

THE ULTIMATE GUIDE TO

# DIGITAL MARKETING

DIGITALMARKETER

CHAPTER
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**The perfect resource for beginner to advanced digital marketers looking to learn new skills or hone existing ones.**

*The Ultimate Guide to Digital Marketing* is full of insights and strategy for business owners, marketing professionals, students, and anyone else looking to hone their current skills and get up to speed on the latest in digital marketing.

## What is Digital Marketing?

Digital marketing is the act of promoting and selling products and services by leveraging online marketing tactics such as social media marketing, search marketing, and email marketing.

If you're new to digital marketing, it may feel overwhelming.

We get that…

But in many ways, digital marketing is no different than traditional marketing. In both, smart organizations seek to develop mutually beneficial relationships with prospects, leads, and customers.

Now, think about the last important purchase you made. Perhaps you purchased a home, hired someone to fix your roof, or changed paper suppliers at your office.

Regardless of what it was, you probably began by searching the Internet to learn more and find your best options. Your ultimate buying decision was then based on the reviews you read, the friends and family you consulted with, and the solutions, features, and pricing you researched.

Today, most purchasing decisions begin online.

That being the case, an online presence is absolutely necessary—regardless of what you sell.

And having a strong digital presence will help you in multiple ways:

- It will make it easier to create awareness and engagement both before and after the sale.
- You can convert new buyers into rabid fans who buy more (and more often).
- You'll enjoy all the benefits of word-of-mouth and social sharing.

Be aware, though, the digital marketing scene is ever changing. Gurus, podcasts, and bloggers declare a tool or tactic hot one week and dead the next.

The truth is, today, digital marketing is less about "digital" and more about "marketing," largely because digital marketing has come of age. Its fundamentals have already been established.

At DigitalMarketer, our objective is to clear the confusion about the tactics that work and how to use them to grow your business. We stand against those so-called gurus who promote the next "shiny object" that will reportedly kill email marketing, digital advertising, or search engine optimization.

Here, we're all about the fundamentals.

As you'll see in this guide, these core disciplines of digital marketing will be critical to your business growth today, tomorrow, and for years to come. Each of these disciplines will be covered in a chapter of this *Ultimate Guide to Digital Marketing* as shown below.

## What You'll Learn

### Chapter 1: Your Digital Marketing Strategy Template

The Customer Value Journey is the strategic foundation of everything we do here at DigitalMarketer. It's the master template upon which every other digital marketing discipline and tactic is built. Learn all 8 stages and how you'll use them to create a winning strategy for your business.

## Chapter 2: Developing a Content Marketing Strategy

Done right, your content marketing will not only attract prospects, but also move them through a marketing funnel to drive more sales and grow your business. Learn how to plan your content marketing strategy and how to create "perfect" content.

## Chapter 3: Crafting a Digital Advertising Plan

The secret to powerful digital marketing is traffic. If you can master traffic acquisition, you can easily drive traffic, sales, and ultimately, growth. Here, you'll learn the secrets to crafting a digital advertising plan that actually works.

## Chapter 4: Understanding Social Media Marketing

"Going social" isn't simply about being active on Facebook and Twitter. Learn the Social Success Cycle and how you can use it to attract your fans and followers, engage them, and even sell to them.

## Chapter 5: Following Email Marketing Best Practices

Forget any rumors to the contrary. Email is alive and well—and if you know how to use it, it will help you exponentially grow your business. Learn the role of email in a growing business and how you can use it to quickly move prospects and customers through the Customer Value Journey.

## Chapter 6: Designing Your Search Marketing Strategy

Search marketing has radically changed in the last few years. But we see that as good news! Today, it can boost your website's traffic and visitors' trust while supporting your other digital marketing disciplines as well. Learn the *right* way to do search engine optimization here.

## Chapter 7: Applying Website Analytics to Your Digital Marketing

If numbers aren't your thing, we've got you covered. Website analytics are a powerful tool for helping you figure out what's working, what's not, and what to do next. Learn the process we use here at DigitalMarketer—an easy-to-understand approach anyone can use.

## Chapter 8: Leveraging Conversion Rate Optimization to Drive Growth

Conversion rate optimization may sound hard, but it doesn't have to be. And it's critical to your success as a digital marketer. We'll show you how to implement a simple framework that will guide everything you do as a digital marketer.

In each chapter, we'll cover 4 key aspects to the strategy being discussed:

- **The Methods:** the strategies and processes you'll use to create your plan and execute it in your own business. This is the bulk of each chapter—because in digital marketing, *how* you execute a strategy is key. And in this Guide, we share the exact methods we use here at DigitalMarketer.

- **The Metrics:** the numbers you'll watch to measure your success and identify areas that need tweaking (or are worth doubling down on).

- **The Lingo:** the terminology used by experts, so you can communicate intelligently (even if you don't consider yourself a pro).

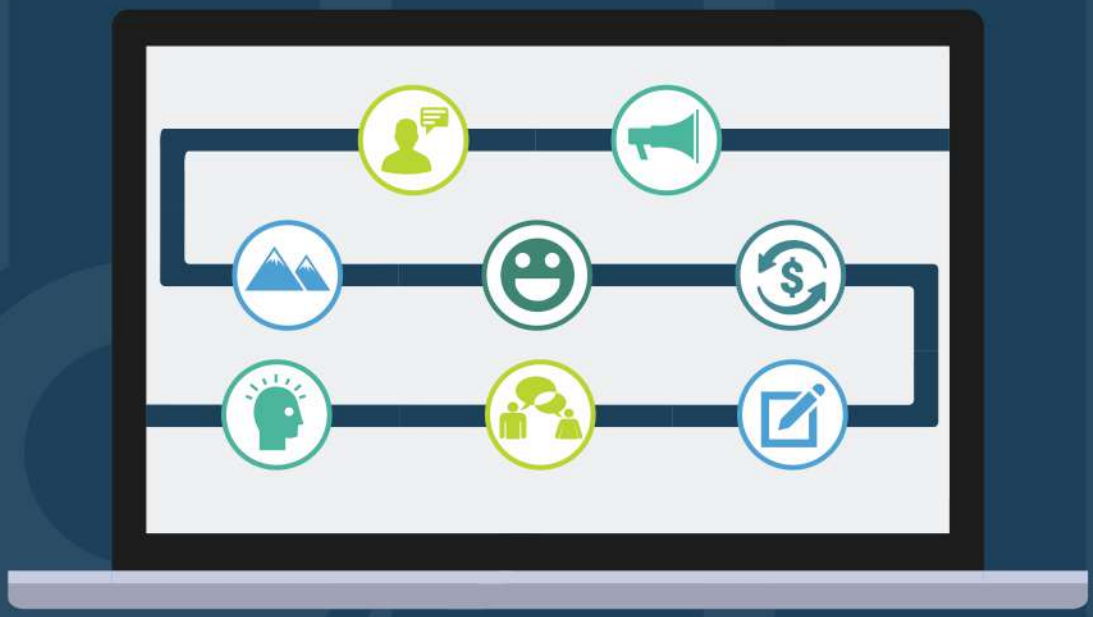
- **The Roles:** the people in your organization who will likely have responsibility for planning and running each tactic.

We've organized this Guide in a logical progression. Though you can jump around, learning the tactics in whatever order you feel you need them, we recommend that you read through the chapters in order.

Take your time. Read and study one chapter at a time. Apply what you learn. And when you feel you've got the methods up and running, move on to the next chapter.

You'll be surprised at how quickly you can implement these tactics if you focus on them one at a time. Then, when everything is up and running, you can focus on optimizing and improving your processes for maximum growth.

Ready to start?



CHAPTER 01:

# YOUR DIGITAL MARKETING STRATEGY TEMPLATE

## (AKA THE CUSTOMER VALUE JOURNEY)

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CHAPTER
# 01

This is where digital marketing begins and ends…

With a Customer Value Journey that strategically builds relationship with new prospects and converts them into loyal, repeat customers.

This Journey is *the process every prospect goes through to become a new customer.*

It's how strangers become buyers and, eventually, raving fans of your business.

The hard truth is that marketing is not a one-step process. There are eight stages you must account for on the path to purchase and promotion.

But, I have great news. If you understand this digital marketing strategy (a.k.a. the Customer Value Journey), then you can *intentionally* engineer your business in such a way that it moves people predictably through the stages in this template.

In other words, you'll no longer wonder if you'll be able to generate leads. You won't have to cross your fingers and hope for customers. When you understand the Customer Value Journey, even reviews and referrals will become automatic.

The Customer Value Journey is the strategic foundation of everything we do here at DigitalMarketer. It's the master template upon which every other digital marketing discipline and tactic is built.

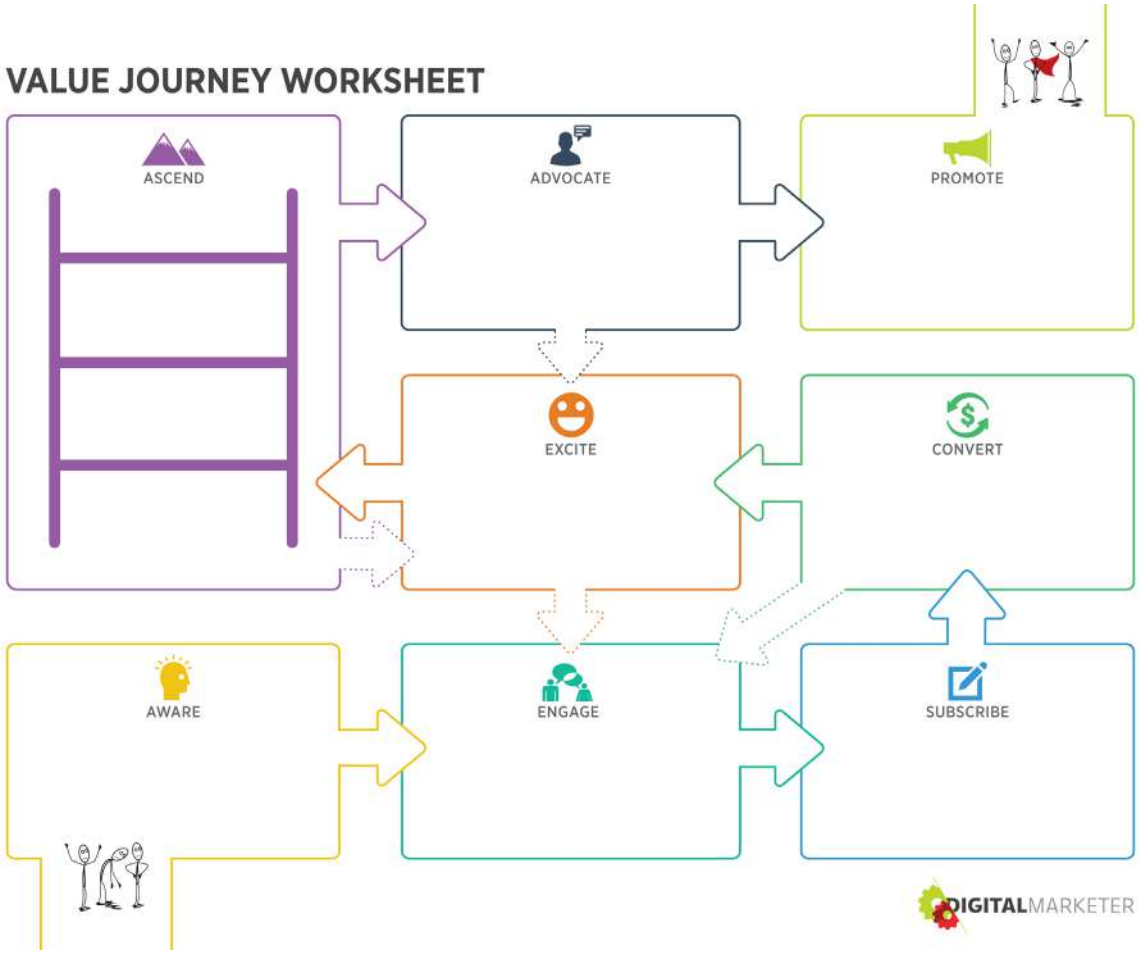
It's so important, we confidently make this bold statement:

**The job of marketing is to move prospects and customers seamlessly and subtly through each phase of the Customer Value Journey.**

In this chapter, we'll start with a high-level map of the Customer Value Journey. Then we'll dive into each of the 8 steps, talk about the tactics you'll need to move people along the Journey, and review case studies so you can see it in action.

## An Overview of the Customer Value Journey

So, now that you understand why it's important... here's what the Customer Value Journey looks like:




*Click the image above (or click here) to download your writeable copy of The Customer Value Journey*

Now let's walk through the 8-step process of crafting your digital marketing strategy:

## Step 1: Awareness

Before someone can buy from you, they have to realize you exist—right?

Well, that's Step 1 in the Customer Value Journey.

This step is pretty self-explanatory: It's where the person becomes aware of you. After all, nobody is born knowing who Apple or Amazon are. At some point they have to become aware of these companies if they are to become a customer.

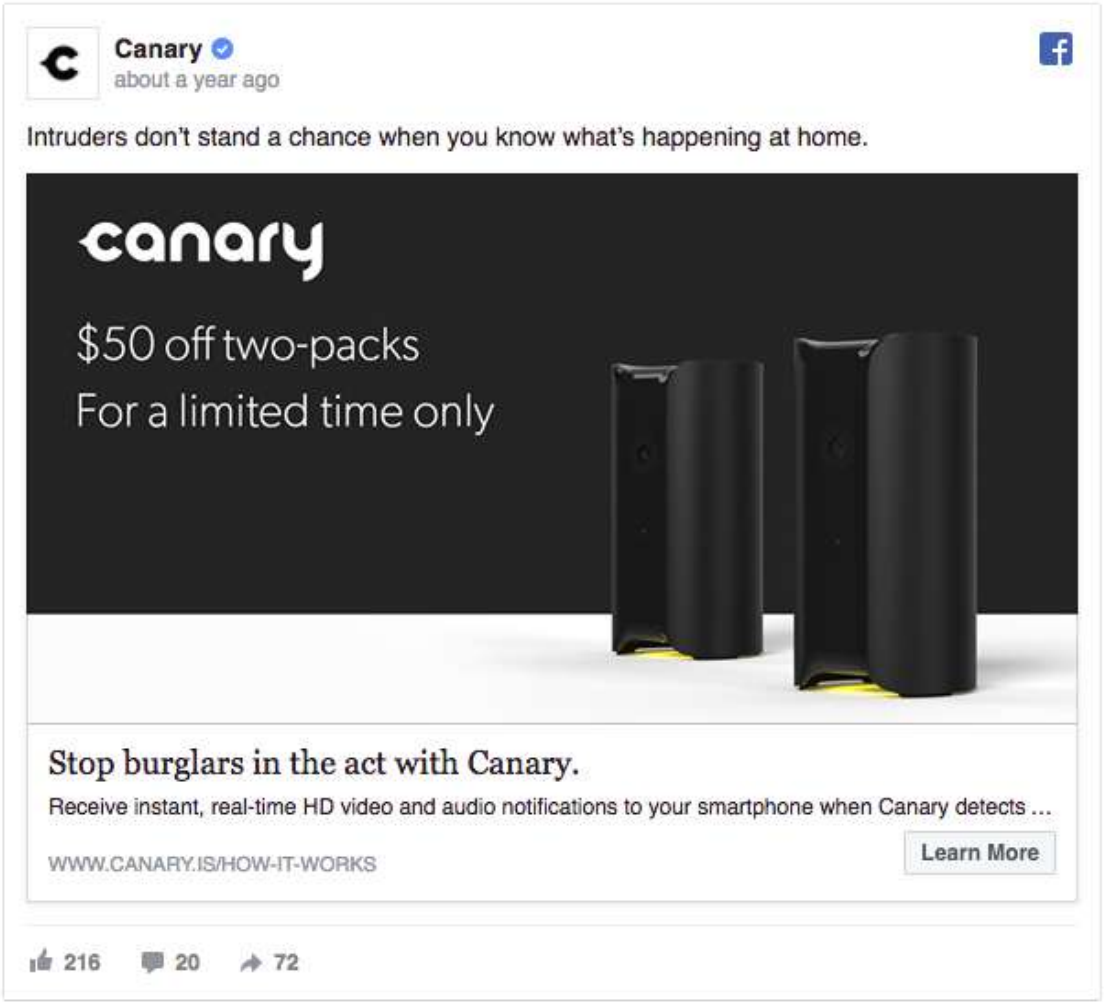
The same thing is true of your company.

### Examples of Marketing that Generates Awareness

There are any number of ways a prospect could become aware of your company, products, and services. Here are three possible scenarios:

- A father of two sees an advertisement for a new children's summer camp on Facebook.
- An office manager searches Google to find a new coffee supplier.
- A college student watches an Instagram video of her friend raving about a new brand of noise canceling headphones.

Facebook ads are the perfect vehicle for driving awareness. In this example, browsers are introduced to a home security company:




*If you weren't aware of Canary, this Facebook ad makes you aware.*

## Digital Marketing Disciplines That Create Awareness

To improve awareness of your company, the digital marketing tactics you need to master or hire include:

- Digital Advertising
- Search Marketing
- Content Marketing
- Social Media Marketing

- Community Management
- Copywriting

## Step 2: Engagement

Your prospect is now aware of you—they know who you are—but you're still in the early stages of a relationship with them. They don't yet know you, like you, or trust you.

So the next step is to start developing relationship with your prospect.

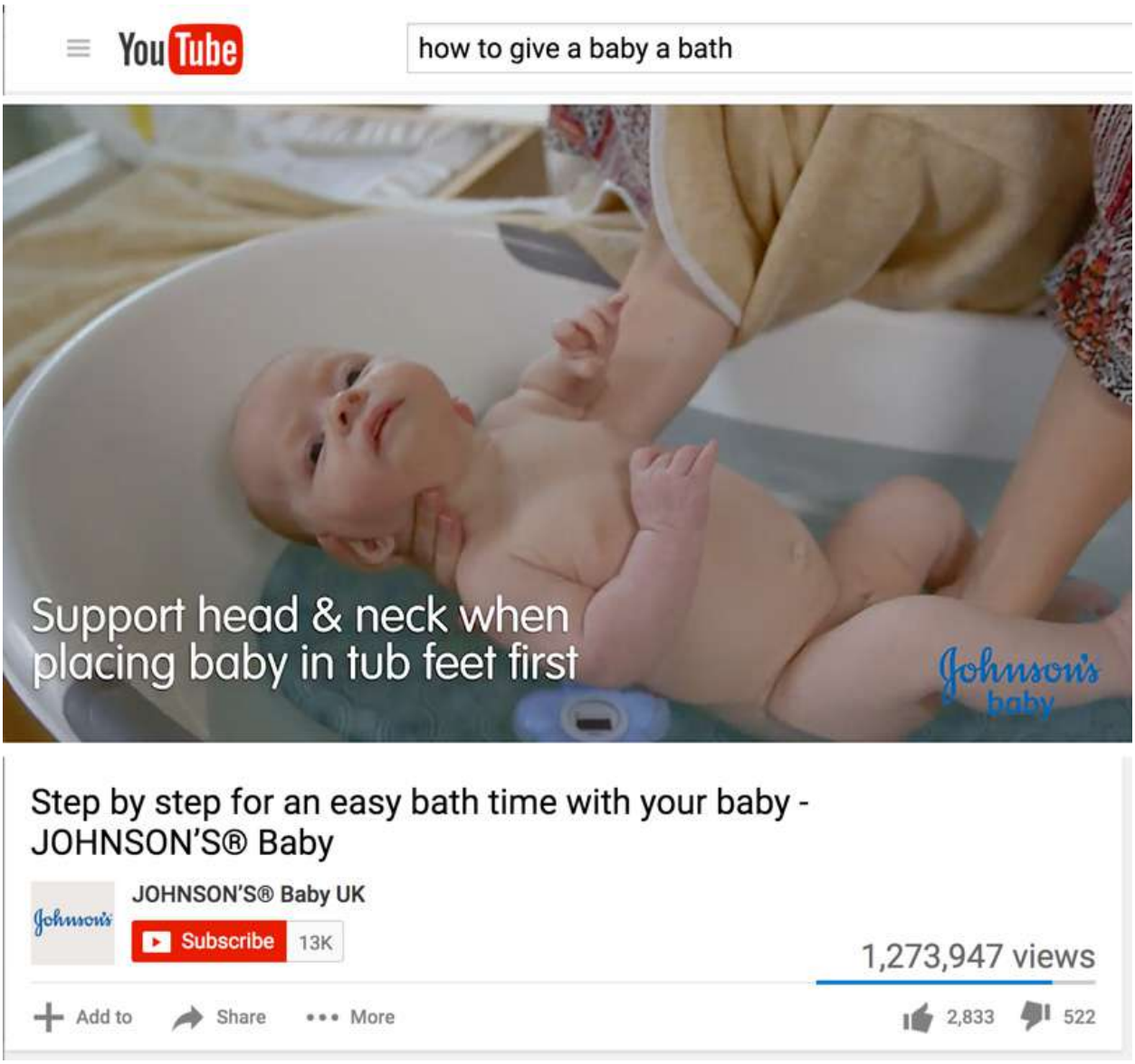
Step 2, Engagement, is where you start conversing with your prospects. You engage them through some form of content that provides entertainment, information, or both.

Engagement is something that must continue throughout the Customer Journey. It's not something you do once and move on.

