPIs (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			
E	Expectations for Future	<ul style="list-style-type: none"> <li>Sales trends</li> <li>Next steps</li> <li>New creative</li> <li>New solutions/strategies</li> <li>Future goals (ROI + KPIs)</li> <li>Future internal marketing</li> </ul>			
!	Additional Info	<ul style="list-style-type: none"> <li>Invoicing process</li> <li>Industry data to drive business</li> <li>Community events and opportunities</li> </ul>			

1

## SET YOUR MONTHLY MARKETING GOALS

Circle one of the below campaign goals

Establish new customer goals

Estimate % of shoppers,  
callers or web visitors that buy

Establish # of shoppers, callers or web visitors needed

Goal: ☐ Visits ☐ Calls ☐ Web Traffic

Desired # of New Customers Per Month \_\_\_\_\_

÷

Conversation Rate \_\_\_\_\_%

=

# Needed to Achieve Goal Per Month = \_\_\_\_\_

Example: Goal: ☒ Calls → 10 new customers ÷ 20% conversion rate = 50 calls needed

## MONTHLY ROI CALCULATOR

\$ Monthly Ad Investment	÷	USE ONE: <input type="checkbox"/> \$ Average Sale <input type="checkbox"/> \$ Gross Profit Per Sale	=	# Monthly Transactions Needed to Begin Turning Profit	÷	4 or 5 (# weeks in month)	=	# Weekly Transactions Needed to Begin Turning Profit
\$	÷	\$	=		÷	4 or 5	=	

## MONTHLY GOAL CALCULATOR

# New Buyers Per Month	X	USE ONE: <input type="checkbox"/> \$ Average Sale <input type="checkbox"/> \$ Gross Profit Per Sale	=	Increased Additional \$ Per Month	-	\$ Monthly Ad Investment	=	\$ Increased Additional Monthly Profit
	X	\$	=	\$	-	\$	=	\$

## ANNUAL VALUE OF EACH NEW CUSTOMER

USE ONE: <input type="checkbox"/> \$ Average Sale <input type="checkbox"/> \$ Gross Profit Per Sale	X	Average # Times Customer Buys Per Year	=	Average Annual Value of New Customer
\$	X		=	\$

## LIFETIME VALUE OF EACH NEW CUSTOMER

\$ Average Annual Value of New Customer	X	Average # of Years Customer Buys	=	Average Lifetime Value of New Customer
\$	X		=	\$

2

## TRACK, MEASURE, EVALUATE &amp; ADJUST

Month	# Total Visitors, Callers or Web Traffic	# Total Buyers	% Conversion (# Buyers ÷ # Shoppers, Callers or Web Traffic)	# Average Items Purchased	\$ Average Sale Per Buyer	\$ Total Sales	Promotional Message or Offer

# PERFORMANCE REPORT

Advertiser		Date of Performance Report
Campaign Dates		

PRINT ANALYTICS					
Newspaper / Printed Product	# Ads	X	Daily or Sunday Readership	=	Gross Impressions
Total Monthly Gross Impressions					

DIGITAL ANALYTICS		
DIGITAL STRATEGIES	Impressions Promised	Impressions Delivered
Total Monthly Impressions		

- Impressions are the number of times your ad appeared in front of potential customers.
- See attached for more detailed reporting.

- ▶ Proof of performance
- ▶ Power of products
- ✓ Share additional information if desired




## PARTNERS IN SUCCESS

### OUR PARTNERSHIP COMMITMENT

*We are committed to providing the most powerful advertising solutions and professional guidance to help you achieve your business goals.*

#### *Our promise to you ~ we will:*

- ☐ Provide industry- and market-specific research to help you make educated decisions for your company.
- ☐ Recommend solutions customized to your unique business goals and challenges.
- ☐ Create an enticing and effective, result-producing campaign for your business.
- ☐ Deliver your message to the number of potential customers we promised.
- ☐ Meet with you monthly to evaluate the success of the campaign and optimize its performance.
-  ☐ Share monthly analytics to provide proof of performance.
- ☐ Offer internal marketing expertise to assist you in maximizing sales opportunities when customers call or visit your store.



