



Digital marketing basics to help you grow your business

For use with financial professionals and health brokers.

The strategies discussed throughout are for educational purposes only. Financial and other professionals should contact their compliance departments prior to implementing the concepts discussed to ensure compliance with firm policy.

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Why digital marketing?



Digital marketing leverages the power of the internet to promote a business. It's a broad term that is used to describe a variety of strategies and communications — all using technology that is widely available to both businesses and people worldwide.

It's a fast-moving, ever-changing suite of disciplines. But businesses that invest in this type of marketing can see a positive return on their investment. Digital marketing has the power to help organizations reach their growth goals from increasing brand awareness to creating more long-lasting client relationships.

There is a lot of noise and competition for mindscape on digital platforms, so your brand and voice should be differentiated and meant to add value to your clients.

Benefit #1: Expand your reach

Digital marketing is an easy gateway to vast markets, thanks to the wide availability of the internet. You can increase your brand's visibility and target your outreach efforts using consumer data collected and managed by web-based companies like Google™, Facebook™ and X (formerly Twitter)™, to name a few. You can also foster closer ties with new prospects and existing customers, enabling them to get to know you and your brand better to help drive interest and loyalty.

Benefit #2: Stretch your budget

Digital marketing works for every size of company, and many features are free to use. Platforms are easy to scale over time and typically don't require long-term contracts. With a solid research strategy and ongoing focus, businesses may be able to make a large impact with a reasonable marketing budget.

Benefit #3: Target and find leads

Digital marketing includes targeting elements that direct your efforts to the right audiences. Things like search engine optimization (SEO) keywords, hashtags and demographic targeting get your message to people within your desired, target audiences. Think about how your bread crumb (navigational aid that allows users to keep track of their current location on a website or interface) leads to deepening connections through different digital platforms. Gated content is often used as a lead generation tool to help a company gather helpful data about their prospects (see *Glossary of digital marketing terms*, pp. 34–36).

Benefit #4: Increase your client engagement

Digital marketing is highly engaging by nature, and people like to share what they find valuable. Any piece of content you create, whether an article, photo or video, can be the one that resonates. Digital content can start discussions, encourage curiosity and build trust in your brand, as long as your content resonates and adds value.

Benefit #5: See real results

Digital marketing gives you real-time analytics and results, so you can course-correct and optimize immediately. Technology helps you track how users found your site, what they read, where they clicked and what resonated with them. This provides a feedback loop to further develop your marketing strategy and content decisions to strengthen your marketing program over time.



Chapter 1: Before you begin

Digital marketing must-dos

Before investing time, money or energy into implementing any new marketing initiatives for your organization, we suggest doing these five important steps (and revisiting them often).



Know your audience(s)

- Develop a concierge, high-touch service.
- Create a short list of audiences you'd like to target.
- Research demographics for each: age, gender, location, marital status, work status, job title, education, etc.
- Learn about their digital habits: with social media platforms they use, favorite websites, topics/interests, email responsiveness and desktop vs. mobile.
- Understand their motivations to act, their goals and what makes them happy.
- Understand their fears, worries and challenges.
- Determine how you want to segment your existing client list: large organization vs. small; newly established vs. long-standing; life stages; etc.



Know your brand

- Define your brand voice and tone; it should sound consistent with your existing mission and values. Pay attention to how you naturally speak with your clients, what messages resonates with them and which words they use.
- Know your compelling brand story and differentiators.
- Be able to succinctly communicate your business' core purposes, unique approach and what makes you special.
- Have a defined visual style and color scheme.
- Check your existing content for consistency between marketing materials and client communications.



Determine what's manageable

- Consider the expertise and resources you have available to you. For example, do you have a designer who created your website or business cards?
- Plan ahead. It takes time and budget if you need to build or improve your technical capabilities for effective digital marketing.
- Start small. Choose only the priorities that fit within your business' capacity, and write a long-term road map to implement other digital marketing goals.



