



Marketing on Purpose with an Annual Marketing Roadmap

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Marketing plans are _____.



**“In preparing for battle I have always
found that plans are useless, but
planning is indispensable.”**

—Dwight D. Eisenhower



An effective marketing plan should answer the following questions:

- What goals do we hope to accomplish this year?
- What actions will we take to accomplish them?
- How will we measure progress/success?



Alignment & Accountability



Learn the essential ingredients you need to define a clear, actionable 12-month marketing plan. We'll teach our exact process for creating an annual **Marketing Roadmap** including:

- Relational Marketing Framework
- Standalone Campaign Calendar
- The “5 Pillars” Digital Marketing Audit
- Evergreen Funnels
- Nurture Strategy
- Traffic Channels



About me



It was around 2004...



Marketing is like dating



The goal of **relational marketing** is to build positive and valuable long-term relationships between you and your audience.



CARE → CONNECT → CONVERT



CARE → CONNECT → CONVERT



Give, Give, Give, Ask.
—Gary V.



Give, Give, Give,

—Alex Hormozi



**Give, Give, Give,
Give, Give, Give,**

—Alex Hormozi



**Give, Give, Give,
Give, Give, Give,
Give, Give, Give,**

—Alex Hormozi



**Give, Give, Give,
Give, Give, Give,
Give, Give, Give,
Get.**

—Alex Hormozi



What does all this have to do
with a **marketing roadmap**?

STRANGER



SUBSCRIBER
(COMMUNITY / LEAD)

Trust
Affinity
Excitement



SUPPORTER
(CONTRIBUTOR / CUSTOMER)

Ascension
Retention
Identity



**BRAND
EVANGELIST**
(ADVOCATE)

STRANGER

SUBSCRIBER

(COMMUNITY / LEAD)

Trust • Affinity • Excitement

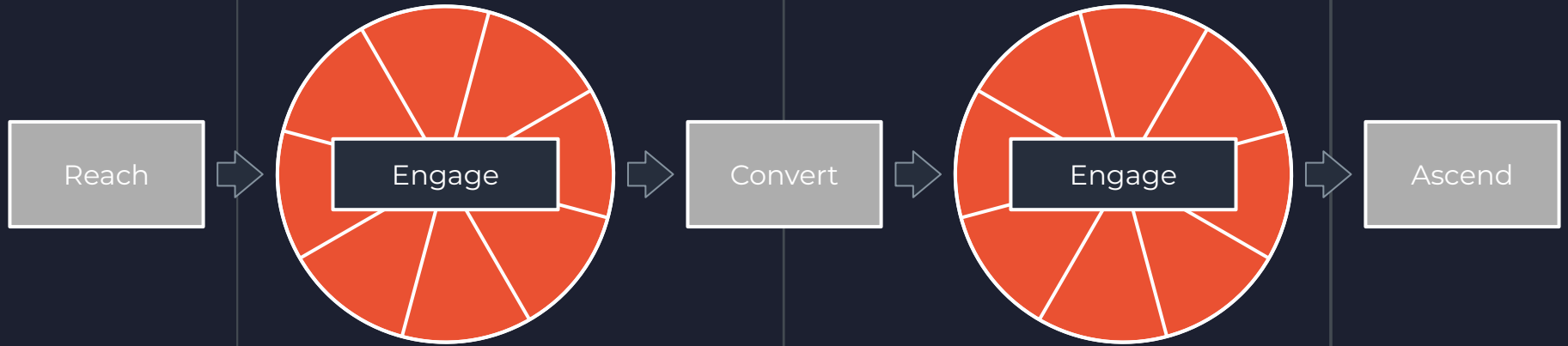
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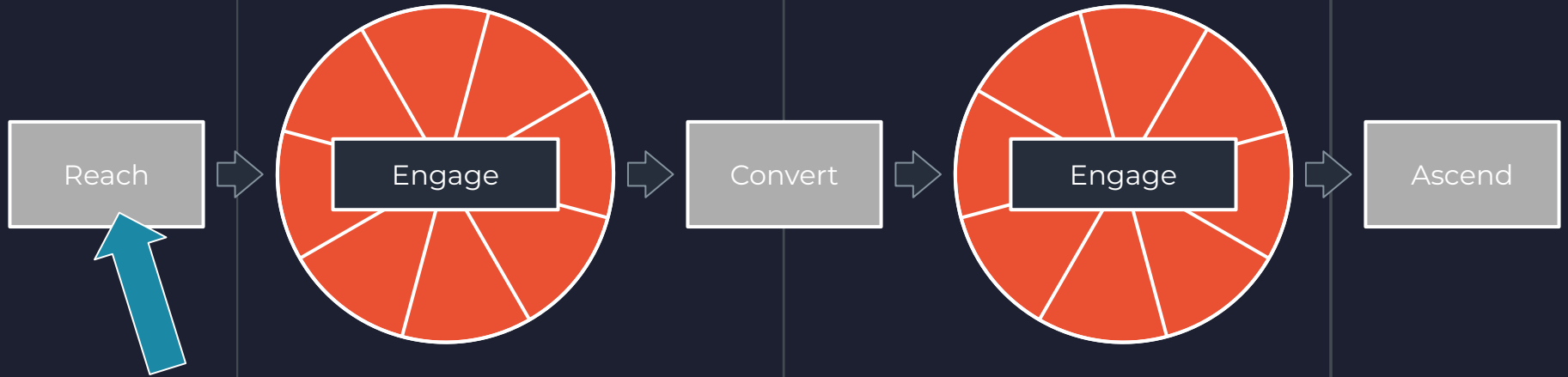
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EVANGELIST**