### YOUR PARTNERSHIP COMMITMENT

## PERFORMANCE REPORT

- ✓ Deliver on your promise
- ✓ Deliver each month

“Partnership” ~ a relationship involving close cooperation between parties with each having specific responsibilities.



# EXAMPLE MEETING #1

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
C	<u>Current Situation</u>	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>			
A	<u>Attribution + Ad Performance</u>	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>			
R	<u>ROI &amp; KPIs</u> (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			
E	<u>Expectations for Future</u>	<ul style="list-style-type: none"> <li>Sales trends</li> <li>Next steps</li> <li>New creative</li> <li>New solutions/strategies</li> <li>Future goals (ROI + KPIs)</li> <li>Future internal marketing</li> </ul>			
!	<u>Additional Info</u>	<ul style="list-style-type: none"> <li>Invoicing process</li> <li>Industry data to drive business</li> <li>Community events and opportunities</li> </ul>	<p><i>Review the customer's first invoice, as they can often confuse new clients.</i></p>		



# EXAMPLE MEETING #1

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
C	Current Situation	<ul style="list-style-type: none"> <li><del>Company changes &amp; challenges</del></li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>			
A	Attribution + Ad Performance	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li><del>Schedule review</del></li> <li><del>Creative evaluation</del></li> </ul>			
R	ROI & KPIs (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li><del>New measurements needed</del></li> </ul>			
E	Expectations for Future	<ul style="list-style-type: none"> <li>Sales trends</li> <li>New products</li> <li>New advertising strategies</li> <li>New marketing strategies</li> <li>Future goals (KPIs)</li> <li>Future internal marketing</li> </ul>			
!	Additional Info	<ul style="list-style-type: none"> <li>Invoicing process</li> <li><del>Industry data to drive business</del></li> <li><del>Community events and opportunities</del></li> </ul>			




CLIENT	
ACCOUNT EXECUTIVE	

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____
C	<u>C</u> urrent Situation	<ul style="list-style-type: none"><li>Company changes</li><li>Internal marketing to accompany</li><li>Employee involvement promotional efforts</li></ul>		
A	<u>A</u> ttention + Ad Performance	<ul style="list-style-type: none"><li>Metrics &amp; optimization campaign</li><li>Schedule review</li><li>Creative evaluation</li></ul>		
R	<u>R</u> OI & KPIs (Return on Investment & Key Performance Indicators)			
E	<u>E</u> xpectations for Future			
!	<u>!</u> Additional Info			

Ideally, meet with every client IN PERSON at least once a month.

# EACH MONTH DETERMINE PERTINENT DISCUSSIONS

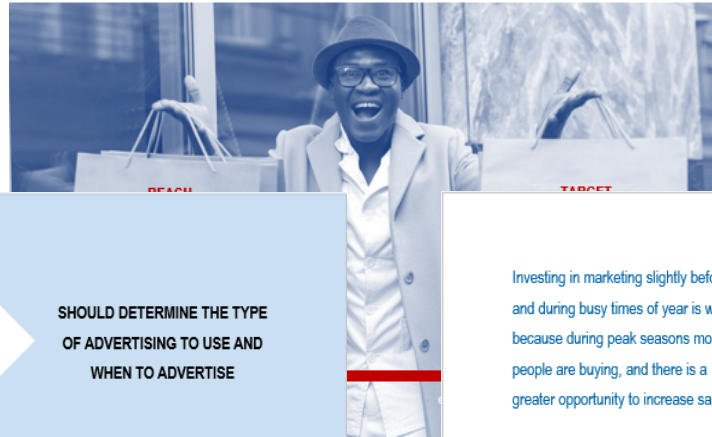
## BEFORE CAMPAIGN ENDS BRING NEW STRATEGIES

C	Current Situation	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>			
A	Attribution + Ad Performance	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>			
R	ROI & KPIs (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			
E	Expectations for Future	 <ul style="list-style-type: none"> <li>Sales trends</li> <li>Next steps</li> <li>New creative</li> <li>New solutions/strategies</li> <li>Future goals (ROI + KPIs)</li> <li>Future internal marketing</li> </ul>	<p><i>“The second quarter is one of your peak seasons, so I recommend a strong promotional strategy including...”</i></p>		
!	Additional Info	<ul style="list-style-type: none"> <li>Invoicing process</li> <li>Industry data to drive business</li> <li>Community events and opportunities</li> </ul>			



