

# MORE SALES Less Stress



How small business can use  
data-driven marketing to get more customers.



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# Introduction

Welcome to *More Sales, Less Stress: How small business can use data-driven marketing to get more customers*.

Whether you own a shop, you're a tradie or you're a service business like a hairdresser or accountant, this book will give you a whole new perspective on digital marketing.

It will show you how to use data and systems to get more customers and increase sales.

It will give you practical tips you can start using today.

Before we get into the nitty gritty, let's understand why digital marketing is so important to small business these days. Consider these stats:

- 91% of consumers are more likely to shop with brands who recognise, remember, and provide them with relevant offers and recommendations<sup>1</sup>.
- 80% of consumers are more likely to make a purchase when brands offer personalised experiences<sup>2</sup>
- 72% of consumers say they now only engage with marketing messages tailored to their interests<sup>3</sup>
- 25% of consumers would stop considering a small business they haven't dealt with before if they can't find information about it online<sup>4</sup>

What does this mean for a small business like yours?

Having a digital marketing strategy that allows you to send tailored and personalised messages to your customers and prospects will be the difference between growing your business or falling behind competitors.

And by “send” I mean via email, on social media, on your website or any place online where customers interact with your business.


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<sup>1</sup>[https://www.accenture.com/\\_acnmedia/PDF-77/Accenture-Pulse-Survey.pdf](https://www.accenture.com/_acnmedia/PDF-77/Accenture-Pulse-Survey.pdf)

<sup>2</sup><https://www.epsilon.com/us/about-us/pressroom/new-epsilon-research-indicates-80-of-consumers-are-more-likely-to-make-a-purchase-when-brands-offer-personalized-experiences>

<sup>3</sup><https://c.smarterhq.com/resources/Privacy-Personalization-Report.pdf>

<sup>4</sup><https://www.smarterbusiness.telstra.com.au/content/dam/smarter/pdfs/telstra-business-intelligence-report1.pdf>



Consumers are smart. They don't want to receive bulk emails. They don't want to see ads for products or services they will never buy. They buy more when they receive personalised emails, see relevant advertising, and feel a human connection to a business.

To be able to do this, without creating more work for yourself and increasing your stress levels, you need to use data and technology. It is not manageable otherwise.

In the past, only large companies with big budgets and a team of IT and data geeks could take advantage of data and technology and make personalisation happen in their marketing. Now, any business (including yours) has the data and technology needed to use these strategies.

I call it having a ***data-driven marketing strategy***.

It is tools like MailChimp, Facebook, InfusionSoft and others that make it possible.

Companies who don't start to use these techniques in the next 3-5 years are at risk of being left behind and maybe even going out of business, as more and more of their competitors start doing it. Big companies have been using these techniques for years, which has set the bar high for everyone.

If you're like many independent or family-owned business, who are making a decent living, be it in retail, a trade or personal services, you know you need more than a great website and some social posts to be able to grow, but you're not sure what the next step is; how to start using data and technology more effectively to promote your business. How to be data-driven. This book is for you.

And for those who are used to being in control of *everything* in their business, who feel frustrated or overwhelmed by digital and technology, those who think they are not tech-savvy. This book will help you see the strategy is more important than the tools you use.

For everyone who thinks they need to spend thousands of dollars before you can even get started using these tactics - I bet you have what you need to get started sitting in your business today.

If you have some information on your customers (eg their purchase history) and a system for sending email (eg MailChimp, Active Campaign, MailerLite), I

assure you, you have enough to get started on a data-driven marketing strategy for your business!

This guide is for small business owners who want to get on top of current marketing strategies and techniques. People who know they need to move on from the basics of having a website and doing the odd social post or the odd email newsletter but are not sure how. And definitely don't want it to cause more work or headaches.

Before we get into detail, I know it is unrealistic to think we can personalise every communication or interaction with a customer.

What we are doing is using data to understand our customers, then create a strong human connection online, because we might never meet our customers in person.

In some cases that means having things unique to the individual customer, in other cases, it is showing your human side, that you understand and respect where the person is at in their sales journey with you.

That's what I think personalisation is about in digital marketing.

To make data-driven marketing easy to manage, there are three principles to follow:



*When you keep these in mind as you develop your data-driven marketing strategy, you will get more customers and they will buy more. Guaranteed!*

Finally, on page 36 there is a one-page marketing plan you can complete as you go through.



## Who Am I?

Before we dive in, a little bit about me.

I help small businesses make marketing easier and more effective, so they can get more customers and increase sales.

While social media and websites are important, I take a holistic, data-driven approach, using data and technology to save you time and improve engagement with your customers.

I'm a real person, helping other real people. My mission is to make digital marketing one less thing small businesses have to worry about. No jargon. Nothing cutting edge. Just support to get on top of the essentials you need to stay competitive and future-proof your business.

I spent the first part of my working life employed by big companies, like Coke and Danone, growing their eCommerce to multi-million dollar operations. When I left, I wanted to help small businesses grow by applying the same digital marketing tips and tricks large businesses use.

Here's a few nice things our clients have had to say:

*"Anne cuts the tech out and makes it basic, simple and easy to understand. MARKETING is another scary word for SME's but Anne explains it so that it's no longer a frightening subject" ~ Jaythene, Sparks Shoes, NSW*

*"The clarity that Anne and the team provided is something I've needed for years. They've allowed me to see how technology and systems can be successfully applied to my specific business." ~ Alison, Bike Shop, NSW*

But enough about me, let's get cracking to get you More Sales and Less Stress.