(ADVOCATE)





REACH

TYPE	AUDIENCE	NOTES
Paid Ads		
Organic		
Earned (OPP)		

STRANGER

SUBSCRIBER

(COMMUNITY / LEAD)

Trust • Affinity • Excitement

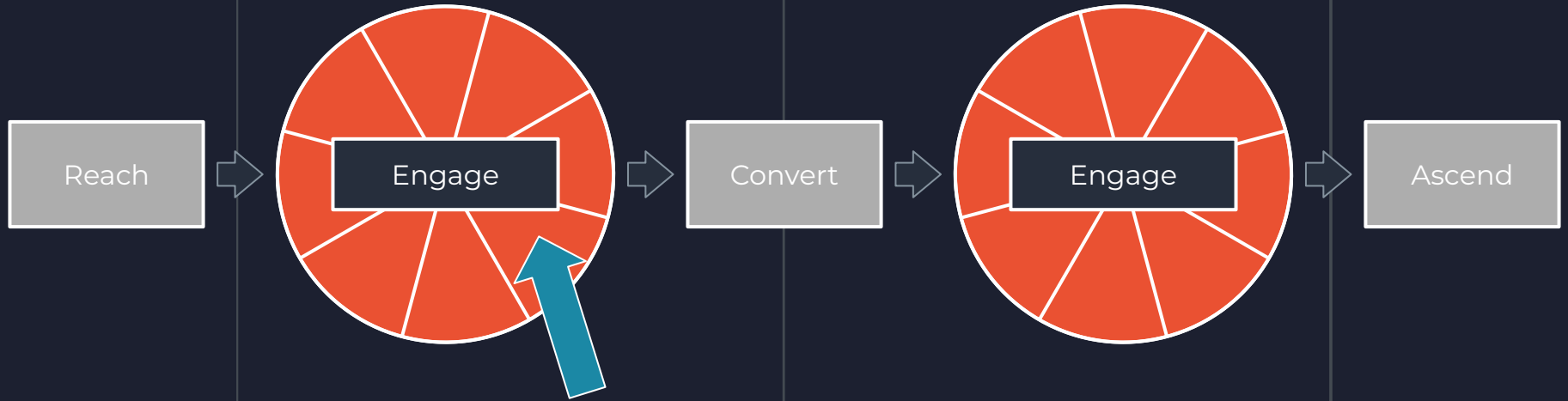
SUPPORTER

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Ascension • Retention • Identity