### Examples of Marketing That Generates Engagement

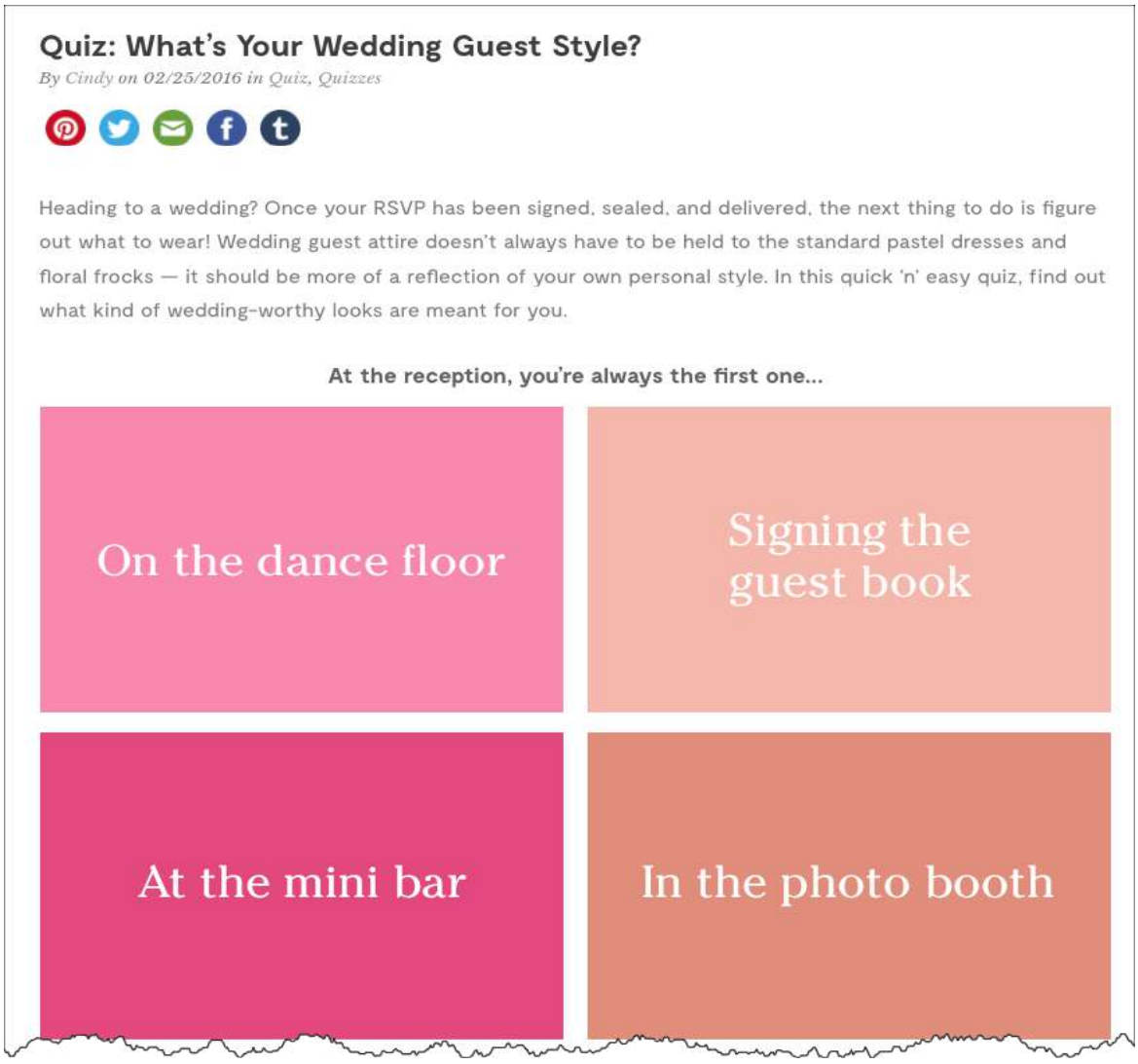
Engagement typically comes in the form of content or community.  Here are a few examples to get the ideas flowing for your company:

- A grandfather of five receives an email newsletter from his financial advisor detailing several ways to save for a child's college tuition while reducing taxes.
- The owner of a boutique wine store becomes active in a Facebook community for wineries and other wine retailers.
- A new mother watches a YouTube video from Johnson & Johnson showing her how to give her baby a bath.




*Engagement often occurs through valuable, relevant content.*

Let's look at another example of engagement from Modcloth, an etailer selling women's clothing. This is an entertaining and educational piece of content for one of Modcloth's most lucrative customer segments—people attending weddings:




*You can boost engagement with content that's as entertaining as it is useful.*

## Digital Marketing Disciplines That Create Engagement

To improve engagement in your company, the digital marketing tactics you need to master or hire include:

- Content Marketing
- Social Media Marketing
- Email Marketing

- Community Management

## Step 3: Subscribe

At this point, your prospect knows who you are and has engaged with you in some way or another.

However, if you failed to get that person's contact information, odds are high you'll never hear from them again.

Why?

Because people today are inundated with marketing and content, creating a scarcity of attention. Just because someone reads one of your blog posts today does NOT mean they'll remember to revisit your site in the future.

Instead, you need to get that person to progress to Step 3 in the Value Journey, which is to subscribe.

Here, the person gives you their contact information and, in doing so, grants you permission to contact them again in the future.

Most often, this transaction is an exchange, sometimes referred to as an "ethical bribe." You promote a valuable offer, but instead of asking for money, you ask for the prospect's contact information. And when they give it to you, not only do you give them access to the content, product, or service you promised, you also add them to your subscriber list.

### Examples of Marketing That Generates Subscribers

The biggest criteria for your free offer is that your target audience finds it valuable. Here are some examples from a variety of industries:

- A young professional signs up for a webinar presented by a local realtor about the best practices of purchasing a first home.

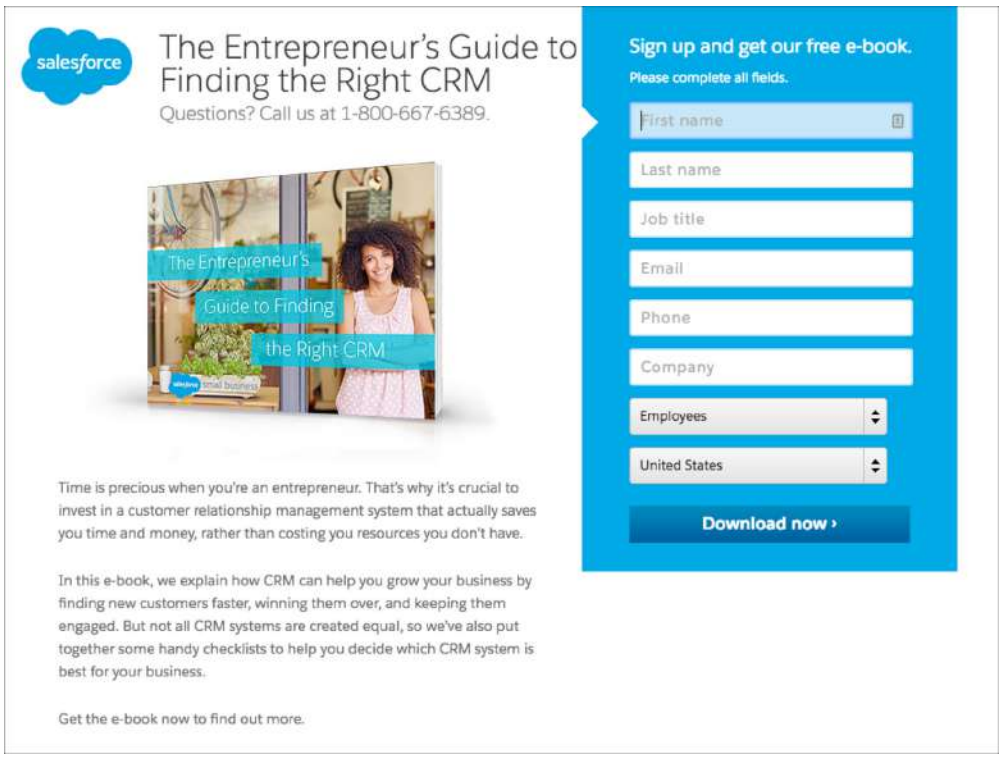
- A college girl fills out a form on a blog to receive a free sample of a new face cream.

- The Human Resources manager at a mid-sized accounting firm signs up for a demo of a new application he can use to manage the hiring of new employees.

In each case, the prospect fills out a form, provides their contact information, and is sent information about how to access the offer.

- The young professional is sent the time and URL of the webinar.
- The college girl is sent a thank-you email telling her the face cream is in the mail.
- The manager is contacted to schedule his demo.

But it always starts with a form. For example, here's how Salesforce generates leads with a whitepaper offer.




*Salesforce's offer is perfect for the Subscription stage of their Customer Journey.*

### Digital Marketing Disciplines That Generate Subscribers

To get more subscriptions for your company, the digital marketing tactics you need to master or hire include:

- Content Marketing
- Email Marketing
- Digital Advertising
- Community Management
- Conversion Rate Optimization
- Copywriting

## Step 4: Convert

If the subscribers you gain in Step 3 of the journey remain engaged, some of them will be ready to increase their level of commitment. They like the information you share and have begun to trust you, so they're ready to invest in one of two ways: either with time or money.

This is a critical stage in the Customer Journey and one that frustrates many business owners. The key to success in this stage is to employ what we call "entry-point offers." These offers are designed to give the new prospect tremendous value without forcing them to put too much "skin in the game."

At this stage, to ask for a significant investment in a complex product or service would be asking too much, too soon. You're still in the early stages of relationship.

In fact, it's too early even to concern yourself with profitability. That's right: in this stage of the Customer Journey, you might lose money on the prospects you acquire as buyers.

This is, perhaps, the most important lesson you must learn so it bears repeating:

**The Convert stage of the Customer Value Journey is about acquiring buyers or ramping up the commitment level of the leads you already have. It is NOT about profitability.**

The most valuable businesses in the world all understand that the costliest marketing activity your business undertakes is customer acquisition. It's the reason Sprint is willing to buy you out of your Verizon cell phone contract and give you a free phone. It's the reason GoDaddy offers domains for $2.95, and it's the reason VistaPrint will sell you 500 business cards for $9.

The goal is to acquire a new customer. Profits come later.

## Examples of Marketing That Generates Conversions

There are two types of entry-point offers: those that require a commitment of time, and those that require a commitment of money. Here are some examples:

- The VP of Operations at a large company purchases a high-dollar management consultant's book for $8 on the consultant's website.
- A daughter of elderly parents schedules a walk-through visit at the local retirement home.
- A man takes advantage of a $20 teeth whitening service at his local dentist.

Notice the price point of each of these offers: from $8 to $20.

Your goal here is not to make a huge profit. It's to get customers, to shift the relationship between you and your subscribers. Because, as you'll see, once someone is a customer, it's much more likely that person will purchase higher-ticket, more complex products and services and do it more frequently.

Remember, one of the costliest (in time, money, resources) marketing activities your business will undertake is the acquisition of customers. The good news is that once you've acquired them, you don't need to pay to acquire them again.

Here's an example of an offer from GoDaddy that does a great job of acquiring new customers with extremely low-priced domain registration services:




*By offering a fantastic up-front deal, GoDaddy easily acquires the customer.*

Getting that initial conversion was the hard part. Now they can build the customer relationship to create profits down the road.

### Digital Marketing Disciplines That Generate Conversions

To improve conversions in your company, the digital marketing tactics you need to master or hire include:

- Digital Advertising
- Content Marketing
- Copywriting
- Email Marketing
- Search Marketing

## Step 5: Excite

At this point, your new customer has had a transaction with you. A small transaction, sure, but a transaction nonetheless.

Your job now is to make sure the transaction is a good one, that the excitement of the purchase develops into good will and trust.

The reason for this is simple: if the person doesn't get value from this transaction, they won't move on to the next stage and purchase more expensive things from you.

So, how do you make sure your customers have a good experience?

First, we assume that whatever the prospect purchased or gave up valuable time for is outstanding. Great marketing will only increase the speed at which your business fails if you don't have outstanding products and services.

Second, the prospect must get value from their last transaction with you. The Excite stage of the Customer Value Journey is something you must return to again and again. And every time, it should create excitement.

That being the case, whenever a customer or prospect does what you ask them to do (attend this webinar, buy this product, hire me for this service), you should engineer your marketing to maximize the chances they'll get tangible value from the experience.

## Examples of Marketing That Creates Excitement

Your goal in the Excite stage of the Customer Value Journey is to make sure your customer gets value from their transaction.  Here are some examples:

- A married couple buys a Keurig (coffee maker) and uses the free coffee servings and Quick Start Guide to have an amazing cup of coffee within minutes of opening the box.

- A new user of the Spotify music streaming app goes through an instructional walkthrough teaching her how to build a playlist of her favorite songs.

- A young man reads through 3 eye-opening blog posts recommended via email by his newly hired Life Coach in advance of their first coaching session.

This stage is all about ensuring that your marketing is giving your customer opportunity to get value from doing business with you—and to enjoy that value right away.

It could be as simple as an email onboarding campaign, like this one from the productivity app, Evernote:




*An onboarding campaign is a simple way to add value immediately after a purchase.*

Evernote is a cloud-based note-taking app that you can use to sync notes between your computer, phone, and tablet. It has a lot of useful features, but Evernote knows that, in order to really hook new users and turn them into long-lasting customers, they have to make sure new users are successful with the app.

That's why Evernote sends you these educational emails when you sign up for a new account. The emails contain tips that help you to get more value out of the application, making you more excited about it and more likely to use it.

## Digital Marketing Disciplines That Create Excitement

To improve consumption in your company, the digital marketing tactics you need to master or hire include:

- Email Marketing
- Content Marketing

- Copywriting

## Step 6: Ascend

At this stage of the Value Journey, you've sunk time, money, and resources into acquiring leads and customers and making sure they get value from doing business with you.

It's entirely possible that, until this stage, you have yet to turn a profit. In fact, if you're in a competitive market (and who isn't?) you may be *losing* money on the front end of this process to acquire customers.

That's perfectly acceptable, and here's why:

You're investing in your future profits.

Always remember that it costs more to acquire a new customer than to sell to an existing one. That first sales isn't about profits. It's about converting a prospect to a customer, so you can begin a long (and profitable) customer relationship.

Buying customers on the front end is just shrewd business, but only if you can monetize those customers on the back end.

The Ascend stage of the Value Journey is where your customer will be ready to buy more and more often. If your business has a core offer, this is the place to make that offer. Then once your customer purchases that core offer, it's time to present them with other relevant offers.

You'll notice that the Value Journey worksheet represents the Ascent stage as a ladder. That's no accident. This is really a ladder that will hopefully lead to multiple purchases over time.

### Examples of Marketing That Creates Ascension

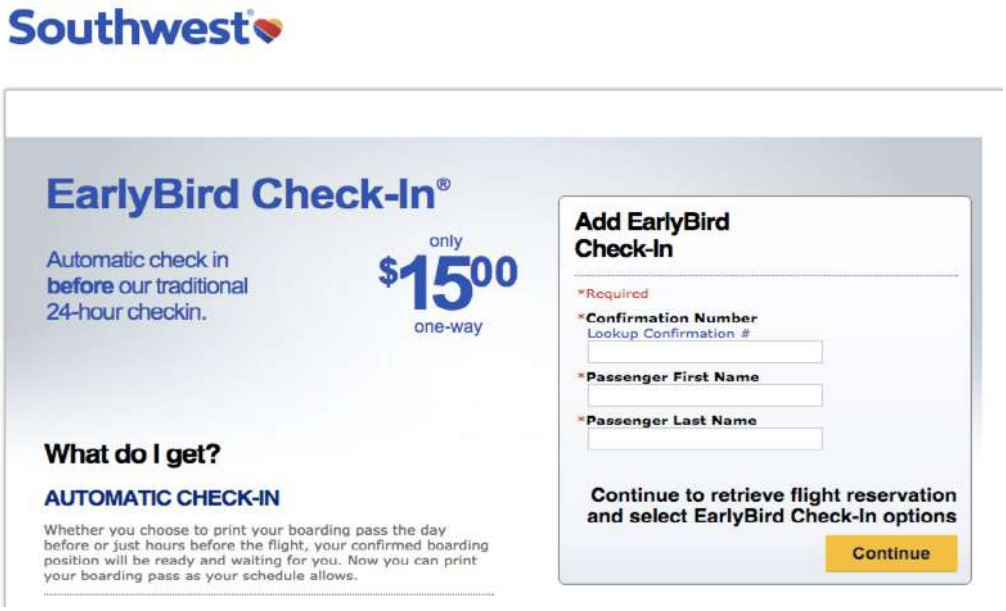
Examples of ascension might include:

- A dating couple rent a convertible in San Diego and pay extra for satellite radio and GPS.

- A new dad buys a digital camera for $2,495 and adds a lens kit, camera bag, and tripod to his purchase for a bundle price of $699.

- A woman with a brand new Mercedes buys an unlimited car wash package for $40 per month instead of paying for each car wash individually.

Here's how Southwest Airlines creates ascension by making an offer that will improve your experience and increase the value of your transaction:




*Southwest's ascension offer is an affordable add-on that improves their customer's experience.*

When you execute this stage properly, your customers will thank you for these offers. Southwest airlines customers who want to board the plane early are happy to pay an extra $15 to avoid hectic boarding.

## Digital Marketing Disciplines That Create Ascension

To improve ascension in your company, the digital marketing tactics you need to master or hire include:

- Email Marketing

- Copywriting

- Digital Advertising
- Content Marketing

## Step 7: Advocate

You now have a happy customer who has made several profitable purchases from you. The next stage in the Value Journey is to create marketing that encourages your most loyal customers to advocate for your business.

An advocate is someone who speaks positively about your brand.

An advocate is what you might call a "passive promoter." They won't necessarily promote your business in an active way, but when asked about you, they will respond favorably.

### Examples of Marketing That Generates Advocates

These final two stages (Advocate and Promote) are often thought to be outside of the control of marketing, but that simply isn't true. You can create marketing that intentionally generates more advocates and promoters.

Here are a few examples:

- A woman enters a contest to win a new lip gloss from a beauty company by shooting a video review detailing how much she loves one of their lipsticks.
- Upon request, the Warehouse Manager at a produce supplier company writes a glowing review of the local courier service she uses to transport fruits and vegetables locally.

Designer Shoe Warehouse knows the value of the Advocate stage in the Customer Journey. This email is designed to activate advocates by asking for a review:




*DSW actively encourages customers to become advocates.*

### Digital Marketing Disciplines That Generate Advocates

Getting advocates is important because it helps generate awareness, trust, and credibility with a wider audience—which helps you to get more customers and grow your business.

To get more advocates in your company, the marketing efforts you need to work on include:

- Social Media Marketing
- Email marketing
- Search Marketing

## Step 8: Promote

Promoters differ from advocates in that they are actively seeking to spread the word about your brands, products, and services.

In some cases, the promoter simply had a great experience with your company and wants to share their story with friends and family. In other cases, they promote because you've created an incentive for them to do so.

This puts your message in front of a new audience, the fans, followers, and friends of the promoter. And because this new audience is hearing about you from a trusted source who they already know, they're much more likely to become customers themselves.

## Examples of Marketing That Generates Promoters

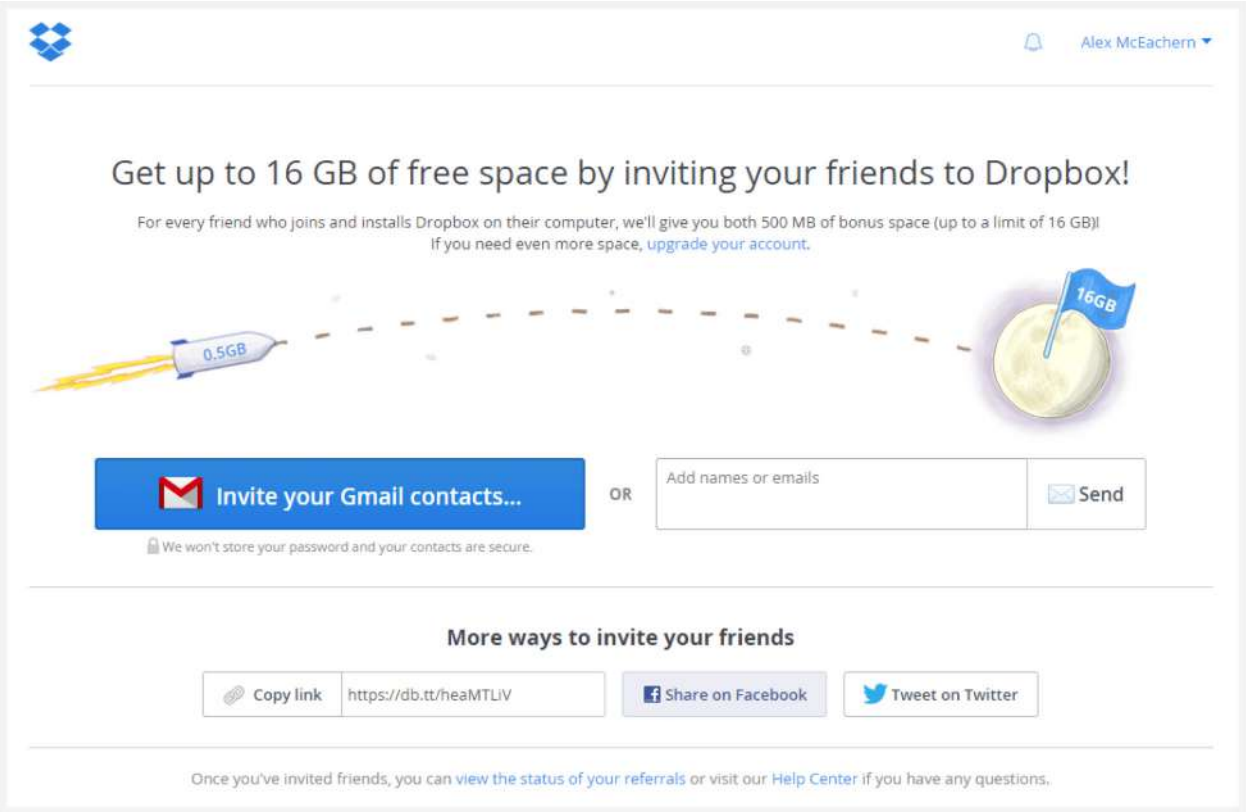
Intentionally creating more promoters is important because it creates an army of paid or unpaid salespeople spreading the word about what you sell.

Here are a few examples:

- A man who runs a podcast about fishing earns a 20% commission every time one of his listeners buys fishing equipment using his affiliate link.
- A woman attends a conference for free because she arranged for 5 of her colleagues to go as well.
- A marketing agency partners with a marketing automation software company to resell their software for a commission.