## EMPLOY THE RIGHT ADVERTISING AT THE RIGHT TIME

TYPE	EXPLANATION	TIME OF YEAR TO EMPLOY
IMAGE / BRANDING	Reminding about offerings and advantages, plus maintaining or adjusting company perception.	<ul style="list-style-type: none"> <li>Appropriate the entire year.</li> <li>For businesses with limited budgets, effective during slower times of the year.</li> </ul>
DIRECT RESPONSE	Encouraging trial, purchase or repurchase with a promotion, sale or incentive.	<ul style="list-style-type: none"> <li>Most effective slightly before and during busy times of the year.</li> </ul>
EDUCATIONAL	Creating interest through information.	<ul style="list-style-type: none"> <li>Effective for launching a new business, product or service ~ especially for sharing complex or innovative solutions.</li> </ul>
AWARENESS	Creating excitement for an event, promotion, new product, service or business. Awareness advertising is often difficult to avoid or ignore.	<ul style="list-style-type: none"> <li>Effective in combination with direct response advertising before and during busy seasons.</li> </ul>
LOYALTY	Building long-term brand affinity, plus establishing open, direct and ongoing communication. Loyalty advertising is one-on-one-communication directly to consumers.	<ul style="list-style-type: none"> <li>Appropriate the entire year.</li> </ul>



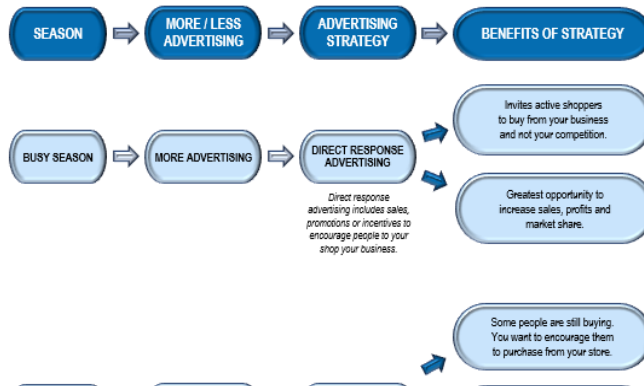
## SALES TRENDS

SHOULD DETERMINE THE TYPE OF ADVERTISING TO USE AND WHEN TO ADVERTISE

## INVEST WISELY

*Your advertising investment should "mirror" your sales trends.*

Investing in marketing slightly before and during busy times of year is wise because during peak seasons more people are buying, and there is a greater opportunity to increase sales.\*



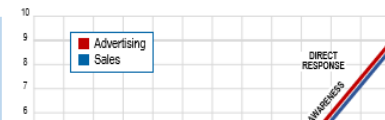
- ▶ Investing a significant portion of your budget during slow times of the year to encourage sales is an unwise and costly decision. Advertising cannot change a company's natural sales cycle. Although slight increases may occur, generally, it will not provide a comfortable return on your investment.
- ▶ Businesses that typically do not see significant annual sales fluctuations, such as service companies, should advertise each month consistently.
- ▶ If your business has an extremely limited budget, advertise only during and slightly before peak seasons.
- ▶ Larger businesses with significant inventory and consistently high sales in various products or services should advertise top-selling items in the appropriate months. If the budget is adequate, these businesses will benefit from marketing all year.
- ▶ \*There are exceptions to these guidelines, such as restaurants that cannot accommodate additional patrons during busy seasons or times of the week. However, most businesses should allocate their promotional budgets slightly before and during peak seasons, when they have the greatest opportunity to increase profits and market share.

