bigwave marketing

Digital marketing action planner

Contents

Introduction 3
Audience Journey Model 4
The five stages 5
Digital Marketing Pillars 6
Creating your foundation 7
Stage 1 - Not on my radar 9
Stage 2 - Thinking about it 13
Stage 3 - Research 17
Stage 4 - Action 21
Stage 5 - Retention/Secondary spend 25
Continue your journey 29



Introduction

The Digital Marketing Action Planner is a resource to help you improve your digital marketing.

We want to make it simple, quick and easy to plan your digital marketing to have the biggest impact on your business.

This resource is designed to help you to:

- Create an audience or customer journey
- Promote what you offer better and to more people
- Create demand, which leads to new customers
- Build engagement with and demand from your customers
- Potentially increase your income over time.

This planner sets out an easy-to-use tick list to help you explore and increase your use of digital marketing.

We recommend you work through the planner, ticking off each item you have already actioned or currently do. You'll then be left with a list of potential actions to focus on.

The actions are suggestions for you to implement at your own pace. Apply as you see relevant to your business and use your audience insight, own capacity and knowledge of what has/hasn't worked in the past to identify which will be of most use to you as you seek to engage more prospective customers.

If you want to take action but don't know how to, then contact us and we will see how we can help.

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Audience journey model

This planner uses a simple audience journey model.



When used in a marketing context this journey makes it easier to understand how we can reach people to engage them in our businesses.

In marketing terms, a 'customer journey' is simply the path that an individual takes, via touchpoints, in their decision to purchase an item. Journeys work across many settings.

Think about the last product you purchased.

Something motivated you to buy it, but what?
That motivation may have come from an advert, or perhaps a friend made a recommendation. There are many ways in which that motivation could have been sparked.

Along your journey you may have done some research before committing - Where can you buy that item? Is there a delivery charge? What is the price?

Again, there can been many consideration points, and some of the answers to these may have ruled out certain businesses. This will have helped you narrow down who to buy from.

So, when we book or purchase anything we go on a journey. The journey time will depend on a range of factors, but it is generally related to price, and the more it costs, the longer we consider it for. Consider buying a car, this could be a 2-3 month journey, whereas joining a gym might only take 2-3 weeks to decide on our gym of choice.

The audience journey model, when we align it to our marketing efforts, helps us map out how, where and when to target people. It also gives us an indication of what they need from us as they move through that journey.

Importantly, the journey to your business is one that you curate and grow yourself. You are in control of how, where and when people join or stay on that journey.

The five stages

Let's review each stage and how we can measure them.

Each stage below provides a summary explanation alongside a suggested way to measure performance.

01 **Not on my radar**
Pre-contemplation

02 **Thinking about it**
Contemplation

03 **Research**
Preparation

04 **Action**
Action

05 **Retention/ Secondary spend**
Maintenance

Stage		State	Summary	Key measures
01	Not on my radar	Pre-contemplation	Anyone that is not aware, not engaging with, or not considering your business	- Potential target market - Reach
02	Thinking about it	Contemplation	Anyone that is aware of, or considering, your business	- Engagement - Website visits
03	Research	Preparation	Anyone in 'research' mode that is narrowing down businesses they will buy from	- Enquiries - Subscribers - Followers
04	Action	Action	Anyone that becomes a customer	- Conversions - Sales - Income
05	Retention/ Secondary spend	Maintenance	The customer repeats a purchase	- Repeat purchases - Advocacy - Retention

Digital Marketing Pillars

We've aligned this action planner to five pillars:

Social media



Content



Website & metrics



Search (SEO)



Email



Creating your foundation

Everyone needs a starting point. The following outlines some of the foundation actions or tools you may want to have in place to make progress in both your digital marketing and the action lists that follow.

Not all the following may be relevant for your business. They are simply starting points that cover most typical organisation/business marketing requirements. These are a foundation that some of your promotion or marketing is likely to rely on and use.