As you can see, promoters help you get more customers at a lower cost. So even when you reward promoters, it's a win-win.

A good example of this is Dropbox. When it was just starting out as a new company in a new industry, they realized discoverability would be key to their success. So they initiated a referral program that gave its users a strong incentive to promote the service to others.




*By generously rewarding users who promoted Dropbox, word spread quickly about the new cloud-storage service.*

Simply by inviting your contacts to try out Dropbox, you could increase your own online storage space from 2 GB up to 16 GB. This was such an attractive offer, thousands of new users recruited their friends and family, helping turn Dropbox into a software giant (valued at $10 billion in 2014).

## Digital Marketing Disciplines That Generate Promoters

To get more promoters in your company, the marketing efforts you need to work on include:

- Email Marketing
- Copywriting

## How To Move Prospects Through The Customer Value Journey

Now that you know what the Customer Value Journey is, the next thing you need to understand is:

***How do you seamlessly and subtly move customers and prospects through each phase of the Customer Value Journey?***

The short answer? You build marketing CAMPAIGNS that INTENTIONALLY move people from one stage to the next.

And those two words—*campaigns* and *intentionally*—are important here. So let's unpack them one at a time.

### What Is A Marketing Campaign?

First, let's talk about what a *campaign* really is.

A marketing campaign has two critical components:

- A call to action
- A traffic source

The **call to action** is what you want people to do. If the marketing campaign you're creating is aimed at the Subscribe stage of the Customer Journey, your call to action might be for people to download a whitepaper, checklist, or video resource. If it's a campaign in the Convert or Ascend stage, your call to action might be to buy a product or service. If the campaign you are creating is for the Awareness stage, the call to action might be as simple as listening to a podcast episode or reading a blog post.

The **traffic source** could be digital clicks from ads, email, social media sites, or search engines like Google. Offline marketing could include direct mail, TV, or radio advertising, print ads, or anything else that gets the call to action in front of your prospects.

Now that you know what a campaign IS, let's talk about what a campaign is supposed to DO.

The purpose of a marketing campaign is to intentionally move people from one stage of the Value Journey to the next.

For example:

A campaign might have the goal of getting people to sign up for your email list (going from Engaged to Subscribe).

Another campaign might have the goal of getting new customers excited about their purchase (going from Convert to Excite).

Once again, notice that a campaign is intentionally moving people through the Value Journey. And that word "intentionally" is important.

## Intentionally Moving Customers Through The Value Journey

Anyone who has ever become a customer of a company has moved through the Value Journey, whether that company made it happen intentionally or not.

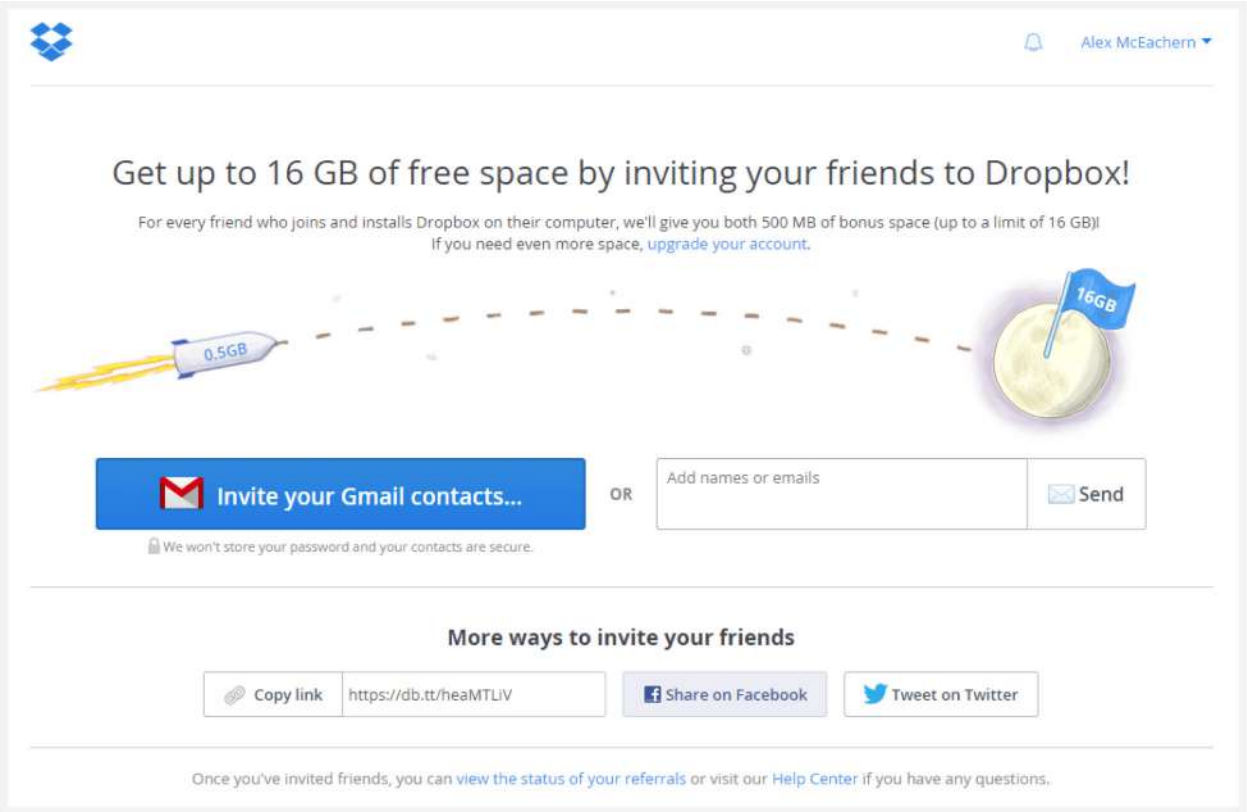
Sometimes, people move through the Value Journey on accident.

For example, imagine that you had never heard of Dropbox before. Then, one day, a friend tells you that he uses Dropbox to store all his files online, and he recommends that you check it out.

At this point, both you and your friend have progressed along the Value Journey. You have moved to Step 1, Aware, and your friend has moved to Step 8, Promote.

However, this progression didn't happen because of anything Dropbox did *intentionally.* It resulted from a random comment or a casual conversation between you and your friend.

Contrast that with Dropbox's marketing campaign offering extra space to customers who refer friends and family:




*Offer rewards for people taking the action you want them to take.*

In this example, Dropbox is moving people along the value journey INTENTIONALLY by creating a program that is designed for that specific purpose.

This is an important distinction to make.

Once you figure out that you can move people intentionally through the Value Journey using marketing campaigns, you realize that you have the ability to grow your business by improving the areas where your customers are getting "stuck."

At this point I'd like to point out that there's one common mistake that many companies make when trying to move customers and prospects through the Customer Value Journey.

### The #1 Mistake Marketers Make When Creating Campaigns

Once a business understands the Customer Journey, they can get so excited about the possibilities that they try to move people all the way from stranger to promoter in one step, in one campaign.

This is impossible.

You cannot possibly create one campaign that makes people aware of you, engages them, gets them to subscribe and convert, excites them, ascends them, and then turns them into advocates and promoters.

Instead, you need to create multiple specific campaigns that are designed to move people from one stage to the next. (Or in some cases, a campaign can probably move people through 2 or maybe 3 steps at once.)

The best way to explain this is with a few case studies.

## Value Journey Campaign Case Studies

### Case Study: DigitalMarketer

- **Campaign Goal:** Aware to Engage
- **Content Needed:** Branding Video
- **Traffic Source:** Facebook Ads (Video Views campaign)
- **Call to Action:** End the war between sales and marketing... watch this video!

When we create a new campaign here at DigitalMarketer, we always start by looking at the Value Journey map and identifying any steps where we need help. In this case, we realized that while we were doing a good job of generating awareness through Facebook ads, we didn't have a good engagement campaign in place.

So we decided to create some content (a branding video) whose goal was to get people engaged with DigitalMarketer:




*We call this video the "Valentine's Day War on Sales & Marketing."*

But as you know, just creating a video isn't enough. We also had to decide how we were going to get people to watch the video. So we chose to run a Facebook ad campaign (with video views as the goal) to generate traffic to the video. This made up the "Traffic" portion of our campaign.

Here's what one of those ads looked like:




*Advertising is the best way to get eyeballs on your content—for all stages of the Customer Journey.*

Because the goal of this campaign is to get people engaged with us, our call to action was very simple: "Watch this video!"

It's important to note that we didn't try to convince people to sign up or buy anything (at least not right away), because that wasn't the goal of this campaign. The goal was to generate engagement, and it succeeded very well because it was focused 100% on simply engaging people.

## Case Study: ModCloth

**Campaign Goal:** Engage to Subscribe

**Content Needed:** Blog Post

**Traffic Source:** Facebook organic traffic

**Call to action:** Sign up for ModCloth's good news and great offers!

Here's an example of a campaign with a different goal. In this case, the clothing company ModCloth wanted people who were already engaged with their content to subscribe to their email list.

The content needed for this campaign was pretty straightforward: it's a blog post. When you go to the ModCloth blog, you'll see many helpful blog articles like this one:

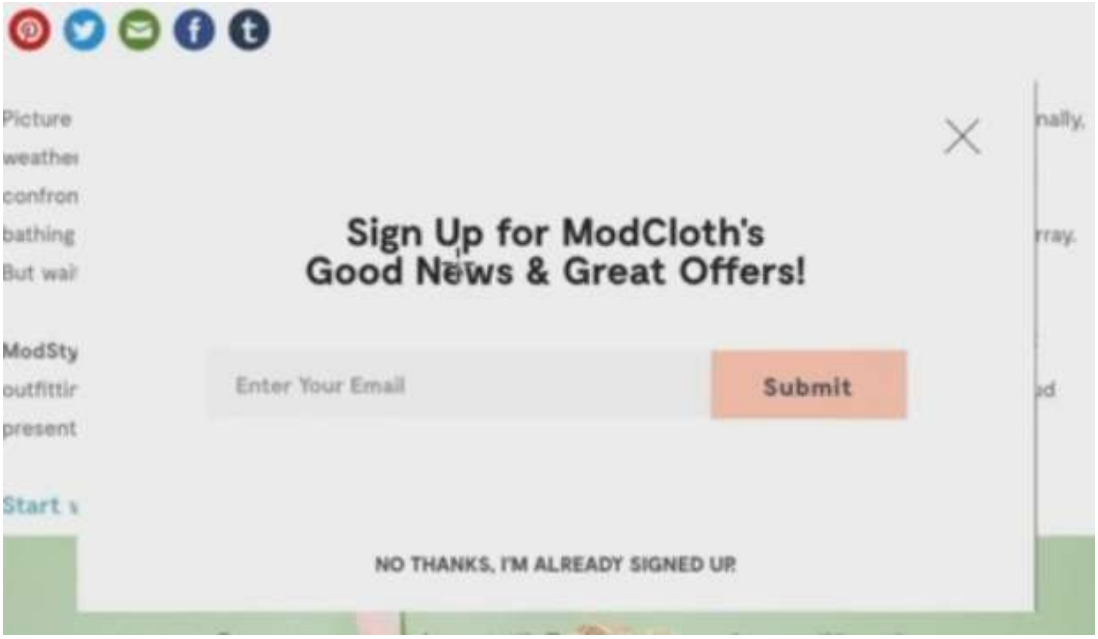



*ModCloth leveraged this blog post to drive subscriptions.*

Because ModCloth has a lot of engaged Facebook followers, they were able to use free organic Facebook traffic as their traffic source. (Remember, you don't always have to pay for traffic.)

So we have content and a traffic source. Now, what's the call to action?

Well, you'll notice that while you're browsing the blog you'll be greeted with this popup:




*Popups have been proven to be an effective tool for a Subscribe call to action.*

Now you might not think of this as a campaign, but it totally is. It's a specific call-to-action: *Sign Up for ModCloth's Good News & Great Offers!* And anytime someone fills out this form, they move on to the next stage in the Customer Value Journey.

Often the best marketing campaigns are the simplest.

## Case Study: Honest Company

**Campaign Goal:** Engaged to Subscribe to Convert

**Content:** Email Copy and Creative

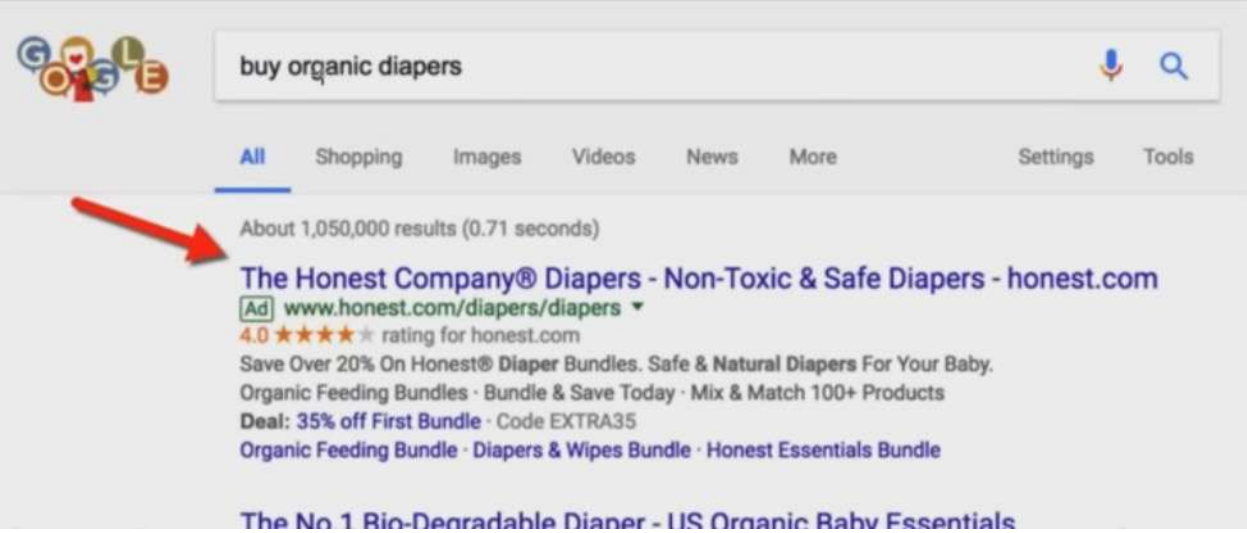
**Traffic Source:** Google Adwords

**Call to action:** Exclusive Offer! 25% off your first order

Here's an example of a campaign that moves people through two steps in the Value Journey: from Engage to Subscribe and then to Convert.

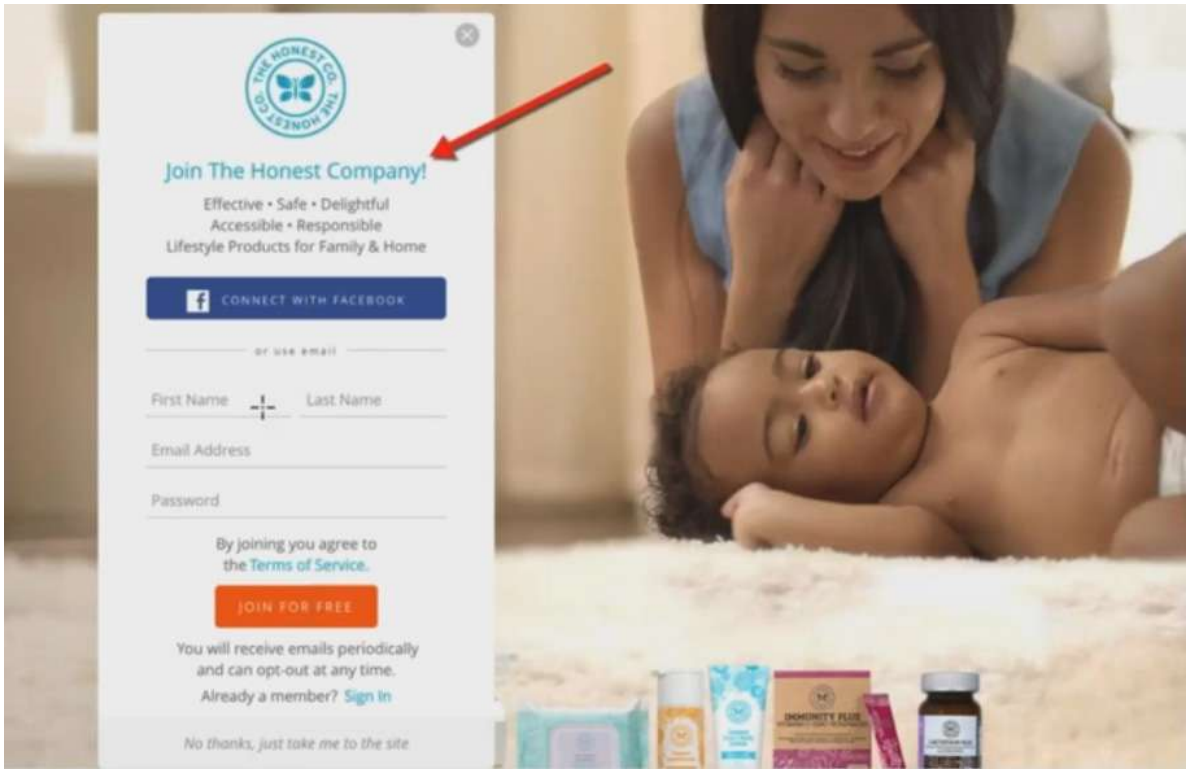
Let's go through this campaign from the beginning. The traffic source here is Google Adwords targeting the keyword "buy organic diapers."

Here you can see the AdWords ad:



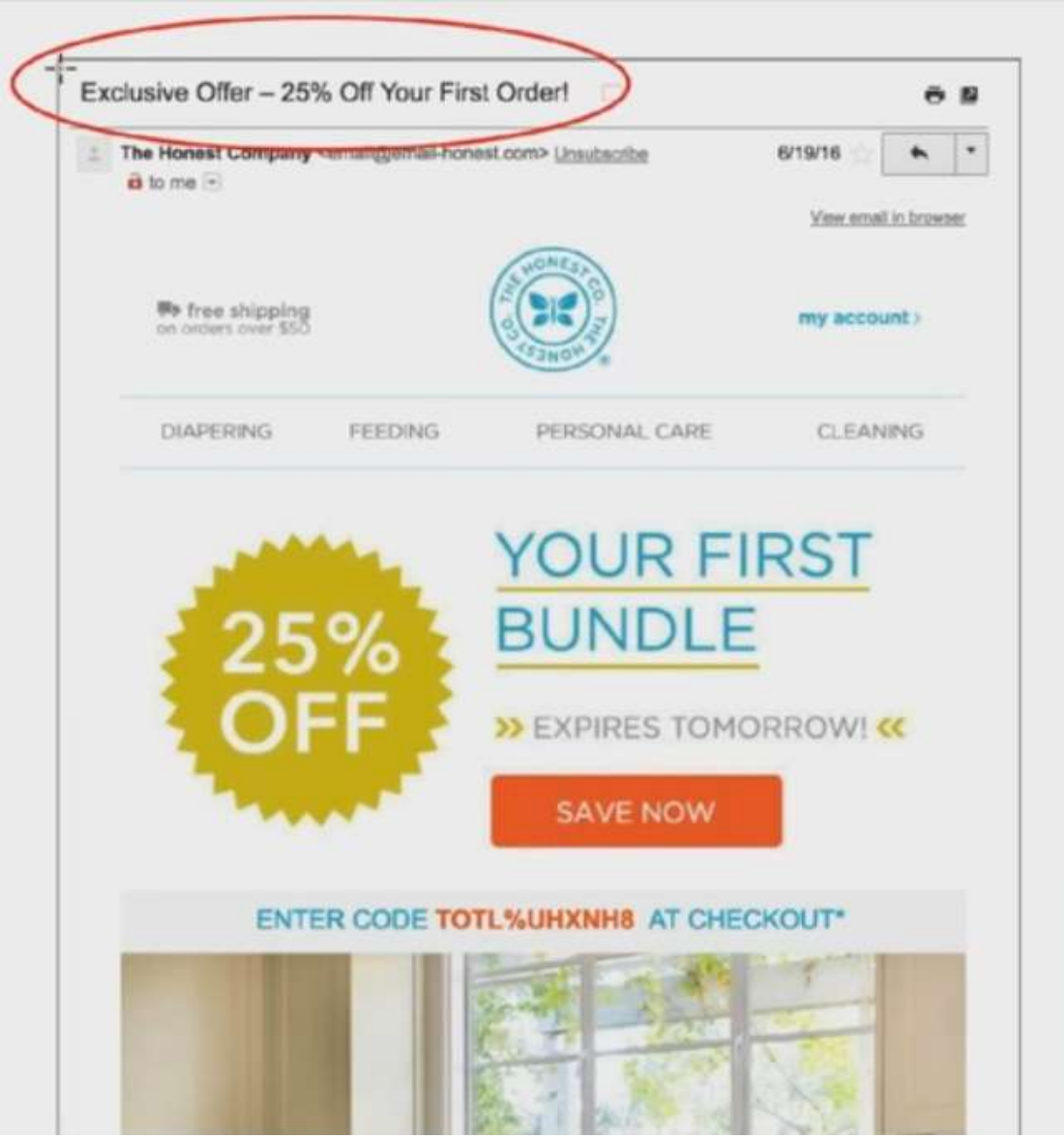

*Attention*

When you click on that ad, you arrive on a landing page that asks you to subscribe.




*Subscribe*

Once you opt in, they'll send you the following coupon in your email (about 24 hours later, assuming you didn't already make a purchase):




*Convert*

I want you to pay close attention to that call to action: *Exclusive Offer! 25% Off Your First Order*. Notice that this discount only applies to your first order. That's because the goal of this campaign isn't to generate repeat purchases; it's to get someone to make their very FIRST purchase. It's a time-tested and effective tactic for turning someone into a new customer.

## Summing Up

The Customer Value Journey is the foundation for all the tactics you'll learn in this Guide. Whether you're learning about content marketing, digital advertising, or analytics, or any other topic, keep this concept in mind.