**BRAND
EVANGELIST**

(ADVOCATE)



SUBSCRIBER ENGAGE

TYPE	AUDIENCE	NOTES
1:1 Contact		
Attend		
Register		
Download		
Subscribe		
Watch		
Read		

STRANGER

SUBSCRIBER

(COMMUNITY / LEAD)

Trust • Affinity • Excitement

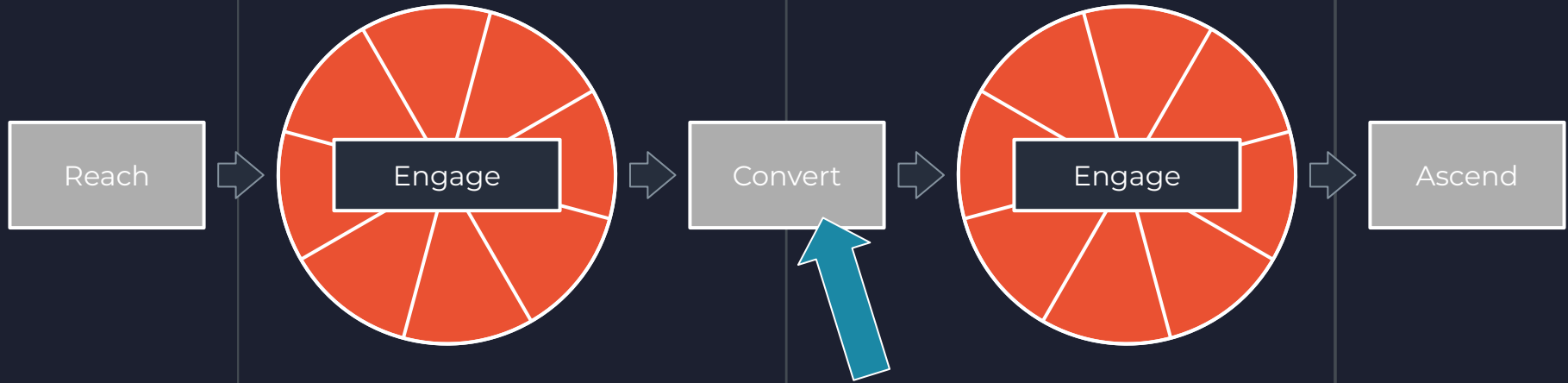
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(CONTRIBUTOR / CUSTOMER)

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**BRAND
EVANGELIST**

(ADVOCATE)





CONVERT

TYPE	AUDIENCE	PRICE	NOTES
Entry-Point			
Core			
Ascend			

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(COMMUNITY / LEAD)