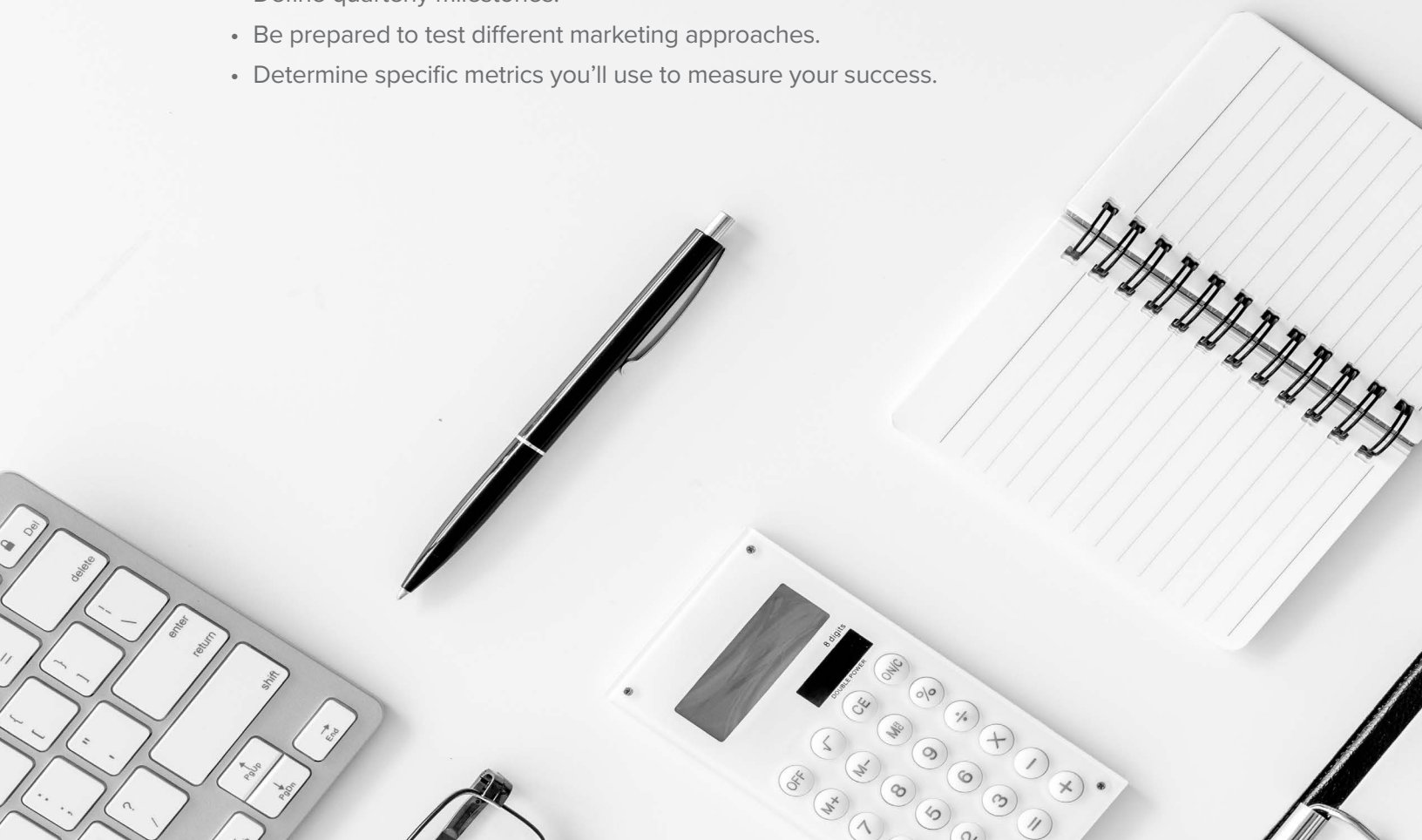
Make a game plan

- Decide who will own digital marketing for your business.
- Identify who will create written and visual content (can be done in-house by an employee, by freelancer or through an agency).
- Have plans and capacity for each digital marketing objective, like:
 - Developing content topics and types.
 - Aligning content calendars business-wide.
 - Creating content and visuals.
 - Publishing.
 - Building web pages, emails and ad campaigns.
 - Getting internal — and external — feedback.
 - Obtaining compliance approval.
 - Establishing outreach and engagement tasks.
 - Responding to inquiries.
 - Tracking and reporting.



Set goals that fit your business

- Determine which types of digital marketing align closest with your current business goals.
- Create specific, manageable, achievable, realistic and timed (SMART) marketing goals for the year.
- Make sure these SMART goals support your overall business objectives and strategy.
- Define quarterly milestones.
- Be prepared to test different marketing approaches.
- Determine specific metrics you'll use to measure your success.





Chapter 2: The foundations

The importance of websites, content and SEO

While many parts of digital marketing can be implemented in any order, there are three items that we recommend prioritizing.



A modern website



Engaging digital content



Search engine optimization (SEO)

Together, these three create a home for your digital outreach. No matter how your other strategies perform, your technically sound, modern website should be easy to find and full of valuable content. This, in turn, will make it possible for prospects to become clients — and clients to become advocates for your business.

A modern website

A website is a must-have for your business. If you don't have one yet, start there, as it acts as the home base for all your digital marketing.

- It makes you easy to find.
- It allows people to research and learn about your offering, bringing you more clients and increasing conversion rates.
- It builds credibility and positions you as an expert in your field.
- It increases brand awareness.

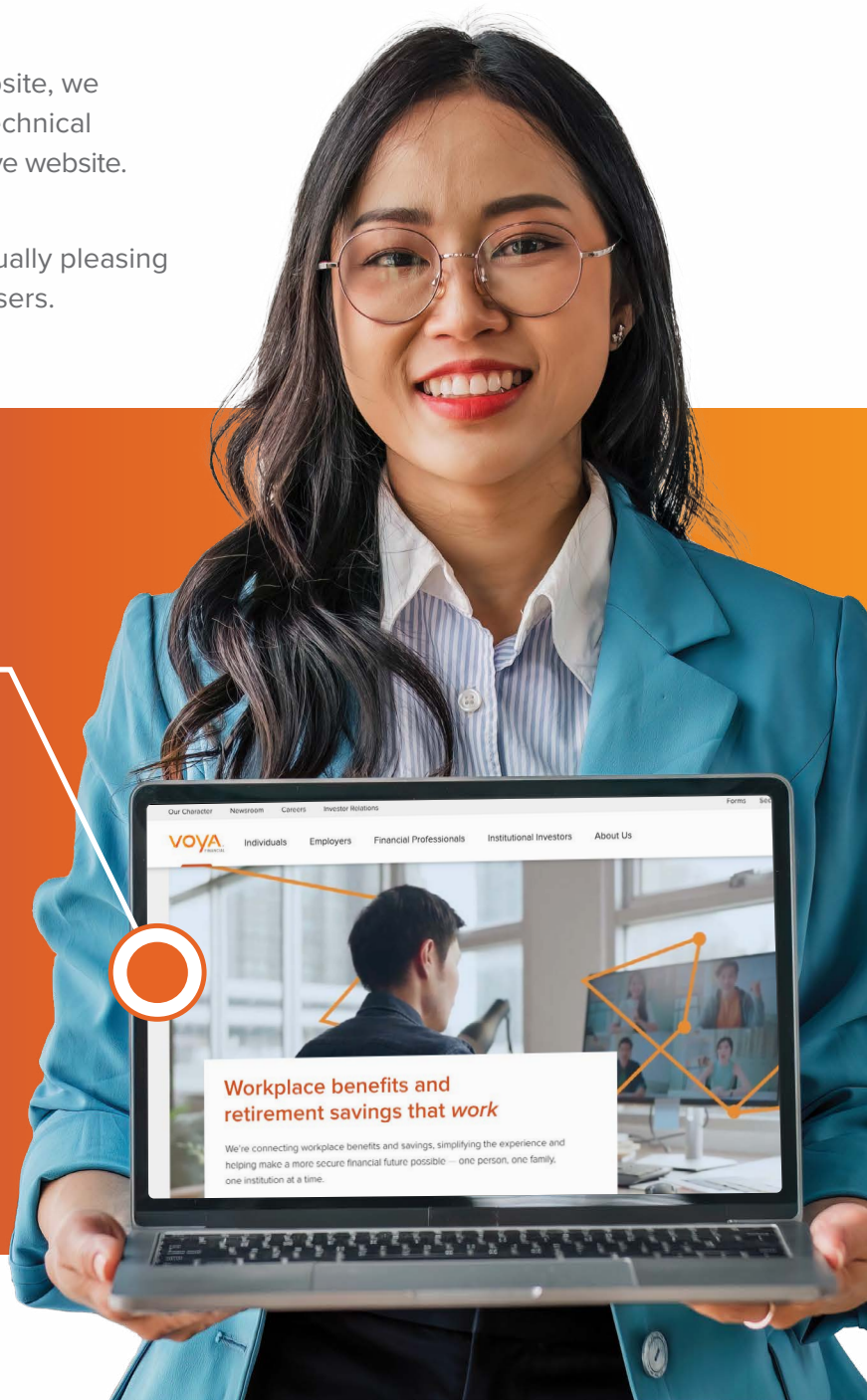
If you already have a website, check that it has capabilities to track visitor data, capture new leads and regularly share new content. Google Analytics™ is a good starting point.

If you need help building or optimizing your website, we suggest hiring a professional. There are many technical details involved in building an efficient and effective website. You do not want to skimp on the budget here.