# Chapter 1 - Understand

## Who are your customers? What do they need?

Believe it or not, the first couple of steps to making more sales and having less stress using data-driven marketing have nothing to do with data and technology (that comes in Chapter 3).

The first step is to deeply understand who your customers are and what makes them tick. There are two parts to this:

- Creating a Customer Profile
- Mapping the Customer Journey

## Customer Profile

You've probably heard of this before.

It's often referred to as a customer persona, an avatar, a niche, a segment, an ideal customer.

They all basically mean the same thing – getting into the nitty gritty detail of who your customers are.

It covers things like:

- Demographics (age, gender, where they live, how much they earn),
- Behaviours (where they shop, the social media they have, how they spend their spare time)
- The products they buy
- The problems they have (sometime referred to as pain points)
- Goals and motivations

The more you know and understand your customers, the easier it is to personalise their experience, and get them buying more from you.

It really is that simple.

At this stage it's important to be honest with yourself about who your customers are and what they need. It can be hard to narrow it down to just one or two groups.

On Page 39 is a blank customer profile you can use. Or you can Google “customer profile template” and find 1000’s more examples.

If you have more than one customer type, create profiles for all of them. It helps to get clear in your mind who you sell to. For example, if you sell golf clubs, you might have two profiles – professional men and retired women (I know, a massive stereotype...)

Lots of people shy away from creating customer profiles or even acknowledging who their ideal customer is. Convincing themselves they appeal to everyone. The problem is, if you try to appeal to everyone, you run the risk of appealing to nobody.

The goal of data-driven marketing is for customers to feel like you know them. You understand them and that you’re the best person to solve their problem whether it’s golf clubs, a haircut, accounting services or a new pair of shoes.

## Customer Profile Exercise

Complete the Customer Profile Template (on page 39) for as many customer types as you have.


## The Customer Journey

“Journey”, one of the most over used words in the English language – especially if you watch any kind of reality TV.

But it is the best way to describe the relationship customers have with you.

In general, the Customer Journey can be broken into 4 stages:





How customers feel at every stage of this journey is important. This is what personalisation is all about – making people feel good about your business EVERY TIME they deal with you – be it online or offline. Showing them you know where they're at in the buying process. Making every single person you deal with feel special.

In marketing, a lot of focus is put at the front end of this journey – getting people to the first purchase or first appointment. Finding new clients and customers.

If the experience at the start of the journey is good, the person feels you understand them, they're more likely to keep coming back AND telling friends/family about you.

There are a lot of places online people will find you online during the Find and Buy stages. For example, they may have:

- searched on Google
- looked at your website
- seen something on social media
- interacted with you / your team over the phone or via email
- asked a friend for advice / recommendations
- checked out your competitor/s


If the experience is poor here, it doesn't feel personal or relevant to them, the chance of creating a loyal customer is low – no matter how personalised you make their experience for them afterwards – you only get one chance to make a first impression!

If you are an established business, chances are you've got that bit down pat.

The beauty of the online tools we have access to, like CRM systems, email marketing tools, retargeting ads, means it is easier to know where people are in the journey and personalise the journey for them – all the way to the recommend stage.

What does this mean in practice?

Let's take the example of a retail store that sells camping equipment.



In your online point of sale system, you have the details of thousands of customers and information on the products they have bought from you.

You also have a list of people who have signed up for your newsletter.

You could split your email list into 4 groups:

- Those who have never bought (Find)
- Those who have only bought once (Buy). Even better if you split them up by product bought eg tents, sleeping bags, equipment.
- Those who buy regularly (Buy Again)
- Those who haven't bought for over 12 months (Lapsed)

Each of these groups are at a different stage of their customer journey.

As tempting as it may be to save time and effort, if you sent the same message or deal to each of these groups, chances are the response rate won't be that great. A lot of people won't feel the offer is relevant to them.

However, if you send information and offers to people, based on the data you have about their sales history, the message will feel more personalised, more relevant, and the results would be better. In some cases, revenue will increase 10-15% as a result of personalisation.<sup>5</sup>

Another example is an accountant.

If you can use data to segment your customers into personal v business. Or income levels. At tax time and throughout the year, your communication to clients could be tailored based on their needs. For example, lower income earners are less likely to need info on how to lower their taxable income and could actually feel annoyed if they receive info about this.

For data-driven marketing to work and get you more customers and increase sales, the customer journey should be at the heart of everything you do.

Knowing where a customer sits on this customer journey map, then giving them offers and communication relevant to that – demonstrating you understand the relationship you have with them at any point in time.

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<sup>5</sup> <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/the-heartbeat-of-modern-marketing>



Put simply, it's about getting:

*The Right Message, to the Right Person,  
in the Right Place, at the Right Time*

## Customer Journey Mapping

The easiest way to understand the journey of your customer is to create a customer journey map.

To do this, for each part of the journey, break it down into the following sections:

- Customer **Goals**
- Customer **Pain Points**
- What they are **Thinking and Doing**
- What they are **Feeling**
- Business **Opportunities**

By creating a customer journey map, you start to walk in their shoes.

When I have done this with other organisations, they have had some real ah-ha moments.


For example, a large manufacturer I worked for, realised they knew nothing about why their customers stayed loyal or how to reward them for their loyalty.

Another, a small independent shop owner, realised where she was leaving tens of thousands of dollars on the table, she could see where she lost the most people along the customer journey.

One of the easiest ways to do this is to find a large blank wall and create the Customer Journey Map using post-it notes. That way you can keep adding to it and get your staff involved. There is also a template on the page 40.