Don't worry, though. We'll review it several times so it stays fresh on your mind. And by the end of this Guide, it will likely be cemented into your thinking.

Now that you understand the Customer Journey, it's time to talk about the #1 tactic you'll use to engage people at every stage: **Content Marketing.**




## CHAPTER 02:

# DEVELOPING A CONTENT MARKETING STRATEGY

DIGITALMARKETER

CHAPTER
# 02

It's a big promise: perfect content marketing.

But it is possible if you understand how content fits into your overall digital marketing strategy.

And done right, your content marketing will not only attract prospects, but also move them through a marketing funnel to drive more sales and grow your business.

In this chapter, we cover the basics of a successful content marketing program, including methods and metrics, the business roles that should own your content marketing, and the lingo you'll use to talk about it.

## Methods of Well-Executed Content Marketing

Let's start with a thorough understanding of what we mean when we say *content.*

You see, most businesses miss out on a lot of opportunities because their vision for content marketing is too small.

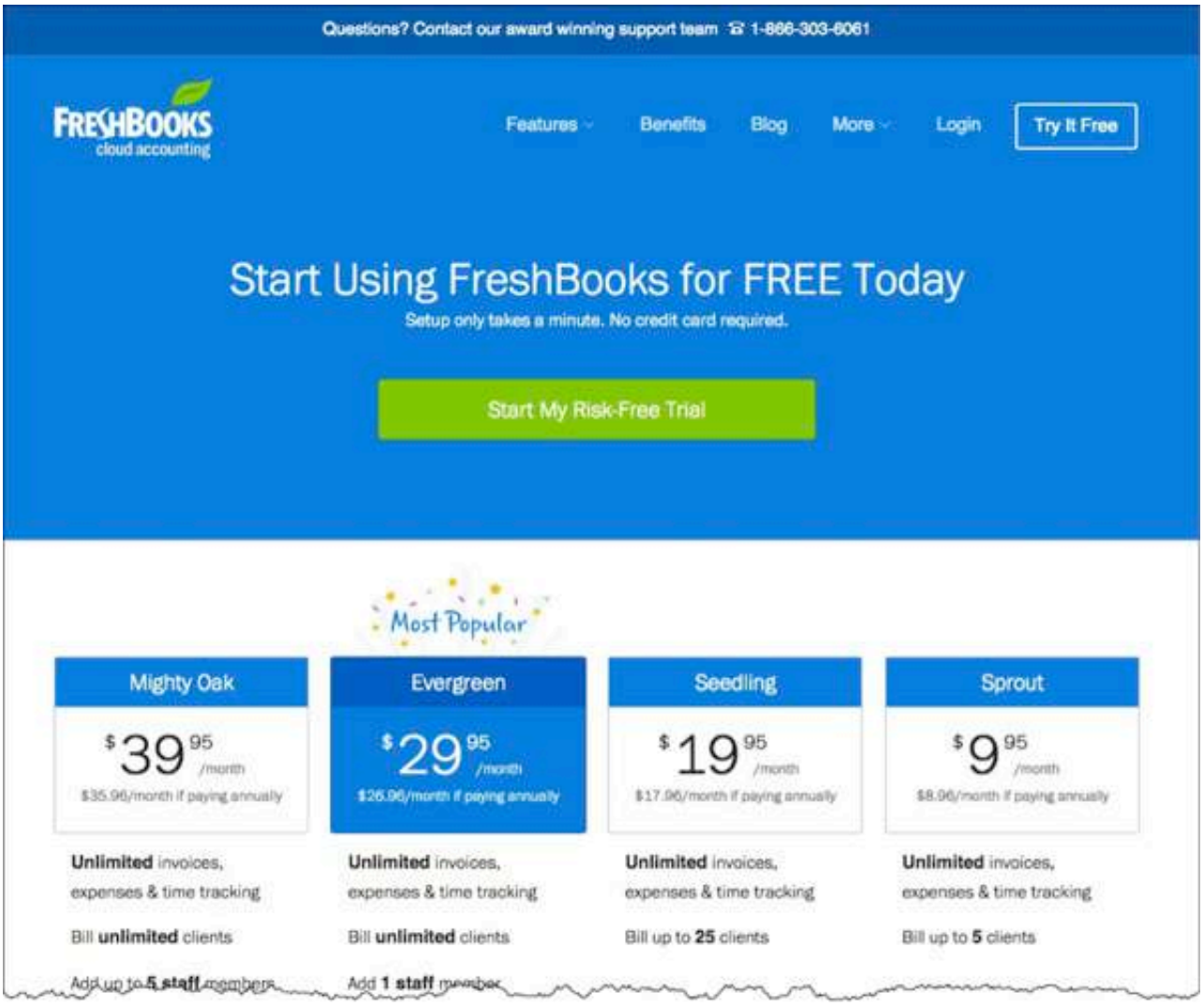
As a result, they're churning out content but not getting great results. And here's why: content in and of itself isn't what drives traffic and sales.

Your content needs to be "perfect."

Now, what do we mean by that?

Perfect content isn't about you, your brand, or your objectives. It's about delivering the right information to your prospects at exactly the right point in the customer journey.

For instance, for the software company Freshbooks, this web page represents perfect content marketing for a prospect who needs pricing information to make an informed buying decision.




*Content is any information that helps you keep the funnel full.*

Yep, a pricing page *is content*.

**The big misconception is that content marketing is blogging.**

While blogs are a major component of content marketing, they're only a *part* of the bigger picture. In fact, in most cases, a blog is not the most lucrative form of content marketing.

But we'll come back to that.

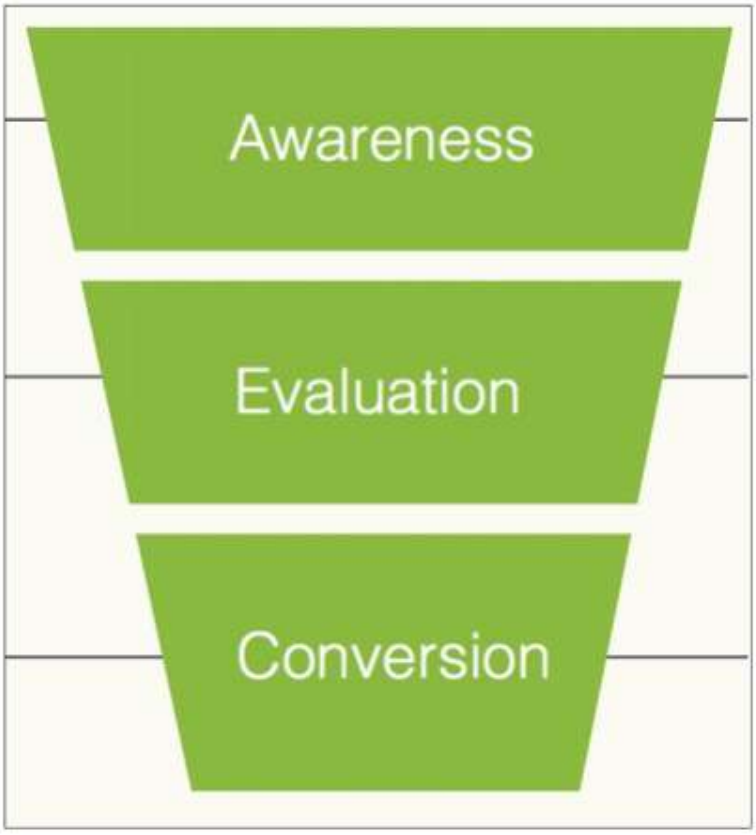
First, let's get clear on the six characteristics of perfect content marketing and why it's essential that you get started.

(**NOTE**: At the end of this chapter, you'll get access to a tool we use to make perfect content planning a breeze.)

## 1. Perfect Content Marketing is Full Funnel

I know this is Marketing 101 stuff, but stick with me for just a second before I get into the more advanced content marketing concepts we'll be covering.

For an ice-cold prospect to become a customer, they will need to travel through three stages:




*The 3 stages all prospects go through on their way to becoming a customer*

1. **Awareness –** The prospect must first become **aware** that there is a problem and that YOU or your organization have a solution for it. (This is where your blog excels.)

2. **Evaluation –** Those who move through the Awareness Stage must now **evaluate** the various choices available to them, including your competitor's solutions and, of course, taking no action at all to solve the problem.

3. **Conversion –** Those that move through the Evaluation Stage are now at the moment of truth—purchase. At DigitalMarketer, our goal at this stage is to **convert** leads into frequent and high-ticket buyers.

A cold prospect cannot evaluate your solution until they are first **aware** of the problem *and* your solution. And **conversion** is impossible until the prospect has first evaluated the possible courses of action.

To move a prospect through a marketing funnel, you need to give them content specifically designed to satisfy their needs at each of the three stages.

In other words…

- They need **content at the top of the funnel (TOFU) that facilitates awareness**.

- They need **content in the middle of the funnel (MOFU) that facilitates evaluation**.

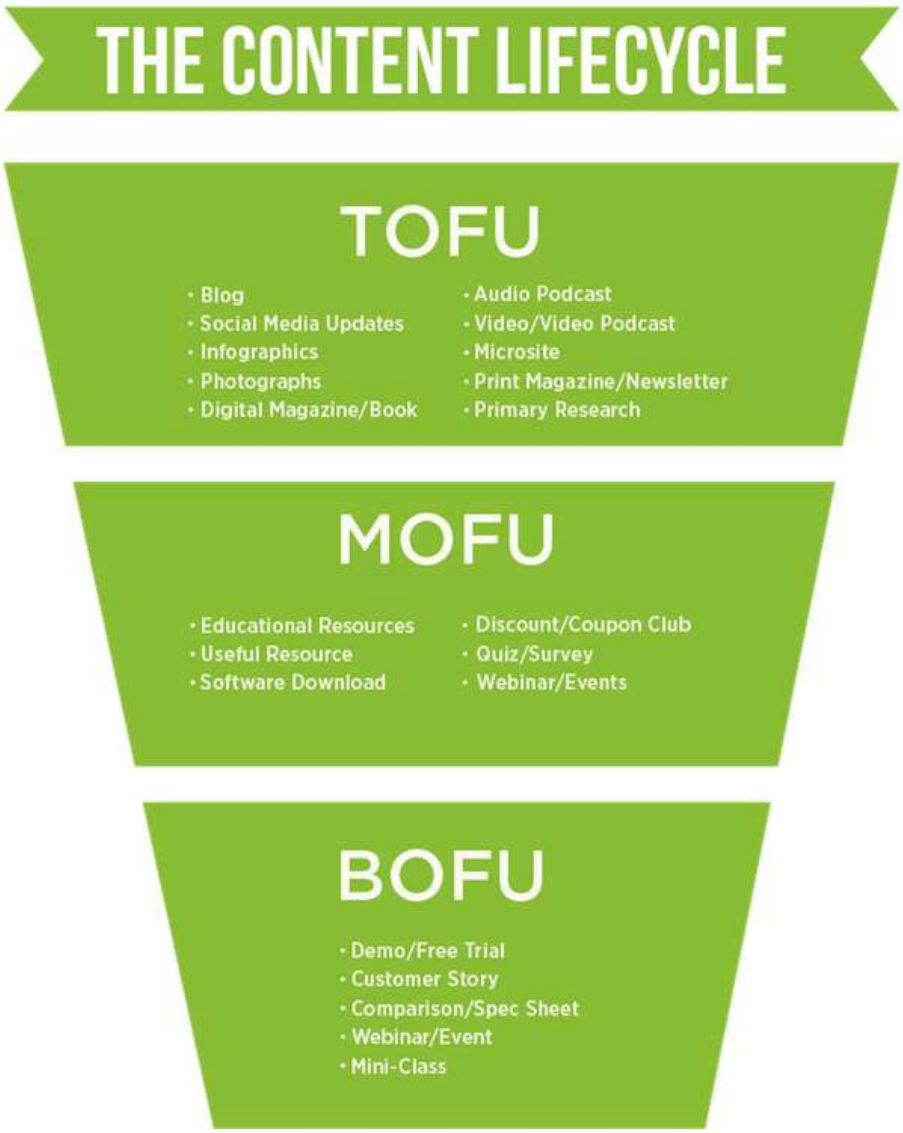
- They need **content at the bottom of the funnel (BOFU) that facilitates conversion**.

Make sense?

**Blogs are fantastic facilitators of awareness,** but they do a poor job of facilitating evaluation and conversion. And, at the risk of pointing out the obvious, evaluation and conversion are super critical to your business.

To move prospects through the middle (MOFU) and bottom of the funnel (BOFU) you'll need other content types.

It looks like this…




*We call this The Content Lifecycle.*

Let's look at each stage of the funnel and the content needed at those stages…

## Top Of The Funnel (TOFU) Content Marketing

The prospects entering the top of your funnel are completely unaware of your solution and, often, completely unaware of their problem.

As a result, you need content with a low barrier to entry—because at this stage, they have little to no motivation to put skin in the game (such as giving your contact information or money).

You need freely available content at the top of the funnel (TOFU) that…

- Entertains
- Educates
- or Inspires

… and you need to make it readily available using content types like:

- Blog posts
- Social Media Updates
- Infographics
- Photographs
- Digital Magazines/Books
- Audio/Video Podcasts
- Microsites
- Print Magazines/Newsletters (You'll need a bigger budget here.)
- Primary Research

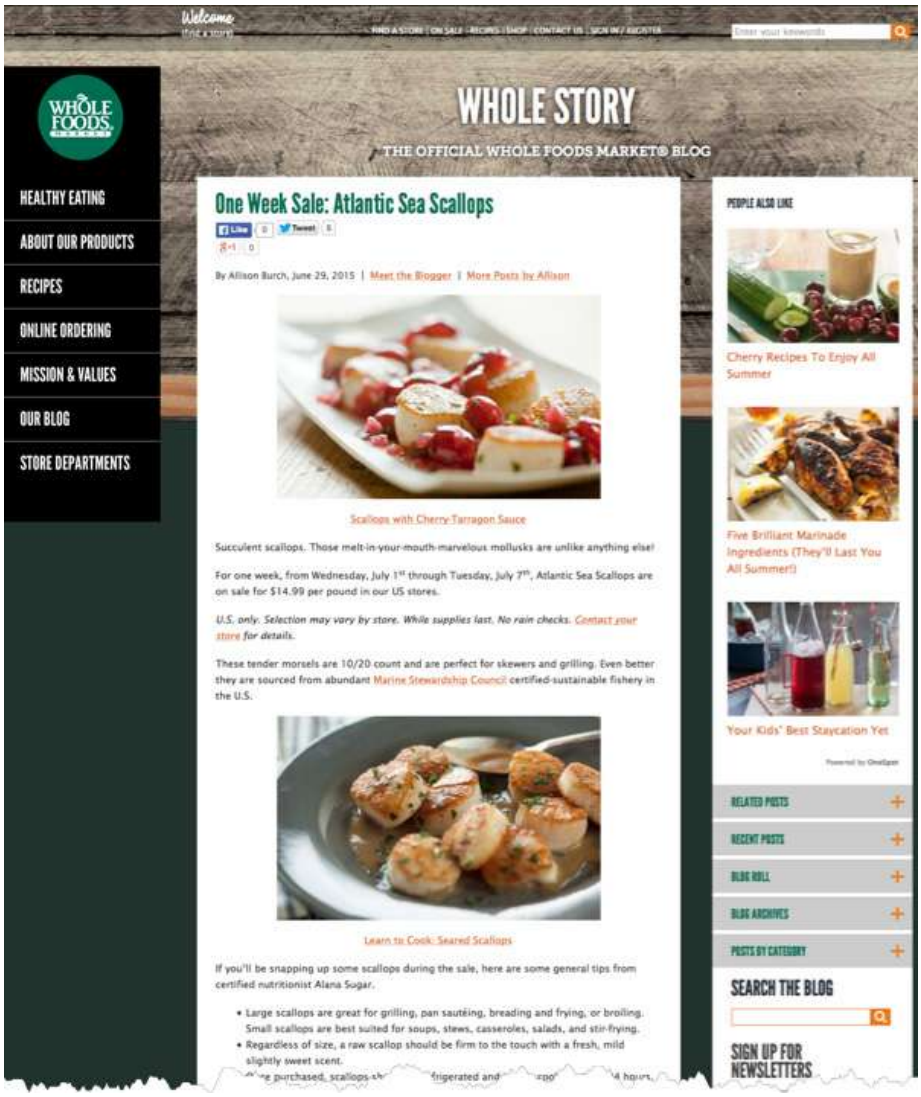
Do you need all of these content types at the top of the funnel?

Heck no.

Most businesses will post content to a blog and to social media channels like Facebook, Twitter, LinkedIn, Pinterest, etc. Once you've mastered these two content types, you'll want to add more top-of-funnel content to the mix, like a podcast or a print newsletter.

Remember, the big goal at the top of the funnel is to make prospects "problem aware" and "solution aware."

Notice how Whole Foods, using their Whole Story blog, raises awareness for a sea scallops offer while providing valuable content (recipes and cooking instructions):




*TOFU content raises awareness of your offers while providing valuable information.*

At DigitalMarketer we do that by providing educational content our prospects are interested in—and using that content to raise awareness of our training products and services.

*(Shhhhh… don't tell anyone, but this VERY chapter is educating you about the strategy and tactics taught in our Content Marketing Mastery Certification.)*

And the good news is it works in any industry for any type of product.

Notice how this kitchen remodeling company uses photographs of remodeled kitchens to make prospects "problem aware" and "solution aware":




*With TOFU content, you want to create awareness around problems as well as solutions.*

Unfortunately, the top of the funnel is where most organizations begin and end their content marketing efforts.

Smart content marketers know that, with a bit more effort, they can move prospects from awareness to evaluation in the middle of the funnel.

Here's how it gets done…

## Middle of the Funnel (MOFU) Content Marketing

The big goal in the middle of the funnel is to convert "problem aware" and "solution aware" prospects into *leads*.

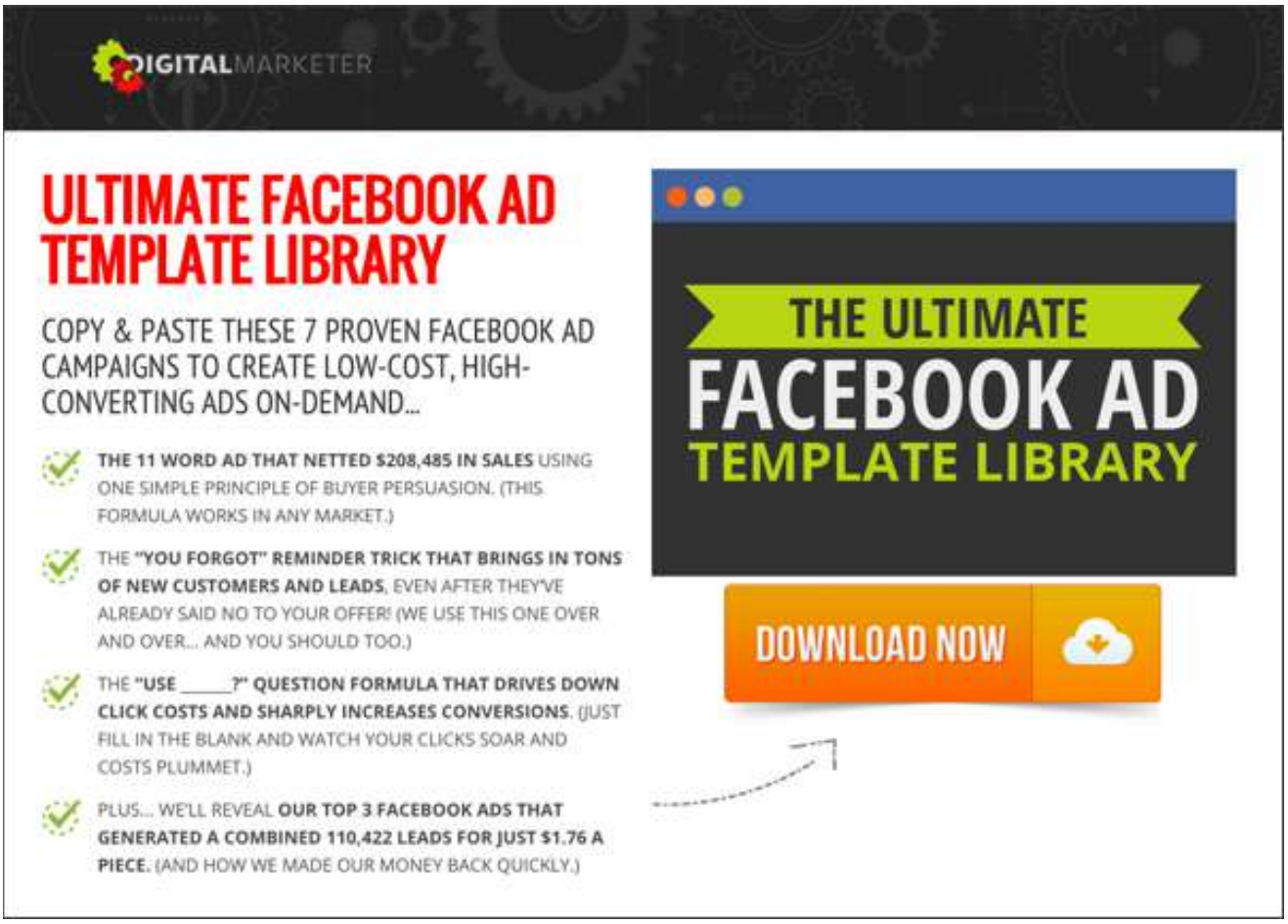
Here, we use free content to incentivize prospects to submit their contact information and opt in to receive future marketing.

We call this type of content a Lead Magnet.

