HOW TO START YOUR FIRST MARKETING CAMPAIGN

DailyStory

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OVERVIEW

Congratulations! You've decided to take the leap and invest in the first marketing campaign for your company. And while marketing itself is definitely nothing new, being a first-timer isn't as unique as it sounds. With so many new companies starting, this is an incredibly common scenario. In fact, there were about 266,000 new businesses that began during the fourth quarter of 2019 alone.

If you're a team of one, planning your first campaign can feel especially overwhelming. Heck, even understanding what a campaign is can be confusing. So, where should you begin?

We've developed this guide to help you and organized it into four main sections:

- Identifying what you want to achieve
- Determining how to achieve it
- Sharing the DailyStory features that can help make it happen
- A checklist of quick to-dos when launching your first marketing campaign

At DailyStory, we're focused on helping you incorporate process, consistency and measurement around your marketing. Doing so enables you to make decisions based on performance rather than what you think might be working.

If you would like to learn more about DailyStory and how we've helped others just like you, contact us at hello@dailystory.com or visit us at https://dailystory.com.

WHAT ARE YOU TRYING TO ACHIEVE?

Sometimes, taking the first step as you start your first marketing campaign is the hardest part.

Remember that the key to success is to keep everything as simple as possible. Then, as you get more comfortable after your first campaign or two, you can add on to what is working for your brand.

Let's dive in!

#1 OUTLINE YOUR GOALS FOR YOUR FIRST CAMPAIGN

This is the first step no matter what type of marketing campaign you want to run, but first let's just talk about what a campaign is!

The simplest definition for a campaign is an organized course of actions to achieve a goal. Most often, they are centered around promoting products or services or generating new leads.

There are typically 3 main types of campaigns:

- Acquisition: aims to acquire new leads to convert into customers.
- Conversion: aims to win sales
- Retention: aims to keep the customers you have

Once you decide which category you're focused on, it's time to think about how to achieve it. If you don't know what you want to achieve or how it will be measured, how will you know if you're successful? This is where it's time to goal set!

Think S.M.A.R.T. goals! This type of goal is:

- Specific
- Measurable
- Attainable
- Realistic
- Time-bound

You can base your goals on sales, customer satisfaction or even profit.

For example, you might want to gain 10 new members a week, sell 10 more products per week than average, increase profit by 10 percent in the first quarter of the year.

Find the question that describes the result you want. Then, develop your ideas to make that happen.

Here is a range of ideas to help inspire you and

Click here for 7 tips to set marketing goals for your small business

get you thinking about what you want to achieve:

- Acquire and nurture new leads or prospects
- Build brand awareness
- Educate consumers
- Increase brand loyalty and community connection
- Sell your product or service
- Keep customers informed
- Offer a discount or another type of promotion

Just remember that once you know the direction you want to head, you must also decide what you specifically want to achieve, how long it will take and how you can measure that performance.

Here are two specific examples of what a S.M.A.R.T. marketing goal can look like:

- Drive more free trial signups by increasing the click-through rate on social media ads to 3 percent by the end of this month.
- Improve organic reach by ranking within the first three search results for five relevant keywords by the end of the year.

The bonus of setting a S.M.A.R.T. goal is that it not only holds your campaign accountable, but it can also help you determine what type of campaign to run.

#2 IDENTIFY YOUR TARGET AUDIENCE

A typical mistake of most first-time marketing campaigns is that the target audience is too broad.

Sure, we all want everyone to want to buy what we're selling. Who doesn't?

However, when our message and strategy is too broad, you risk engaging with almost no one or even losing part of your audience with opt-outs and unsubscribes.

Think of it like casting a net. The more general the message, the larger the net and the netting itself. The more specific and targeted the message, the smaller the net and the netting itself. This means that while the net is smaller, it will catch more fish.

It can be a tough concept to accept at first. However, simply think of yourself as a consumer. What captures you? As a business owner, think of yourself as a marketing sniper. You want to be purposeful and deliberate about who you're talking to, how you're talking to them and where you're talking to them.

The key component of this part of the planning is deciding who you want to reach.

#2 IDENTIFY YOUR TARGET AUDIENCE (CONTINUED)

There are a few ways to go about this.

If you're a new startup, you likely have a target audience already decided in your business plan. It's about reaching out to the ideal customer, based on the market research you've already done.

If you're an existing business, you have an added benefit of auditing your own customer database. Ask yourself these key questions:

- Who is my typical customer?
- Is it who I would expect?
- Am I looking to expand into a different demographic?

The demographic you target can determine the methodology of your first marketing campaign (such as where you should be investing).

For example, print advertising is better for reaching an older, more community-invested audience.

Certain social media platforms, like Instagram, on the other hand, are better for a younger audience.

Think about the gender, age range, education level, salary, location and even the pain points that you can solve with your service or product and interests you can address.

#3 CONDUCT RESEARCH

The term "research" is being left intentionally vague because it really includes both market research and a competitive analysis.

Market research is about understanding consumers' needs and preferences.

This can be discovered through a number of different methods, including surveys, interviews, focus groups, etc.

And it should be done to better understand how to both serve your customers better and reach (or engage with) them more effectively.

A competitive analysis looks at your competition, what they offer, what they're doing well and even what they're not doing.

This research is all about your competitors. In regard to your first marketing campaign, conducting research can help you discover:

- What you can do (inspiration)
- What to avoid

Remember that your research is only intended to inform and inspire you to make the best decisions for your own campaign.

Click here to learn more about what a competitive analysis is

Click here for 16 tools that can make competitive analysis research easier

HOW CAN YOU ACHIEVE IT?