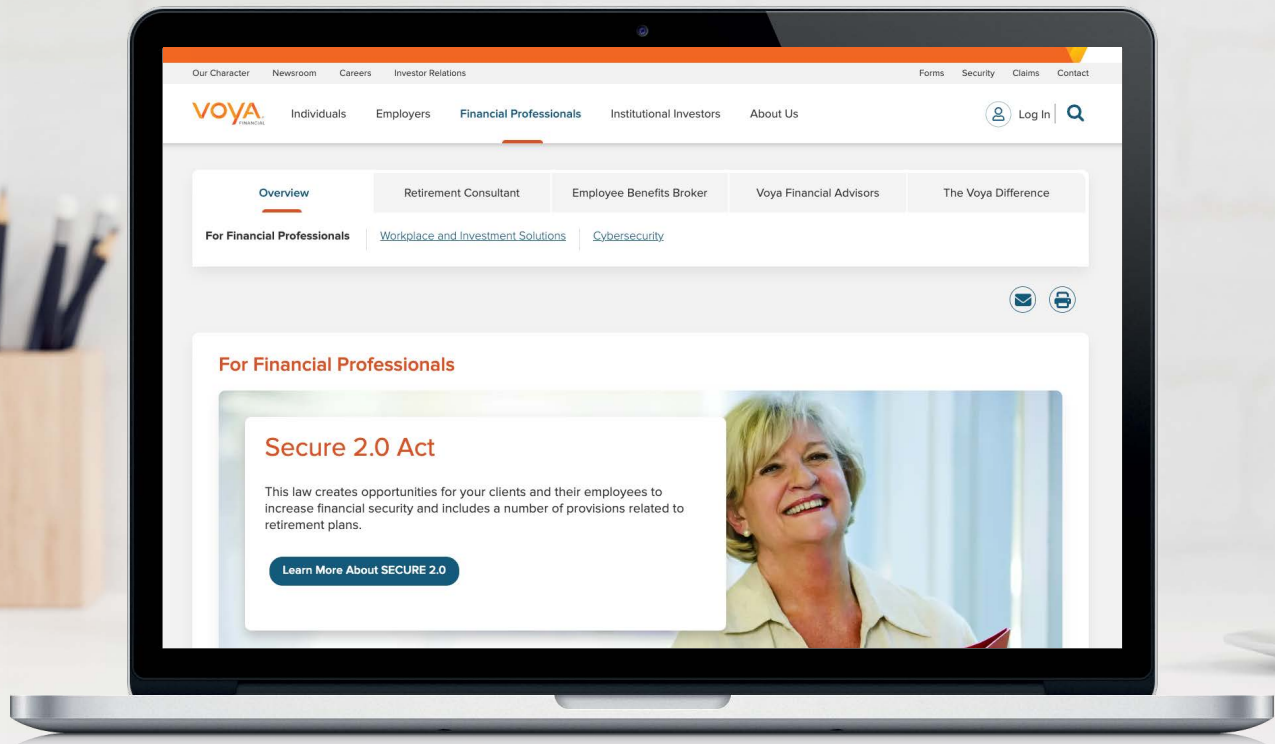
Your website should be easy to navigate, be visually pleasing and work well for computer, mobile and tablet users.

Important website features

- Tells the brand story.
- Differentiates you from the competition.
- Captures viewing insights.
- Loads quickly.
- Meets accessibility requirements.
- Is easy to navigate.
- Has strong calls-to-action (CTAs).



But most of all, your site needs to **tell your story**. It is the digital front door to your business. It should:



- Be easy to find.
- Be interesting, engaging and valuable.
- Ease buying concerns or confusion.
- Clearly explain next steps in the buying process (or, in this case, the process of beginning to work with your business).
- Make contacting your business effortless, either by displaying your phone number, address and email information prominently or through filling out a simple form that is monitored by someone in your business.

Yes, a website has many jobs to do. That's why it's so important to digital marketing. In order to make your website successful, you'll also need to spend time thinking through your content and search engine optimization (SEO).

Engaging digital content

A great digital content strategy tells your story and shows your audience that you understand their challenges, anticipate their needs and have the right solutions for them. It highlights your expertise, products, services and success.

You may consider writing a blog, where you regularly post new articles on a variety of topics and create long-form content that can live on your site for several months.

No matter what you choose, your website will be the destination for much (if not all) of your digital marketing, so it's important that it's valuable and engaging, and that it invites readers to continue interacting with your business.

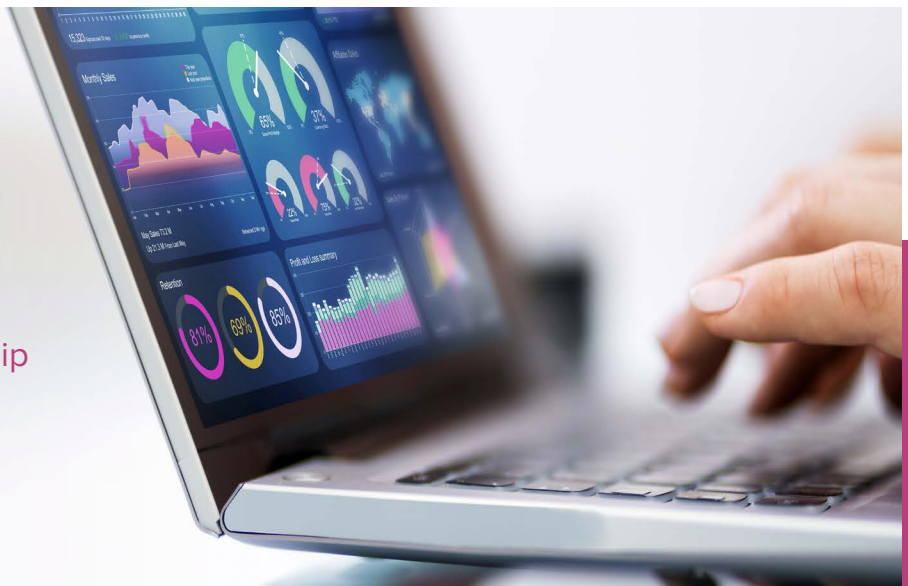
Industry events and legislative updates are valuable and relevant, but they should not be the only topics in your content strategy.

Here are some content ideas that will humanize your brand, create more engagement and create lasting connections with your audience:

- Polls or quizzes
- Infographics
- Inspirational quotes
- Quotes from clients (if legally approved and/or within applicable regulatory guidelines)
- You or your employees' interests/hobbies
- Behind-the-scenes photos of the organization
- Event photos (company philanthropy, holiday parties, client appreciation events, etc.)
- Personal stories (if legally approved and/or within applicable regulatory guidelines)
- Case studies
- Educational videos
- Podcasts

What kind of content matches your goals?

- Building your brand
- Increasing brand awareness
- Extending market reach
- Lead generation
- Establishing thought leadership
- Client retention
- Client acquisition



Well-organized search engine optimization (SEO)

This is how search engines, such as Google and Bing™, read and understand your website — and decide if they will recommend your site (and ultimately your business) to users. For example, if you search a term, what shows up in your search? If you search your industry, where does your business show up in the search results? Your goal is to have your website, blog post, etc., return high up on the list to help generate traffic to your site.

