

# From the Ground Up

## Marketing Fundamentals for Direct to Market Producers

### PROGRAM WORK BOOK

This work book provides the templates needed to start your marketing plan research through to documenting your one-page, quick glance marketing communications plan and associated action plans. It is in 3 parts covering: planning and market research, target market identification, and putting the plan together.

The Work Book is accompanied by the slide deck from the first workshop and three videos providing explanation to the slides, including interviews with three direct market producers who have worked through their own marketing challenges.

Feel free to write in this Work Book, using additional paper to add more information and take notes about the gaps in your knowledge. Review your ideas, information and plans on a regular basis to ensure your strategies are relevant and timely.



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## RESOURCES

These links are designed to get you started on marketing frameworks and research for your business, along with links to tools for designing and managing your marketing activities. This is not a comprehensive list.

### BUSINESS PLANS

**Business.gov.au – Templates & Tools (checklists, templates, marketing, financials + more)**

<https://www.business.gov.au/planning/templates-and-tools>

**NAB Business Plan Template (includes situational analysis & marketing plan)**

<https://www.nab.com.au/business/moments/manage/planning/business-plan-template>

### MARKET RESEARCH

**McCrindle – research reports, demographic studies**

<https://mccrindle.com.au>

***Bernard Salt – worth following on social media for his demography insights***

**ID: The Population Experts – Community profiles**

<https://home.id.com.au/services/demographic-information-tools/local-government-online-tools/community-profiles-profileid/>

**Australian Bureau of Statistics**

<https://www.abs.gov.au>

**Google Alerts – monitor the internet for interesting content/news – direct to email**

<https://www.google.com.au/alerts>

### MARKETING COMMUNICATIONS

**Hootsuite – 3<sup>rd</sup> party social media scheduling and reporting platform**

<https://hootsuite.com>

**Facebook Business – for setting up a Business/Ads Manager account for your Facebook Page**

<https://www.facebook.com/business/tools/business-manager>

**Canva – online graphic design platform for preparing social media posts**

<https://www.canva.com>

**Google Analytics – needs to be embedded in your website to gather data**

<https://marketingplatform.google.com/about/analytics/>

## PART 1: MARKETING RESEARCH BRAINSTORM

Complete this as quickly as possible. Highlight the areas you don't know enough about. This will inform what you do going forward. You'll see some of this in the Situational Analysis or Competitor Analysis part of Business or Marketing Plans.

Have I got a **BUSINESS** plan with defined goals?      YES                              NO

Have I got a **BUDGET**?                                              YES                              NO

**Within the business, what are my STRENGTHS & WEAKNESSES?**

<b>STRENGTHS</b>	
<b>WEAKNESSES</b>	

**External to the business, who and what impacts on my business?**

<b>WHO ARE MY COMPETITORS?</b> (Where are they, what do they offer, who are their customers?)	
<b>WHAT ARE THE THREATS TO MY BUSINESS?</b> Market forces, politics, regulations, technology, environment, social issues	

**Still external to the business**

<p><b>WHERE DO YOU SEE THE OPPORTUNITIES BEING FOR YOUR BUSINESS?</b>  <i>Hint: Sometimes it's converting weaknesses &amp; threats that creates opportunities.</i></p>	
<p><b>WHAT IS MY POINT OF DIFFERENCE IN THE MARKETPLACE?</b></p> <p><b>HOW WILL THAT HELP ME MAKE THE MOST OF THOSE OPPORTUNITIES?</b></p>	

**WHO IS MY IDEAL CUSTOMER? WHAT IS THEIR PAIN POINT (real or perceived problem)?**  
 Describe them and what solutions you may be offering them through your product.

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## PART 1: 5WH - A SIMPLE FRAMEWORK FOR A MARKETING PLAN

Let's start with WHY & WHAT...WHO is covered in Part 2, and the rest in Part 3.

**WHY DO I DO WHAT I DO?** (your motivations, values, beliefs, goals)

**WHAT AM I OFFERING?**

Benefits not features  
(dot points)

**WHAT ARE MY  
CUSTOMERS'  
EXPECTATIONS OF MY  
PRODUCT?**

**WHAT MUST I DO TO  
MAKE MY PRODUCT,  
SERVICE, CUSTOMER  
RELATIONSHIP DIFFERENT  
TO MY COMPETTIORS?**

**\*\* WHAT** is my marketing  
objective? Keep all the  
above in mind, as well as  
your business goals.

## PART 1: MARKETING ASSETS & RESOURCES AUDIT

Do I have a Marketing Budget?                      YES                      NO

*This budget should include graphic design, photography, social media, advertising, flyers, business cards, website hosting/admin etc.*

If my business brand were a person what personality traits would I use to describe it?

