



Custom West Marketing Plan

Calendar of Events – October 5, 2016

Timelines/Deadlines in bolded brackets like this: [10/5/16]. Where no timeline listed, dates TBD.

1. Create master list of all lead sources.

- Link to start of list from Seth. **[10/7/16]**
- Nate to flesh out current working list of all lead sources (potential, active, past successful and unsuccessful).
- Prioritize lead generation activities based on this working list of lead sources.

2. Transfer / Set up Website for overhaul.

- Seth to contact Rodli and begin process. **[10/7/16]**
- Overview of conversion factors, content distribution system, video integration, landing page capabilities, email and lead form capture capabilities, offers and calls to action (CTA) structure, social media integration, analytics and conversion tracking, SEO structure, etc.
- Blog and content publication and promotion strategy.

3. Commercial Lead-Gen Campaign set-up.

- Strategy session. **[10/12 – 10/21]** **Nate schedule meeting w/ Seth for this using this link:** <https://calendly.com/primeconversion/in-person-meeting/>
- Creating list of potential strategic partners, distribution partners, referral partners, large sources of potential clients, “big fish” clients, client targeting details (demos and identifiable targeting data).
- Creating marketing communications and materials to use to reach out to partners and clients, and to communicate the value proposition effectively.
- Defining sales activities for outreach and encouraging inbound leads in these areas.

- Scheduling sales and outreach activities (manual, automated, calendar and triggers, CRM set-up, etc.)

4. Begin USP / Content creation strategy process.

- Message/USP – Goal is to refine and finalize Message/USP by {set dates w/ Nate & Karen}
- 3 USP meetings total.
 - 1st initial meeting to gather information and set course. (After meeting action steps: Seth goes to work to compile and write the first draft of the USP. Custom West team gathers and submits information to Seth.)
 - 2nd meeting to go over the first draft, gather input and feedback, and make edits. (After meeting action steps: Seth rewrites and refines the USP.)
 - 3rd meeting to finalize the USP with the objective of coming away from this meeting with a practical, working message to market we can use across all marketing channels.
- Important note to guide this process: After “finalizing” the USP, we can always tweak and change it. In fact, this is common for the USP to be tweaked over the weeks, months, and years as things evolve. But it is important at this stage to “finalize” the USP to the point where it is “ready to publish” to the public in marketing materials.

5. Social media content distribution/promotion and customer interaction structure and set-up.

- Including organic, native posting and paid ads.
- Where we will post active content, and where we won’t (I call this your “Content Distribution Network” or CDN).
- Best practices: Who will post what, when and how.
- Creating a content editorial calendar for the company.

6. Begin setting up the database for the systematized follow-up system.

- Strategy process
- Technical set-up
- Implementation

7. Video marketing

- Determining what videos we will create, and when.
- Outlining, recording audio and video, editing, reviewing, and publishing new video content across our CDN (Content Distribution Network).
- Continual video creation, tracking of results, and improvement.

- Implementing strategies for your team to capture footage in the field, and determining what our internal procedures will be to filter, edit, and publish that video content onto our CDN and social platforms.

8. Sales training

- Strategy session about your current process.
- Options, opportunities, and potential improvements.
- Setting our game plan.
- Setting up training sessions with your staff.

9. Customer Connection & Retention Strategy and Plan

- Defining your current procedures.
- Options, opportunities, and potential improvements.
- Setting our game plan.
- Implementation (and training if necessary.)

Other Items:

- Community Marketing
- Other Strategic Alliances
- Local Media Opportunities
- Expert Positioning Strategies
- Adding More Value (Process)
- Pricing Audit
- Print and Display Campaigns
- Direct Mail Campaigns
- More....

This calendar of events will evolve and adjust as things progress. For now, this is just a general guideline to keep us on track. Any questions, please feel free at any time.