### GENERAL RULES:

Busier Months\*\* = Increase Advertising

Slower Months = Reduce Advertising

Busier Months\*\* = Direct Response Advertising





CLIENT	
ACCOUNT EXECUTIVE	

INFORMATION TO SHARE, REVIEW & DISCUSS			Date: _____	Date: _____	Date: _____
<b>C</b>	<u>Current Situation</u>	<ul style="list-style-type: none"> <li>Company changes &amp; challenges</li> <li>Internal marketing implemented to accompany the campaign</li> <li>Employee involvement in promotional efforts</li> </ul>		<b>Information to share:</b> <ul style="list-style-type: none"> <li>Marketing guidance</li> <li>Consumer buying behavior</li> <li>Conversion tips</li> <li>Industry trends</li> <li>Competitive intelligence</li> <li>Community events and opportunities</li> <li>Market opportunities</li> <li>Creative ideas</li> <li>Testimonials and case studies</li> </ul>	
<b>A</b>	<u>Attribution + Ad Performance</u>	<ul style="list-style-type: none"> <li>Metrics &amp; optimization of the campaign</li> <li>Schedule review</li> <li>Creative evaluation</li> </ul>			
<b>R</b>	<u>ROI &amp; KPIs</u> (Return on Investment & Key Performance Indicators)	<ul style="list-style-type: none"> <li>Review Results - ROI &amp; KPI</li> <li>New measurements needed</li> </ul>			
<b>E</b>	<u>Expectations for Future</u>	<ul style="list-style-type: none"> <li>Sales trends</li> <li>Next steps</li> <li>New creative</li> <li>New solutions/strategies</li> <li>Future goals (ROI + KPIs)</li> <li>Future internal marketing</li> </ul>			
<b>!</b>	<u>Additional Info</u>	<ul style="list-style-type: none"> <li>Invoicing process</li> <li>Industry data to drive business</li> <li>Community events and opportunities</li> </ul>			

## BIZ TIPS

### ADVERTISING'S GOALS

get potential customers to shop, call  
your business or review your website.

**GETTING CUSTOMERS TO BUY**, as well as increase their spending, is directly related to their shopping experience at your business.

## INCREASE YOUR CONVERSION RATE = INCREASE PROFITS

### Do you know your conversion rate?

It is essential to understand what influences consumer buying behavior. This will help guide your marketing strategy and assist you in setting and measuring goals for your sales team. The optimal conversion rate will vary with each company. For brick-and-mortar businesses, this is a relatively simple matter of comparing the number of callers or store visitors to the number of actual sales during a designated time. For an Internet-based business or a company seeking leads from their website, web analytics measures this data.

*Shoppers buy because they find the right combination of merchandise, price, presentation and service.*

#### WHY PEOPLE DON'T BUY

##### Service & Price Points

- Sales associates not helpful
- Price points not competitive

##### Merchandise Presentation

- Uninteresting or unorganized displays
- No complementary products offered
- Too many or too few options

##### Store Navigation

- Line too long at cash register
- Cluttered store
- Lack of signage

#### CONVERSION STATS

- ▶ While studies vary, estimated conversion rates are continually dropping.
- ▶ 70% of store visitors leave without buying.
- ▶ Over 90% of visitors do not act during their first visit to a website.

#### SIMPLE CONVERSION TIPS

- ▶ Have a team meeting before you launch your next promotion to discuss conversion strategies and upselling opportunities.
- ▶ Create "Promotional Cheat Sheets" and have them available to your team where they welcome customers or answer phone calls. Include the top benefits of the products or services you are promoting, as well as additional specials you are currently offering. You may even wish to distribute sales flyers to customers who visit your store.
- ▶ Set a conversion goal, instruct everyone to measure shoppers/callers and buyers. Place a "scorecard" in a convenient area that only employees can see. You may wish to have a fun conversion contest with your team.
- ▶ Conduct mystery calls and ask friends to shop your business to validate how helpful your associates are to customers.