Lead Magnets can be…

- Educational Resources (Case Study, White Paper, etc.)
- Useful Resources (Swipe File, Checklist, etc.)
- Software Downloads
- Discount/Coupon Clubs
- Quizzes/Surveys
- Webinars/Events

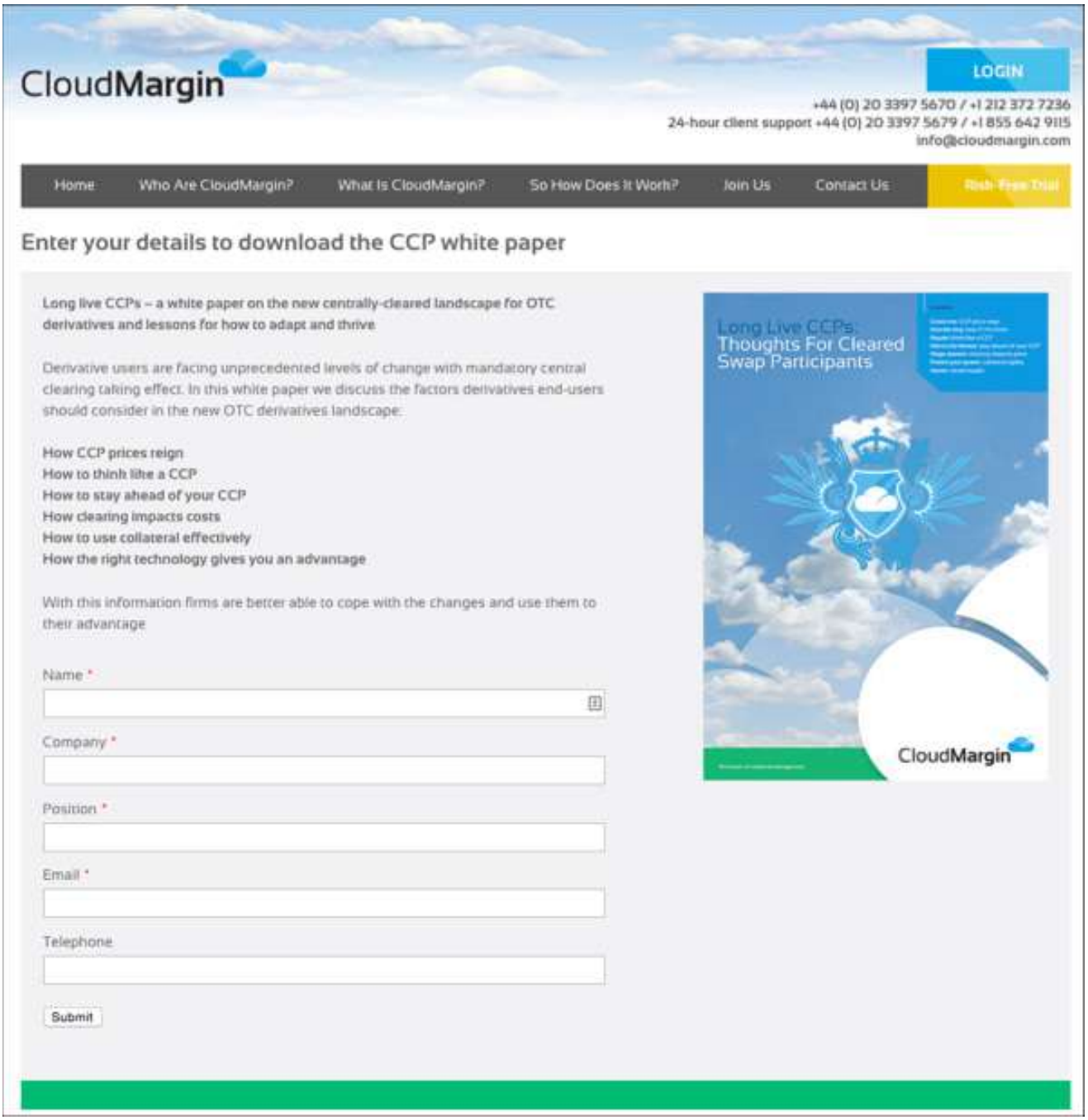
This is a Lead Magnet that DigitalMarketer uses to generate leads for our products surrounding Facebook advertising:




*Lead magnets are free content that incentivize prospects to opt in to your list, becoming leads.*

When visitors click on the "Download Now" button, they're prompted to enter their email address to receive the piece of content.

This piece of content (a white paper) from Cloud Margin generates "solution aware" leads…




*A white paper or report creates "solution aware" leads.*

But you can't deposit leads in the bank.

A third content type is required at the bottom of the funnel (BOFU) to convert leads into customers…

## Bottom of the Funnel (BOFU) Content Marketing

OK, it's point of sale time.

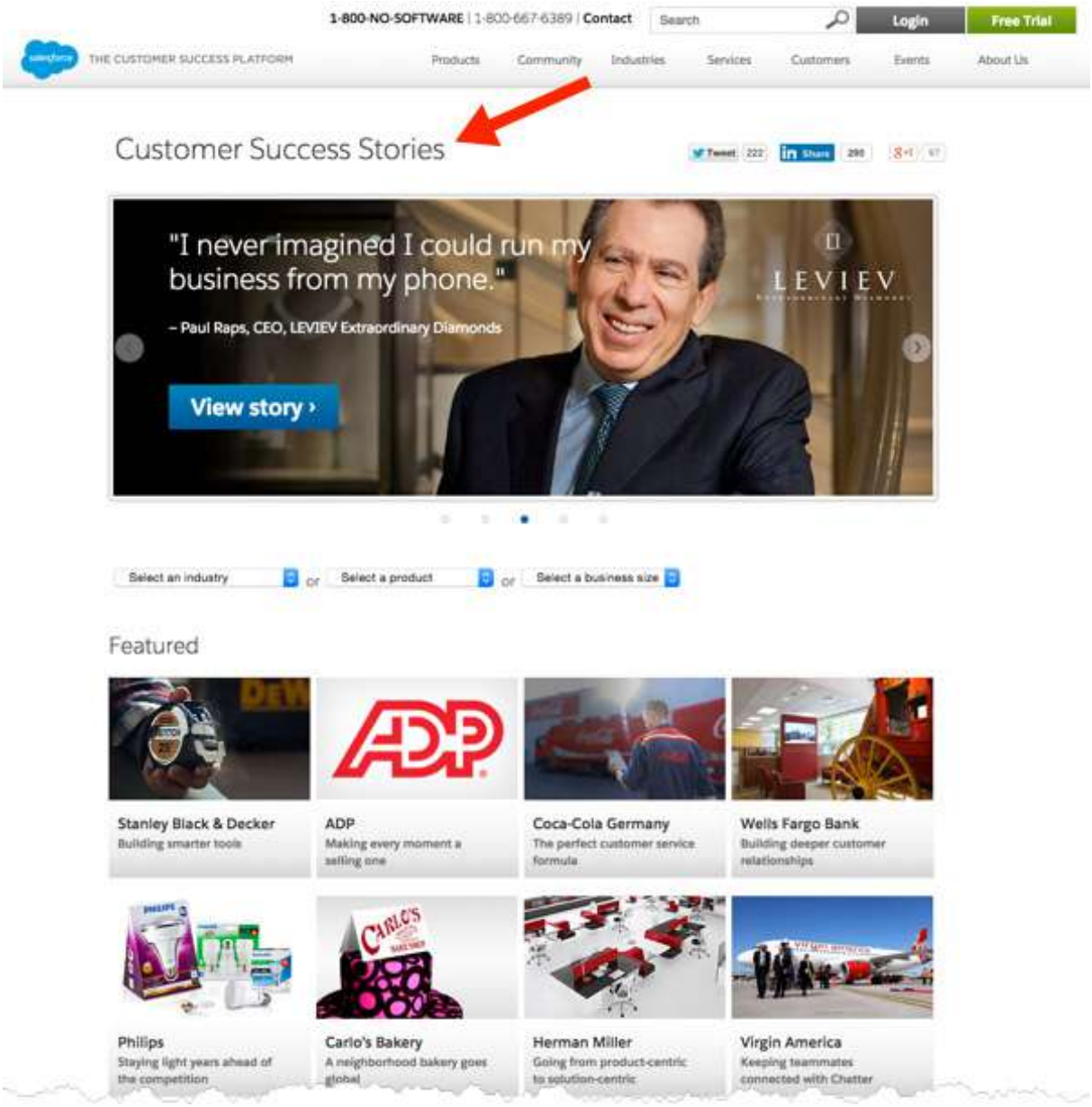
What types of content will your new lead need to make an informed purchase decision?

Here are a few…

- Demos/Free Trials
- Customer Stories
- Comparison/Spec Sheets
- Webinars/Events
- Mini-Classes

Your lead may be reading your blog and downloading lead magnets (and it will help convert her), but you'll need content that helps her decide between you and your competitor to move her through to purchase.

Notice how Salesforce supplies leads in the bottom of the funnel with plenty of customer stories to prove that their product can handle that lead's circumstances…




*Customer success stories are smart BOFU content.*

Salesforce.com has dozens of these customer stories—one for every major industry, product offering, and size of business.

Customer stories are content that converts, and they are the responsibility of the content marketing team.

Consider this piece of content designed to assist prospective Quickbooks customers in choosing the right solution:



The QuickBooks Online Difference

| | QuickBooks Online† | QuickBooks Desktop† |
|---|---|---|
| Create professional invoices | ✓ | ✓ |
| Track sales and expenses | ✓ | ✓ |
| Manage accounts payable | ✓ | ✓ |
| One-click sales and tax reports | ✓ | ✓ |
| Automatically schedule and send invoices | ✓ | |
| Work from PC, Mac, smartphones, or tablets at any time[4] | ✓ | |
| Instant file access for accountants[5] | ✓ | |
| Connect to 300+ cloud-based apps[7] | ✓ | |
| Automatically download your bank transactions[2] | ✓ | $10 – $15 per month avg. |
| Phone support[3] | ✓ | $299 per year |
| Automatic back-up with bank-level security[6] | ✓ | $9.95 per month |
| Access to latest product and feature updates | ✓ | $249 annual upgrade |
| Cloud access (hosting)[7] | ✓ | $40 – $200 monthly per user |
| Access for up to 5 users[8] | ✓ | Requires 5-user license |

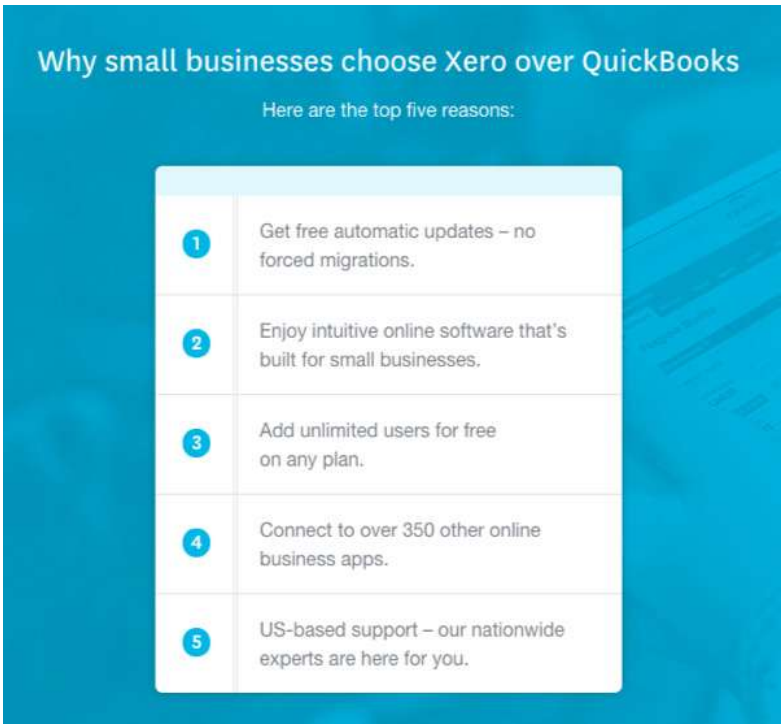
*At the bottom of the funnel, prospects are comparison shopping, so comparison sheets make smart BOFU content.*

But Quickbooks could earn some points by comparing their tools to their competitors' tools as well. For instance, a Google search suggests that a comparison sheet between Quickbooks and their competitors (such as Xero) is another piece of content that should be on the radar of the Intuit content marketing team.



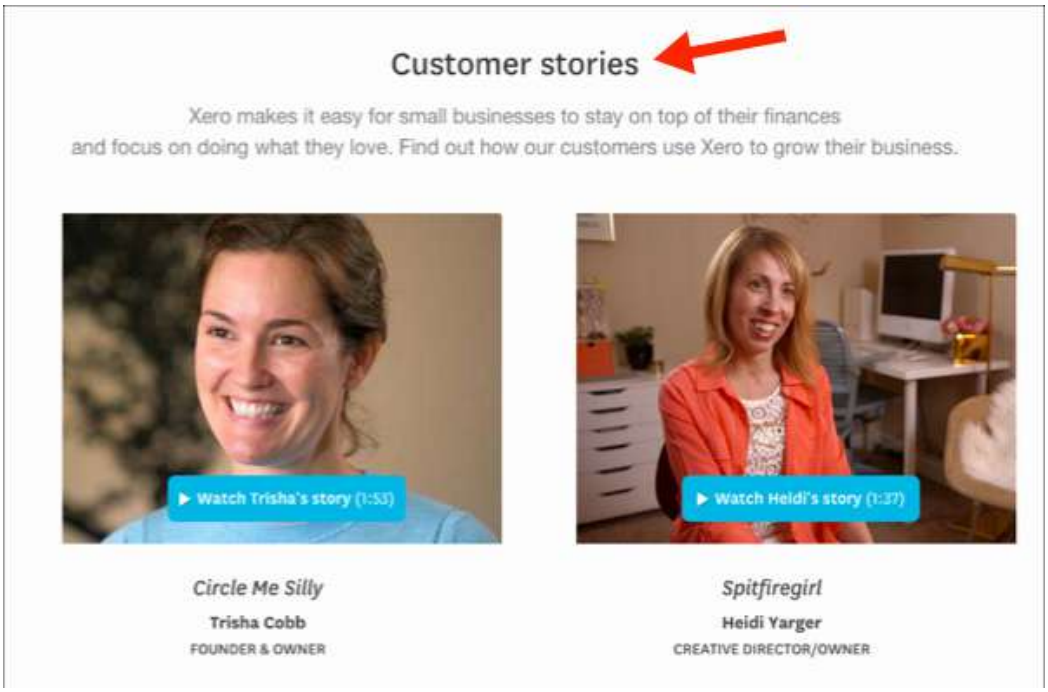

*Google's suggestions are a good source for content ideas.*

And while we're at it, look at all the bottom-of-funnel (BOFU) content Xero's content marketing team has built:




*Brand comparisons are good BOFU content.*

And…




*Customer stories are great BOFU content.*

And…




*The best BOFU content answers last-minute questions and gives prospects a reason to buy.*

Is creating top of funnel (TOFU) content on a blog important?

Absolutely.

But failing to build a full-funnel content plan will leave you disappointed in your content marketing results.

## 2. Perfect Content Marketing Is Intent-Based

Some businesses and marketers get hung up on the wrong metrics, particularly when it comes to their blog.

Take a look at this video to see what I mean:




The key to perfect content marketing is understanding *existing* intent and anticipating *future* intent, and then, creating the content "assets" needed to address that intent 24 hours a day, 7 days a week.

In our Freshbooks example, a customer who's deep in the funnel might have the intent to compare Freshbooks to Quickbooks.

This content asset addresses that intent:



## Accounting Purpose-Built for Small Business Owners

Frustrated by slow, bloated accounting software? FreshBooks is easy to use, backed by award-winning support and loved by millions.

| | FRESHBOOKS cloud accounting | QuickBooks |
|---|---|---|
| Invoices, expenses, and reports | ✔ | ✔ |
| Web and mobile access | ✔ | ✔ |
| Free online and phone support | ✔ | ✔ |
| Designed for service-based small business owners | ✔ | ✘ |
| Built-in time tracking features | ✔ | ✘ |
| Project tracking | ✔ | ✘ |
| Multi-currency billing | ✔ | ✘ |
| Late payment reminders | ✔ | ✘ |
| Award-winning customer support | ✔ | ✘ |
| Industry leading customer happiness score | ✔ | ✘ |
| Free trial period | 30 Days | 30 Days |
| Paid plans start at | $9.95/month | $12.95/month |

* All prices in USD

*To come up with valuable content assets, anticipate current and future needs.*

And you'll have to run paid traffic to your content to maximize your results or you risk leaving money on the table as Molly explains:




The truth is the most lucrative content assets you'll create (if you have an existing business) are assets that meet intent at the bottom and middle of the funnel. Optimize for this existing bottom and middle of funnel intent before going to work on generating awareness at the top of the funnel with an expensive and time-consuming blog roll out.

That's not to diminish the power of a business blog. Over the last 24 months, we've been adding content assets (articles and podcasts) at the top of the funnel and we've increased website traffic (think awareness) by 1053%.

That said, the quick wins in the content marketing game are in the middle and bottom of the funnel.

## 3. Perfect Content Marketing Is Ascension Focused

Failure to provide an ascension path from every piece of content you create isn't just bad marketing—it's a bad user experience.

Smart content marketers anticipate the next logical intent and **remove as much friction as possible to create a clear path to conversion**.

For instance, let's say I'm shopping for supplies to repaint my kitchen…




In our Freshbooks pricing page example, notice that Freshbooks has created a clear ascension path to a "Risk-Free Trial" of the software.

In blog content, prospects can be given the opportunity to opt-in with their email address to get more information about a topic.

Check out this ascension offer embedded in a blog post. Clicking on this banner ad will take the prospect to a landing page to enter their email address and ascend to a lead:




*Ascension offers can be embedded in your blog posts.*

They get more information about a topic they are interested in. You get a lead.

## 4. Perfect Content Marketing is Segmented

You can run surveys and polls until you're blue in the face. But you won't know what people are truly interested in until they give you their money or time.

When a prospect visits a piece of content (spends time) they have raised their hand and indicated interest. And, because of the magic of ad retargeting you can follow up with these prospects with a relevant ascension offer without even acquiring their contact information.




*Retargeting blog visitors can help you create segmented leads.*

## 5. Perfect Content Marketing Is Cross-Channel

Perfect content marketers publish content that meets intent in any channel where groups of prospects are searching for and sharing content including:

- Website/blog
- Facebook
- Twitter
- LinkedIn
- Pinterest
- YouTube

Chances are a single content asset could be published across numerous channels to maximize exposure.




For instance, could that video demo of your product be republished on your YouTube channel like Cuisinart has done here?



(If you're wondering, *"Who in the hell would watch that boring video?"* the answer is anyone who is interested in buying a coffee grinder and, particularly, anyone interested in buying THAT coffee grinder. Anecdotally… I bought that coffee grinder after watching that demo just a few weeks ago. The grinder does a great job grinding coffee and that video does a great job at cross-channel content marketing at the bottom of the funnel.)

Can that article on your blog be repurposed as a webinar? Can that podcast become a written article for LinkedIn Pulse?

## 6. Perfect Content Marketing Is Avatar-Based

Last, but certainly not least, perfect content marketing assets are produced to satisfy the intent of your customer avatars. A content asset can satisfy the intent of multiple avatars or it can be published to target a single avatar.

At DigitalMarketer, for example, we produced an article to raise awareness (top of the funnel) for our marketing certification programs. This article was specifically targeted to our "Employee" avatar who has the intent of acquiring skills that will land them a better job.




*Our goal for this article was to raise awareness for our marketing certification programs, so it was targeted to our "Employee" avatar.*

## Content Marketing Planning: The Content Campaign

To execute perfect content marketing, you need a plan.

At DigitalMarketer, we make this plan at the offer level using a spreadsheet called a Content Campaign Plan.

The planning document includes fields for:

- **Marketing Funnel** – Is this asset addressing intent at the top, middle, or bottom of the funnel?
- **Avatar** – Which avatar(s) will this asset target?

- **Vehicle** – Will this be a text, image, video, or audio asset?
- **Channel** – Where will this asset be published?
- **Ascension Path** – What call-to-action will be used in this asset?

The Content Campaign Plan is used to align content marketing with business objectives like generating leads and sales.

It looks like this (I know that's hard to read, but you can access the template by clicking here).

| SOCIAL CERTIFICATION | AGENCY OWNER | EMPLOYEE | FREELANCER | BUSINESS OWNER | | | |
|---|---|---|---|---|---|---|---|
| AWARENESS | ASSET C, E | ASSET B, C, E | ASSET C, E | ASSET C, E | | | |
| EVALUATION | ASSET D, F | ASSET D, F | ASSET D, F | ASSET D, F | | | |
| CONVERSION | ASSET A, G | ASSET A, G | ASSET A, G | ASSET A, G | | | |
| | | | | | | | |
| ASSET | DESCRIPTION | AVATAR(S) | VEHICLE(S) | CHANNEL(S) | OWNER | ASCENSION | |
| ASSET A | Product Comparison Chart - a matrix that outlines the specifications and pricing of our products. | Agency, Employee, Freelancer | Image | Website | Russ | Cert Sales Page | |
| ASSET B | Growing fields and marketing skills that can lead to a "recession proof" career. | Employee | Text | LinkedIn Pulse/Blog | Suzi | Cert Sales Page | |
| ASSET C | 6 Phases of Social Distribution (Splinter, Visualize) | Agency, Employee, Freelancer | Text | Blog/YouTube/Slideshare | Lindsay/Matt | Social Media Audit | |
| ASSET D | Ultimate Social Media Swipe File | Agency, Employee, Freelancer | Text | Website | NA | DM Lab > Social Media Certification | |
| ASSET E | Social Media Topic Map | Agency, Employee, Freelancer | Text/Video/PDF | YouTube/Slideshare/Blog | Russ | Social Media Audit | |
| ASSET F | Social Media Audit | Agency, Employee, Freelancer | Text | Lead Magnet | Russ | DM Lab > Social Media Certification | |
| ASSET G | Social Media Mastery Product Description | Agency, Employee, Freelancer, Business Owner | Text | Sales Page | Russ/Dennis | Social Cert Order Form | |

*DigitalMarketer's Content Campaign Plan*

Want to create content that converts prospects at all stages of the funnel? Create a Content Campaign Plan and execute on it. It works.