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### CHECKLIST

- Logo
- Brand colours (do they represent the 'personality' of my brand?)
- Website (self-managed or with web admin)
- Facebook Page
- Facebook Business – Business & Ads Manager
- Instagram
- Twitter
- Youtube or Vimeo
- LinkedIn
- Messenger or WhatsApp
- Database of customers/suppliers
- Industry networks and information
- Electronic Direct Mail (EDM) platform for emails etc. e.g. Mailchimp
- Photographer/videographer access
- Someone to proof-read
- Media contacts
- Event calendar – markets, dinners, industry days
- Flyers, business cards
- Branded uniform – caps, aprons, shirts
- Others e.g e-magazines, printed publications:

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## PART 1: MY MARKETING MIX SO FAR

This may change once you know more about your target market. Not all of it may be relevant.

	<b>YOUR MIX NOW</b>	<b>POST-MARKET RESEARCH MIX</b>
<b>PRODUCT</b> Describe qualities & benefits from customer perspective		
<b>PLACE</b> How you distribute your product		
<b>PRICE</b> Where are you on the spectrum & pricing strategy associated with that position?		
<b>PROMOTION</b> How do you promote what you do to your customer?		
<b>PEOPLE</b> Who is involved in your business/ their roles.		
<b>PROCESS</b> Is there a service associated with your product?		
<b>PHYSICAL ENVIRONMENT</b> Your facilities/ farm/ point of sale		

## PART 2: WHO IS YOUR MARKET?

You've already had a go at answering this question on page 4. Perhaps your ideal customer differs from your current customer?

### MARKET SEGMENTS AND CUSTOMER PERSONAS

Segmentation is often done via the following or a mix of these:

- Geographics: where are they located?
- Demographics: age, gender, profession, income (disposable income), life stage
- Psychographics: social class, lifestyle, personality traits
- Behaviours: how the customer perceives the benefits of your product, usage rate etc.

	<b>Geographic/ demographics</b>	<b>Psychographics</b>	<b>Behaviours</b>
<b>SEGMENT 1:</b>			
<b>SEGMENT 2:</b>			
<b>SEGMENT 3:</b>			

**What segments are the most viable in terms of size and uniformity?**

**What do you need to know more about your market segments?**

Customer or buyer personas is about putting a face to your target market, making them less abstract. Develop a persona for each of the segments you've just worked on.

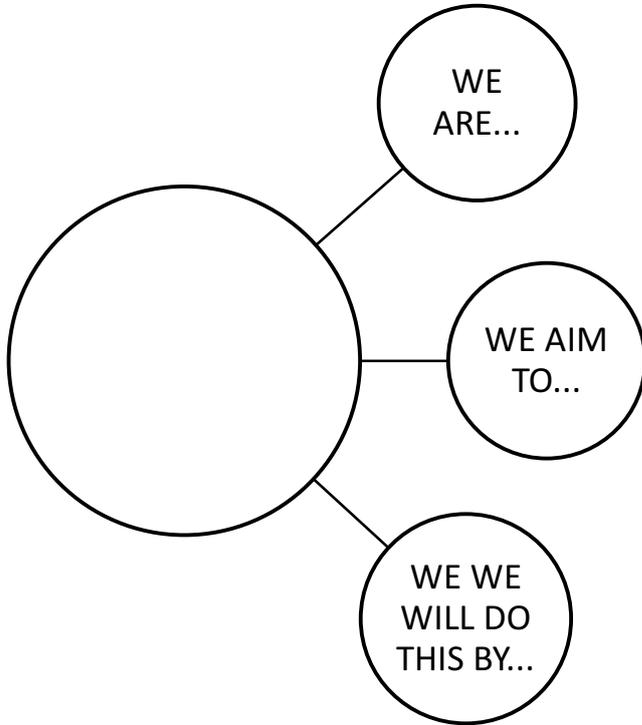
	<b>Name (make it up)</b> <b>Location (typical)</b> <b>Age</b> <b>Profession</b> <b>Family status</b>	<b>Social class</b> <b>Lifestyle</b> <b>Personality</b> <b>Interests</b> <b>Pain point</b>	<b>Behaviours e.g</b> <b>Online shopper</b> <b>Frequency of purchases</b> <b>Where do they hang out? (physical &amp; online)</b>
<b>PERSONA 1:</b>			
<b>PERSONA 2:</b>			
<b>PERSONA 3:</b>			

**What role do your customer personas play in the purchasing decision? Are they influencers, decision-makers, followers? Who is likely to 'champion' my business/products?**

### PART 3: TIME TO DIG IT ALL IN

This brings the WHY and WHAT, together with the WHO, HOW, WHEN & WHERE.