The next step you can take after determining what you want to achieve is to determine the how. The how will determine what channel you should use, such as:

- Your website (such as pop-up ads, web forms, etc.)
- Social media (with tracking links)
- Email
- SMS text messaging
- Some combination of these options

But there's more to think about than just what marketing channels to use. Let's walk through everything you should consider when deciding on the plan for your first marketing campaign.
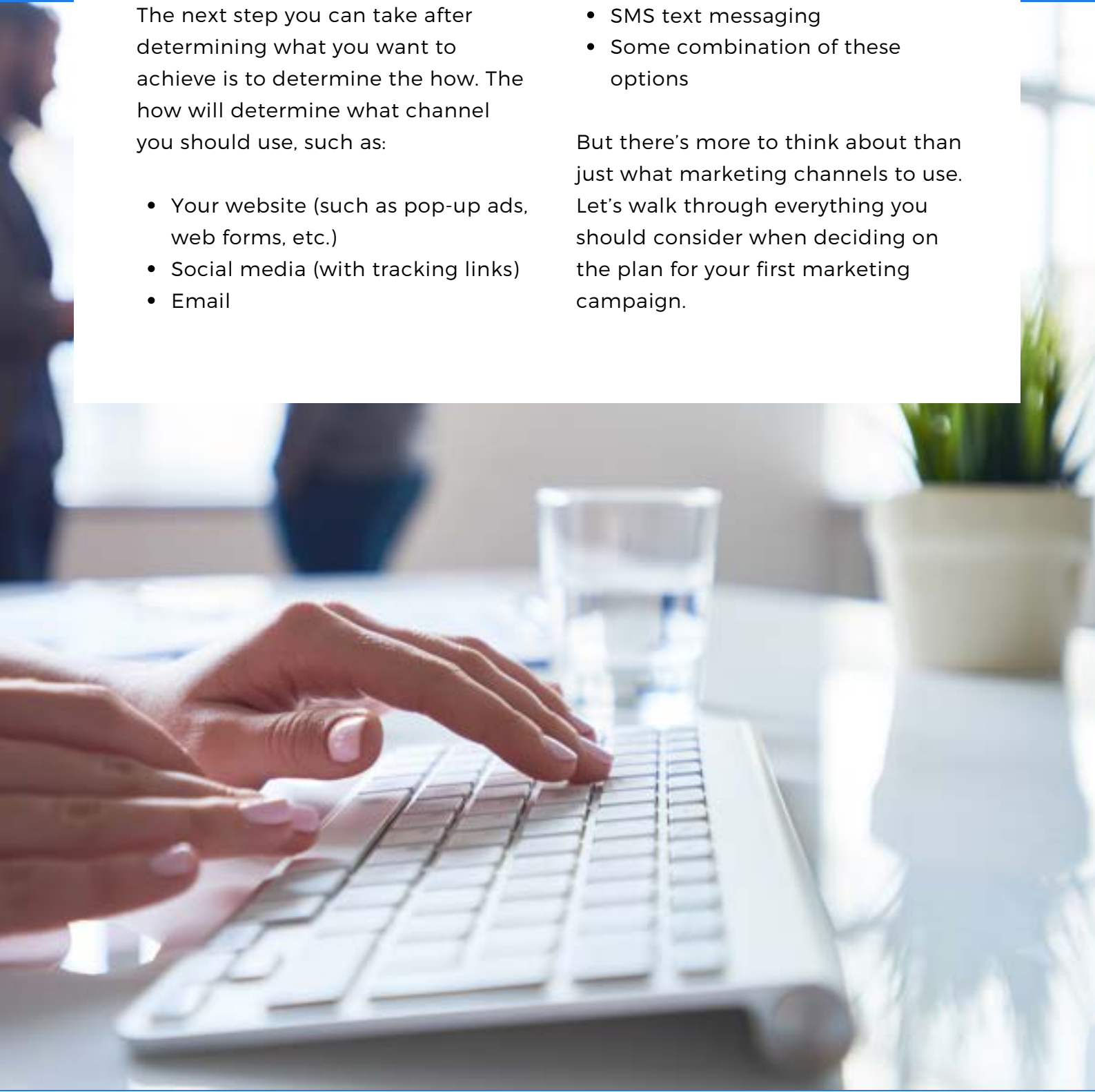
#1 SET YOUR BUDGET

The earlier you can determine your budget, the better.

This helps you make the best decisions for your campaign without spending more than you can afford.

Of course, your budget can be more complicated than simply an amount you can afford next month.

A thoughtful marketing budget factors in the lifetime value of each of your customers (on average). In other words, how much revenue would you typically generate from each customer over a set period of time?

Your budget should balance your company's earning potential with the investment necessary to help it grow.

Startup companies, in particular, might be starting with a small budget, and that's OK!

You can easily start with something small, like a targeted Facebook ad, and then scale up over time.

Of course, as you scale up, you can start diversifying your budget, thinking about what portion should be dedicated to any or all of the following:

- Your website
- Social media management and ads
- Email marketing
- Online advertising
- Event marketing
- Print advertising
- Direct mail campaigns
- TV and/or radio advertising
- Public relations

Your overall strategy and budget should always come back to your S.M.A.R.T. goals.

Click here for 6 tips to maximize your social media advertising budget

#2 DETERMINE YOUR MARKETING CHANNEL(S)

Once you have your goals, your target audience and your prospective budget set, it's time to use that information to decide on the methodology of your first marketing campaign.

Typically, if you're just starting to dip your toe into the marketing world, it's best to try only one method at first.