## Your Content Marketing Success Metrics

How do measure the success of your content marketing tactics?

### Traffic by Channel

At the top of the funnel, design your marketing to raise awareness for your business, brands, and products. Measure traffic from channels like Google, Facebook, and Twitter.

### Net New MQL's

Measure the number of leads generated in the middle of the funnel that require further nurturing before they are ready to make a purchase.

### Conversion Rate

When content marketing is done correctly, it generates traffic to lead forms and product pages. Measure the conversion rate (Page Visits/Conversions) on lead forms, product pages, and other calls-to-action.

### Net New SQL's

Measure the number of leads consuming content at the bottom of the funnel (demos, customer stories, etc.), indicating they're ready to buy.

### Relevant Roles in Content Marketing



Who in your organization should be trained in email marketing?

Three different departments should be proficient at and understand the role of email marketing.

### Marketing

Content marketing is a foundational discipline affecting your search, social, email, and advertising. Every marketer involved in your digital strategy should be well versed in content marketing.

### Sales

According to Harvard Business Review, the average buyer is 57% of the way through the sales process before they engage with a sales representative.

Instead of contacting your sales team your prospects are consuming your content. Sales people who understand content marketing can work in conjunction with your marketing team to create content that closes deals.

### Public Relations

The modern-day PR team must understand how the content they produce fits into the larger content, social, and search marketing strategy.

## The Lingo You'll Use as a Content Marketer

What are the terms you need to know as a content marketer?

### Top-of-Funnel (TOFU) Content

Content designed to raise awareness for your business, brands and products. This content is delivered through a number of channels including blogs, podcasts and video hosting platforms like YouTube.

### Middle-of-Funnel (MOFU) Content

Content designed to generate leads and move the prospect through the evaluation stage. Content in the middle of the funnel often takes the form of a Lead Magnet.

### Lead Magnet

An irresistible bribe offering a specific chunk of value to a prospect in exchange for their contact information. The goal of the Lead Magnet is to maximize the number of targeted leads you are getting for an offer.

### Bottom-of-Funnel (BOFU) Content

Content designed to convert a prospect into a customer by providing the information needed to make an informed purchase decision. Bottom of funnel content includes webinars, product demonstrations, and customer stories.

## Summing Up

Content marketing isn't restricted to blogging. You'll probably create tons of blog posts, but if you're strategic, you'll use your blog as just one channel in your content campaigns.

Remember, content marketing works with your other digital tactics in a comprehensive marketing plan designed to move people deliberately through your Customer Value Journey.

Don't forget to download the Content Campaign Plan, which is your best resource for planning content for every stage of the funnel: TOFU, MOFU, and BOFU.

Then, once you've got your content assets built, you're ready to learn how to use digital advertising to drive traffic and conversions.

## Become a Content Marketing Specialist




Content marketing is an essential aspect of any modern digital marketing strategy. In this mastery course, you'll learn to execute a "full funnel" content strategy that transforms ice cold prospects at the top of the funnel (TOFU) into loyal buyers of even your most expensive products and services at the bottom of the funnel (BOFU).

You'll learn:

- How to create your Customer Avatar so you can architect a content strategy that attracts leads and buyers.
- Choose from 12 goals, 16 metrics, and 21 different types of content to create a content strategy that is laser focused on moving the needle for your organization. (Building this content plan is a snap using our Content Marketing Plan worksheets.)
- The "GC = A" Content Marketing Formula that connects the dots between content and sales.

**Click Here to Learn More »**




CHAPTER 03:

# CRAFTING A DIGITAL ADVERTISING PLAN

DIGITALMARKETER

CHAPTER
# 03

One of our biggest challenges as digital marketers is traffic.

How can we easily and affordably get people's attention, push them to our websites, and convert them to subscribers and customers?

The secret is digital advertising. And if you understand how to make it work, it can give you full control over your traffic flow and help you sell more too.

In this chapter, you'll learn the process for planning, setting up, and optimizing your ads, including the metrics you need to watch, the lingo you'll use as a media buyer, and the people in your business who should be responsible for digital advertising.

But before we start, let's get clear about why paid traffic is a smarter investment than organic.

## The Difference Between Paid and Organic Traffic

Free traffic is always the goal, right? Which is why most businesses aim for organic traffic first. After all, if you can get a steady flow of free traffic, you'll pocket the savings.

But as with everything else in life, you get what you pay for.

The easiest way to explain that is with a simple comparison: the water hose versus the rain.

Paid traffic is like a water hose. You have complete control over the direction it's pointed, the amount of water pouring from it, and how long you let the water flow. You can turn it on and off whenever you want.

If you're getting more traffic than you need, with paid traffic, you can slow the flow. You have control of where it's going, how fast, and when.

Organic traffic, on the other hand, is more like rain. You aren't sure when or if it will come, how consistent it will be, nor how long it will last. Listen to the weather channel all you want. You have no control.

With organic traffic, you can lose traffic if Google changes their algorithm. If a competitor has a huge launch, you could lose traffic to them. You also have no control over where the traffic goes. Even simple things like changing the URL of your landing page can mess things up.

You can enjoy all the control of paid traffic without it actually costing you anything. You do that by building funnels that reimburse your ad spend.

So in essence, you can acquire customers for free, and then once your advertising costs have been reimbursed, use simple tactics to build loyalty and optimize your customers' lifetime value.

Better still, it's not an either/or proposition.

The better your paid traffic is, the better your organic traffic will be as well, because good advertising drives traffic—and the pages that get lots of traffic tend to rank higher in search engines.

That creates an upward spiral of traffic acquisition. A win-win, if you will.

But it's important to be realistic. You just can't run one traffic campaign and expect it to magically deposit a million dollars in your bank account.

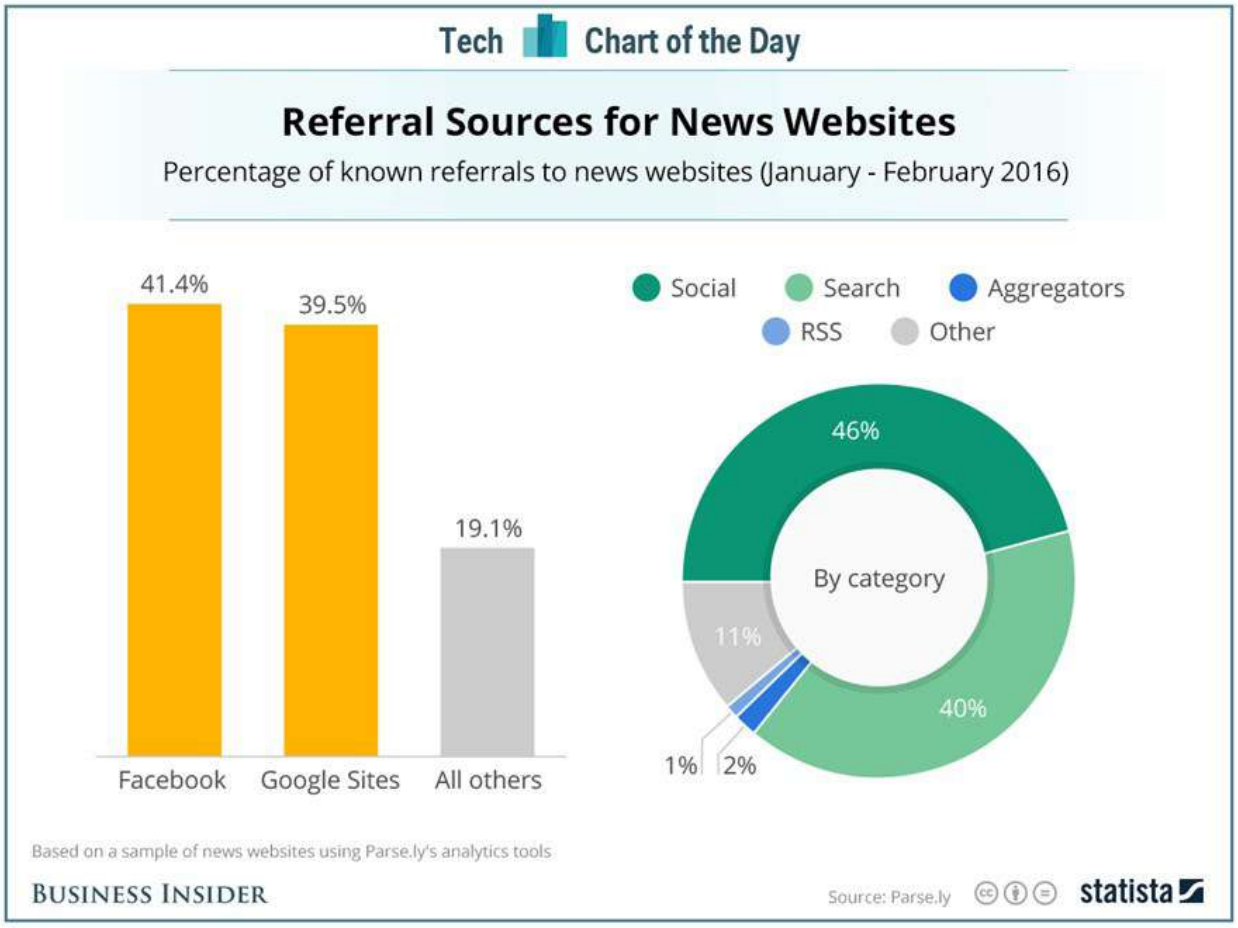
If you want a constant flow of leads and customers for your business, you must look at this as a system.

## Top 3 Sources for Paid Traffic

Some of the best platforms for paid traffic are Facebook, Google, YouTube, Pinterest, LinkedIn, and Twitter.

But to know which one is right for you, you need to know where your customers hang out and which ad platforms are suited for the type of marketing you do.

In most cases, you'll probably start with Facebook and Google. According to Business Insider, these two sites drive 80% of referral traffic, more than all the other platforms combined.




*Facebook and Google are your top sources for paid traffic*

But again, it depends on what you're trying to do.

## Google Is Like the Yellow Pages

Because Google is a search engine, people start there when they're looking for information. So it's a lot like the Yellow Pages.

To drive traffic through Google, you'll bid on keywords that will help people find you and can lead to an ideal sales conversation.

## Facebook Is Like a Billboard

Scrolling through your Facebook newsfeed is a bit like driving down the highway. As you scroll, you see ads, promoted posts, as well as random comments.

And if you, as a business, are willing to pay, your message will also appear in the newsfeed of your target audience.

With Facebook, you can spend as little as you want and still expand your reach.

Because it's a social platform, and because they collect data on our behavior every day, they know a lot about us. All that data makes them the most powerful ad platform available today.

Target your ads precisely enough, and you're sure to get the right eyeballs on your message.

## YouTube Is Like Television

YouTube's top metric is the number of minutes watched. Their goal is to keep you on the site consuming videos, so they operate a lot like traditional television, playing ads in the videos, interrupting people's viewing.

Disruptive, yes, but with YouTube, your ads are always relevant.

That's because you can target your ads based on the YouTube channels your audience likes, the types of videos they watch, and what they're searching for.

So what are the top 3 paid traffic sources? What's the best place to start with your paid traffic campaigns?

Facebook, Google, and YouTube: All three will give you quality traffic from people who are interested in your offers.

Okay, that gives you a good background for the strategy we're about to discuss. Let's dig into the methods you'll use to execute a winning ad strategy.

## Methods of Well-Executed Digital Advertising

We've established that paid traffic is your best (and most cost effective) way to drive traffic. Now let's talk about how to create ads that magnetically attract your best customers.

**NOTE**: We'll focus primarily on Facebook advertising here, but you can apply this same process to whatever platform you're using.

### Two Concepts for Evaluating Your Target Audience

How do you know the type of ads you should be running and how to precisely target those ads? It comes down to 2 foundational concepts: the customer journey and traffic "temperature."

### Concept 1: The Customer Journey

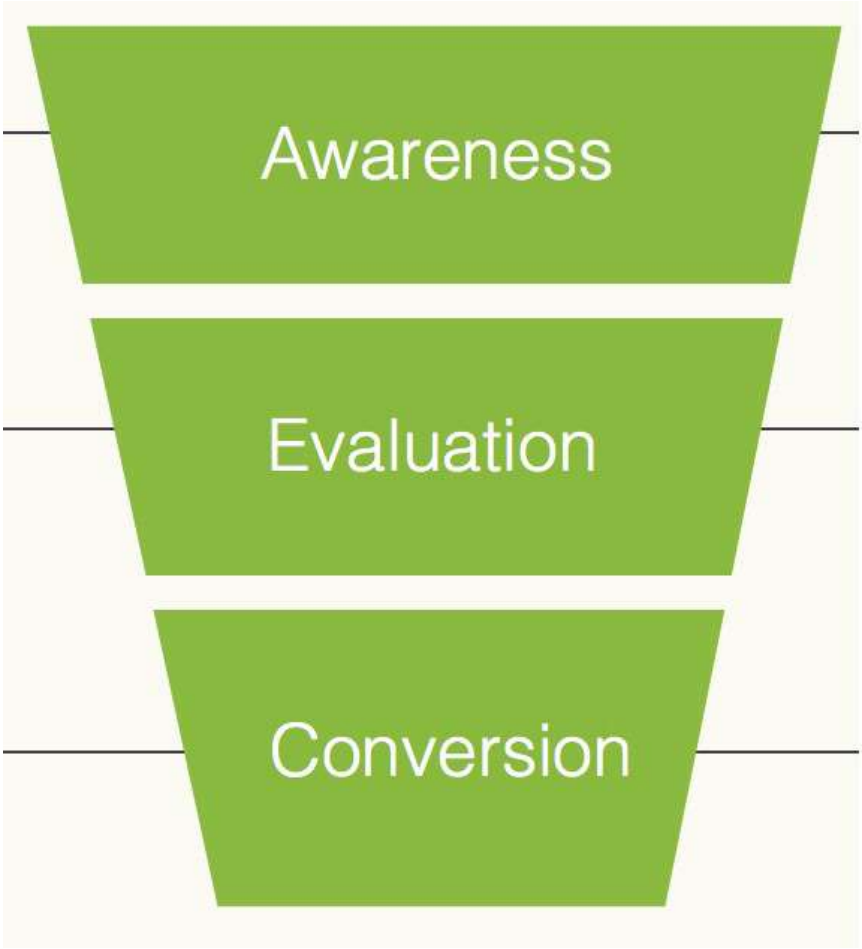
The Customer Value Journey, remember, is the path people follow as they build relationship with your business, from first touch to final sale.

The three core stages of this Journey are:

**Awareness.** This is the top of the funnel, when new prospects first discover your brand exists and that you can help them solve their problems.

**Evaluation.** This is the middle of the funnel, when prospects are seriously considering making a purchase. Their biggest question is whether you're the best source.

**Conversion.** The is the bottom of the funnel, where people take action and buy something from you.

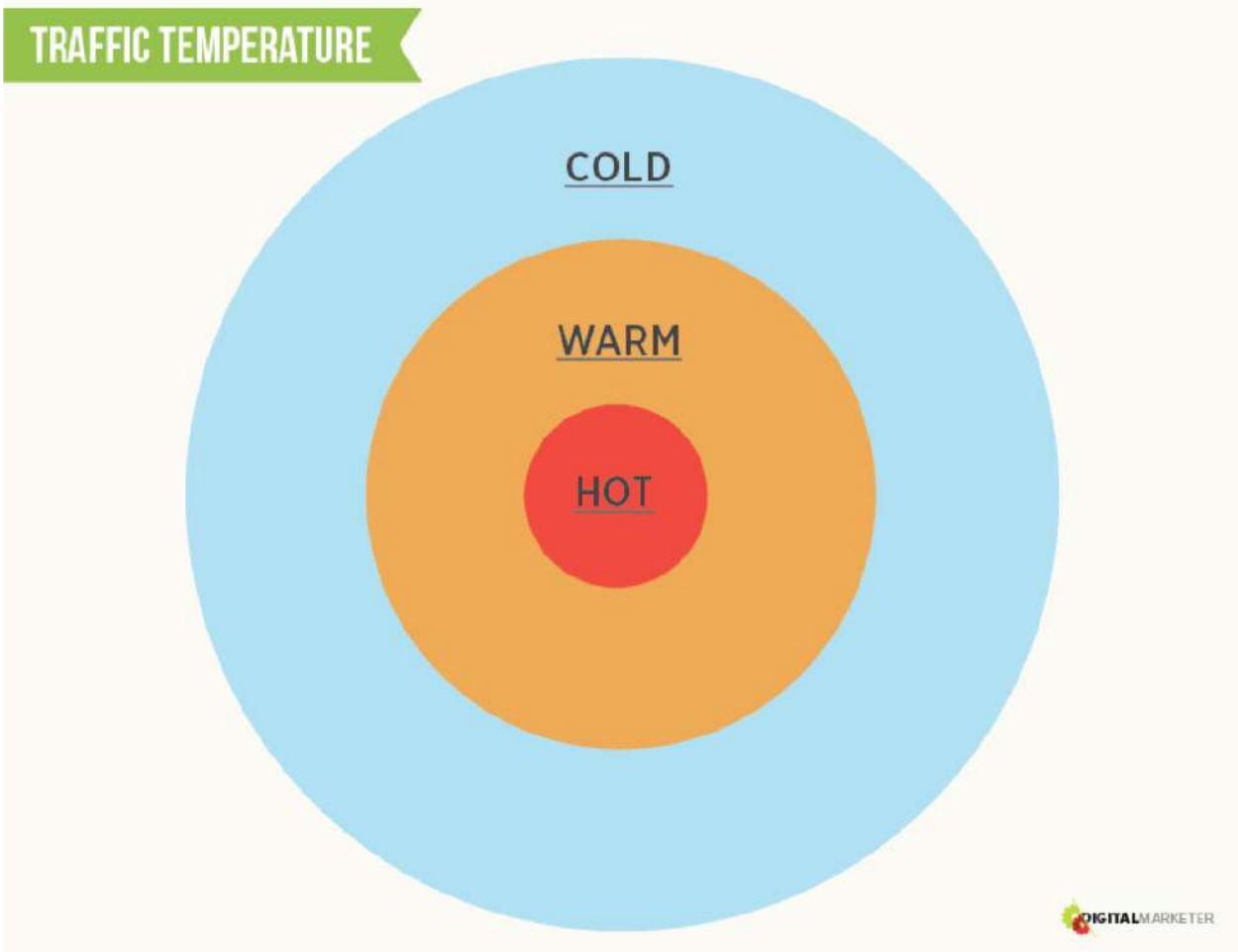



*The 3 stages of the Customer Journey*

## Concept 2: Traffic Temperature

At each stage of the Customer Journey, your audience has a different relationship with you. At the top of the funnel, they barely know you and may not even know what you do. But as they move through the funnel, they learn more about you and become more committed and loyal.

You might say, they "warm up to you." Which is why we refer to this deepening relationship as "traffic temperature."




*Traffic comes in 3 distinct "temperatures," and each aligns with a different stage of the Customer Journey.*

**Cold Traffic.** Generally, this is new traffic from people who are in the Awareness stage. These people are good prospects for your business but have never heard of you or your brand.

Your goal with cold traffic is indoctrination. You want to introduce your business to new audiences and get them coming back for more.

**Warm Traffic.** Warm traffic comes from people who know who you are but haven't bought anything yet. It aligns with the Evaluation stage.

Your goal with warm traffic is acquisition, to convert a site visitor into a lead.

**Hot Traffic.** Hot traffic comes from people who are at the Conversion stage. These are your buyers, people who are ready to buy or have already bought something from you.

Your goal with hot traffic is monetization, to sell a high-dollar product to your best customers.

**Ultimately, your goal is to move people from cold to hot**, transforming new leads into loyal customers, willing to buy from you over and over again.

You do that by matching your message to a prospect's temperature.

With cold traffic, you don't necessarily offer a sale. You'll spend more time building relationship. Whereas with hot traffic, the relationship is secure. You speak more as a friend, and you make offers based on the topics you know they're interested in.

Believe it or not, these 2 concepts alone will massively improve your ability to create successful traffic campaigns. Simply relating to people based on their temperature, you'll build trust and engagement.

Now let's move to the 5 elements that make up a winning ad campaign.

## The 5 Elements of a High-Performing Campaign

Every ad campaign is made up of 5 key elements: the offer itself, the ad's copy and design (which we call the "creative"), the ad scent (the cohesive look and feel of your overall campaign), and the targeting, or who you pitch your offer to.