Here's a bit more detail on each section of the Customer Journey Map

**Customer Goals** – what the customer is trying to achieve at each stage of the journey. It could be information gathering, making themselves feel better, meeting a government requirement. Their goal will change as they progress through the journey.



**Pain Points** – this is their problems or mistakes at each stage of the journey. It is also things that are difficult for them. For example, if you're a hairdresser, and there is only 1 hour parking near your salon, this could be a pain point for your clients who drive to appointments. Or if you are one accountant out of 25 who come up in a Google search, how does a client know who to trust?

It is easy to skim over this, saying everything is easy. But I encourage you to be honest with yourself here – what is a “pain in the behind” for customers in your industry/location?

**Thinking and Doing** – what are your customers asking themselves and what actions are they taking at each stage of the journey? Note down the digital channels (websites and social media) they are using. And the ones you have for your business. There might be gaps.

This is also the place to identify FAQs. Include things like confirmation emails and other pieces of communication you send out here so you can see how you interact with your customers.

**Feeling** – this might make you uncomfortable. But as American author Zig Ziglar said “People buy for emotional reasons”. If you can tap into the emotion of your customers, empathise with them, you will get much better results. For example, if you're a chiropractor, in the early stages of the journey, people will be feeling pain but unsure about the best treatment. After seeing you, they are feeling relief, but concern about what happens next. Your communication and follow up to address those feelings, will be key in ensuring loyalty and advocacy.

When people are looking to buy – whether it is a product or a service – they go through a range of emotions. Businesses with high customer loyalty, tap into this and utilise it when they communicate with their customers.

**Opportunities** – as you go through each stage, ideas and opportunities will come to mind. You will think of new ways of doing things. Better ways to sync up the customer journey. Make a note of them as you go through. When I did this with a manufacturing company, we came up with over 100 new business ideas to think about. We didn't implement them all, but it was a great starting point to work from.



## Customer Journey Mapping Exercise

Complete a Customer Journey Map for your business using the template on page 40.

You can also do it on a blank wall – put the stages “Find”, “Buy”, “Buy Again”, “Recommend” across the top, and the sections “Goals”, “Pain Points”, “Thinking and Doing”, “Feeling” and “Opportunities” down the side. Use post-it notes or pieces of paper to get everything out of your head and onto paper.

A completed example is on page 41.

## Where are you at?

How deep is your understanding of your customers and the journey they go through when buying your product/service? What are you going to do next?

On the next page my top tips for better understanding your customers so you can use data and technology to personalise their experience.



## Top Tips for Understanding Customers

- Ask yourself, who your customers really are. Is it Males 50+ or Teenagers or Young Families or Retirees?
- Create detailed profiles of your target customers. The more you know, the easier it is to market and sell to them. Template on Page 41.
- Give them a name. It is much easier to personalise the customer experience when you are thinking about real people rather than the vague idea of “customers”.
- Find out what customers think using surveys. Especially what they are thinking, doing and feeling along the Customer Journey.
- Act on any feedback you get from surveys. Use email, social and blog posts to talk about the changes you have made.
- Identify the pain points, the things that are annoying or hard for customers when buying your product /service (and fix them!)
- Work out where you lose people in the customer journey. Is it you’re not appearing in Google, or that your online checkout has too many steps?
- Use people’s names as much as you can.
- Test exclusive offers or loyalty programs with your best customers.
- Ask for a review/recommendation to be left on Facebook or Google within a few days of a sale – when they are feeling good!
- Read reviews and respond to them – good and bad.
- Send an email or text to people who haven’t bought for a while with a special offer. Measure what works best.
- Understand how customers use different online channels in the buying process. E.g., they Google when they know what they want, Facebook and Instagram can spark inspiration.
- Work out the Lifetime Value of your customers – how much they are worth to you. Create segments of high and low value customers.



# Chapter 2 - Engage

## Creating a personal connection with customers

We all know the most effective digital marketing creates engagement with our customers. Making them feel like our emails and social posts are one on one conversations – so they feel compelled to respond.

As mentioned before, when we use data-driven marketing, we are simply trying to get:

*The Right Message, to the Right Person, in the Right Place, at the Right Time.*

To do this, two things are super important:

- Content (right message)
- Touchpoints, (right time/place).

Note: Touchpoints are also known as Channels.

These two things get the most attention when it comes to digital marketing.

## Content

Content is the information you share with people. The key to good content is that it provides value to them, based on where they are in the customer journey.


It includes things like:

- Product Descriptions
- About Us
- FAQs
- Delivery information
- Top Tips & Expert Advice
- Industry news

It can be in many different formats, such as photos, videos, eBooks, articles, podcasts, social posts, blogs, leaflets, newsletters etc etc.

Without content, customers don't know who you are or what you offer them.

Content is how you let your customers know you have the answer to their problems. It builds trust and provides the information people need to buy from you, again and again.



Creating content can be hard work, time consuming and expensive. It is also difficult to measure the return on investment for a lot of our content. This means a lot of people don't put energy and focus into it.

For example, if we take a data-driven approach to creating a newsletter, we will have multiple versions based on customer profiles. This requires multiple versions of the content.

A simple scenario is you sell men's and women's clothing and want to create a male newsletter and a female newsletter. This means having two lots of content – product descriptions and images. But it also could mean more sales, as customers relate better as the images and products are more relevant to them.

If you keep this in mind as you plan and create content, it will help keep you on track.