But as you get more comfortable, you can expand out to more of a mix of options that all complement one another in the same campaign For example, a simple campaign to welcome a new customer could be just an email that's sent when they become a new customer or member. A more well-rounded campaign could involve an email, followed by a text message offer a few days later and then another follow-up text message a few weeks later asking for a review on Facebook with a tracking link to your Facebook page.

Building on that, you can launch a display-ad campaign to drive more users to your website, as well as a lead-generation pop-up ad on your site to capture your visitors' contact information to

Click here to view our Digital Marketing 101 Guide for Beginners

include them into your email campaign, and so on.

The more pieces you incorporate, we'd encourage you to track each piece on a marketing plan calendar to keep the big picture (and strategy) in mind.

But again, start simple. This will keep you focused on the execution and goals at hand and make the measurement of the campaign's success easier to understand.

#3 CREATE YOUR MESSAGE, CONTENT

It's important that no matter how simply you might start your first marketing campaign, you must include a message that engages your target audience packaged in a way that catches their attention.

This can be an offer, such as a discount or coupon, or an enticing reason to subscribe to your email newsletter.

The sky's the limit.

Once you know your message, you can start creating your content, whether that's text, illustrated or video (or a combination of those options).

If you are going more visual with your content, there are a number of tools (including Canva) that can help even the biggest non-designers among us create visual content that looks professional.

Just remember to stay in line with your own brand and that the sizing of your content should be optimized for the platform you're making it for.

An email header image, for example, is a different shape and size than the ideal Instagram post or even Instagram Story slide.

Click here for 7 tips to level up your brand's content marketing strategy

#4 MEASURE YOUR SUCCESS AND PIVOT ACCORDINGLY

What you're measuring ultimately depends on your marketing campaign and the goals you're trying to achieve.

There are a number of different KPIs (key performance indicators) you can analyze, depending on the type of marketing campaign, including but not limited to:

- Website page views
- Time spent on your website or page
- Click-throughs and referrals from paid digital ads
- Email opens, click-throughs and CTOR (click-to-open rate)
- Leads
- Engagement actions on social media (reactions, shares and comments)
- Reach on social media
- Sales/Conversions for advertised promotions/coupon codes

The reason why you want to measure is so that you know whether the money you're spending is successful or not.

No one wants to spend money on efforts that are not working.

As part of your planning process, decide what metrics matter most and make sure you know how to measure them. Then, use that information to pivot as needed and continue to improve in future campaigns.

Click here for an explainer to better understand how to use Facebook Insights

Click here for an explainer to better understand how to use Twitter Analytics

Click here for an explainer to better understand Instagram Insights

# LAUNCHING YOUR FIRST MARKETING CAMPAIGN: A TO-DO CHECKLIST

Digital marketing for your small business can incorporate so many different methods, mediums and strategies. But you don't have to feel overwhelmed.

We help keep things simple with this straightforward to-do checklist that you can reference during your first marketing campaign and beyond.

CAMPAIGN LAUNCH TO-DO CHECKLIST

☐ Determine what type of campaign (acquisition, conversion, retention)

☐ Determine your target audience

☐ Determine your goals

☐ Know/determine your resources and campaign budget.

☐ Develop a campaign theme or concept that ties everything together. Brainstorm ideas with your team as needed.

☐ Choose the marketing channel(s) and/or DailyStory features that will serve your campaign.

☐ Set S.M.A.R.T. campaign goals for your campaign.

☐ Plan what content you'll need to create for each marketing channel. (Hint: Think about the user experience throughout.)

☐ Map out the schedule of your campaign on a marketing calendar.

☐ Create all needed content pieces and schedule appropriately.

☐ Monitor performance. Then, use your takeaways to better plan and execute your next campaign.
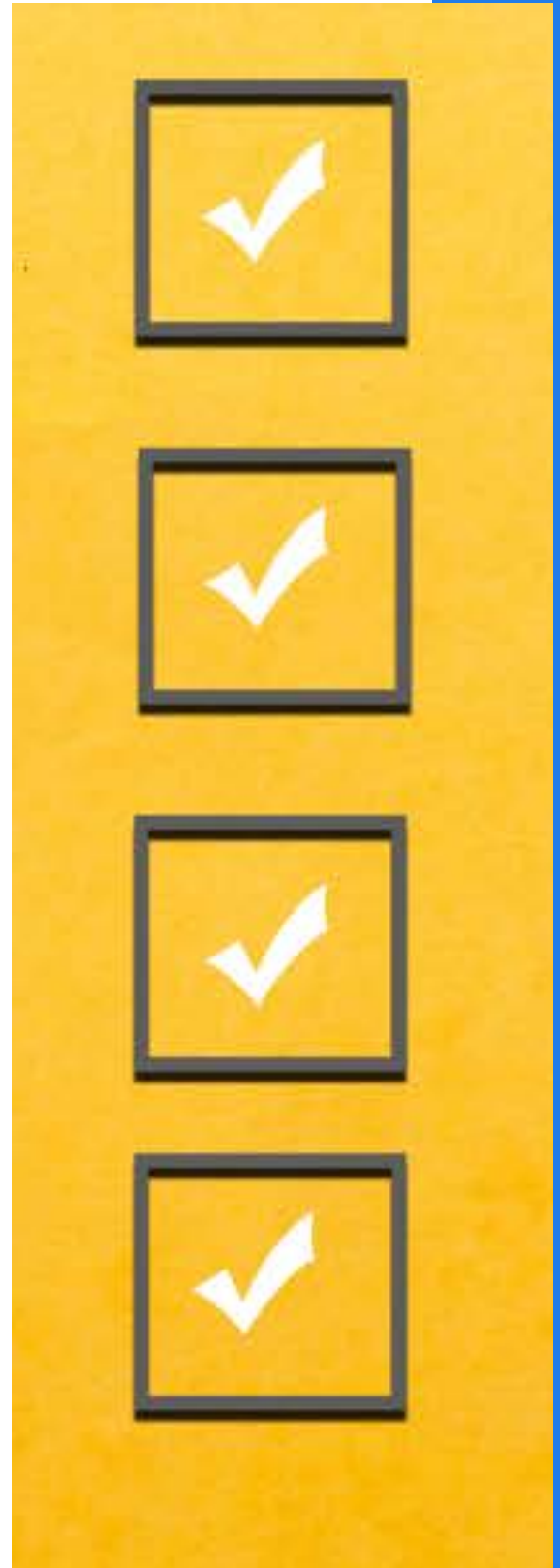
HOW DAILYSTORY CAN HELP YOUR BUSINESS