Like a website, SEO is a business investment that can help grow your bottom line. Creating an optimized website that “ranks” properly on search engines is helpful for increasing your brand awareness and helping drive traffic to your site, which is an important step in building successful, tenured client relationships.

There are many factors that go into a well-optimized site, and it’s important to make SEO an ongoing priority. Technology changes quickly, so staying updated on SEO best practices is one tool to help you stay on trend and ahead of the competition.

Consider SEO to be a part of your long-term public relations strategy because:



It translates the voice of the customer. SEO provides data about marketing shifts, consumer intent and signals on behavior. By better understanding what people are searching for, you can better market to your target audiences.



It can increase engagement, traffic and sales. Mobile traffic and local search are a fundamental part of the success of your business. You can target specific vicinities and/or audiences, targeting those you feel could benefit from your offering.



It can help you create a top-notch user experience. User experience analytics are available to understand how a user is interpreting their visit to your website. You can learn where they are spending their time, learn what they think of the experience, and help them get to the right content with as few clicks as possible..





Don't Skip This. Website, digital content and SEO

Chapter 2 tips



Website

- ☐ Include links to your social media.
- ☐ Have a prominent “Contact us” form to capture new leads.
- ☐ Meet basic accessibility guidelines:
 - More info can be found *here*.
- ☐ Check regularly for broken links or “404” pages (which indicate a web page has been moved, has been deleted or won’t load).
- ☐ Revisit “evergreen” sections occasionally like:
 - Professional headshots and bios
 - Brand mission, vision and values and “About Us” pages
 - Website title and tagline
 - Calls-to-action
 - Lead generation forms
- ☐ Create landing page templates with strong CTAs and tracking for future marketing campaigns.
- ☐ Ensure compatibility and tracking with Google analytics.

Chapter 2 tips continued



Digital Content

- ☐ An editorial calendar to plan content and messaging
- ☐ A consistent point of view across all digital content
- ☐ SEO keywords on every page
- ☐ Links to your other content (called internal links) to help readers without leaving your website
- ☐ Multiple formats of content (articles, photos, videos, infographics, webinars, etc.) to accommodate for different learning styles
- ☐ Social sharing links
- ☐ Catchy, SEO-friendly headlines for articles
- ☐ CTAs that encourage the audience to like and share your content
- ☐ CTAs that drive the audience to the next step in the buying journey (i.e., contact us, schedule a call or newsletter subscription)



SEO

- ☐ A regularly maintained target keyword list
 - Use these keywords on your web pages and in your content.
 - Update seasonally or to coincide with any new products, services, legislation, trends, etc.
- ☐ Business profiles on local directories
- ☐ Analytic tools to understand your website health
- ☐ Keyword ranking tools to gauge where you rank against your competition
- ☐ Correct HTML (code that is used to structure a web page and its content) tags for:
 - Page titles
 - Headers
 - Subheads
 - Captions
 - Alt text
 - Meta descriptions (see *Glossary of digital marketing terms*, pp. 34–36)
- ☐ Correctly sized, high-quality royalty-free or licensed images (your website builder should be able to assist you with this)
- ☐ Training or other learning so you understand how to read and analyze your SEO data (there are many online resources available)



Chapter 3: The influence of social media

Social media is a great complement to your website and other digital marketing activities. It stretches your online presence outside of your own website, and it introduces new people to your business. You don't need to have a presence on every platform. Simply choose the platforms that your clients and target audience use.

Social media allows you to speak to both your current clients and prospective clients at the same time rather than using separate communications. This can be a wonderful way for current clients to communicate your value on your behalf through commenting and sharing your content. Depending on which platforms you decide to use, you may also be able to reach a younger demographic, who may grow into your target audience later, building your funnel for years to come.



Where does
your target
audience
spend their
time online?



While it may seem smart to include all social media platforms in your strategy for maximum reach, it's important to have an authentic presence and not overextend your capacity. The work involved in managing multiple profiles and networks are likely not a good investment for smaller businesses. Be sure to have a strategy and dedicated resources for each social media platform you decide to use.

A good social media strategy helps you:

- Gain key client insights.
- Reach new audiences.
- Strengthen existing client relationships.
- Reinforce your brand culture.
- Highlight your values and expertise.
- Share news in real time.
- Share your unique content with a wider audience.
- Receive immediate feedback.

Building your sales funnel through social media

Like the digital content on your site, **posting only industry news and numbers will not be engaging enough** for these digital gathering spaces. Your content will need to be friendly, human and authentic to resonate in the social media environment. Things like:

- Simplified industry education
- Charitable giving/service
- Employee spotlight/get to know...
- Events
- Company milestones
- Personal interests, hobbies and milestones
- Polls/surveys
- Inspirational quotes
- Suggestions for local activities or businesses

As you can see, some of these content ideas overlap with what you may have on your site. This is a great way to start building trust with new readers, as they won't be surprised or feel "tricked" when they go to your site. (It's also much more efficient to repurpose website content for your other digital marketing avenues.)

By including calls-to-action (CTAs) to visit your site in some of your social posts, anyone who clicks will enter your optimized website — with engaging content full of internal links, enticing CTAs and tracking.