### 1. Your Offer

Your offer is *not* the same thing as your product or service. **Your business is built around a product; your ad campaign is built around an offer.**

So what is an offer? It's the unique combination of your product or service with other bonuses or add-ons, including all the details of your promotion:

- The deliverables
- The price
- The schedule
- How it's being delivered
- And more

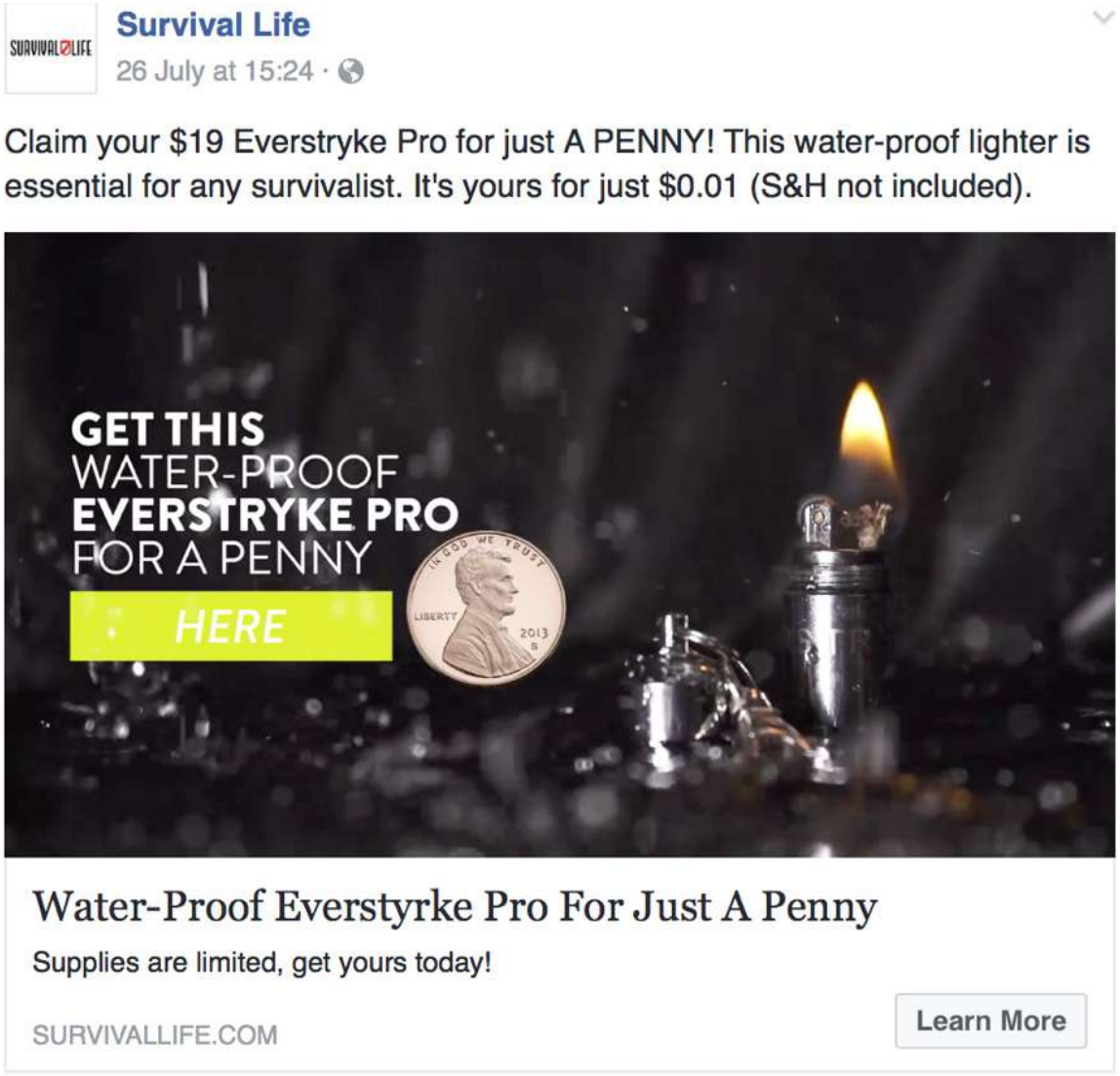
So you may only have one product, but you can offer it for sale in a variety of ways, creating hundreds of different offers.

This example, for instance, offers a coupon for big savings on your first visit:




*Coupons make great offers based on saving money.*

This one, from Survival Life, offers a valuable product for just a penny:




*Another appealing offer: a valuable product at a huge cost savings.*

Your offer is also the starting point for your ad campaign. Get it right, and everything else will usually fall into place.

But the opposite is just as true: put together a bad offer, and your ad won't convert.

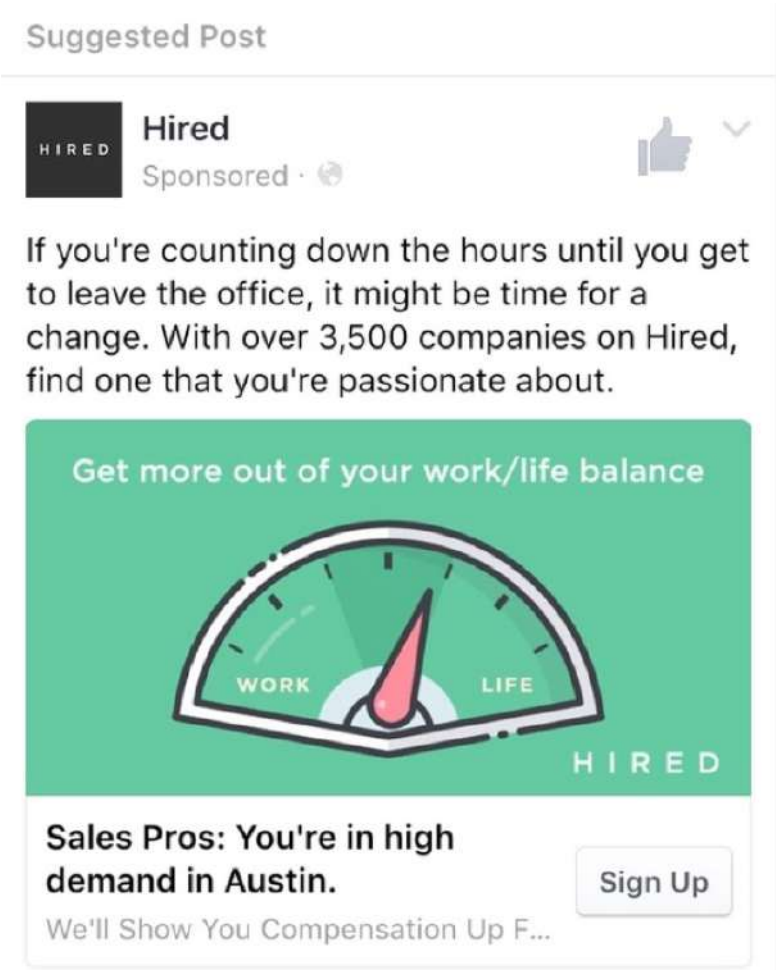
## 2. Your Copy

Your ad copy refers to the messaging you use in your ad campaign. It should be clear and compelling, so the benefits stand out—both the benefits of engaging with the ad and of taking whatever action you're asking for.

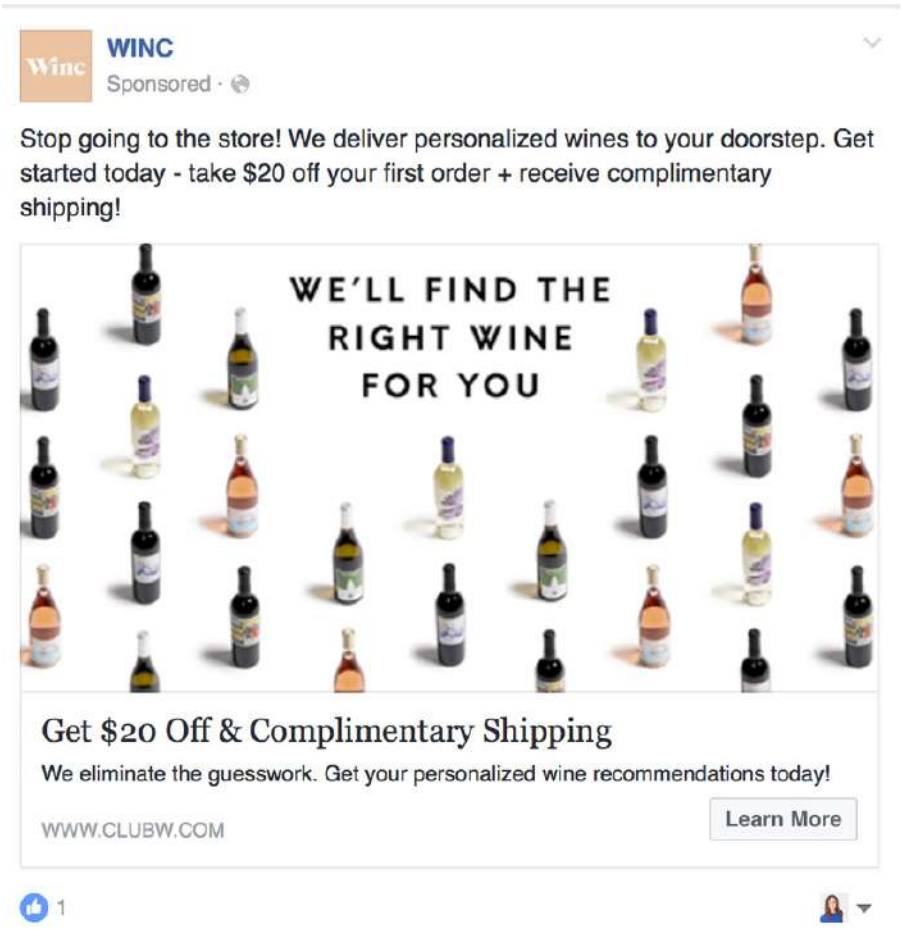
Good copy has a strong emotional hook. It's intriguing and persuasive without relying on hype.

Generally, you want to start your ad by speaking to a pain point your target is dealing with. Then your offer should be presented as the solution.

This Hired promotion leads with the problem: "counting down the hours until you get to leave the office." If someone resonates with that problem, they'll be eager to see the solution.



Or take this example from WINC:




*If going to the store is a pain point, they hook your interest in the very first line.*

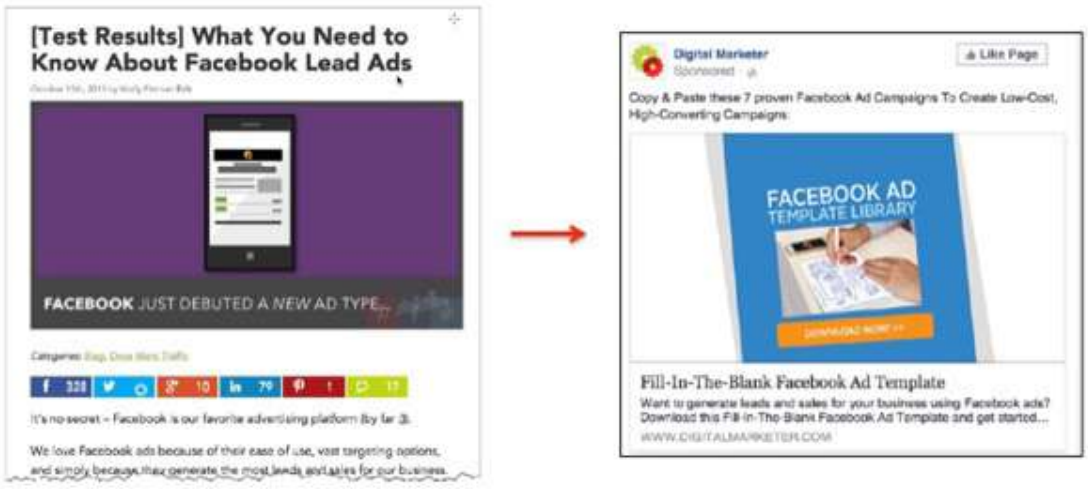
### 3. The Creative

Creative refers to the graphic elements of your ad: the image, video, or carousel images.

Don't be fooled by the term "creative." It doesn't have to be overly imaginative. Good creative communicates your message visually in just a second or two. So it supports and enhances your copy.

Here at DigitalMarketer, we like to be literal with our ad creative. Whenever possible, we visually display the offer, so people know at a glance what the deliverable is.

Take this ad as an example. The article we promoted the offer in is on the left, and the resulting ad is on the right.




*Your creative should communicate your message visually in 1-2 seconds.*

Or this one where we promoted our 60-Second Blog Plan:




*"Literal" creative communicates clearly.*

In both cases, the creative is literal, depicting—as closely as possible—the download we're offering.

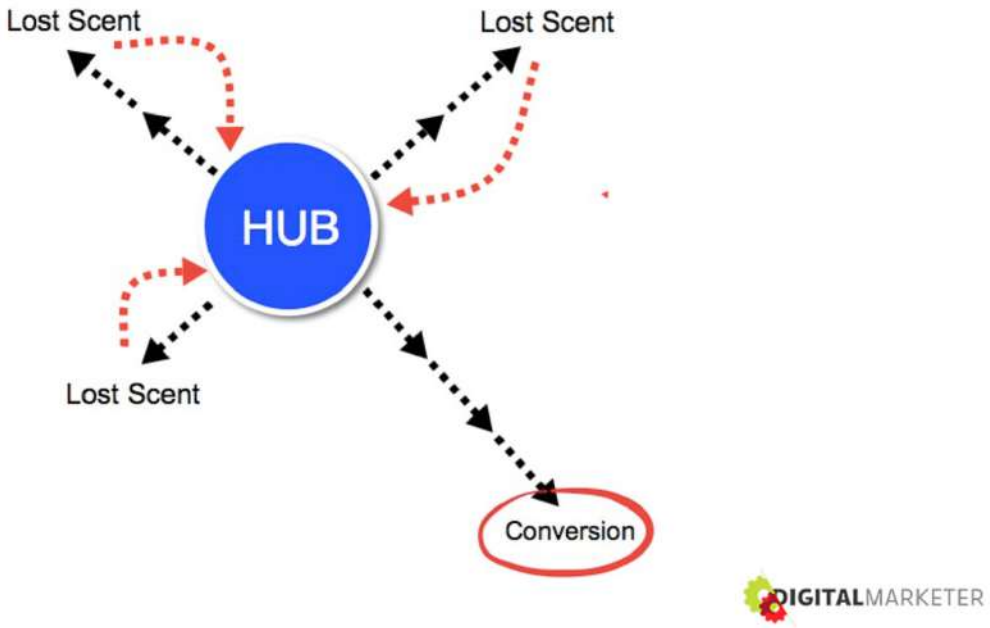
### 4. Ad Scent

Ad scent refers to congruency, or "sameness," throughout your campaign.

Why is this important?

Because trust is a huge conversion factor. If people feel comfortable that your offer is valid, they'll seriously consider your offer. Do anything to create doubt or fear, and they'll exit without taking action.

Here's how ad scent works…




*Ad scent*

Every time we click, we use simple visual cues (or scent) to ensure we're in the right place. If we lose scent at any point, we begin to feel we're in the wrong place or that we're being tricked. As soon as that happens, we exit and go back to where we started.

Your visitors should always feel like they're on the right path.

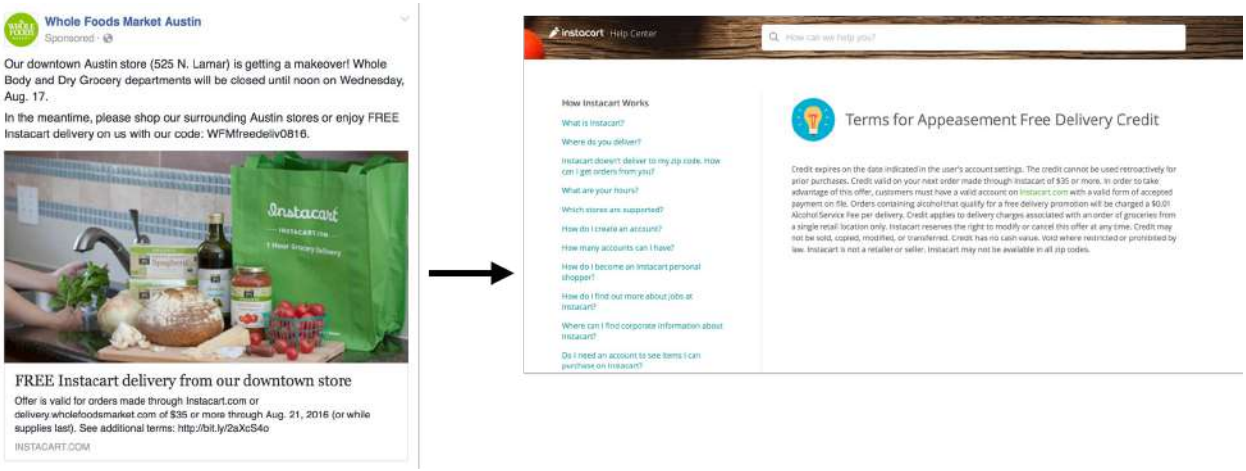
You do this by creating a flow—visually, in your messaging, and in the presentation of your offer—from your ad to your landing page, and every other piece of your campaign.

To create congruency, focus on 3 elements:

- Design: Use similar imagery and colors on each piece of the campaign.
- Messaging: Use similar phrases and benefits.
- Offer: Your offer should be the same throughout.

Ad scent is low-hanging fruit in digital advertising. Get it right, and you'll boost your conversion rate and lower costs.

See how Whole Foods does it in this ad:




*Whole Foods maintains good scent.*

The ad mentions "FREE Instacart delivery," and when they click, they land on a page with similar wording in the headline: "Free Delivery Credit."

If the landing page talked about keeping your fruit fresh or any other topic unrelated to free delivery, it would confuse people, and they'd click off without taking action.

That's why it's important to create a strong scent between the elements of your campaign.

### 5. Targeting

The final element in a high-performing ad campaign is targeting, and it's important because even a great offer won't convert if you put it in front of the wrong audience.

Follow 2 rules of thumb when planning your targeting.

**First, be as specific as possible.**

Specificity has to do with research. When planning your targeting, learn as much as possible about your target audience. You want to know your target audience so well, you can single out specific interests that this group has but no one else would have.

**Second, get the message right for your target temperature.**

Temperature, as we talked about earlier, has to do with matching your message to the level of relationship you have with your target audience.

Here are some guidelines for getting the temperature right.

**Cold Traffic.** Here, you're just introducing yourself to new audiences, so you have 3 goals (none of them being to sell):

- Indoctrination. Aim to build trust and establish credibility by sharing valuable information for free.

- Pixelling. When they arrive on your content, pixel them so you run more ads to them and warm them up.

- Segmentation. If they click on a blog post about email marketing, we know they're interested in that topic, so we can make them a more relevant offer later.

What kind of offers do you make to cold traffic?

- Blog posts
- Social media updates
- Content videos
- Podcasts
- Lead magnets
- Quizzes
- White papers
- YouTube ads to content
- Twitter ads to pillar content
- Infographics

When paying for cold traffic, you'll pixel people who engage with your ad or click through to free content. You want to give them value so they begin to like your brand. So focus on entertaining, inspiring, and educating everyone who clicks through.

**Warm Traffic.** Think about warm traffic as acquaintances who have shown interest in return. It's not a developed relationship yet, but there has been a connection. So you'll target these ads to:

- Leads that opted into your email list. (You'll upload that list to a traffic platform.)

- People who have visited your website and been pixeled.
- Facebook fans, Twitter followers, YouTube channel subscribers, etc.

Your goals for warm traffic are to:

- Generate leads
- Drive low-dollar sales
- What kind of offers do you make to warm traffic?
- Lead magnets
- Quizzes or surveys
- Free or paid webinars
- Flash sales/low-dollar offers
- Product demos
- Branding videos
- Books (free or paid)
- Free trials

**Hot Traffic.** These are your buyers. They may be people who have opted in and are on the fence about buying from you. They may have added products to the shopping cart but never purchased. They may have purchased something from you in the past but haven't responded to recent offers.

Your goals in running ads to this group are:

- Activation. If they haven't purchased in a while, remind them that you're still there.

- High-dollar sales. Upsell buyers of lower-priced products.

What kind of offers do you make to hot traffic?

- Events
- Paid webinars
- High-dollar offers
- Done-for-you services

Cold, warm, or hot, getting the temperature right allows you to put your campaign in front of the right people. And the more precisely you can target your ads, the better they'll perform.

Now let's talk about…

## Creating an Ad Campaign

How do you put all these concepts and elements together to create a successful ad campaign?

The secret is to create everything in advance—all the copy, creative, and targeting—before trying to set up your campaigns. The idea is to create precisely targeted ads that speak directed to your target audience. And for that, we use the Ad Grid.

### Ad Grid: From Strategy to Scale

The ad grid is a strategic approach to creating campaigns that perfectly align with the temperature and interests of the people you're targeting.

The idea is to identify *in advance* the types of people you're targeting and the hooks that are most likely to grab their attention, so you can be sure you're creating a good marketing/message fit.

You'll create your ad grid in Excel or a Google Sheet, but it will look something like this:

| HOOKS | AVATARS | | | |
|---|---|---|---|---|
| | A | B | C | D |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

*The Ad Grid helps you create highly targeted ads. Create a different ad grid for every campaign you put together.*

Now, with your spreadsheet ready, here are the 7 steps you'll go through to plan, implement, and scale your campaign.

### Step 1: Identify your avatars

An avatar is a profile for one type of person who'd be interested in your offer (example: entrepreneur, stay-at-home mom, consultant). The avatars for your campaign may be different from the avatars for your business, and that's okay.

For each traffic campaign, you'll have 2-4 different avatars. You can have more, of course, but the more avatars you have, the more work it will take to plan your campaign.

To figure out who your best avatars are, look at your offer (e.g., the lead magnet, blog post, or webinar you're promoting) and brainstorm several different types of people who'd want it and benefit from it.

Each of these will be an avatar for your campaign. Plug them into the top row of your grid.

### Step 2: Identify the hooks

What's most appealing about your offer? Each benefit or outcome of your offer can be turned into a hook to grab the attention of your audience.

Generally, you'll create hooks based on these 6 outcomes.

- **Have.** What will they have if they download and consume your offer? How do their lives look before & after?
- **Feel.** How will they feel better, smarter, or more successful for accepting your offer?
- **Average day.** How did you change or improve their average day?
- **Status**. How do people elevate in status or become a better person after consuming your offer?
- **Proof/results.** What social proof, case studies, or testimonials validate your offer? How can you promote the sense of belonging that people will get from joining other people who've responded?
- **Speed and automation.** Speak to the time savings or quickness of learning or applying the information in your offer.

Don't feel like you need to create a hook for all these outcomes. But do be creative and come up with several benefits or outcomes that will grab the attention of your avatars.

Okay, now that you have your hooks, enter them in the first column of your grid.

### Step 3: Create your ad copy

You need segmented messaging for every cell in your spreadsheet, each targeting one hook and avatar.

You can write the ad copy yourself or, because the ad grid clearly communicates the avatars and hooks you're targeting, you can outsource it to a copywriter.

Regardless of who does the writing, though, you want unique ad copy for every segment: Avatar1/Hook1, Avatar 2/Hook1, etc. And for each segment, you want the copy for the entire ad: text, headline, description and ad type.