## The 3 F's of Content

When planning what content to use along the customer journey consider the following 3 F's of content:

- **Function** – what is its purpose? Why is this piece of content important for getting the customer to know, like and trust you? How will it help them find you or buy from you?
- **Format** – what is the best way to get the message across? Video, photo, infographic, lists, written article. Does the format help to build a stronger connection?
- **Frequency** – how often / when will this information be shared? Is this the right time to be sending this message?

One of the most frequently asked questions about Frequency is “How Often to Post on Social Media”. My answer is usually “as often as you can manage”, but ideally 3-4 times per week.

For other things like your website and FAQs, it is good to review every 3-6 months to make sure it is still relevant and accurate



For email newsletters, it depends on your sales cycle. For some service businesses like accountants, lawyers, podiatrists, every quarter might be fine. For some retailers, every month is OK. What is more important is how personalised you can make it. How relevant the information is. What might be better than a newsletter, is a series of time-based email updates.

What do I mean by that?

Take for example, a vet. Time of year is kind of relevant, but age of the pet is much more important. So, a series of emails, based on the age of cats/dogs (and segmented for cats and dogs of course!!) is better, rather than bland, “it’s winter” emails with generic advice. You need great content to make this happen – and data and technology to make it happen without stress (but more on that in Chapter 3 😊).

### A note about SEO

SEO (Search Engine Optimisation) i.e. getting your website to appear in Google, relies on a few things to be happening on your website.

The three big things that contribute to SEO success are:

- Content
- Technical set-up
- Links from other sites

We won’t go into technical or links here. If you join our Facebook Group – Marketing Strategy for Small Business - we go through it in there.

To give yourself the best chance of coming up in the Google results, make sure your content contains the keywords or search terms people type into Google. You can do keyword research using a tool like SEM Rush.

One tip is to not focus on the big obvious words (though they are important, lots of your competitors will also have them), but also use what we call “long tail” key words. These are the sentences or phrases with 4+ words in them, that people use.



Here's some examples:

Popular Term	Long Tail Term
Tent	Family tent for camping
Accountant	Small business accounting specialist
Black shoes	Men's formal black shoes
Plumber	Plumber to fix blocked toilet

## Content Exercise

To help understand how all your content fits into the customer journey, complete the following table.

	Content You Have	Content You Need
Find	<i>eg: About Us</i>	<i>eg SEO</i>
Buy	<i>eg: FAQs</i>	<i>eg Returns Policy</i>
Buy Again		
Recommend		



## Content ideas

If you struggle to come up with content ideas, here are some of my favourites to help build engagement with your customers:

- Frequently Asked Questions – what do your customer ask over and over and over again? This can be published on your website, but also turned into Social Media posts.
- Team Member profiles – what their role is and what they do for your customers. People love seeing the people who look after them when they buy from you. It strengthens that personal bond.
- Behind the scenes of your business including company history.
- Run a competition – also a great way to capture customer data.
- Products – new products, new season, customer favourites, team favourites.
- Customer Profiles – regular customers, new customers.
- Keyword research then use the common terms in your blog/email/social media
- Local news / topics – showing how you are part of the community.
- Tips and how to guides – especially on video
- Offers / Sale
- Survey Results
- Memes and Gifs – people love to laugh.
- Inspiring quotes related to your industry.

For every piece of content you come up with, relate it back to your customer profile/s and ask yourself, is this relevant? Does it help build a relationship with my customers?



# Touchpoints

Touchpoints are sometimes called Channels.

They are the places where people come in contact with your business and your product/service. They can be online or offline.

The most common examples are:

- Website
- Social Media
- Physical location such as a store, office, clinic
- Google, including Google My Business
- Email
- SMS
- Packaging
- Catalogues and Brochures
- Sales and Customer service staff

Touchpoints often represent your business and your brand when you can't physically be with the customer. They're how you create personalisation online.

Think about the last time you bought something for your house. How did you start the process of buying? Google, Amazon, Instagram, a website, a catalogue, family and friends, going to the shops? There's 6 touchpoints already.


And when you purchased, I bet a couple more were added, for example a confirmation email, the online store.

The challenge for many small businesses is having a presence in all the places your customers expect you to be AND making sure the experience in all those places is excellent.

You can very quickly undo all the great work of your social media posts if your website is slow or difficult to navigate.

It can also be hard to keep on top of all those touchpoints. Big businesses have teams of people to manage this. We small businesses don't have that luxury.

Identifying the right touchpoints for your business and your customers is key to creating a great data-driven marketing strategy.



Two common mistakes small businesses make when thinking about their touchpoints are:

- Not being where the customer is – for example being on Facebook, because that’s what you use in their personal life, when all your customers are on TikTok.
- Not looking at how all touchpoints interact and work together – if they look very different or have a different tone, it creates confusion for customers.

A great example of this is not selling online because it is too hard. Customers expect to be able to buy pretty much everything online these days. If you’re a retailer *without* an online store, I guarantee you are missing out on sales from your existing customers.

Another example is email newsletters. These are time consuming to pull together and sometimes it doesn’t feel worth the effort, but I guarantee they create a connection to your customers social media can’t deliver. Email is still one of the most effective digital marketing channels available, but a lot of small businesses find it too hard to do on a regular basis.

## Conducting a Touchpoint Review

It’s a good idea to review all your touchpoints every so often, to see how they are connected, how they work together and where you can add personalisation.

You can do this using the customer journey map.

Go through the journey step by step and take photos/screenshots of every touchpoint, to see how they look side by side. Really break down what happens, especially around the sale.

