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# Small Business Marketing “How To” Playbook



Your small business has limited time and budget to build an effective marketing program. How do you “get the word out”? Here are 9 steps to get you started.



# Introduction



Small business owners are looking for a time and cost efficient way to market within thier limited budgets.

You have probably heard the term, “If money grew on trees, everyone would be a millionaire.”

Spending money on marketing can feel like a gamble unless you are armed with data and a clear goal. Without a marketing team to navigate the maze of options available today, it can be challenging. We’ll provide 9 simple steps to guide your small business in marketing effectively.



# Step 1: Who is your Customer?

## What do you sell?

The very first step is to **know your product or service**.

Identify products and/or services that generate profits. Small businesses today may have dozens to hundreds of competitors. For example, you may be in the construction business. Is your service focused on new homes, remodels, commercial projects, or residential projects? Since the construction field is very broad, it is critical to identify your core business.

## Who buys your product or service?

Is your target customer older, younger, outgoing, or introverted? As of this writing, there are five core generational marketing groups: Baby Boomers (born 1946-1964), Generation X (born 1965-1980), Millennials (born 1981-1996), Generation Z (born 1997-2012), and Generation Alpha (born 2013-present). Which group does your customer belong to? This is important for messaging, as your message needs to be delivered to your specific target audience effectively and in a way that they understand



# Step 2: Who Competes with you?



## Know your competitor

It is important to know who your competitors are in the same or a related field or category that your business is in. For example, if you are in the lawn and gardening category, how many other businesses are competing with you in this category?

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## How do I determine this?

Perform a web search of similar businesses in your area. This simple process will save you hours of research and guesswork. For example, if you are in the lawn care business, a simple web search for “lawn services near me” will allow you to see who is competing with you in your area. Although search engines do not have a defined search radius, you can specify. Example; “lawn services within 25 miles of my location.”



# Step 3: SWOT Analysis

**S**

## Strength

What gives your business an advantage over competitors? These can include unique resources, a strong brand reputation, a loyal customer base, etc.

**W**

## Weaknesses

What creates a disadvantage relative to competitors? This might be areas where your business lacks resources, skills, or competitive strength.

**O**

## Opportunity

What creates a disadvantage relative to competitors? These might be areas where your business lacks resources, skills, or competitive strength.

**T**

## Threat

External factors that could cause trouble for your business might include economic downturns, increasing competition, changes in consumer behavior, etc.

A SWOT analysis is a strategic planning tool used to identify and analyze the Strengths, Weaknesses, Opportunities, and Threats related to a business or project. This is a summary of each component



# Step 4: Indentify Budget



## Perform a pre-analysis of what budget you have to spend on marketing

How do I do this? Review your financial statements, set clear financial goals, and allocate a percentage of your revenue for marketing. There are some standardized recommended spending percentages for all categories of business. Each business is different, so consult with a financial advisor if necessary.

References: QuickBooks Budgeting, Small Business Administration Budgeting.



## STEP 5: Find a Trustworthy Marketing Guide

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### Who can Help Me?

- **Find a Trustworthy Marketing Guide:** Find a person or company that you trust to guide you through the right channels for effective marketing. Ensure they are qualified to address all marketing channels available to you, including legacy media, promotional, and digital channels like social media.
- **Where do I find these people?** Look for marketing professionals through referrals, online platforms like LinkedIn, or local business networks. Local media reps are a good starting point. Radio, TV, and print media consultants can provide initial guidance, and the consultation is almost always free.
- **Can I trust traditional media reps?** Verify their experience and ask for case studies or references. Remember, they are mostly skilled in their specific products. However, some professionals can be a valuable source for strategic direction.
- **What questions do I ask?** Ask about their experience, strategies, expected outcomes, and how they measure success.
- **References:** [LinkedIn](#), [Upwork](#), [American Marketing Association](#).



# Step 6 - Goals: What do you want to achieve?

→ Are you looking for new customers?

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→ Are you looking for website visits?

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→ Are you looking for increased online sales?

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→ Are you looking for customer leads? People interested in your service?

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→ Are you looking for a combination of all of the above?



# Step 7: Commit and Monitor the Process:

## What does this mean?

Set clear timelines and milestones, regularly review progress, and be prepared to adjust strategies based on performance data. Ask for monthly reports and updates. Inquire about the monitoring notifications available for you. Ask, “Can you have access to data and dashboards?” If the answer is “no” in any form, move on. Most importantly, once you have decided on a strategic plan, stick to it and adjust as needed. But don’t stop. Stopping midstream will always be costly.





# Step 8: Start with a Manageable Marketing Budget



## I dont know how much to invest.

Start with a marketing budget that works within the framework of your operation. Begin with a small and manageable amount. It is not necessary to “spend big” right out of the gate. Overspending can be risky, especially if you do not have a surplus of marketing dollars to retool or pivot to another tactic or strategy. However, it is necessary to invest in some type of marketing.

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## How do I determine my marketing budget?

Assess your overall financial health, consider your business goals, and allocate a sustainable percentage of your revenue for marketing.

Typically, small businesses might allocate 5-10% of their revenue to marketing, depending on the business category.

References: Forbes Guide to Marketing Budgets, Marketing Budget Templates.



# Step 9: Secure your Campaign



## Get everything in writing.

Be certain to get everything in writing for your campaigns, strategies, payment processes, and how payment is made. Obtain a commitment from the entity, individual, or agency you are working with to provide a monthly recap on trends, progress, and changes that need to be made for your campaign. Ask for dates, timelines, and details on remediation if needed. Nearly all marketing entities should accommodate this.



# References for you.



"Marketing on a Shoestring Budget" by Dee Blick

- An accessible guide for small businesses to create effective marketing strategies without breaking the bank.
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Small Business Administration (SBA) - "Marketing 101"

- Provides tips and strategies for marketing on a limited budget.
  - SBA Marketing 101
- 



"The One Page Marketing Plan" by Allan Dib

- Offers a simple framework for creating a comprehensive marketing plan based on your specific product or service.
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HubSpot - "How to Create a Marketing Budget for Your Small Business"

- Step-by-step guide to creating a marketing budget that aligns with your business goals and product offerings.
  - [HubSpot Marketing Budget Guide](#)
- 



- Google My Business
- Free tool to manage your online presence across Google, including search and maps.
- Google My Business

# YOU CAN DO THIS



If you just don't have the time to manage this, that's okay.

Get recommendations from colleagues or business networks you trust for advisory recommendations.

Reach out to a local media marketing company and ask for an experienced marketing person for a consultation.



Marketing



Social Media



Cyber Security



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