Gone are the days of small business successes regardless of customer service and overall experience. More than ever, businesses must understand consumers' needs and digitize as many aspects of the purchasing experience as possible. We are living in a customer-first, digital-preferred marketplace.

The power of DailyStory lies in the diversity of our features and the power of our automation capabilities to help you hit your goals and achieve the desired results of your campaigns.
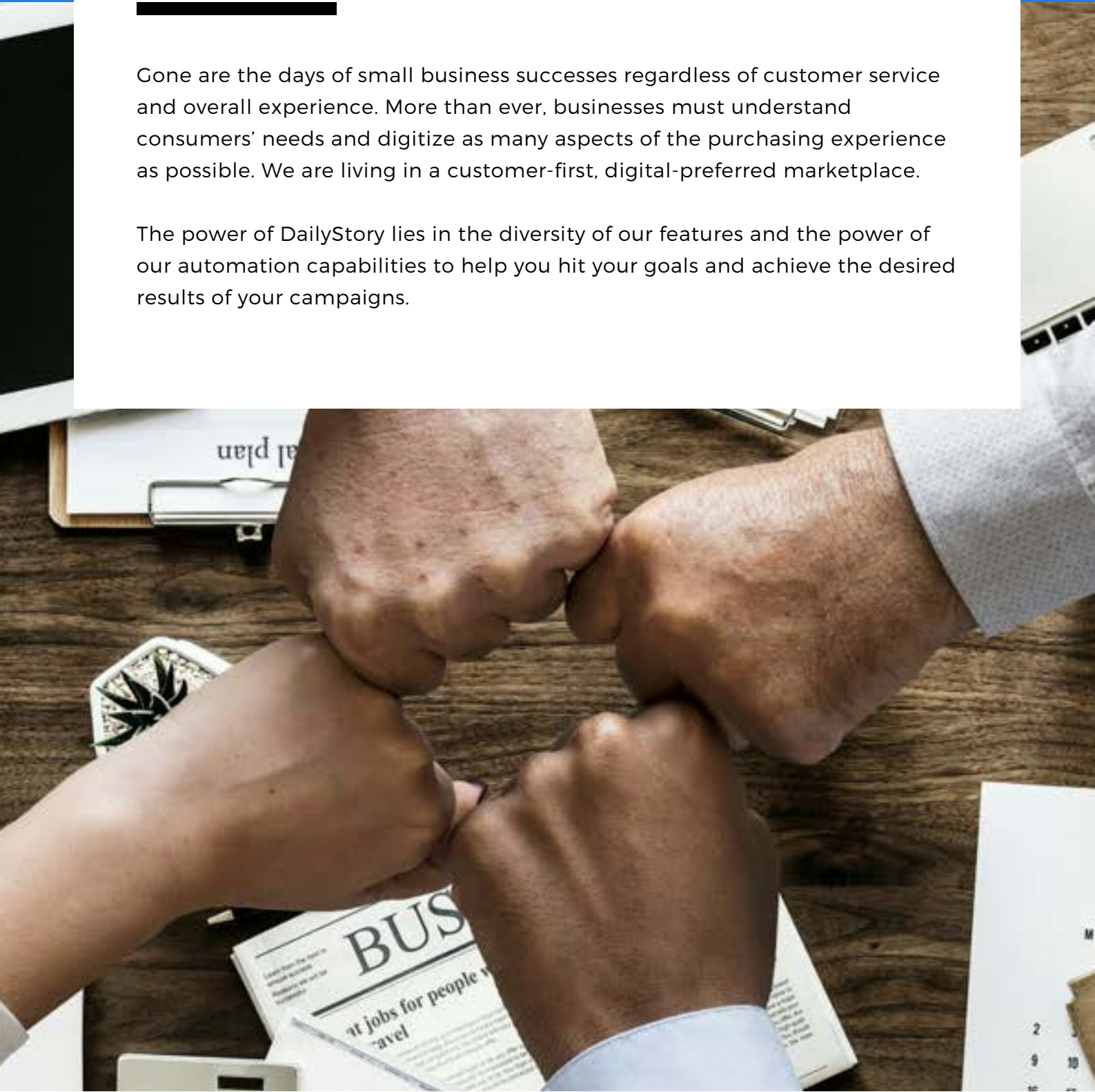
NATIVE INTEGRATIONS WITH WITH POPULAR APPLICATIONS

DailyStory integrates with your favorite applications to simplify your digital marketing and enhance your audience segmentation and targeting efforts.

You can use DailyStory's native integrations with popular applications, such as Shopify, WordPress, Salesforce and more. You also can connect to thousands of other applications using Zapier.