Include any automated emails or texts you have related to sales or booking confirmations. For example, order confirmation, delivery confirmation, booking confirmation and booking reminders.

Walk through it as if you were a customer. What would you think? How would it make you feel? Is it personalised?



## Paid Advertising

One touchpoint that can't be overlooked as we focus our energy on data-driven marketing is paid advertising.

It is becoming harder and harder for your social media posts to be seen by your followers, especially on Facebook. Organic reach (where your followers are shown your post in their newsfeed) is less than 5%. Less than 1 in 20 of your followers will see you post. Now if you are Coca-Cola with over 2m followers, this is probably OK, but for most of us small businesses, it's a problem.

One way to combat this is to use paid advertising to make sure our posts are seen.

There are multiple ways to do this – you can boost a post in Facebook, you can set up a paid campaign, you can pay for ads in Google.

There are pros and cons to running ads in any platform. And keep in mind click through rates are low – the industry norm is 1-2% of people who see your ad will click on it.

Don't expect everyone who sees an ad (or a post for that matter) to click!

The benefit of paid advertising is you can get specific messages in front of your customers and people who are like your customers - called a look-a-like audience. This is a great example of being data-driven.

You can be super targeted in who sees your ad and what your goal is. For example you can advertise a special deal just for your customers and you can say it is for customers only. This can make it feel very personalised for your customers.

Or if someone comes to your website, you can then pay for them to see a specific ad in Facebook. We have a client who is doing this and seeing great results for online sales.

The reality is for almost all businesses, you will need to spend some money on marketing and advertising. It is virtually impossible to increase sales without it.

A good rule of thumb is to spend 8-10% of your revenue on marketing.

The cons are it can take some time to see the benefits to your sales. They may not be instant, especially if you have a long sales cycle.



This is where targeting your advertising along the customer journey and to your specific customer profiles is important – for example, using paid ads to retarget those who have already been to your website, or using paid ads to appear at the top of the Google search results.

The role of paid advertising in data-driven marketing to get more customers and increase sales will depend on your goals and your customer's journey to a sale. Bring it back to your customer journey to determine where you will get the best bang for your advertising bucks

## Touchpoint Exercise

To help understand how all your touchpoints fit into the customer journey, complete the following table.

	Touchpoints You Have	Touchpoints You Need
Find	<i>eg: Social Media</i>	<i>eg Google My Business</i>
Buy	<i>eg: Website</i>	<i>eg eCommerce</i>
Buy Again		
Recommend		




## What do you think?

On a scale of 1 to 10 how would you rate the engagement with your customers?  
What's are you going to do next?

Below are my top tips for improving customer engagement using content and touchpoints.

## Top Tips for Engaging with Customers

- Use a variety of ways to get your message out there - for example, product information, personal stories, testimonials, jokes and quotes. Mix it up. Don't just stick to what you are most comfortable with.
- Use Video – video is more personal, gets more views and engagement than images and words.
- Use Humour – be funny, people love a joke and it shows your personality, creating the 1 to 1 connection important for personalisation.
- Be Human – put yourself and/or your team in your marketing. People buy from people. Don't be afraid to show customers who you are as a person.
- Use images that reflect your customers – for example their age, gender, cultural background. Help people see themselves in your marketing.
- Plan your marketing using a marketing calendar. Include social media, email, your website and anything else you use. Try to do it a month in advance to save time and stress. Identify what will be generic (to everyone) and what will be targeted (personalised).
- Look at your stats using Google Analytics or your social media tools, to see what marketing gets the best engagement (likes, clicks, comments, page views). Learn what works and do more like it.
- Create a list of common questions asked by your customers – turn these into videos, blogs, FAQs. It builds loyalty by showing you're interested in helping people.
- Do keyword research on the words people use when searching for your product/service on Google. Use a keyword planning tool like Google Keyword Planner to do this.
- Use these keywords in your content to show you understand your customers and speak their language.
- Review EVERY possible way of connecting with customers – website, social media, email marketing, directories, review sites, paid advertising, offline.



Are you happy with how your business is presented in all of them? Is every experience great for the customer?

- Research the social media channels your customers are using – no point being on Twitter if they are on Pinterest.
- Regularly review and update your Google My Business listing – this makes you easier to find and helps with SEO.
- Regularly update the product descriptions on your website if you are selling online. Add in reviews if you have them.
- Have multiple product shots on your website if you are selling online. Include some lifestyle shots – i.e. pictures of people using your products.
- Offer multiple customer service options – email, phone, messenger, web chat.
- Send emails to people on your email list on a regular basis. These are people who have said they want to hear from you!
- Include blog or information content in your emails as well as offers and products – make it more than just a catalogue. Solve customer problems with the information you provide.
- Upload your email list to Facebook and start to target them with Facebook advertising.
- Create a look-a-like audience from your email list. People who Facebook thinks are like the ones on your email list, so they're more likely to buy from you.

Phew, that was a long one. You don't have to do everything all at once! Based on the work you did to map out your customer journey, work out the ones that are most important to you.



## Chapter 3 - Automate

### Data-driven marketing at scale.

Once you Understand who your customers are and know the best way to Engage them, we start to use data and technology to take away the stress of marketing.

This is where many small businesses get stuck.

If you don't see yourself as "tech-savvy", this can easily end up on the backburner.

If you don't value this as "productive" work it can easily drop to the bottom of the to-do list.

It is worth prioritising this and chipping away at it, you will see benefits in the long run.

### Data – The sleeping asset

Are you part of a supermarket or retailer loyalty program?