80% of companies say they deliver "superior" customer services, only 8% of customers agree.

*Contact your local media advisor for  
ideas to increase your conversion rate  
and ensure your advertising investment is  
receiving maximum results.*

**PROMAX**  
promax training & consulting

© PROMAX TRAINING & CONSULTING

## ATTRACT MORE CUSTOMERS = INCREASE PROFITS

#### TIPS TO ATTRACT MORE CUSTOMERS

- ▶ Advertise your hottest products and services.
- ▶ Promote the lowest price possible.
- ▶ Include testimonials in your marketing efforts.
- ▶ Offer additional promotions when people call or visit your business and website.

*The success of a marketing strategy is  
NOT simply measured by the total sales  
of the products or services promoted. It IS  
about the opportunity to improve overall sales,  
profits and market share for your business.*

#### MORE WAYS TO INCREASE CONVERSIONS

- ▶ To increase spending, display your advertised products with accompanying products.
- ▶ Put a bell on the door to remind your team to stop what they are doing when a customer arrives and to give them their full attention.
- ▶ Staple promotional flyers or brochures to receipts before giving them to customers.
- ▶ Send promotional materials or brochures with invoices.
- ▶ Include all five senses in your marketing efforts ~ vision (store layout), hearing (music), taste (samples if appropriate or free cookies), smell (clean or appealing) and touch (ability to hold, try on or test products).
- ▶ Include product and company ratings and reviews throughout the store.
- ▶ Provide personal experiences, suggestions and testimonials. When an associate adds value to the shopping experience, the customer often feels an obligation to purchase from that person and retailer.
- ▶ Review the entire customer interaction on your website to ensure it is providing an easy and interesting experience. In-store shoppers that have pre-shopped their needs online typically convert at higher rates in the store. Plus, websites that have familiar storefront names gain higher conversion rates due to higher trust.

#### POSITIVE REVIEWS INCREASE CONVERSION RATES



- 92% of consumers read online reviews
- 40% form an opinion after reading just 1-3 reviews

Encourage customers to post positive comments  
on your website, a review site or on social media.

For example, say: "Thank you very much for your purchase today. We are confident you are going to enjoy the (product/service). Will you please take a moment to review us on our website or on (review site)? We also would appreciate any referrals or positive comments to your friends on social media."

**THE WORST QUESTION TO ASK CUSTOMERS:** "Can I help you with anything?" the answer is typically "no."

When customers enter your store, share information to assist them in their shopping experience: "Welcome to (your company name). I am (your name). We have some great items on sale, such as... The sale racks are located... Also, you will not want to miss the items that just arrived that are located... These are flying off the shelf! So, if you find something you like, I suggest you buy it today! Please take your time and browse and let me know if I can be of any assistance."


Use the 10-Minute Check Back Rule. Check back with customers every 10 minutes to see if they need assistance or have any questions and offer suggestions or advice.

When customers call your business, inquire about their needs and provide recommendations. For example:

- "We have (three) specials going on right now. These include... Which one of these will best serve your needs?"
- "Thanks for your call. So that I can be of the biggest help to you, can you share with me what your specific needs are?"
- "Can I ask you a couple of questions so I can best serve your needs?"

© PROMAX TRAINING & CONSULTING

# AFTER THE CAMPAIGN IS LAUNCHED INQUIRE ABOUT ITS SUCCESS

<b>DO</b> say to the client	 <b>DO NOT</b> ask the client

# AFTER THE CAMPAIGN IS LAUNCHED INQUIRE ABOUT ITS SUCCESS

<b>DO</b> say to the client	<b>DO NOT</b> ask the client
<ul style="list-style-type: none"><li>▶ “I’m excited to hear about the success of your campaign.”</li><li>▶ “I’m excited to learn how your campaign is progressing.”</li></ul> <p><i>These questions convey that advertising is a process, and you are confident the business is getting results.</i></p>	<ul style="list-style-type: none"><li>✗ “Did you get any results from your ad?”</li><li>✗ “Did you get any results this weekend?”</li></ul> <p><i>These questions suggest that you have no idea if the advertising in your product produces results. They also suggest instantaneous results.</i></p>