DailyStory's native integrations that are currently supported include:

- **American Shaman,** a business management and online point-of-sale platform.
- **Blood Bank Computer Systems, Inc. (BBCS),** a dedicated partner to the blood banking industry.
- **BigCommerce,** an e-commerce platform offering software-as-a-service (SaaS) services for building and hosting online stores.
- **Calendly,** an app for scheduling appointments, meetings, and events.
- **Clubspeed,** the world's leading venue management software for Family Entertainment Centers.
- **Flowhub,** the modern cannabis retail management platform for running a compliant dispensary that keeps up with the evolving industry.
- **Google Analytics,** a web analytics service offered by Google that tracks and reports website traffic.
- **Google APIs,** which enable integration with Google services, such as geocoding used in distance-based searches.
- **Google reCAPTCHA,** a free service that protects your website from spam and abuse by adding a simple test.
- **Gorgias,** which enables merchants to manage their customer service channels in a unified platform.
- **Instamojo,** India's simplest online selling platform.

- **Konnektive,** a customer transaction and campaign management platform.
- **Lightspeed,** a point-of-sale and e-commerce software provider.
- **Magento,** a platform with built-in PHP, which helps programmers create eCommerce websites.
- **Mailfloss,** a bulk email verification service built for busy businesses.
- **Mailgun,** an email platform used for sending transactional emails.
- **Mindbody,** a business management and online scheduling platform for health and wellness businesses.
- **NeverBounce,** an email verification and email cleansing service.
- Plivo, an enterprise-grade communications platform with premium carrier network connectivity for messaging and voice calls.
- **RhinoFit,** a feature-packed and easy-to-use member management platform.
- **Salesforce,** a sales automation platform.
- **Shopify,** a subscription-based software that allows anyone to set up an online store and sell their products.
- **Slack,** which brings all your communication together in one place. It's real-time messaging, archiving and searching for modern teams.
- **Square Online,** a robust platform that covers your website, the items you sell online, online order fulfillment, and much more.
- **Twilio,** a cloud communications platform for sending SMS messages.
- **Verint Community,** an online community platform.
- **WooCommerce,** an open-source e-commerce plugin for WordPress.
- **WordPress,** a free content management system for building websites.
- **Yotpo,** an eCommerce marketing platform for customer reviews, visual marketing, loyalty, referrals, and SMS marketing.
- **Zapier,** an automation platform that makes it easy to connect your favorite applications.

TRACK AND MEASURE VISITOR EXPERIENCES

DailyStory helps you understand what your website visitors are doing, where they came from and how often they've returned. You can see the full customer journey and tag visitors for remarketing through your third-party ad networks.

Have you ever been to a website and seen an ad from another website you recently visited?

That's remarketing and it's a great way to re-enforce your marketing message.

DailyStory can help you target potential customers without them ever visiting your website, building an audience through other people's content.

When it comes to anonymous visitors on your website, Google Analytics tells part of the story, but wouldn't you like to know more?

With DailyStory's anonymous visitor identification feature, Lead Periscope, you can identify your website visitors by business and organization.

Of course, the power of effective digital marketing, in general, resides in the ability to easily and quickly understand what's working and what's not.

DailyStory's reporting dashboards are both intuitive and straightforward.

In addition to common performance data (such as email opens, email clicks, text replies, so on), we offer heat maps and additional insights to help inform you.

Easily understand how your campaign is doing.

CAPTURE AND CONVERT NEW CUSTOMERS

When your website visitors are ready to act on your offers or need more information about your products or services, DailyStory makes it easy to capture their information and convert them into leads.

If you already have a list of contacts, you can import them easily to DailyStory for better management and potential conversions along your sales funnel.

You also can promote your welcome and exit offers on your website using DailyStory, whether it's a newsletter sign-up, a discount offer or something else, that can capture your visitor's information and add them into your system.
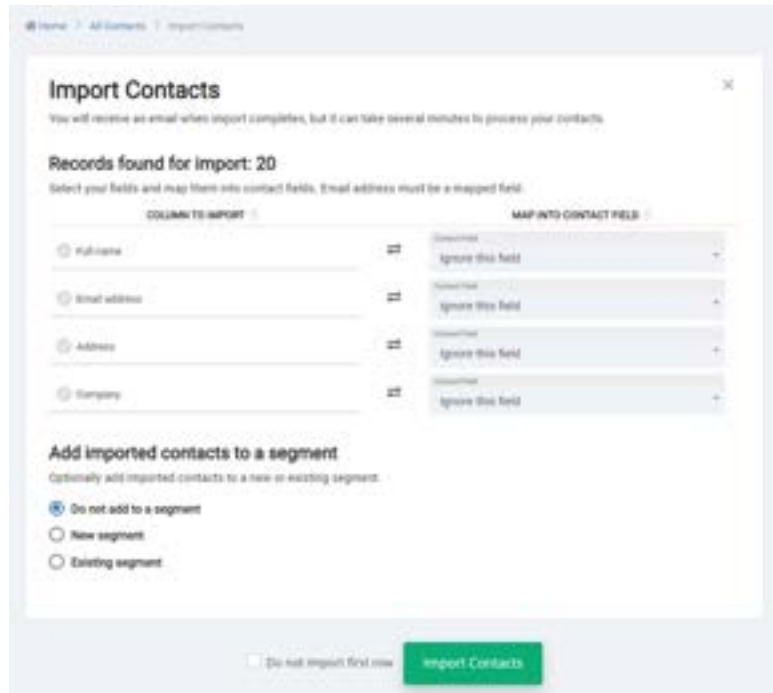
Lead-capture forms also are available for use on pre-built landing pages, custom landing pages, squeeze pages and more. These forms automatically upload lead information into DailyStory.