Work up to, or through these at your own pace. Incremental steps on any of these will be time well spent and will serve as a strong base to your digital marketing journey.

Pillar	Activities	Tick	Actions to take
Strategy	We have set goals and targets for our business (e.g., to grow to x number of customers)		
	We have defined what type of person our ideal customer is (e.g., gender, age, location etc.)		
	We have created a brand identity (at minimum a logo) to visually represent our business		
	We have set aside a specific amount that we are willing to spend on our marketing (a marketing budget)		
	We have a basic plan in place that outlines what marketing activity we will do		
	We have set goals and targets that we expect our marketing activity to deliver		

Pillar	Activities	Tick	Actions to take
Tools / Platforms	We have a way to record or log our customers (i.e., a spreadsheet or a Customer Relationship Management (CRM) system)		
	We have a tool or way to create and edit images		
	We have a central online space we can share information & updates (e.g., a website or social media profile)		
	People can book, pay, or enquire online		
	We have a custom domain (i.e., myname.co.uk)		
	We have email account(s) setup on our custom domain (i.e., me@myname.co.uk)		
	We have a way to send mass emails and track metrics (e.g., open rates and links clicked)		
	We have a way to send mass text messages and ways to track delivery		
	We have setup one or more social media channels		
	We have social tools to help us manage and schedule our social media (e.g., schedule when a social post goes out)		

STAGE 1

Not on my radar

Your ideal audience is not aware, not participating or not considering, your business. ***What do you do?***

This section helps you identify actions to reach people for the first time. So, they go from having never heard, or thought about, your product or business to having some awareness of you.

Potential measurement at this stage includes:

- **Potential target market** – This is the total number of people who could be a new customer. This could be based on the geographic population with a set boundary (e.g., all adults, aged over 25 within a 5-mile radius of your premises). This is useful to know as it tells you how many individuals you could market to. This is called 'market potential'.
- **Reach** – this is the total number of individuals that any form of marketing you publish has reached (e.g., an X post). It doesn't give an accurate figure on the number of individuals that have read or digested your message, neither does it indicate how many may be interested in further information. It is simply how many people your message 'may' have reached. This is a useful figure to track as it shows you how many individuals your message could be getting to.

Review the following. Tick any that you have already completed or do. Once complete, write down any actions you intend to take. Once you have taken the actions come back and tick them off!

Pillar	Activities	Tick	Actions to take
Social Media	Our social media channels are public (i.e., not private)		
	We encourage sharing of our posts/content		
	We use hashtags in posts		
	We run competitions on social media		
	We run social media advertising to promote our posts or business service/products to new people		

STAGE 1

Not on my radar (cont'd)

Pillar	Activities	Tick	Actions to take
Content	We pay to promote our content to try and reach new audiences		
	We create shareable content (e.g., how to guides)		
	We push our content out across the platforms that we own or use (e.g., website, social media, email)		
	It is easy for people to share our content (e.g., social share buttons on a website)		
	We run social media advertising to promote our posts or business/service/products to new people		
Website and Metrics	We have created some basic personas of our ideal member, client or participant		
	We have identified our market potential or how many people we think we can reach		
	We can easily add or update content to an online platform (e.g., via a content management system – CMS)		
	We have photos or access to stock libraries that can be used online		

STAGE 1

Not on my radar (cont'd)

Pillar	Activities	Tick	Actions to take
Search (SEO)	I've reviewed Google Trends or Google Keyword Planner to work out how popular search terms (for what we offer) might be – this tells us what the demand might be at the next stages		
	We've reviewed Google Trends to see what topics are currently popular to see if there are any we might be able to piggy back		
	We've searched for keywords related to what we offer to do some investigation on who our natural competitors are		
Email	(If using an eMarketing system) We have verified our domain in anticipation of getting prospects to email! (i.e., gone through a process of ensuring our emails can get delivered past spam filters)		
	Our emails feature a 'Forward' option for customers/ members to send the email onto their friends		
	We email referral offers to our existing customers (e.g. 10% off first purchase)		

STAGE 1

Not on my radar (cont'd)

My Stage 1 targets to track are:

Target	Current figure	Target figure	Target date	Achieved (tick)
E.g. Increase the total reach of our X account each month	1-2k p/m	2.5k p/m	31 May	✓

STAGE 2

Thinking about it

Your ideal audience is now aware of, or is considering, your business.
What do you do?