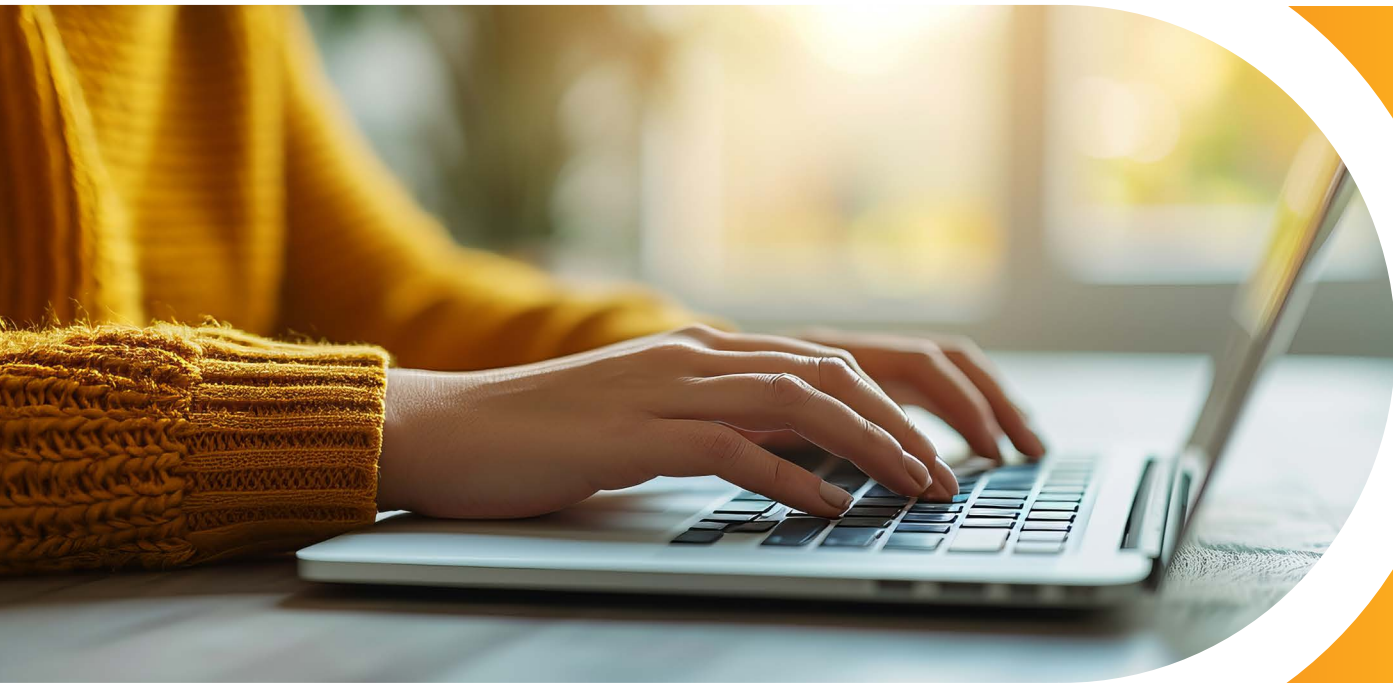




Don't Skip This. **Social media**

Chapter 3 tips

- ☐ Social media objective and goals that support your overall business goals
- ☐ A social media calendar that aligns with your other content
- ☐ Target audience research
- ☐ Hashtag research for each platform (these are where your SEO keywords will come in handy)
- ☐ Regular posts on company pages
- ☐ A variety of graphics, videos and photos
- ☐ Following communities or hashtags where you can find your target audience
- ☐ Regular engagement on social media (commenting, liking, following accounts, sharing, etc., from the business account)
- ☐ A monthly metrics review to understand what is resonating
- ☐ Providing compliance-approved content to employees to use in their own social media channels



Chapter 4:

The strength of email marketing

Email newsletters and campaigns help reinforce connections with your clients and prospects. They are cost-effective alternatives to direct (snail) mail and offer flexibility in reaching your audience at any time of day through their desktop, mobile phone or tablet.

As with all digital marketing, email campaigns should be backed by a strategy that aligns to your business goals and fits your customer funnel.

We recommend using an email marketing tool to deploy emails. There are many options available on the market, so be sure to do your online research to choose one that works with your client relationship management (CRM) system and is easy for you to use. You could also ask peers which platform they use and what they like best about it.

These products streamline the email creation and sending process, help you maintain regulatory compliance (such as recipient data security, anti-spam and unsubscribe requests) and provide flexibility and efficiency that makes your return on investment (ROI) well worth it.



Customized and personalized

The flexibility of email marketing allows you to create different strategies for each segment of your audience — something other forms of digital marketing can't do.

You can have a monthly newsletter that goes out to your entire client list, customize weekly emails to your largest clients, and set up automated email campaigns to be sent to your smallest clients.

You can even send marketing messages to people who are not yet clients. So strategy is crucial when it comes to email marketing.

Building an email strategy

Before you send an email, newsletter or campaign, answer these questions to ensure you have a solid strategy in place.

- What audience or segment is this going to?
- What resonates with this audience?
- What is the purpose of the email(s)?
- What is the next step you want the reader to take (after reading)? This is your call to action (CTA).
- If sending multiple emails, what cadence is both manageable and effective?
- What will this do for your overall digital marketing and business goals?
- How will you measure the success of this email/campaign?

When it comes to cadence, the goal is to be valuable but not overbearing. You don't want to annoy your audience, but you don't want to lose momentum either.

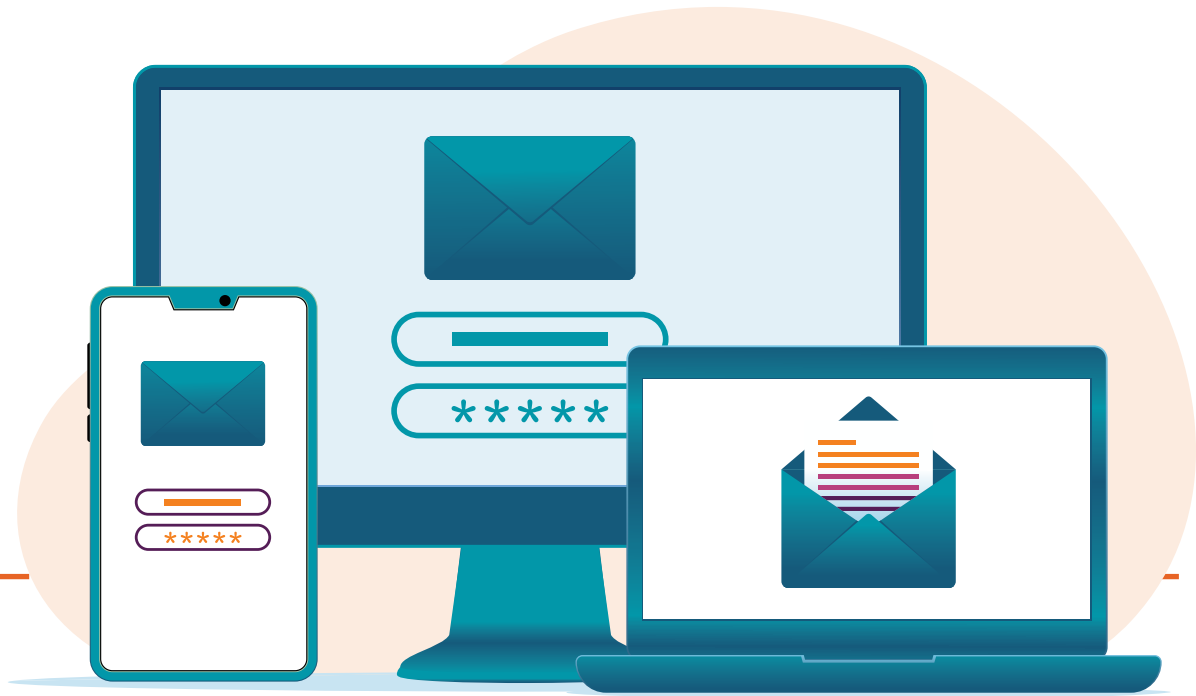
Be sure to analyze your open, read and click-through rates on your first several campaigns. Is there a noticeable drop-off in readers? This may be a sign that your cadence is too quick. It may take several tries to find the right cadence for your audience, so don't get discouraged.

Finally, you'll always want to make sure your singular email campaigns fit into your larger strategies. They should help you achieve your business goals, whether that be new sales, retention, cross-selling or something else.