# ENCOURAGE CLIENTS TO QUESTION THEIR CUSTOMERS

DO encourage clients to ask or say	DO NOT encourage clients to ask

# ENCOURAGE CLIENTS TO QUESTION THEIR CUSTOMERS

DO encourage clients to ask or say	DO NOT encourage clients to ask
<ul style="list-style-type: none"><li>▶ “Are you familiar with our current (buy one get one free) promotion? It includes...”</li><li>▶ “May I ask where you typically learn about sales and promotions that local businesses are having?”</li></ul> <p><i>The first statement allows the business owner to <b>entice the customer</b> even if the person was not exposed to the advertising, or it reinforces the promotional message. The second question <b>provides valuable information</b>. For example, if the customer states he or she gets promotional information on TV, the advertiser can inquire about favorite stations and programs watched. This information can guide future advertising plans.</i></p>	<ul style="list-style-type: none"><li>✗ How did you hear about us?</li><li>✗ Where did you get our phone number?</li><li>✗ What brought you in today?</li></ul> <p><i>These questions rarely produce helpful information. This is because most marketing strategies encompass numerous media elements. Furthermore, customers often either habitually site Google or share the last ad they heard or saw.</i></p>



# **RETENTION STRATEGY = LONG-TERM CLIENTS**



**A business is only as good,  
as the company it KEEPS!**

This form is also provided in an Excel worksheet for easy calculations

1

## SET YOUR MONTHLY MARKETING GOALS

Circle one of the below campaign goals

Goal: ☐ Visits ☐ Calls ☐ Web Traffic

Establish new customer goals

Desired # of New Customers Per Month \_\_\_\_\_

Estimate % of shoppers, callers or web visitors that buy

Conversation Rate \_\_\_\_\_%

Establish # of shoppers, callers or web visitors that buy

# Needed to Achieve Goal Per Month = \_\_\_\_\_

Example: Goal: ☒ Calls ☐ Visits ☐ Web Traffic ☐ 10 new customers ÷ 20% conversion rate = 50 calls needed

### MONTHLY ROI CALCULATOR

\$ Monthly Ad Investment	+	USE ONE: <input type="checkbox"/> \$ Average Sale <input type="checkbox"/> \$ Gross Profit Per Sale	=	# Monthly Transactions Needed to Begin Turning Profit	+	4 or 5 (# weeks in month)	=	# Weekly Transactions Needed to Begin Turning Profit
\$	÷	\$	=		÷	4 or 5	=	

### MONTHLY GOAL CALCULATOR

# New Buyers Per Month	X	USE ONE: <input type="checkbox"/> \$ Average Sale	=	Increased Additional \$	-	\$ Monthly Ad	=	\$ Increased Additional
------------------------	---	--	---	-------------------------	---	---------------	---	-------------------------

### ANNUAL VALUE OF EACH NEW CUSTOMER

USE ONE: <input type="checkbox"/> \$ Average Sale <input type="checkbox"/> \$ Gross Profit Per Sale	X	Average # Times Customer Buys Per Year	=	Average Annual Value of New Customer
\$	X		=	\$

### LIFETIME VALUE OF EACH NEW CUSTOMER

\$ Average Annual Value of	X	Average # of Years	=	Average Lifetime Value of
----------------------------	---	--------------------	---	---------------------------

## BEHIND THE SCENES

2

## TRACK, MEASURE, EVALUATE & ADJUST

Month	# Total Visitors, Callers or Web Traffic	# Total Buyers	% Conversion (# Buyers ÷ # Shoppers, Callers or Web Traffic)	# Average Items Purchased	\$ Average Sale Per Buyer	\$ Total Sales	Promotional Message or Offer