Use this section maps out your actions to help people feel comfortable and interested in your business.

Potential measurement at this stage includes:

- **Engagement** – This is the total number of interactions you receive. This could be social media interactions (e.g., likes on a Facebook post, or retweet on a X Tweet).

This is useful as it tells you how many individuals might be interested in your business.

- **Web Visits** – This is the number of visits your website gets. If you don't have a website then this might be a Facebook page or Google Map/Business profile.

This is useful as it's an accurate way to measure interest as they will only visit your website if they were encouraged to do so, or they had some form of intent.

Review the following. Tick any that you have already completed or do. Once complete, write down any actions you intend to take. Once you have taken the actions come back and tick them off!

Pillar	Activities	Tick	Actions to take
Social Media	We share content on social that might appeal to new people (e.g., guides or offers)		
	We monitor engagement on our channels (e.g., number of likes or shares per month)		
	We engage with people on social (e.g., reply to them if they comment on a post)		
	We regularly follow other profiles where relevant		

STAGE 2

Thinking about it (cont'd)

Pillar	Activities	Tick	Actions to take
Content	We have a centralised place where we house our own content (e.g., a website for blogs or YouTube for videos)		
	We monitor engagement of our content (e.g., web page views or YouTube views)		
	We regularly review what content types are working best with our audience so we can tailor it and produce more of the same		
	We use headlines that may grab our ideal audience's attention that encourages them to read it		
	We've used Google Keyword Planner tool for content ideas		
Website and Metrics	We have Google Analytics setup ready for when we get visitors		
	We have an online way that new customers can contact us or make a booking/purchase (e.g., an enquiry form or eCommerce/booking tool)		
	We have online profiles on Bing and Apple (to appear in Map views)		
	We have setup re-targeting tracking on our website for any social or search advertising		

STAGE 2

Thinking about it (cont'd)

Pillar	Activities	Tick	Actions to take
Search (SEO)	We have a Google My Business account setup, so our location shows up on Google Maps		
	We keep our Google My Business profile up to date (e.g., changes to opening times)		
	We know what the key search engine terms (keywords) that people would use to find the types of business / services / products that we offer		
	We know what keywords our own website ranks for		
Email	It is easy for people to sign up to receive email updates from us (e.g., an online sign-up form)		
	We have ensured our data collection and usage is GDPR compliant		
	We regularly email our current customers with information, guidance or offers		
	When people sign up for our email content, we take an action and either contact them (in person or automated) or add them to our customer relationship management system (CRM)		

STAGE 2

Thinking about it (cont'd)

My Stage 2 targets to track are:

Target	Current figure	Target figure	Target date	Achieved (tick)
E.g. Increase the number of website visitors our site receives each month	350 unique users p/m	400 unique users p/m	31 May	✓

STAGE 3

Research

People are considering your business. They are in a 'research' mode and narrowing down their choice of product or business. That's great! But how do you get them to choose you?

This section helps you identify actions to 'convert' people into becoming paying customers.

Potential measurement at this stage includes:

- **Enquiries** – This is the total number of direct enquiries you have had. This is often called 'Leads Generated'.
  It could be via your website, a direct message (DM) on social media or from another source.
  This is an important one as this is your primary list of people that may buy.
- **Subscribers** – This is the total number of individual people that have given permission for you to contact them. You will have collated contact details for them.
  You may have gathered email addresses, phone numbers or postal addresses via mechanisms such as an online form, a live event, or the phone.
  These are useful as it gives you an audience you can contact direct to promote your business.
- **Followers** – This is the total number of individuals that may like your Facebook page or follow you on X, Instagram, YouTube, or other channels.
  This provides you with a slightly captive audience that may see any content you publish.