Email marketing tools provide:

- Easy-to-build emails
- A/B testing abilities
- Predesigned, visually appealing templates
- Regulatory compliance
- Metrics to measure success

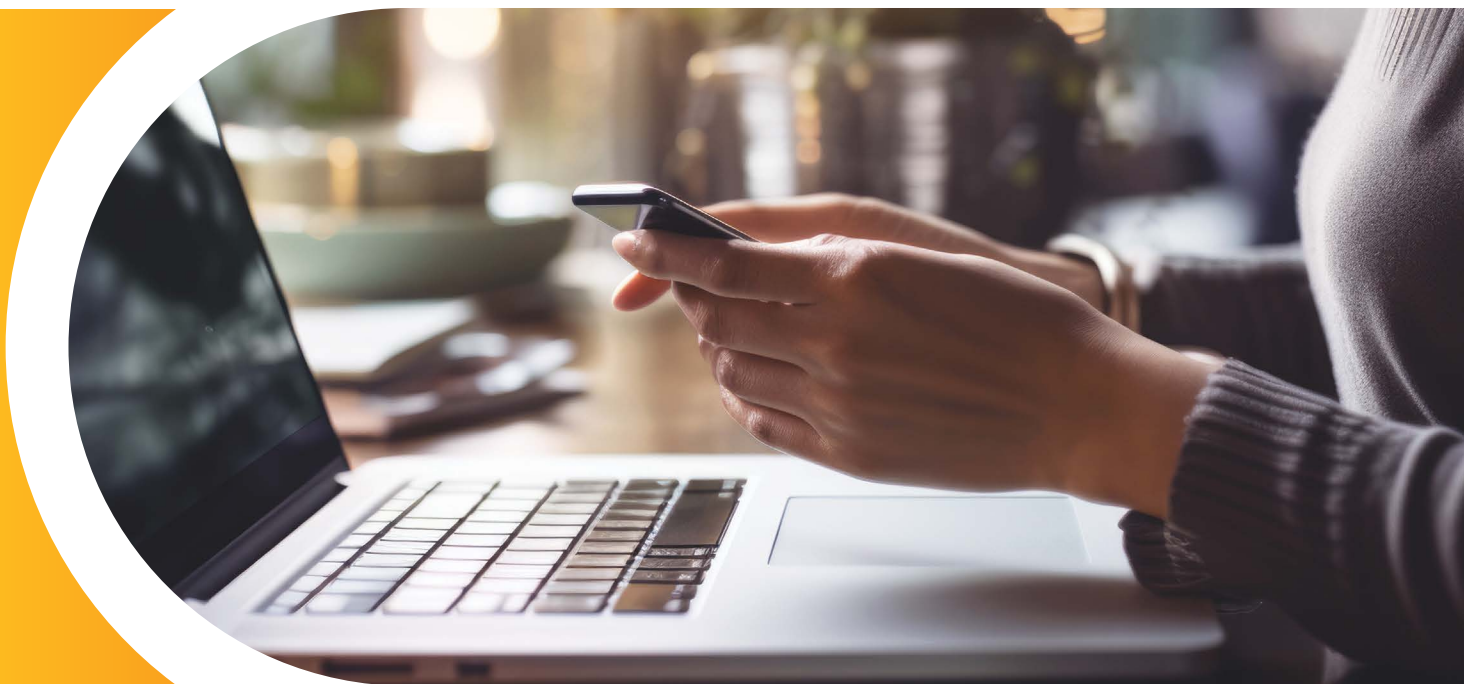




Don't Skip This. Email marketing

Chapter 4 tips

- ☐ Include personalized content, like first names and birthday/anniversary well wishes.
- ☐ Link to new content on your site.
- ☐ Include micro-stories in newsletters, like a list of tips or an inspirational story.
- ☐ Avoid complicated industry jargon.
- ☐ Include your social media buttons/links.
- ☐ Use attention-grabbing subject lines and preview text (but avoid oversensationalizing, which is considered “click-bait”).
- ☐ Conduct A/B testing (see *Glossary of digital marketing terms*, pp. 34–36) to determine which subject lines resonate better.
- ☐ Include clear CTAs.
- ☐ Design emails to be attractive (when applicable).
- ☐ Include a clear CTA to send/share email with others (when applicable).
- ☐ Measure. Measure. Measure.



Chapter 5: The power of online advertising

Online advertising uses websites, social media and search engines to reach audiences outside of your “organic” circle (the people your business has reached on its own).



Paid Search
ads on a search
engine results page



Display
ads published on
social networking
sites or search
engines



Native
paying a media
company to create
posts with your
products



Social Media
online ads through
networking sites



Email
reach clients
who opt into
hearing from
your company's
brand

There are a variety of different kinds of online ads, but they can all be very **effective** with the right **strategy**.



Online or “digital” ads:

- Establish brand identity.
- Allow for precision targeting.
- Deliver real-time feedback.
- Provide flexibility to promote content across multiple platforms.
- Are a reliable source of lead capture.
- Keep you top of mind with clients and prospects.
- Are more cost-effective than traditional marketing.
- May ignite two-way communication with prospects.
- Can showcase your differentiators.



A high-level look at ad campaigns

Online ads are typically an image or a short video (no more than 60 seconds). There is very little space for written copy or complex graphics.

Still, online advertising is more than just the ad. It's the beginning of a journey — one that can lead to a long-term client relationship. But before you get there, you need to define each step of that journey.

For online ad campaigns, it's the **action** you want the reader to take when they see your ads — like click, subscribe, download, watch, follow or buy. Not only does this give the reader instructions on how to proceed, but it gives you something to measure.

Any action from your ads can have compounding effects on your digital marketing later. So while there are costs associated with all ads, they may be worth it if you are crystal clear on your strategy and plan for each campaign. *See the next page for a few ad campaign examples.*

Here are few examples:

Generate brand awareness locally

Ad leads to a business' Instagram™ profile, which has photos of company employees volunteering at a local food bank:

- Measures impressions, click-through rate (CTR), Instagram likes and follows (see *Glossary of digital marketing terms*, pp. 34–36).
- Leads to Instagram's algorithm pushing your content to people who have previously engaged with your profile; brand recognition can build trust and result in more engagement.



Build an email list

Ad for a free industry e-book, leads to landing page with lead capture form to claim download:

- Measures CTR, lead (prospect data).
- Leads to direct contact information and consent to send personalized marketing messages.



Introduce a new product offering

Ad leads to business website, to web page with a synopsis of the new product and CTA to learn more

- Measures CTR (see *Glossary of digital marketing terms*, pp. 34–36), time spent on page, page clicks, sales.
- Leads to data on who is interested in this new product, ability to retarget or create look-alike audiences later.



These are provided as examples only. Actual results may vary.