Trust • Affinity • Excitement

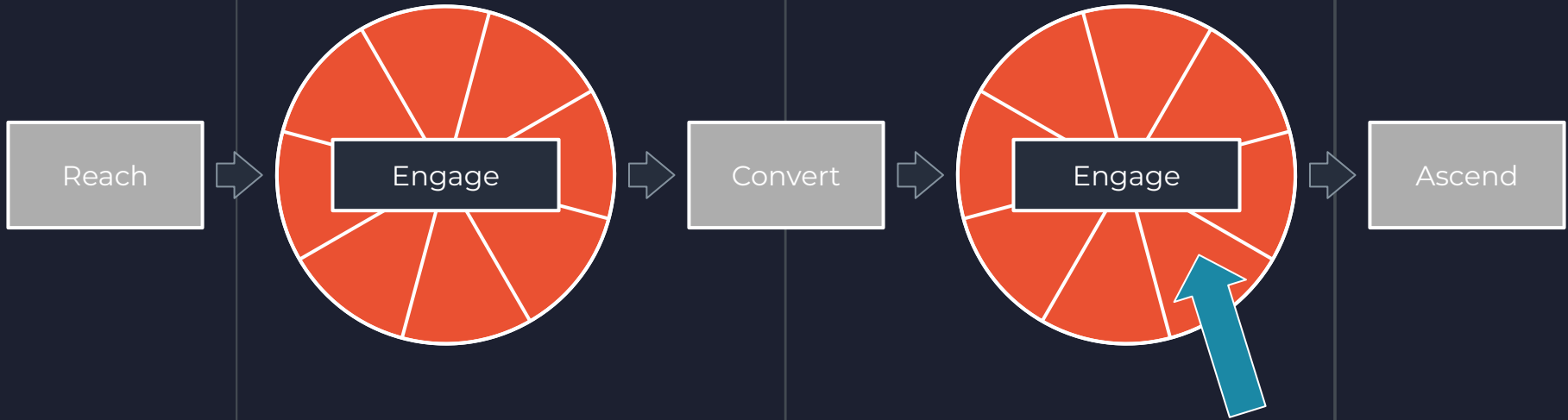
SUPPORTER

(CONTRIBUTOR / CUSTOMER)

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**BRAND
EVANGELIST**

(ADVOCATE)



SUPPORTER ENGAGE

TYPE	AUDIENCE	NOTES
1:1 Contact		
Attend		
Register		
Download		
Subscribe		
Watch		
Read		

STRANGER

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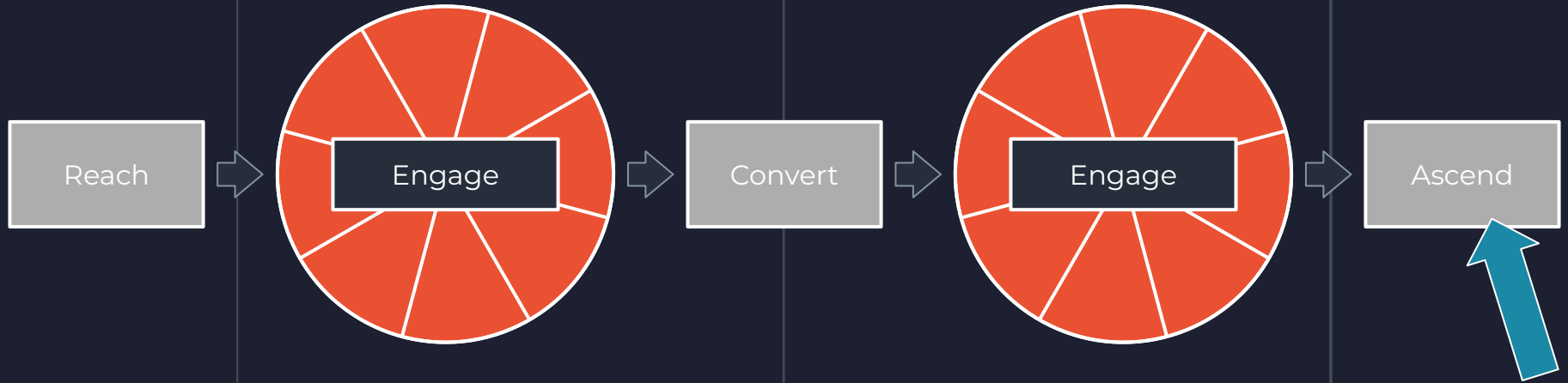
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EVANGELIST**

(ADVOCATE)





ASCEND

TYPE	AUDIENCE	NOTES
Upgrade		
Expand		
Recurring		
Testimonial		
Share / Refer		



Questions?