Review the following. Tick any that you have already completed or do. Once complete, write down any actions you intend to take. Once you have taken the actions come back and tick them off!

Pillar	Activities	Tick	Actions to take
Social Media	We have a social media strategy or, at a minimum, a social content plan in place		
	We are confident we are on the right social platforms to engage with our ideal audience		
	We keep our social profiles up to date (e.g., descriptions, contact details, opening times)		

STAGE 3

Research (cont'd)

Pillar	Activities	Tick	Actions to take
Social Media	We follow up on all enquiries or questions received via social media, and always reply within 24 hours		
	We encourage readers of our content to sign up (either to email updates or social following/subscription)		
Content	We place call to actions (CTAs) within or at the end of all content pieces (e.g., 'Buy here'/'Enquire today')		
	We review our website analytics to see what content gets the most traffic		
	We have a content strategy in place which includes SMART goals		
	We have tested our enquiry, sign up or buying journey to ensure they are smooth and work (i.e. pretended to buy)		
Website and Metrics	We are able to benchmark our website against other similar sized sites in the same sector (e.g., Google Analytics benchmark tool)		
	We share customer reviews on our website and keep adding to them		
	We run search engine advertising to reach people that may have intent to buy what we offer		
	We add (and review) meta-data to our web pages (e.g. page titles, meta descriptions)		

STAGE 3

Research (cont'd)

Pillar	Activities	Tick	Actions to take
Search (SEO)	We create focussed landing pages for key promotions or products		
	We review Google Search Console to see how we can improve our website for search benefits		
	We have run the Google mobile-friendly test and implemented/requested updates to correct any issues		
	We segment new audience email lists to ensure we send relevant content that is tailored to interests (e.g., specific activity or course type)		
Email	We test different approaches to see what works best (known as A/B testing - e.g., with emails to test different subject lines)		
	We always use a clear call to action (CTA) in our emails		
	We review email tracking data and follow up with anyone that shows interest via phone or alternative methods		

STAGE 3

Research (cont'd)

My Stage 3 targets to track are:

Target	Current figure	Target figure	Target date	Achieved (tick)
E.g. Increase the total number of X followers each month	3,450	3,800	31 May	✓

STAGE 4

Action

Success! You've gained a new customer. ***But what do you do now?***
This section helps you identify actions to keep people engaged, react positively towards your brand and to promote you to others.

Potential measurement at this stage includes:

- **Conversions** – this is the total number of sales/sign ups that have been made.
  Typically, it reflects the number of people that have gone through your journey and signed up or made a purchase. Often this is a sales transaction. It can differ from the next measure as one person may make two purchases.
- **Customers** – this is the total number of individuals that are paid up/ signed up (depending on how you define a sale or success).
- **Income** – A measure of success from a financial perspective is how much income you have brought in. Often you can tailor your marketing approach to target audiences that might spend more, be more engaged or perhaps are more cost-effective to market to.
  For many this is the ultimate measure for success across your whole marketing activity.

Review the following. Tick any that you have already completed or do. Once complete, write down any actions you intend to take. Once you have taken the actions come back and tick them off!

Pillar	Activities	Tick	Actions to take
Social Media	We use social media tools to engage our audience (e.g., hashtags, reels, stories, location tags)		
	We actively ask our customers to share out content with their friends/audience		
	We remind and encourage our customers to use a consistent hashtag and to tag us when posting about us our products		

STAGE 4

Action (cont'd)

Pillar	Activities	Tick	Actions to take
Content	We prompt new customers to check out our content channels (and why they should) by signposting them to it		
	We have created content specifically for new customers so that we start engaging them from the start of our relationship		
	We use a consistent tone of voice on all our content, so when a new customer joins us the language/tone we use is similar on all paperwork, forms, and materials we might provide		
Website and Metrics	We track the number of new customers (or sales) we have gained in any given period		
	We can establish what the main method of conversion was for each sign up/sale (e.g., they came via a Google Search advert)		
	We have mystery shopped our post sign up communication to ensure we give new customers the right information at the right time		