Ad campaign details to consider

- 1 Campaigns should have only one goal each.** Choose a campaign goal that fits into your overall business strategy.
- 2 Research your target audience for this specific goal. You'll need to know:**
 - a. Where to find your audience online = Where to run your ads
 - b. What resonates with them = Your creative approach
 - c. What makes them take action = Your CTA
 - d. Their demographics = How to target them
 - e. Relevant keywords/hashtags = How to target them
- 3 Understand your technical capabilities.**
 - a. What type of ad campaign will you run? *(See graphic below.)*
 - b. If needed, do you have the right pixels on your site to properly track your results? *(Your advertising agency or ad sponsor can provide specs.)*
 - c. Do you meet the requirements of the ad campaign host (Google, Meta, LinkedIn, etc.) to run ads?

Different ways to pay for ads:



Pay per click (PPC)

You pay a fee each time someone clicks on your ad.



Cost per mile (CPM)

You pay a fee for every thousand impressions your ad receives.



Cost per lead (CPL)

You pay a fee for each lead your ad generates.



Cost per view (CPV)

You pay a fee each time your video ad is viewed.



- 4 **Set a budget and tracking plan.**
 - a. How much are you willing to spend?
 - b. How long will the campaign run?
 - c. How often will you analyze metrics?
 - d. Will you include A/B testing in this campaign?
 - e. How often will you consider tweaking the campaign, if needed?
 - f. What is your goal, and how will you measure success?

- 5 **Plan your creative direction and execution.**
 - a. Decide on messaging direction and CTAs.
 - b. Decide on visual direction.
 - c. Identify where the ad will lead, if anywhere.
 - Does something new need to be created?
 - d. Hire or DIY: Create assets in multiple sizes so it can be used in multiple formats.
 - e. Hire or DIY: Write copy that will accompany the visual ad.

Once your ad campaign is launched, your work isn't done. You'll need to respond to inquiries and messages, especially for prospecting campaigns. You'll want to check metrics regularly and possibly tweak the creative, targeting or budget of your ads over time.

It may take some trial and error to find a campaign strategy that works for your goals. But every ad launch comes with countless lessons and builds a baseline for your future marketing — you must start somewhere! The key is to stay consistent and always have a strategy behind every campaign.





Don't Skip This. **Online advertising**

Chapter 5 tips

- ☐ Create the same ads for multiple platforms to see which is more effective.
- ☐ Use A/B test creative directions to determine what resonates better.
- ☐ Try a mix of different headlines and copy options.
- ☐ Use paid search to make it easy for prospects to find you.
- ☐ Place ads on websites your clients frequent when they are online.
- ☐ Follow up on messages or signs of positive intent immediately.



Chapter 6:

A guided experience with QR codes

Quick response (QR) codes are a relatively new way to lead customers and prospects to an online property with their mobile device.

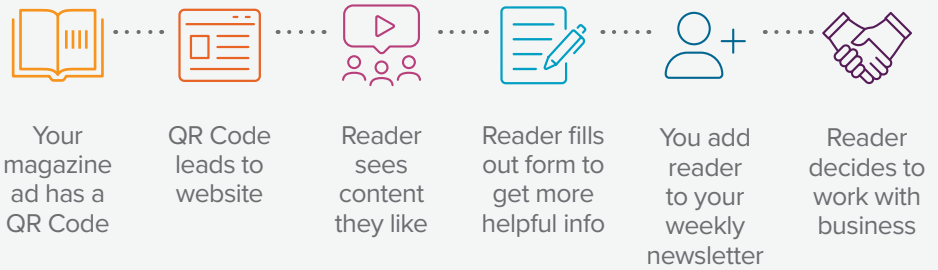
In its simplest form, a QR code looks like a white square block with an array of black squares inside. Like barcodes, QR codes are machine-readable. The difference is that nearly everyone has the machine required to read QR codes: a mobile device.

QR codes are incredibly user-friendly, which makes them versatile for all forms of marketing and communication. They don't require users to navigate or type out web addresses — they only point their mobile device camera and click the link that appears.

You can insert QR codes on almost any visual media: flyers, letters, print ads, social media, emails, videos, websites, etc. Integrating these into your digital marketing plan lets you expand your customer base from almost any source, leading readers along a messaging journey intended to turn them into loyal, long-term clients.



*Example of QR code
in Digital Marketing*



QR code details you should know

It's important to note that QR codes are simply a tool within your digital marketing campaign. They get a reader from point A to point B, with the added benefits of versatility and trackability. We recommend you create a campaign strategy and design your assets before you start making your QR codes, because there are several elements to consider:

- Marketing messaging surrounding the QR code
- CTA or explanatory language about the QR code
- Customer journey after the scan
- QR code destination:
 - Is mobile-friendly.
 - Fulfills the CTA promise or entices the reader to continue forward.
- Size and placement of the QR code within the designed material
 - Should never be smaller than 1 sq. inch.
 - Needs to be larger the further away the reader is.

Once you have your marketing campaign and messaging planned, you can begin your QR code strategy. There are two types of QR codes you can use: static and dynamic.



Static QR codes

- Have the URL embedded within the boxes of the code.
- Cannot be changed once created.
- Are good for one-time marketing campaigns.



Dynamic QR codes

- Use a shortened code within the boxes of the code.
- Allow you to change where the QR code leads without having to replace it on each marketing piece.
- Allow tracking.

No matter which you choose, you can customize your QR codes to match your branding. You may change the colors (while still maintaining a good contrast so the camera can read it properly), include your logo and add other style elements.

Tracking and reporting with dynamic QR codes

If you decide to use a dynamic QR code, you'll be able to track your marketing in greater detail, because you'll be able to add tags to your URL. (These tracking tags make the URL too long for static QR codes to accommodate.)

Determine which metrics you'd like to track for your campaign, then create those tags in Google Analytics and add them to your URL. The data will populate in your Google Analytics dashboard, which you can then filter and analyze.

Ideas of metrics to track:

- Source type
- Time of scans
- Total number of scans
- Location of scans
- Unique scans
- Device type

If your QR code leads readers to your website, you can use your scan metrics in conjunction with your other website data to see a full picture of your readership. How long do they stay on the destination page? Do they continue viewing your site? What other pages do they visit? What topics are they interested in?

As time goes on, you'll gather enough real data to determine which strategies work, which placements have the best ROI, what messaging resonates and more.





Don't Skip This. QR codes

Chapter 6 tips

- ❑ A full campaign strategy or complete customer journey
- ❑ A quick-loading, user-friendly destination
- ❑ Testing on both Apple® and Android™ devices
- ❑ Fulfilling your CTA promise or enticing the reader to continue beyond the QR destination
- ❑ Consistency across all marketing touchpoints
- ❑ Campaign analytics

Digital Marketing Cheat Sheet and Marketing Plan Templates

Types of digital marketing

Website

A fundamental asset in digital marketing, your website is your digital storefront and home base to all your digital marketing efforts.

Digital Content

How you tell your brand story, differentiate your business, build relationships and engage with your audiences.