"5-PILLAR" MARKETING FOUNDATIONS AUDIT

STRATEGY

TRAFFIC

CONVERSION

NURTURING

REPORTING

"5-PILLAR" MARKETING FOUNDATIONS AUDIT

STRATEGY	TRAFFIC	CONVERSION	NURTURING	REPORTING
Brand Pillars (mission, vision, values)				
Visual Identity Guidelines (logo, fonts, colors)				
Ideal Audience Personas				
Ideal Audience Before & After Grid				
Brand Messaging Strategy				
Relational Marketing Framework				
Annual Campaign Calendar				

"5-PILLAR" MARKETING FOUNDATIONS AUDIT

STRATEGY	TRAFFIC	CONVERSION	NURTURING	REPORTING
Brand Pillars (mission, vision, values)	Paid Traffic (social, search, video)			
Visual Identity Guidelines (logo, fonts, colors)	Organic Traffic (social, search, podcast)			
Ideal Audience Personas	Earned Media Traffic (interviews, events, posts)			
Ideal Audience Before & After Grid	Intentional Word-of-Mouth			
Brand Messaging Strategy				
Relational Marketing Framework				
Annual Campaign Calendar				

"5-PILLAR" MARKETING FOUNDATIONS AUDIT

STRATEGY	TRAFFIC	CONVERSION	NURTURING	REPORTING
Brand Pillars (mission, vision, values)	Paid Traffic (social, search, video)	Conversion-Focused Homepage		
Visual Identity Guidelines (logo, fonts, colors)	Organic Traffic (social, search, podcast)	Lead Magnet Opt-in Page (subscribe incentive)		
Ideal Audience Personas	Earned Media Traffic (interviews, events, posts)	Conversion Page (donate/register)		
Ideal Audience Before & After Grid	Intentional Word-of-Mouth	Ascension Page (increase/recurring)		
Brand Messaging Strategy		Standalone Lead Generation Campaigns		
Relational Marketing Framework		Standalone Conversion Campaigns		
Annual Campaign Calendar		Standalone Ascension Campaigns		

"5-PILLAR" MARKETING FOUNDATIONS AUDIT

STRATEGY	TRAFFIC	CONVERSION	NURTURING	REPORTING
Brand Pillars (mission, vision, values)	Paid Traffic (social, search, video)	Conversion-Focused Homepage	Retargeting Ads	
Visual Identity Guidelines (logo, fonts, colors)	Organic Traffic (social, search, podcast)	Lead Magnet Opt-in Page (subscribe incentive)	New Lead Welcome Email Series	
Ideal Audience Personas	Earned Media Traffic (interviews, events, posts)	Conversion Page (donate/register)	New Contributor Email Series	
Ideal Audience Before & After Grid	Intentional Word-of-Mouth	Ascension Page (increase/recurring)	Ongoing Lead Content Schedule	
Brand Messaging Strategy		Standalone Lead Generation Campaigns	Ongoing Contributor Content Schedule	
Relational Marketing Framework		Standalone Conversion Campaigns		
Annual Campaign Calendar		Standalone Ascension Campaigns		

"5-PILLAR" MARKETING FOUNDATIONS AUDIT

STRATEGY	TRAFFIC	CONVERSION	NURTURING	REPORTING
Brand Pillars (mission, vision, values)	Paid Traffic (social, search, video)	Conversion-Focused Homepage	Retargeting Ads	Google Analytics w/ Goals
Visual Identity Guidelines (logo, fonts, colors)	Organic Traffic (social, search, podcast)	Lead Magnet Opt-in Page (subscribe incentive)	New Lead Welcome Email Series	Tracking Pixels + Events
Ideal Audience Personas	Earned Media Traffic (interviews, events, posts)	Conversion Page (donate/register)	New Contributor Email Series	Weekly Scorecard
Ideal Audience Before & After Grid	Intentional Word-of-Mouth	Ascension Page (increase/recurring)	Ongoing Lead Content Schedule	KPI Dashboard
Brand Messaging Strategy		Standalone Lead Generation Campaigns	Ongoing Contributor Content Schedule	
Relational Marketing Framework		Standalone Conversion Campaigns		
Annual Campaign Calendar		Standalone Ascension Campaigns		



Questions?