Do you scan your reward / loyalty card every time you shop?

If you do, you are giving them valuable data or information about yourself and your shopping habits.


Before these programs were introduced, these retailers had very little information about their customers. They had some high-level data on total sales of individual products from the checkout scanning systems. That was it.

With the loyalty programs, they can marry up purchase information with personal information.

This is powerful.

Big organisations like Amazon, Google and Facebook have been using customer data to their advantage for years. It is one of the reasons they are all so successful.

The power of data is not in the data itself. It is what you do with it. How you use it.



Amazon is the obvious example here – they pioneered the “Other people who bought this, also bought this”, which has created 10-30% increases in their revenue.<sup>6</sup>

## What is data?

Before we go any further, let’s agree on what we mean by data. There are 2 categories:

- Business performance information
- Personal information about customers

Examples of business performance data include:

- Revenue
- Costs
- Profit
- Web traffic
- Social media engagement
- Email open rates

Examples of personal information about customers include:

- |                                 |                          |
|---------------------------------|--------------------------|
| ■ Name                          | ■ Product preferences    |
| ■ Email address                 | ■ Email clicks           |
| ■ Contact details               | ■ Social media likes and |
| ■ Demographics like age, gender | comments                 |
| ■ Sales history                 |                          |

Many people shy away from data because they think it is all numbers and they are rubbish at maths. They are generally thinking about the business performance data.

Another reason some small businesses (and even some large businesses) don’t use data is because the information about their customers is kept in so many different systems, they don’t know where or how to start to use it effectively.

But data is key to getting more customers and increasing sales in this digital age. It is the golden ticket, the sleeping asset, in so many businesses.

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<sup>6</sup> <https://econsultancy.com/amazon-and-the-age-of-personalised-marketing/>



## Two ways to use data

There are two ways to use data in a small business

- Analysing performance
- Personalisation of communication

### Analysing Performance

There is a saying by Peter Drucker – “What Gets Measured, Gets Managed”. If you are not *measuring* and analysing the performance of your sales and marketing activity on a regular basis, then it will not be *managed* to perform better. This is important when you start using data-driven marketing strategies.

If analysing marketing performance is new to you and you're not sure where to start, go back to the customer journey map in Chapter 2. At each part of the journey, think about the most relevant stats for your business and work out how best to measure them. Here are some ideas to get you started.

Find: Website Traffic, SEO Traffic, Paid Traffic, Leads, Product Page Views, Social Followers, Social Engagement, Cost Per Lead, Email Open and Click rate

Buy: Sales, Sales by Product, Cost per Sale

Recommend: Repeat Purchase, Customer Lifetime Value

Advocacy: Google Reviews (number and star rating), Facebook reviews (number and star rating), Customer Satisfaction, Net Promoter Score

Most of this data is available in Google Analytics, Facebook, Instagram and your email marketing tool. Some you will need to collect via surveys.

By understanding the performance of these stats, you can understand how well your strategies are working and how loyal your customer base is. You can see where you gain (and lose) people along the journey and where to focus your efforts to get more customers and increase sales.

### Personalisation of Communication

I'm sure you have had the experience where as soon as you have looked at a website, you suddenly have ads and posts popping up in your Facebook feed about that particular product/service.



You know it isn't a coincidence.

It is because when you clicked on the original post/website, data was collected about you (using what's called a cookie), an assumption was made about your preferences, and you were put into a group of people who also indicated they are interested in that product.

It is all driven by data. This is the crux of data-driven marketing.

Similarly, you receive emails that address you by your first name. This is a simple example of personalisation, but it relies on good quality data to make it a great experience. Imagine if your name was spelt wrong ... how would you feel every time you received that email if that small detail was wrong?

Data is the key to success in this digital age, but it must be high quality to have an impact on sales.

### 3 C's of Data

There are 3 parts to high quality data.

- **Clean** – the data is accurate. For example, spelling is correct. You have the right data matched to the right person.
- **Complete** – as much data as required is captured. There is no need to capture every single detail about your customer's lives. Align your data needs to the customer journey and only collect as much as you need. For example, if you're a vet, dog's name is very important; if you are clothing store, it's not relevant, but size is.
- **Current** – update your data as often as you can. Things like email and postal addresses can go out of date easily. Brand preferences can change. Keep the data fresh.

Often the quality of data relies heavily on your staff. They are the ones who have the most direct contact with your customers and clients.

To get them on board with collecting high quality customer data, as Simon Sinek says, "start with why". Help your team understand why data collection is important and the value it brings to the business. Ask them for input on the best way to collect data so they're engaged in the process and don't just see it as one more thing they have to do.



## Data Privacy and Security

This is a topic that is receiving more and more attention. It is important to understand what data you collect, where it is stored and to ensure it is secure. Especially if you have sensitive data like people's contact details and credit card numbers.

Most countries have Data Privacy laws. In Australia there is the Privacy Act and Privacy Principles. In Europe there's the GDPR regulation. In the US there is the US Privacy Act plus state-based laws.

Get familiar with the regulations that apply to you, ensure you have an up-to-date Privacy Policy which outlines how you collect, store and use data.

## Data Audit

At this stage it is good to complete a data audit. Go through every system you have and note down the customer data it contains.

It is good to understand if you have the personal customer data mentioned earlier:

- Name
- Email address
- Contact details
- Demographics like age, gender
- Sales history
- Product preferences

For each piece of data, rate its quality based on the 3C's outlined above.

Then make a plan for any additional data you want to start to collect, and any data clean up that needs to happen. The table on page 30 will help with this exercise.