One of the most important aspects of converting leads into customers is personal follow-up. DailyStory allows you to create lead visit alerts that automatically sends email alerts to team members when a prospective customer visits specific pages within your website. This is in addition to general email notifications you can have automatically triggered for your team members.
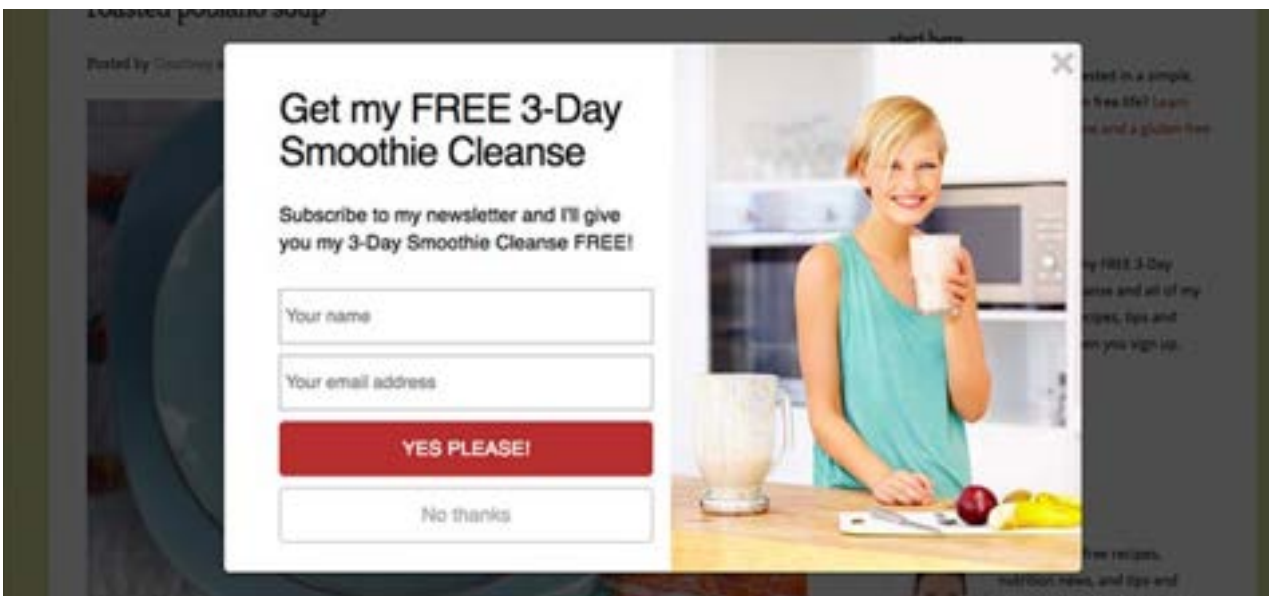
AUTOMATE AND NURTURE YOUR CUSTOMERS

In DailyStory, you can organize all your account activity into easy-to-manage campaigns that can coordinate all customer touch points.

And the messaging goes beyond just emails. Text messages and app push notifications also are available to use.

Campaigns within DailyStory house all of these assets so that you can stay organized and run multiple campaigns at the same time if you choose to do so.

To make your messaging even more powerful, personalization is a feature where you can use contact information to make your message more unique and targeted (such as first names).

AUDIENCE SEGMENTS

Add to that the audience segments (or groupings) you can create to better target your campaigns as well.

Personalization and segmentation work together to increase the success of any given campaign.

Beyond that, who doesn't appreciate an "easy button" amidst their digital marketing efforts?

DRAG-AND-DROP CAPABILITIES

DailyStory features a few, including drag-and-drop capabilities in both our email designer and Autopilot, which manages and designs endless combinations of automation capabilities.

The email designer's drag-and-drop features make it especially easy to convey both your branding and message in record time to your target audiences.

However, there also is the ability to edit the HTML and CSS of your email to take your design even further if you prefer.
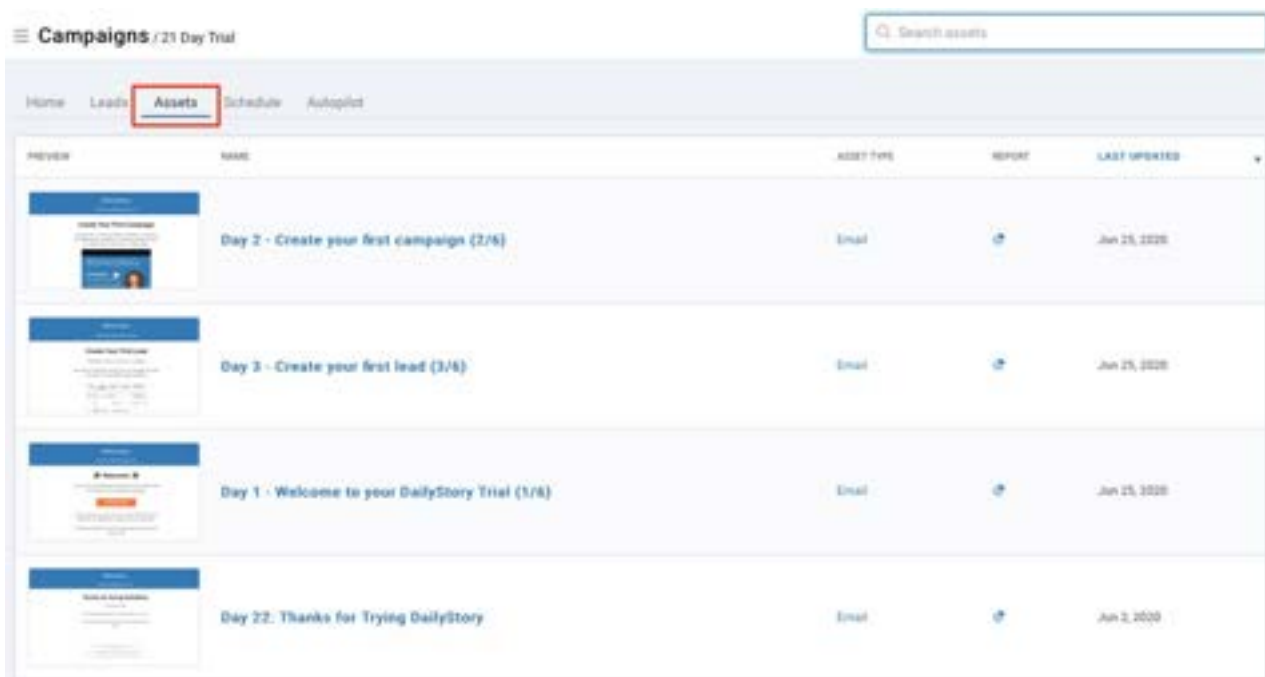
POWER OF AUTOMATION