# BASIC ROI

## WEEKLY & MONTHLY ROI CALCULATOR

\$ Monthly Ad Investment	÷	<div>\$ Average Sale</div> <div>\$Gross Profit Per Sale</div>	=	# Monthly Transactions Needed to Begin Turning Profit	÷	<div>4 or 5</div> <div>(# weeks in month)</div>	=	# Weekly Transactions Needed to Begin Turning Profit
\$2,000	÷		=		÷	4 or 5	=	
\$2,000	÷		=			4 or 5	=	

## BASIC ANNUAL & LIFETIME VALUE

ANNUAL VALUE OF EACH NEW CUSTOMER					LIFETIME VALUE OF EACH NEW CUSTOMER			
\$ Average Sale	X	# Average Times Customer Buys Per Year	=	\$ Average Annual Value of New Customer	X	Average Number of Years Customer Buys	=	\$ Average Lifetime Value of New Customer
	X		=		X		=	

## ANNUAL GROSS SALES

### ANNUAL GROSS SALES

Average Sale	X	# Transactions Per Month	X	12	=	Estimated Gross Sales
	X		X	12	=	

**WHY IS THIS AN  
IMPORTANT NUMBER?**

## # CALLS OR VISITORS

### # CALLS OR VISITORS NEEDED

# New Customers Desired	÷	Conversion Rate	=	Calls or Visitors Needed	÷	Weeks in Month 4 or 5	=	Weekly Calls or Visitors Needed
	÷		=		÷		=	

**WHY IS THIS AN  
IMPORTANT NUMBER?**

## MATH CHALLENGE #1

You recommend to a prospect that the business invest \$3,000 in advertising per month. The decision-maker has told you that the average sales is \$50 and has a profit margin of 50%.

**What is the point at which the business will begin turning profit per week (4-week month)?**

WEEKLY & MONTHLY ROI CALCULATOR								
\$ Monthly Ad Investment	÷	<div>\$ Average Sale</div> <div>\$Gross Profit Per Sale</div>	=	# Monthly Transactions Needed to Begin Turning Profit	÷	<div>4 or 5</div> <div>(# weeks in month)</div>	=	# Weekly Transactions Needed to Begin Turning Profit
	÷		=		÷	<div>4 or 5</div>	=	
	÷		=			<div>4 or 5</div>	=	



## MATH CHALLENGE #2

You recommend to a restaurant owner that the business invests \$2,000 in advertising per month. The restaurant has 50 tables, and the decision-maker has told you that the average sale is somewhere between \$50 to \$100. He also shares that diners visit approximately 6 times a year. While it is difficult to determine how many years diners return, he estimates approximately 5 to 7 years.

**What is the estimated annual and lifetime value of a new client?** (without averaging up)

ANNUAL VALUE OF EACH NEW CUSTOMER					LIFETIME VALUE OF EACH NEW CUSTOMER			
\$ Average Sale	X	# Average Times Customer Buys Per Year	=	\$ Average Annual Value of New Customer	X	Average Number of Years Customer Buys	=	\$ Average Lifetime Value of New Customer
	X		=		X		=	

## MATH CHALLENGE #3

### Information Gathered in CNA:

- ▶ Average Sale: \$200
- ▶ Average Number of Transactions Per Month: 300
- ▶ Industry Average Invested in Advertising: 3%
- ▶ Conversion Rate: 30%
- ▶ Goal: 15 New Customers
- ▶ Customers Typically Call for Quotes

### Based on this information:

1. What is the monthly amount you will recommend for their annual ad budget?
2. How many calls per month do you need to generate to achieve their goals?

**Average Sale X # Transactions X 12 = Estimated Gross Sales X Industry Average**

$$\$200 \times 300 \times 12 = \$720,000 \times 3\% = \$21,600 \div 12 = \$1,800 \text{ per month}$$

**# New Customers Desired ÷ Conversion Rate = Calls Needed**

$$15 \div 30\% = 50 \div 4 = 13 \text{ per week (rounded up)}$$



dedicated to  
maximizing productivity  
profits & people

Kelly@ProMaxTraining.com

Phone: 760-898-0607

[www.ProMaxTraining.com](http://www.ProMaxTraining.com)



Kelly Wirges



ProMax Training



KellyProMax