Without knowing the data you have and the quality of the data, it is going to be tough to be able to use a data-driven marketing in your business.



## Data Exercise

To help understand how all your data fits into the customer journey, complete the following table.

	Data You Have + Quality of the Data	Data You Need
Find	<i>eg: First name of leads, good quality</i>	<i>eg cookie on website visitors</i>
Buy	<i>eg: Customer email address, incomplete</i>	<i>eg Product preferences</i>
Buy Again		
Recommend		



## Systems

Very few businesses operate without a myriad of technology, systems and processes. They're supposed to make connecting with customers easier and businesses more efficient.

Often in small business, technology is the domain of the person with an interest in computers, or it is outsourced to another company.

A lot of small businesses have systems that have been in place for many years. They may no longer be fit for purpose but changing is too much hassle and expensive.

For anyone who is a technophobe or not “tech-savvy”, systems, computers, etc whatever you want to call it, can be a source of huge confusion and frustration.

In the context of data-driven marketing, when we talk about systems, we're talking about anything that holds customer data or is used to manage customer touchpoints.

The best way to get the most from your systems is to have a clear plan of what you need them for.

When it comes to planning (or reviewing) systems, ask yourself these questions:

- Does it help to personalise the customer journey
- Does it make the customer journey easier?
- Does it automate manual tasks?
- Can all the functionalities be used by your business?

In many cases, systems have been bought before the business has a clear picture of what they really need or want it to do in their business.

You end up paying for features you don't use or understand just because they sounded cool or someone you know uses that system. I liken it to buying a top range Porsche when all you need is a Corolla.

## Systems Audit

A useful thing to do at this stage, is go to back to the customer journey map, and note down each system you use at each stage of the customer journey.



For example, do you have Google My Business for the find phase?

Do you use a CRM for email marketing?

A point of sale for purchase?

What is your website built on?

What do you use for invoicing?

As you go through the customer's journey step by step, write down every system or online tool you use along the way.

And make note of which ones allow you to personalise the way you do business with your customers in some way. For example, send automated SMS as an appointment reminder, or emails after a sale.

You can use the table in the Systems Exercise section on Page 34 to complete this.

## Automation

The basic, underlying reason we use systems is to automate manual tasks.

Think about Xero or other accounting systems – we have them so we don't have to keep a ledger and shoebox of receipts

Online banking – the system we use so we don't have to send cheques.

Facebook – the system we use to keep up with friends and family so we don't have to call them 😊

CRM system – the system we use to keep track of our leads and customers, so we don't have to keep files and pieces of paper.

Systems continue to evolve, and the functionality is mind blowing.

If you are overwhelmed and confused, keep coming back to – what is a manual task I think I can automate? How can I use this to personalise the experience of my customer?

A great example of automation and personalisation is in email marketing, which we have touched on before.

Tools like MailChimp allow you to send different content to different people really easily.



For example, coming back to our example of the retailer who sells to men and women, this is straightforward in most email packages these days. You upload the content and create the rules and off you go. Previously you would have had to send multiple campaigns, setting up multiple audiences.

People know you have data about them.

They expect you to know who they are what they have bought.

They assume you have systems to help you run your business.

They expect you to use them to give them a great experience.

Otherwise, they will go elsewhere, because that is what other places can offer them.

Unfortunately, the experiences delivered by big business, has set the standard for small business.

I know I keep saying it, but to get more customers and increase sales using data-driven marketing, you will need to use technology to automate. It's not manageable otherwise.

Here are some questions to think about when it comes to using automation to make your life easier and your customer's experience personalised.

What tasks are still done manually in your business? What could you automate?

What marketing is still done in "bulk", i.e. the same message to everyone? How can you use systems to personalise? Email is often an easy win here.

## Connecting Systems

One great power of systems is the ability to connect multiple systems to each other to share data.

This makes automation even easier.

We use a tool called Zapier to connect systems and enable automations.

For example, for one client, we created a survey in Google Forms, every time it is completed, the answers are uploaded into their CRM system (Keap, previously known as InfusionSoft). An email is triggered from G-Suite



containing the responses and alerting them to follow up with the customer. Three systems, no human interaction except to contact the customer. Sweet!

If you have multiple systems with lots of manual processes moving information from one to the other, I encourage you to check out Zapier. It can connect most of the major tools small businesses use in their digital marketing.

## Systems Exercise

To help understand how all your systems fit into the customer journey, complete the following table.

	Systems You Have	Systems You Need
	<i>eg: email marketing</i>	<i>eg Google My Business</i>
Find		
	<i>eg: Point of Sale</i>	<i>eg Online payments</i>
Buy		
Buy Again		
Recommend		

## What do you think?

Do you have the data and systems already in place to be able to personalise the experience of your customers?

What else do you need to make it happen?

On the next page are my tips for using data and systems to automate and personalise the customer experience.