“What goals do we hope to accomplish this year?”



12-MONTH GOALS

	GOALS	METRICS	OPPORTUNITIES
1	Increase ____	From ____ to ____ by ____	● ...
2			
3			
4			



“What actions will we take to accomplish them?”

GETTING STARTED WITH IMPLEMENTATION

→ Traffic Channels

Reach more of the right people to raise awareness about your mission using a mix of paid, organic, and earned traffic sources.

→ Evergreen Funnels

Build an engaged audience by offering specific value to new subscribers and starting your relationship with a welcome email series.

→ Nurture Emails

Foster relationships with those subscribers sending valuable content via email on a consistent basis.

→ Scheduled Campaigns

Provide opportunities for your subscribers to convert into supporters, and continue to engage your supporters to ascend their involvement by giving more and promoting the mission.



Funnels & Campaigns

ANNUAL CAMPAIGN CALENDAR

CAMPAIGN	J	F	M	A	M	J	J	A	S	O	N	D
Winter Lead Generation Campaign												
Spring Conversion Campaign												
Summer Ascension Campaign												
Fall Lead Generation Campaign												
Year-End Conversion Campaign												



ANNUAL CAMPAIGN CALENDAR

CAMPAIGN	AUDIENCE	GOALS	ASSETS
Winter Lead Generation Campaign			
Spring Conversion Campaign			
Summer Ascension Campaign			
Fall Lead Generation Campaign			
Year-End Conversion Campaign			