NOTE: You're using the 'royal we' here – being your business (or you).



OUR CORE MESSAGE IS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### KEY MARKETING ASSETS/FREQUENCY

See your checklist & options on page 6. Frequency refers to how often something needs to be communicated e.g. 3 x week for Facebook/Instagram, as needed on website, monthly videos & e-news, fortnightly blogs, seasonal e-mags etc.

- ✓ \_\_\_\_\_ UPDATED: \_\_\_\_\_

Use arrows to link each asset to those related to each other e.g. updated website content becomes content for a Facebook post. New videos become content for Facebook posts. New blog posts become content for emails or e-news.

OUR STORIES – EXAMPLES INCLUDING HOW (FORMAT) YOU’D TELL THEM:

	<b>What is the story?</b>	<b>How do we tell it? Video, photos etc.</b>
<b>PRODUCT</b>		
<b>PEOPLE</b>		
<b>BENEFITS</b>		
<b>CASE STUDIES/ CUSTOMERS</b>		

PERSONA SUMMARIES (WHO ARE WE COMMUNICATING WITH?)

	<b>Name (make it up) Location (typical) Age Profession Family status</b>	<b>Social class Lifestyle Personality Interests Pain point</b>	<b>Behaviours e.g Online shopper Frequency of purchases Where do they hang out? (physical &amp; online)</b>
<b>PERSONA 1:</b>			
<b>PERSONA 2:</b>			



## PART 3: ACTION PLANNING

Now add detail to your marcoms plan in the form of deadlines, resources, budgets and KPIs.

Put together a spreadsheet or simple table in a Word document (landscape orientation will be easier to work with), including the following:

### EXAMPLE

Objective	Actions (dot points)	Timeframe	Budget	Human resources	KPIs	Review deadline
To maintain awareness of seasonal produce	<ul style="list-style-type: none"> <li>Develop fact sheets on product &amp; how to use it. Call to action for more recipes – direct traffic to website</li> </ul>	A month before product is ready for market	\$200 – photos, postcard printing for market days	Me and photographer	Follow traffic to recipe page on website via Google Analytics – 10% of flyer numbers in web page views from first day of distribution to end of season	Monthly
	<ul style="list-style-type: none"> <li>Run FB Ads for duration of season</li> </ul>	From the time the product hits the market until the end of the season	\$10/day over 3 months (mix of 2-3 ads during that time)	Me and consultant	Look at FB Ad analytics for Cost Per Result (comparing ads) + CTR	Monthly

Keep your action plans simple and easy to follow. You're more likely to use them.

Make your KPIs clear. You want to basically know:

- What's generating leads?
- What's referring traffic to your website?
- What's converting into sales?
- How are people using the information you're providing them?
- What content is working the best?

You can also monitor sentiment about your product, which is a bit harder to measure but gives you a more qualitative feel for how your product is performing. That can be simply done through testimonials and anonymous feedback in a way that's easy for your customers to provide.

You then need to determine if your marketing objectives are meeting your business objectives. That's the ultimate test.

## PART 3: ACTION PLANNING YOUR DIGITAL MARKETING

Content calendars are an invaluable way to ensure you're thinking and working ahead of time on your social media content. Being at least 2-4 weeks ahead is good practice. Again, the best way to ensure this becomes a valuable working document is to keep it simple.

There are two ways you can do this:

1. Print out a blank calendar page on a piece of A4 and using different colour pen ink – mark in the social media platform e.g. Facebook, Instagram, e-news, on the day it's due to be posted, the time it's to be posted, & a brief description of what the post is.

1 9pm: FB Video of field day 9pm: IG Video of field day (hashtags)	2 2/5-14/5 FB Ad \$10/day Market promo	3 6am: FB Markets reminder	4 9pm: IG Markets reminder (hashtags)	5 9pm: EDM Monthly update (new recipes)	6 7am: FB Live – from the markets 7.30am: Add FB Live video to IG Stories	7 9pm: IG Personal pic from the farm
8 9pm: FB Recipe of the week  9pm: IG Recipe of the week (hashtags)	9	10 6am: Profile seasonal produce	11 9pm: profile seasonal produce (hashtags)	12	13 7am: Orders for boxes close today 7.30am: Orders for boxes close today	14 FB Ad market promo ends  9pm: IG Personal pic from the farm

2. By doing a spreadsheet or Word table that documents the same type of information. You can also add who might be responsible for each platform & deadlines for content.

Week/date/time to be scheduled	Facebook	Instagram	EDM	Blog (recipes)
Wk 1: Mon 1/5, 9pm	Video: field day	Video: field day		Update recipes for market day & EDM dist on Friday
Tues 2/5	FB Ad \$10/day – 14/5: Market promo			

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