## Top Tips to use Automation to Personalise

- Complete a Data audit – what data or information do you have on your customers. You might have more than you think when you look across all your systems.
- Check the quality of your data – spelling mistakes on names, complete email addresses and other information for all customers.
- Set up Google Analytics on your website so you know what people do when they go there.
- Look at your Google Analytics data – understand what people are doing on your website – what they are interested in and why they leave.
- Create groups of customers (segment) based on the products they buy, and their total spend over time.
- Use customer groups (segments) in your email marketing. Send different messages to different groups.
- Put a Facebook pixel on your website so you can retarget people with Facebook advertising.
- Look at data and statistics at least monthly. What do people do on your website, which posts got the most engagement? What was the open and click through rate of personalised emails? Plan the next month based on what worked and what didn't work.
- Complete a systems audit - List out all the systems you have in your business, what you use them for and how they fit into the customer journey.
- Research your systems to see if they can be connected to each other. For example, Mail Chimp can be connected to a lot of Point of Sale systems, Point of Sale can connect to accounting tools like Xero.
- If you are not confident using the systems you have, do some online training videos.
- Look at the functionality of your systems for duplication. E.g. do you have two systems that can send out email. Do you need both?
- List all your manual processes. Is there a way a system can help with any of these?
- Automate – even just one email!
- Personalise – even just one email!



# Marketing Plan

Company Name: \_\_\_\_\_

	Now	Goal
Average Monthly Web Traffic	_____	_____
Social Media Followers	_____	_____
Email Subscribers	_____	_____
Average Monthly Sales	_____	_____
# Repeat Customers	_____	_____
Customer Lifetime Value	_____	_____

Marketing Goal #1 \_\_\_\_\_

Marketing Goal #2 \_\_\_\_\_

Marketing Goal #3 \_\_\_\_\_

Project #1 \_\_\_\_\_

By When \_\_\_\_\_ By Who \_\_\_\_\_

Project #2 \_\_\_\_\_

By When \_\_\_\_\_ By Who \_\_\_\_\_

Project #3 \_\_\_\_\_

By When \_\_\_\_\_ By Who \_\_\_\_\_

# Summary

We've covered a lot of ground in this book. Here's the More Sales, Less Stress checklist for using data-driven marketing in your business.

- ☐ Complete a customer profile for your main customer segments – use the template on Page 39
- ☐ Map the customer journey making note of *Customer goals, Pain points, Thinking and Doing, Feeling, Opportunities*
- ☐ Along the customer journey, make note of places where personalised marketing or communication can be used.
- ☐ Complete the Content Exercise to understand the content you have and what you need
- ☐ Complete the Touchpoints exercise, to understand the touchpoints you have and the ones you need,
- ☐ Complete a data audit – what data do you have, where is it stored, what's the quality like? What other data do you need?
- ☐ Complete a systems audit – what systems do you have, how do you use them? What other systems do you need?
- ☐ Identify at least 3 communications where you could improve the personalisation.
- ☐ Identify at least 3 tasks you could automate using the data and systems already in the business.
- ☐ Watch the sales roll in 😊

# What's next?

First off, good on you for making it to the end of the book. Thanks for putting in the time to get here.

Once you have read through this, if you need some help or extra pointers, feel free to join our Facebook Group – Marketing Strategy for Small Business. [Link here](#).

In this group we regularly post tips and pointers about digital marketing, especially how to be data-driven.

Or email me directly [anne@neilandigital.com.au](mailto:anne@neilandigital.com.au).

I would love to hear how you're going and get to know you and your business.

Finally, good luck as you use data-driven personalisation strategies to get more customers and increase your sales – I know you're onto a winner!!



**MORE SALES**  
Less Stress

# Customer Profile Template

A customer profile template should be completed for each customer group. This profile template will help you to create an avatar, niche and segment your offering. Allow this guide to help you to note down all the relevant information about the people you want to sell to.



Persona 1

## Demographics

Name

Age

Gender ☐ Male ☐ Female

## Goals and Motivations

## Challenges / Pain Points

## Needs

## Sales / Service Opportunities

## Where they get information

# Customer Journey Map Template



*Persona*

For each part of the customer journey, make notes about what the experience is like for the customer.

	Find	Buy	Buy Again	Recommend
Goal				
Pain Points				
Thinking & Doing				
Feeling	Delighted 😄	Delighted 😄	Delighted 😄	Delighted 😄
	Pleased 😊	Pleased 😊	Pleased 😊	Pleased 😊
	Indifferent 😐	Indifferent 😐	Indifferent 😐	Indifferent 😐
	Unimpressed 😞	Unimpressed 😞	Unimpressed 😞	Unimpressed 😞
	Frustrated 😡	Frustrated 😡	Frustrated 😡	Frustrated 😡
Opportunities				

# Customer Journey Map Example



*Persona*

**Parent of a 6 year old**

For each part of the customer journey, make notes about what the experience is like for the customer.

	Find	Buy	Buy Again	Recommend
Goal	Find out what options are available and who sells kids bikes.	Information about prices and what is in stock. Buy a Bike	Buy bike accessories	Help friends / family
Pain Points	Too many options. Not sure what is important	Getting the bike home	Having to re-enter details online	Don't know how / where to leave a review
Thinking & Doing	I want something that will last a couple of years. I'll google what size I need?	What is the guarantee? Can I pay with AfterPay	We need a bike stand and a drink bottle holder. Are they on Amazon?	It was easy to buy from Bert's Bikes, I recommend going there.
Feeling	Delighted 😄	Delighted 😄	Delighted 😄	Delighted 😄
	Pleased 😊	Pleased 😊	Pleased 😊	Pleased 😊
	Indifferent 😐	Indifferent 😐	Indifferent 😐	Indifferent 😐
	Unimpressed 😞	Unimpressed 😞	Unimpressed 😞	Unimpressed 😞
	Frustrated 😡	Frustrated 😡	Frustrated 😡	Frustrated 😡
Opportunities	Paid Ad Words to appear in search results. Post more regularly on social media	After-sales follow up	Discount offer on next purchase. Segmented emails.	Ask for a review 7 days after purchase