But the power of taking your digital marketing to the next level is tied to our Autopilot tool, where the limits of what you can automate are almost only limited by your imagination.

For example, you could create a pop-up ad for your website through DailyStory. Then, when it captures a lead, Autopilot can be set up to immediately send an email. Perhaps the recipient hasn't opened that email within so many days. Then, a resending of that email with a different subject line can deploy. Maybe that second email still wasn't opened, and a follow-up text message is automatically sent. Of course, an email notification to one of your team members to follow up personally could also be sent.

Another example could include a series of emails being sent out to a targeted group of your contacts, nurturing them to purchase a new service or product you're offering.

Either way, the Autopilot tool helps prevent customer leads from falling through the cracks. This enables you to more automatically "be everywhere" along each customer's journey with your business.

And you can score your customers based on the activities and actions they take. This includes pages viewed, email opens or pages visited.

Again, this is all to better inform your overall strategy and increase those conversions.
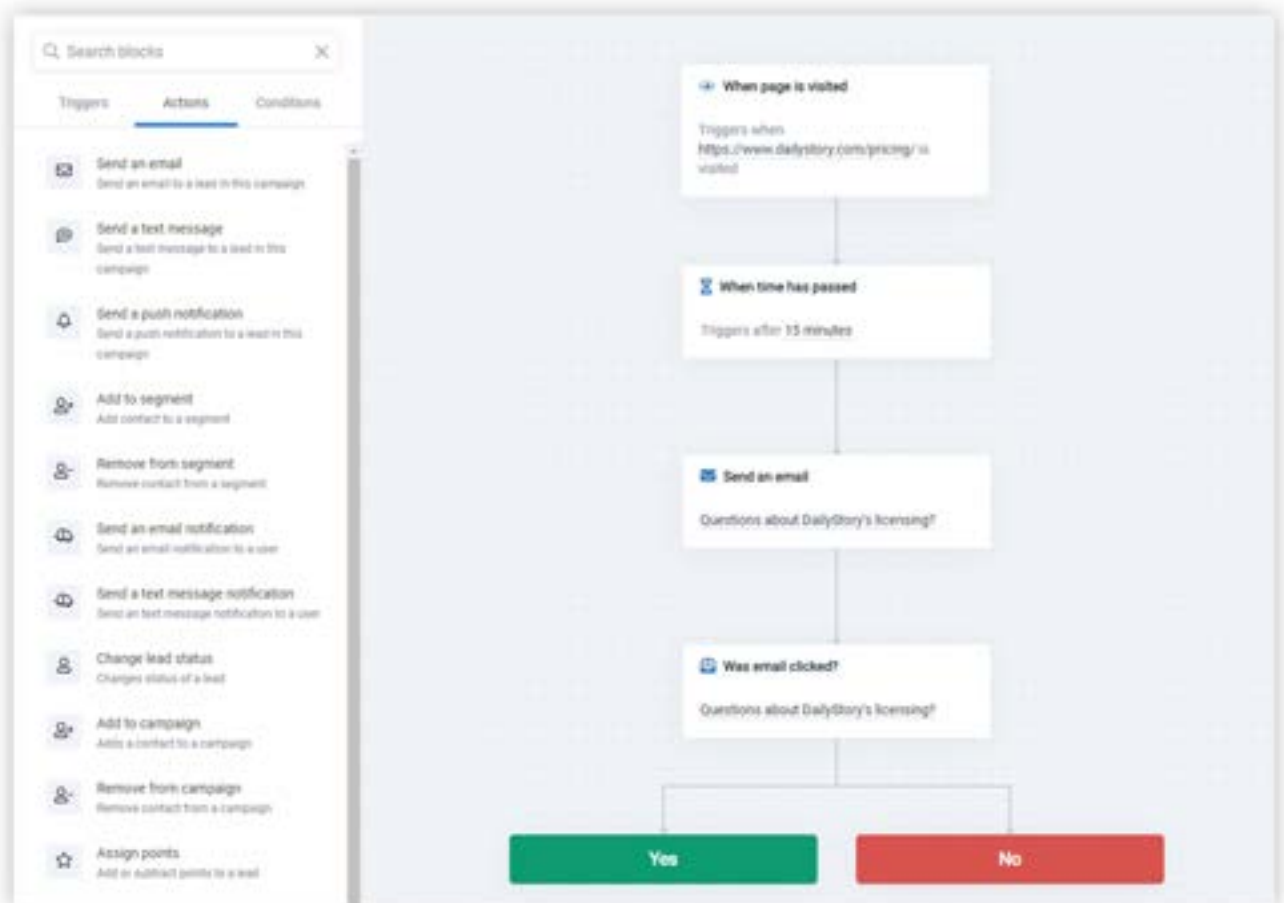
IN CONCLUSION

We hope this guide helps you run successful campaigns and provides some good tips.