SEO (Search Engine Optimization)

How search engines read and understand your website. Good SEO helps drive traffic and improve visibility of your business.

Social Media

Helps you build your brand and drive traffic by connecting in real time with existing clients and new prospects.

Email

Allows you to send targeted messages to your subscriber list that will help you increase brand awareness, build client loyalty, and help promote products/services.

Online advertising

Paid methods where you can target prospects outside of your current efforts in the digital spaces they occupy, like websites, email, social media, etc.

QR Codes (Quick Response)

A type of barcode that can be read easily by a digital device and that stores information as a series of pixels in a square-shaped grid. A way for an interested party to learn more about your offering.



Glossary of digital marketing terms

A/B (Split) Testing

The process of testing two versions of digital content with a target audience, the preference is learned by measuring by conversion rate. Used in testing e-newsletters, email subject lines, social ads, calls-to-action and landing page copy to know which version has the greater chance of giving the desired action such as subscribing for a paid membership.

Alt Text

Text that appears in lieu of a photo or graphic. Important for accessibility

Bounce Rate

The bounce rate is the percentage of visitors navigating away from a website after viewing only one page without engaging further.

Brand Positioning

Building a brand identity and connecting to it as different from competitors through tone, voice and visual design of ads, promotion, logo, representation in social media, etc. Creates market differentiation, builds reputation, drives sales and focuses your brand marketing message.

Content Strategy

Planning and implementation of digital content to make it work toward a uniform end. Includes creating and distributing content for digital marketing campaigns such as blog posts, articles, social media posts, videos, podcasts, e-books, guides, webinars, etc. Encompasses testing to gauge content performance — content is the base on which all marketing techniques are built.

Conversion Rate

The percentage of users who completed the desired action; calculated by dividing the overall size of the audience with the total number of “convert” users. Users might include those who clicked on an ad. Conversion rate percentage is used as a metric upon which marketers try to improve further growth. Digital marketing strategies are almost always data-driven, and this digital marketing term is one of the most common parameters measured to determine the performance of any campaign.

CPA or Cost per Acquisition

A pricing model that charges only when leads, sales or conversions are generated. It is a financial metric that measures the costs of acquiring one paying customer, and it helps marketers to know how much a company can afford to pay for leads and drive new customer growth.

CPC or Cost per Click

A pricing model that measures the cost for each click on an ad. Designed to drive traffic to a website, CPC is a critical digital marketing metric showing how much a business pays for someone to click on their ad.



Glossary of digital marketing terms *continued*

CPL or Cost per Lead

You pay a fee for each lead your ad generates.

CPM or Cost per Thousand

A pricing model that measures the cost of an online ad per 1,000 impressions.

An impression is whenever the ad is displayed on a web page. This is ideal for creating brand awareness and delivering a direct message on high-traffic websites.

CPV or Cost per View

You pay a fee each time your video ad is viewed.

CRM or Customer Relationship Management

A set of applications that marketing firms use to manage customer data, analyze customer interactions and receive relevant data in real time. CRM is used to update and improve customer relationship strategies, to personalize and target marketing services.

CTA or Call to Action

Referring to a piece of content, such as a text, banner, form, button or image on a web page (or email) prompting visitors to perform a specific action. Includes instructions or directives to either read more content, join, subscribe, sign up or buy. CTAs guide visitors in their buying journey and impacts conversion rates.

CTR or Click-Through Rate

The percentage of users who click on links placed in emails, ads, websites, etc. Measures the users actively engaging with linked content on a site with the formula $CTR = (\text{click-throughs/impressions}) \times 100$. This metric helps to understand customers and fine-tune target audience.

Keyword

A specific word or phrase representing the main topic or focus of a web page or piece of content. In addition, it is essential for search engine optimization and to help drive relevant traffic to a website.

Gated Content

Requires a user to complete a form or provide basic information prior to gaining access to a particular section of content within a website. It's often used as a lead generation tool to help brands gather helpful data about their prospects.

KPI or Key Performance Indicator

A metric or quantitative benchmark to track progress toward marketing goals. KPIs should be SMART or Specific, Measurable, Achievable, Relevant, and Time-Bound. Used in measuring performance and course correction.

Landing Page

Standalone pages that users land on after clicking on a CTA in an advertisement or an email. The primary goal of a landing page is to convert the user into a customer by completing a specific action.



Glossary of digital marketing terms *continued*

Lead Generation

Educating visitors on a product or service and the industry where visitors, in turn, provide qualitative information to the sales team and in order to help them to capture qualified leads.

Meta Description

Important for SEO. A short description that explains what a specific web page is about.

Meta Tags

HTML tags that provide information about a webpage to search engines. The most common meta tags are the title tag, meta description and meta keywords tag.

Pixel

Important for tracking. A piece of HTML code that loads when a user visits a website or opens an email.

PPC

Pay per click. You pay a fee each time someone clicks on your ad.

SEO

Search engine optimization. How search engines read and understand your content.

SEM or Search Engine Marketing

Strategies to get higher placement on search engines by bidding on search terms and increasing the visibility of a website in search engine results pages. Refers almost exclusively to paid search advertising and alternately referred to as pay per click or PPC. Used to generate better leads.

Target Audience

The ideal client persona in mind while strategizing new ad campaigns or content; the group of people who could benefit from a company's offers. Determining a target audience through paid and organic efforts helps to increase sales and grow the reach.

UX (User Experience)

A user's overall experience and satisfaction when interacting with a website, application or digital product. Furthermore, it encompasses factors such as ease of use, accessibility, efficiency and emotional engagement, ultimately influencing customer loyalty and the overall success of a digital product or service.



Marketing plan template

Category	Description			
Business Summary				
Marketing Objectives				
Opportunities				
The Solutions				
Competitive Advantage				
Target Market (demographics)				
Marketing Strategy and Objectives				
Budget Parameters				
Category	Action	Owner	Date	Estimated Costs
Product/Services				
Marketing Channels				
Performance Standards				
Results Measurement				
Other				
Review				

Marketing tactics template

Campaign	Additional Information	Owner	Q1			Q2			Q3			Q4		
			M1	M2	M3	M1	M2	M3	M1	M2	M3	M1	M2	M3
Email Marketing														
<i>Educational Email</i>														
<i>Newsletter</i>														
<i>Legislative Updates</i>														
<i>Account Review</i>														
Social Media														
<i>Posts</i>														
In-Person Events														
Webinar														
Advertising														
<i>Online Banner Ads</i>														
<i>Online Display Ads</i>														
<i>Print Ads</i>														
Content Marketing														
SEO														
Sponsorships														
Community Outreach														

Editorial calendar template

[illegible]

For use with financial professionals and health brokers.

The strategies discussed throughout are for educational purposes only. Financial and other professionals should contact their compliance departments prior to implementing the concepts discussed to ensure compliance with firm policy.

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