STAGE 4

Action (cont'd)

Pillar	Activities	Tick	Actions to take
Search (SEO)	We actively seek reviews from customers via a third-party tool that collates them (e.g., Google, Facebook or TrustPilot)		
	We feature partners and suppliers on our website		
	We have a frequently asked questions (FAQs) section on our website that helps new customers and our SEO rankings		
Email	We have an automated email journey that sends emails to new customers once they sign up/purchase		
	We review our automated emails regularly to ensure they are still relevant/accurate		
	We survey customers to gather their input and help us improve/grow		
	We have authenticated our email send domain to ensure emails are getting through (if using an eMarketing platform)		

STAGE 4

Action (cont'd)

My Stage 4 targets to track are:

Target	Current figure	Target figure	Target date	Achieved (tick)
E.g. Increase the number of sales each month	12 p/m	15 p/m	31 May	✓

STAGE 5

Retention/secondary spend

People are actively re-engaging with our business and are repeat customers. How do you keep them engaged and leverage their own network?

This section helps you identify actions to 'retain' customers and help amplify your brand to new potential customers.

Potential measurement at this stage includes:

- **Repeat purchases** – How many people return or make a second purchase.
  You could measure individuals (e.g., we had 10 people return this month) or you could measure the number of repeat purchases.
  This is an great measure as it shows you are building loyalty and active habits.
- **Advocacy** – this is a measure of how much people endorse your brand (like you).
  This can be hard to measure, but surveys offer the best way to do this. Check out 'Net Promoter Scores' if you want to boss it!
- **Retention** – this is a measure of how many or how long someone stays loyal to your brand or product/offering.
  This could be the number of months they have been a customer.
  After income or new customers, this can be the next most vital key performance indicator (KPI) to track. Keep them buying and your marketing costs can be lower as you don't need to keep chasing new customers.

Review the following. Tick any that you have already completed or do. Once complete, write down any actions you intend to take. Once you have taken the actions come back and tick them off!

Pillar	Activities	Tick	Actions to take
Social Media	We follow customers on social media and engage with their own posts through encouragement or comment		
	We actively tag customers in social content		
	We encourage staff to amplify customer success stories on social media		

STAGE 5

Retention/secondary spend (cont'd)

Pillar	Activities	Tick	Actions to take
Social Media	Our customers are supportive on social media and regularly share or engage with our content		
Content	We profile current customers in our content (e.g. interview/demos)		
	We create content that appeals to existing customers to provide them with ideas/guidance		
	We seek feedback from current customers on what the like and would like to see more of from our content (e.g. by email, survey or face to face)		
Website and Metrics	We have specific online content, tools or login areas that are for customers access		
	We can separate our web traffic data by new or returning visitors		
	We have surveyed our customers to check we communicate clearly and at the right intervals post sale		

STAGE 5

Retention/secondary spend (cont'd)

Pillar	Activities	Tick	Actions to take
Search (SEO)	We respond to all customer reviews by posting a comment/ response/thanks		
	We ask relevant partners and suppliers to link to our website where possible		
	We use a search tool to monitor our search engine rankings		
Email	We email offers to our existing customers (e.g., renew this month and get 1 month free)		
	We regularly email our current customers with information, guidance or offers to motivate or prompt secondary spend		
	We check our email reports to ensure we flag any bounce backs and ask the customer for an updated email address		
	We review any email data we can get to check what is working (e.g., open rates and click throughs)		

STAGE 5

Retention/secondary spend (cont'd)

My Stage 5 targets to track are:

Target	Current figure	Target figure	Target date	Achieved (tick)
E.g. Increase the total number of retained customers per month	35 p/m	40 p/m	31 May	✓



Action planner designed and crafted by Bigwave Marketing.

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