Clearly, there are many ways you can go when first creating marketing campaigns for your business. It's easy to get overwhelmed and lose track of what might be working (or know what is working in the first place). Remember to think about your goals first. Then, keep it simple with your first campaign and build from there as you get more comfortable.

You also don't have to do any of this alone. At DailyStory, we're focused on helping marketers put process, consistency and measurement around your marketing campaigns. Doing so enables you to make decisions based on performance versus what you think might be working.

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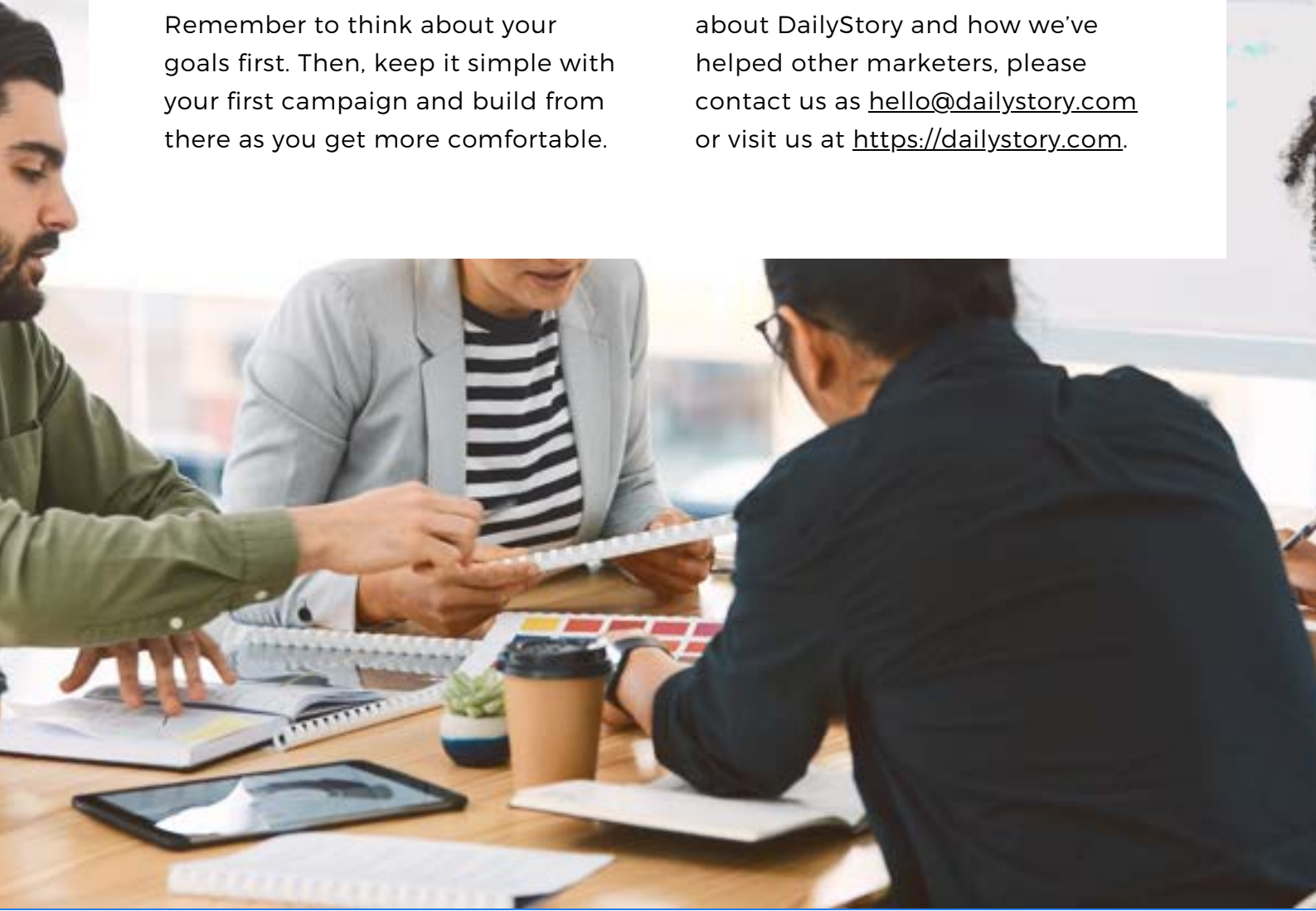
ADDITIONAL RESOURCES

The following is a compiled list of resources shared throughout this guide (in order of appearance):

- *7 tips to set marketing goals for your small business*
- *7 tips to help you determine your target audience*
- *Learn more about what a competitive analysis is*
- *16 tools that can make competitive analysis research easier*
- *6 tips to maximize your social media advertising budget*
- *View our Digital Marketing 101 Guide for Beginners*
- *7 tips to level up your brand's content marketing strategy*
- *11 free graphic design tools intended for the non-designer*
- *An explainer to better understand how to use Facebook Insights*
- *An explainer to better understand how to use Twitter Analytics*
- *An explainer to better understand how to use Instagram Insights*
- *8 tips to generate more leads through pop-up ads*