5 INGREDIENTS OF AN EFFECTIVE LEAD FUNNEL



Traffic
Sources



Landing
Pages



Email
Series

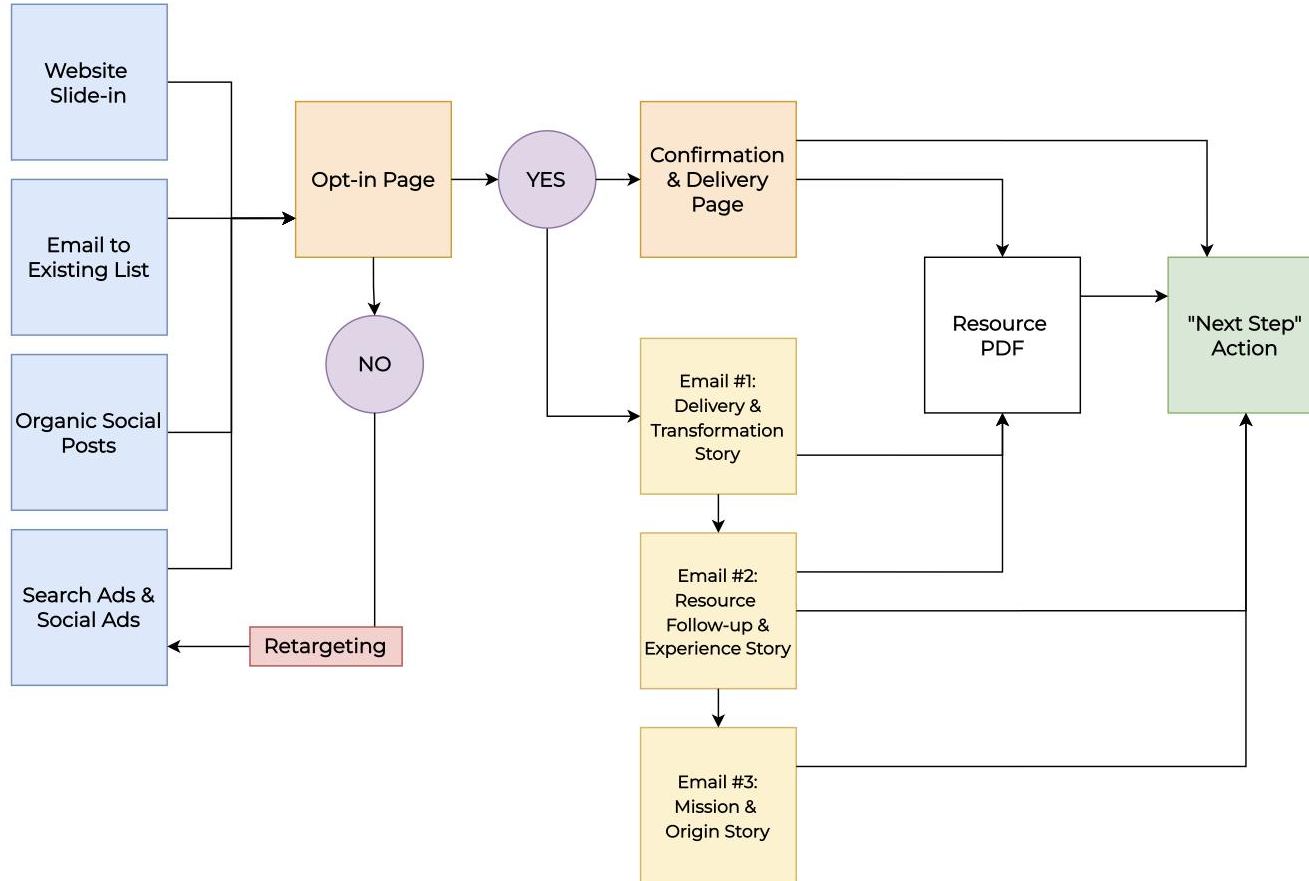


Valuable
Resource



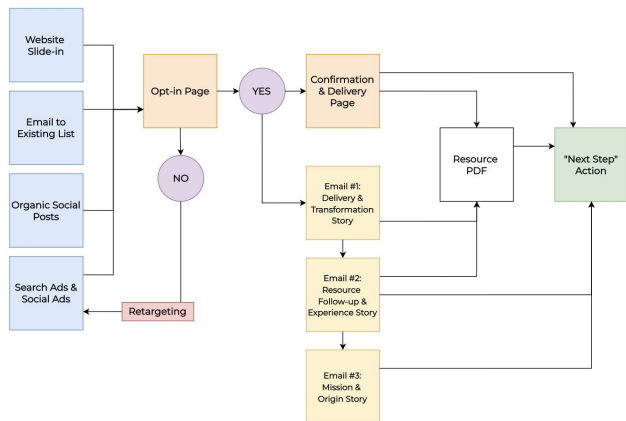
"Next Step"
Action

FREE DOWNLOAD FUNNEL EXAMPLE



CORE LEAD GENERATION FUNNEL

FREE DOWNLOAD FUNNEL EXAMPLE



RESOURCE

Free "Essential Guide" Download PDF

TRAFFIC

Google Ad Grant search ads
 Website page (organic traffic)
 Website slide-in
 Social media ads
 Social media posts (organic)
 Email main list
 Email partner lists

NURTURE

Automated welcome email series
 Ongoing monthly nurture emails

NEXT STEP

Primary: Schedule a "next steps" call with our team
 Secondary: Join our online Facebook community

ASSETS

Ads, promo emails, ppt-in page, confirmation page, 3-part welcome email series, social posts, website slide-in



Prioritize



PRIORITIZING WORK

- Start with “enough” Strategy
- Next tackle Conversion
- Then add Nurturing
- Make sure you have Reporting in place
- Finally, add Traffic
- Check the data and optimize as needed



Questions?



Let's review



TWO COMPONENTS WE DIDN'T COVER:

Brand Statement of Value
Ideal Audience Personas



LET'S CONNECT

Get these slides and more resources at:

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CAFO Marketing Strategy Hub

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