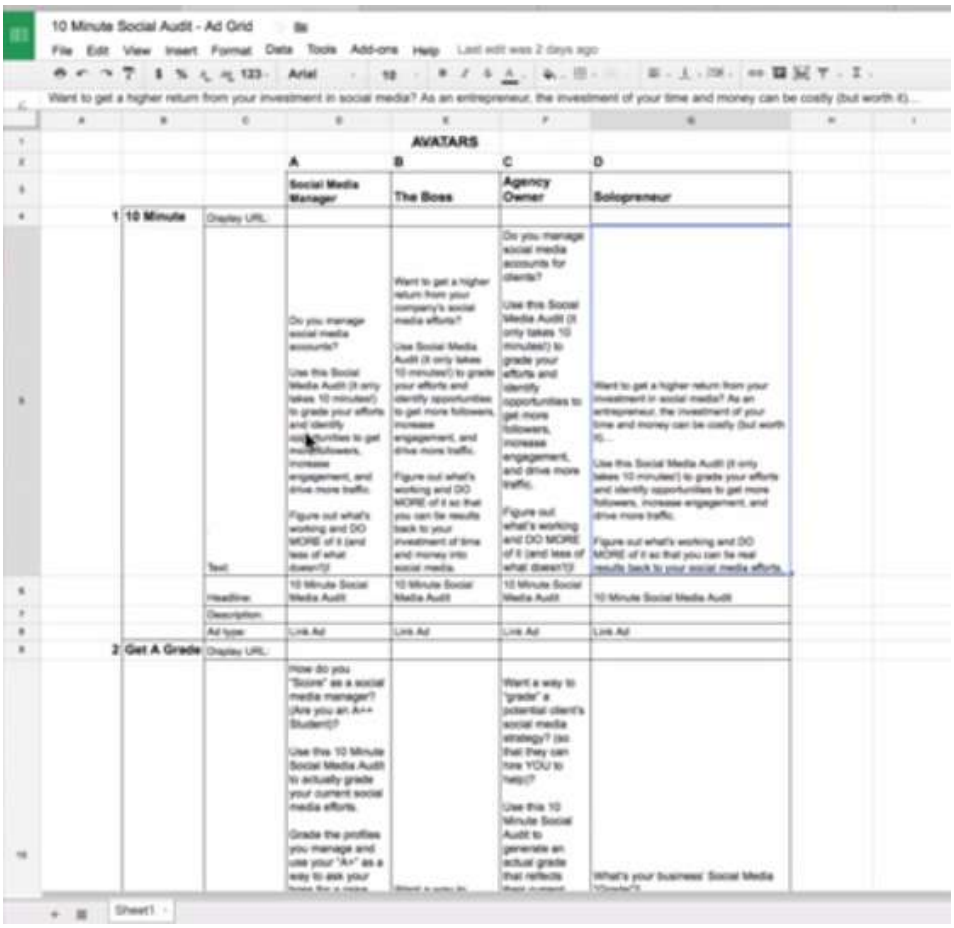
So let's say you have 4 avatars and 5 hooks, you'll need to write 20 ads.

| | Social Media Manager | The Boss | Agency Owner | Solopreneur |
|---|---|---|---|---|
| 10 Min | 1 | 2 | 3 | 4 |
| Get A Grade | 5 | 6 | 7 | 8 |
| Create A Report | 9 | 10 | 11 | 12 |
| Grade Your Competition | 13 | 14 | 15 | 16 |
| Know Your Goals | 17 | 18 | 19 | 20 |

*Your Ad Grid tells you how much copy you need to write.*

This level of segmentation gives you the best chance of success in your campaign. Instead of creating generic ads for a few avatars or hooks, you'll create highly targeted ads aimed at specific types of people (avatars) with specific interests (hooks).

With this approach, your odds of getting a good return on your ad spend are incrementally higher!




*A completed ad grid with unique ad copy for every avatar and every hook*

## Step 4: Avatar Research

Once your copy is written, it's time to research your avatars to identify the interest groups you'll use in your ads.

For this, research each avatar separately, finding the answers to each of these questions:

- Who are the authority figures, thought leaders, or big brands in your niche?
- What books/magazines/newspapers does your ideal customer read?
- What events do they attend?

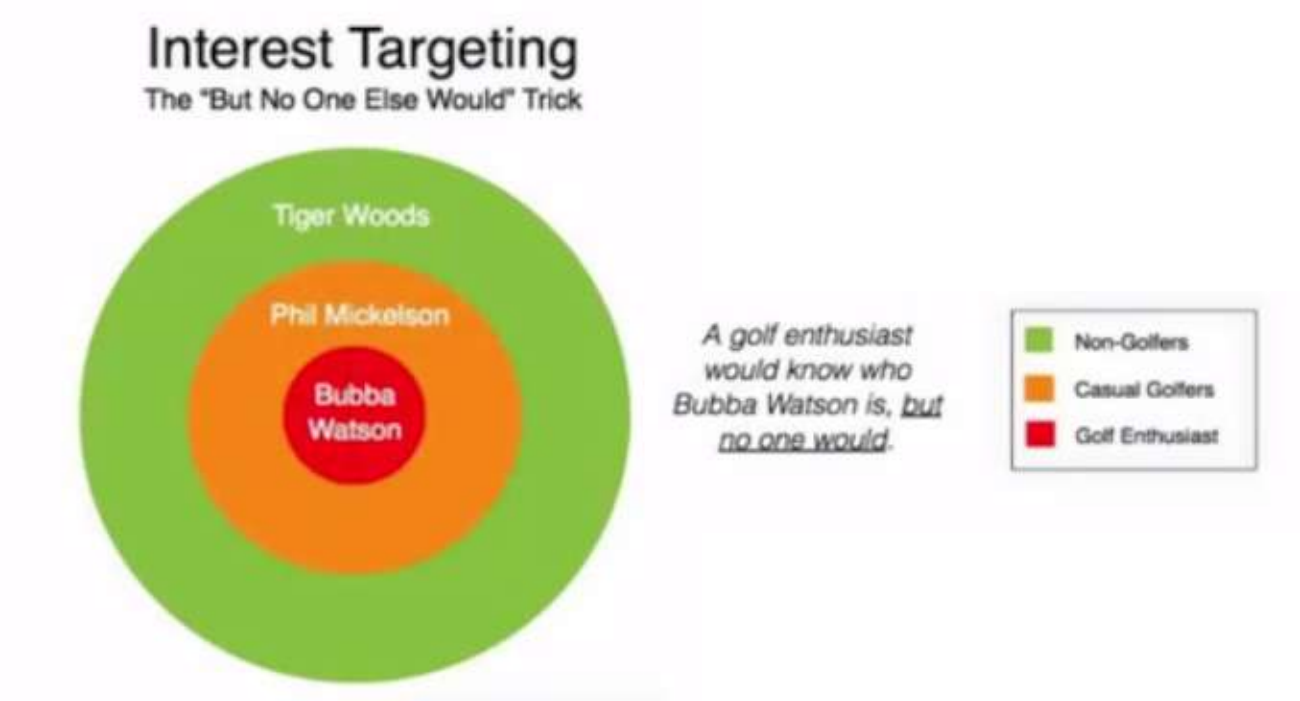
- What websites do they frequent?
- Where do they live?
- What tools do they use?
- What's specifically unique about this group?

To find the answers, do a Google search and ask people in your target audience. It may take time to find the answers, but these answers will help you get your ads in front of the people who need to see them. So take the time to do it right!

You should also use this little-known technique…

We call it the "But No One Else Would" trick, and here's how it works.

Let's say you're targeting an ad to golfers. You want to find interests that only avid golfers would know about, so no one will click on your ad except qualified prospects.



Even casual golfers would likely know who Tiger Woods and Phil Mickelson are, but only avid golf enthusiasts would know Bubba Watson. So when setting up your ad, you'd want to target people interested in Bubba Watson.

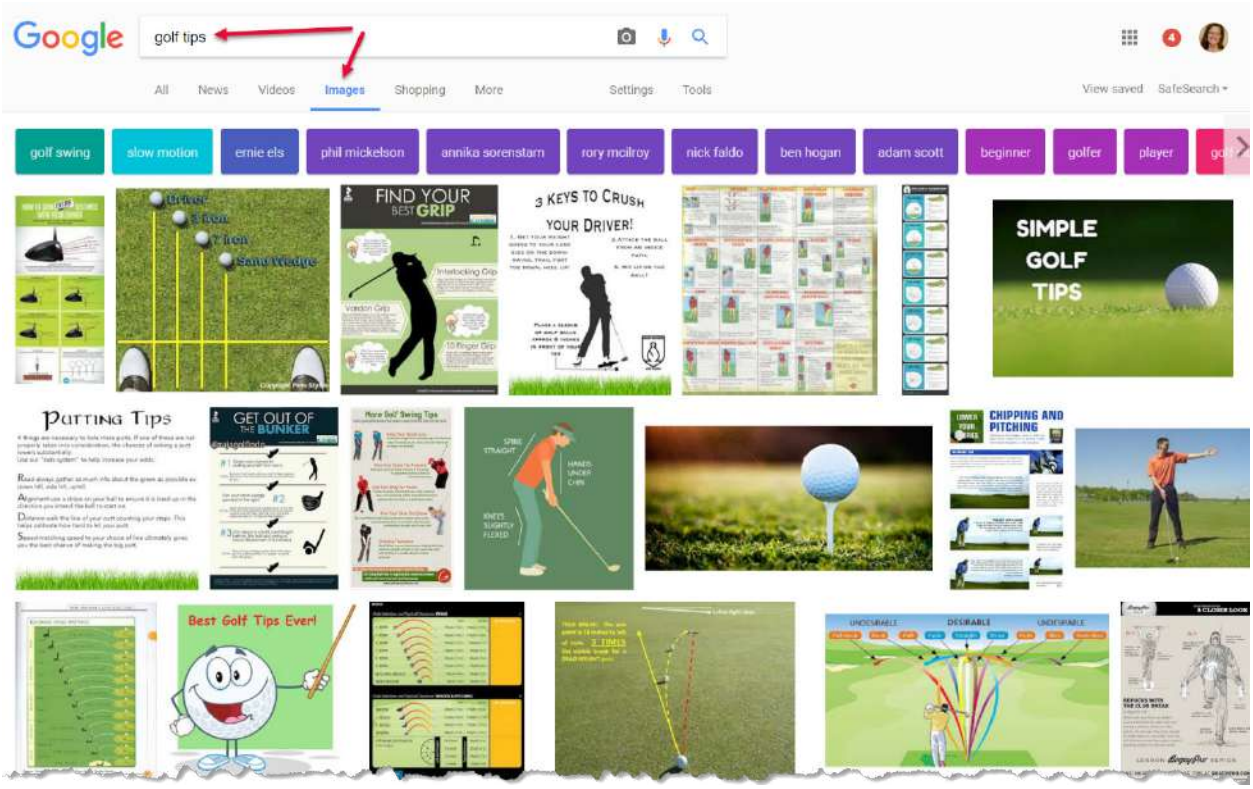
This is what you're looking for in your avatar research: the interests that only die-hard fans would know about, so you can get the right eyeballs on your ads.

## Step 5: Create or Outsource Ad Creatives

Your creative is the visual element you'll use in each ad. At a minimum, you need one creative for each hook.

What should your creatives look like?

Do a Google image search of each hook's keywords, and see what comes up.




*Images for the Google search "golf tips"*

The top-ranking images show you what people think about when they hear your keyword.

Use that as inspiration. But don't copy. Design original images or videos that include the imagery people associate with your keyword—but that also have your brand's unique look and feel.

### Step 6: Set up your ads and compile your results

At this point, you have all the assets you need for your ad campaigns. It's time to set up your ads. Use the ad grid to help you build each ad:

- Use the avatar for your targeting.
- Use the copy and creative you've developed to build the ads.
- Use your avatar interests to build an audience size in the range of half a million to 1.5 million each.

Then turn your ads on and run them about a week. Once you start getting results, you can begin gathering your metrics.

Your best success metric depends on the purpose of your campaign and the temperature you're targeting. It might be:

- cost per click
- cost per 1,000 impressions
- cost per acquisition
- ROI
- Or some other metric that reflects your success

Record that metric in your ad grid below the ad copy for each avatar/hook. Ideally, you'll collect the metrics at 7 days, 14 days, 21 days, and at the end of the campaign.

## Step 7: Scale

Scaling is about figuring out what's working, what's not, and how you can get bigger, better results.

There are 2 ways to scale a campaign:

- **Horizontally**: If your results for an avatar are better than average, buy traffic in on other ad platforms to boost your visibility to that group of people.

- **Vertically**: If a specific hook or avatar is working especially well, create more ad sets to that group on the same platform.

Find your winning avatar and hooks, and scale those. But also refine your process so you get better results in less time with a smaller investment of time or money.

## Optimizing Your Process

In digital advertising, your goal is to attract cold traffic, then warm it up over time, so you can effectively attract new people to your website, get them to opt in, and persuade them to buy.

To do that, you'll build campaigns that include ads for all temperatures of your target audience. The challenge is to stay within your budget while targeting different segments. Here's how to optimize your ad spend.

**Your formula for success is**

# 6:3:1

Let's assume your budget allows you to spend $10 a day. Your daily spend will look like this:

- $6/day on cold traffic, driving cold traffic to your site with pure content

- $3/day turning warm traffic into leads or buyers

- $1/day retargeting and selling a higher-dollar product

That ratio may change periodically depending on your needs, but this is a good balance, allowing you to target all temperatures while maintaining control of your spending.

## Optimizing your Ads

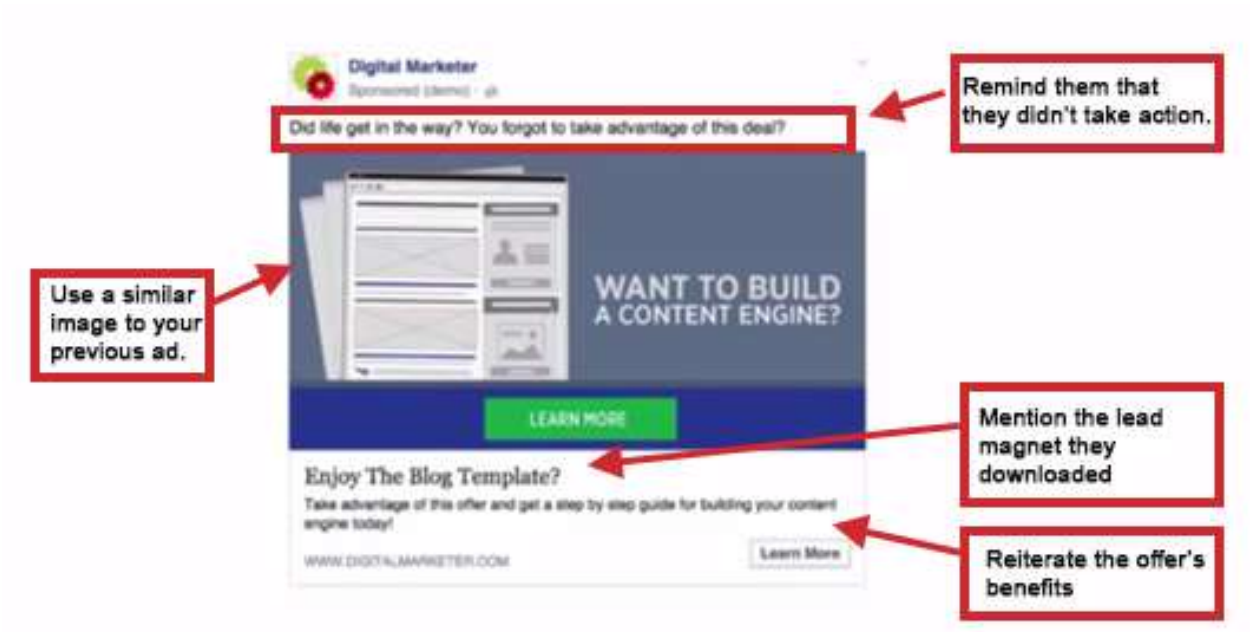
When targeting different temperatures, you need to adapt your ads to the level of relationship. These templates will give you a good head start.




*Cold Traffic Ad*




*Warm Traffic Ad*




*Hot Traffic Ad*

## Optimizing a Weak Campaign

If a campaign isn't performing well, go back to your offer. If you have a powerful offer, your other elements can be weak and the ads will still work. But if your offer isn't right, nothing else matters.

In some cases, your ads will start out strong, but results will wane over time.

When this happens, it usually means ad fatigue has set in. People have seen the ad too many times and aren't responding to it anymore.

You can fix ad fatigue in 2 ways:

1. Retarget to another audience.

2. Change out the campaign.

## The Lingo: The Language of Digital Advertising

What are the terms you need to know as a digital advertiser?

### Traffic Temperature

The classification of the audiences you target with your digital advertising campaigns as cold, warm, or hot.

### Cold Traffic

Audiences targeted with ads that have no prior experience with your brands, products, or people. Ads targeted at cold audiences introduce the business to the prospect and establish trust and authority in an effort to build awareness.

### Warm Traffic

Audiences targeted with ads that are aware of your brands, products, or people but have not yet converted to a customer or haven't purchased in a long period of time. Ads targeted at warm audiences should be designed to convince a prospect that you have the superior solution.

### Hot Traffic

Audiences targeted with ads that have previously purchased. These audiences know your reputation and have used your product or service. Ads targeted at hot audiences should convert a customer into a high-ticket or repeat buyer. Most ad campaigns to hot audiences will be conducted through retargeting.

### Retargeting Campaign

An ad campaign designed to reach customers and prospects with a message and offer that is based on their previous behavior. That behavior might be an opt-in to a lead form, a purchase, or a visit to a page on your website. Ad retargeting is available from ad platforms such as Facebook and Google.

### Frequency

How many times has an ad been shown to the people you're targeting. Ideally, you want to keep the frequency below 10. If people to see the same ad too many times, it becomes annoying and can lead to ad fatigue.

### Relevance

The Facebook metric calculating how relevant your ad is to your target audience. In Google Adwords, it's called "quality score." It measures people's engagement level and how much they like your ad.

## The Metrics You'll Use to Measure Success

What are the metrics you need to watch as a digital advertiser?

### Click-Through Rate (CTR)

The number of clicks divided by the number of impressions on an ad and any other call-to-action. The higher the click-through rate, the more prospects you will be moving from stage to stage in the customer journey.

### Cost Per Acquisition of Customer (CPA)

The amount of advertising spend divided by the number of customers generated. Drill down on this metric by calculating CPA by by traffic campaign, traffic source, and more.

### Cost Per Lead (CPL)

The amount of advertising spend divided by the number of leads generated. Once again, drill down on this metric by calculating CPL by traffic campaign, traffic source, and more.

### Cost Per Click (CPC)

The amount of advertising spend divided by the number of clicks on the ad, ad set, or ad campaign. Believe it or not, this is the least important of these four metrics.

### Cost Per 1,000 Impressions (CPM)

The amount it costs to reach a million people. When you're creating a campaign to extend your reach or build brand awareness, this is the metric to use.

## The Roles: Who Has Responsibility for Digital Advertising?




Who should own your digital advertising? Where in the company does responsibility lie?

### Media Buyer / Paid Traffic Specialist

The paid traffic team (or individual) should have primary responsibility for setting up and deploying your digital advertising.

They'll rely on input from other teams and individuals within the organization, especially from designers for creating the ad graphics and landing pages, marketing and sales for creating compelling offers, and content marketing for finding great content to direct cold traffic to.

### Marketing & Sales

As the competition for attention continues to increase online, all marketing teams must learn to buy traffic at a positive return on ad spend.

### Content Marketing

Any team member who is producing content (blogs, podcasts, videos, press releases, etc.) must understand how that content can be leveraged by a paid traffic specialist.

### Data & Analytics

To produce a positive return on ad spend, a paid traffic team needs access to an analyst that understands the goals and processes involved in buying traffic.

## Summing Up

Digital advertising is a key tactic for digital marketers because it gives you control over your traffic flow.

To succeed, though, you need to create different campaigns for each stage of the Customer Journey—and you need to understand the "temperature" of each stage. Get that right, and you'll soon be driving traffic like a pro.

But your digital marketing mastery doesn't stop there. Not only do you want to be driving traffic to your onsite content and landing pages, you also want to engage your audience in social media. And that's just what we'll cover in the next chapter.

## Become a Digital Advertising Specialist




Companies today must have scalable traffic campaigns that produce new, qualified customers from scratch if they want consistent growth.

In this mastery course, you'll gain the skills you need to help brands and businesses leverage paid traffic channels such as Google, Facebook, Twitter, YouTube and other demand-gen platforms to grow their customer base... without breaking the bank.

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CHAPTER 04:

# DEVELOPING A SOCIAL MEDIA STRATEGY

DIGITALMARKETER

CHAPTER
# 04

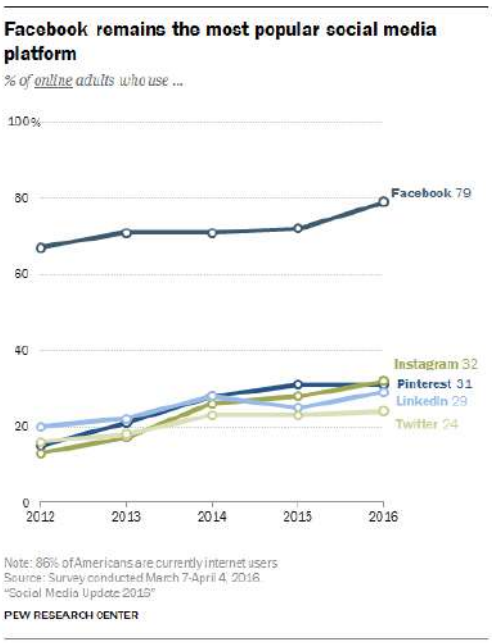
If marketing is about putting your message where your audience hangs out (which it is), then social media is a no brainer.

That said, many businesses fail to fully leverage social media in their marketing plans. They dabble, sure, but their strategic efforts end with content and advertising.

That's a big mistake, and here's why…

Today, 79% of US internet users are on Facebook. Six out of ten Americans stay updated on news through social media, while 35% have used social media to look for or research a job.

And these same numbers are reflected worldwide. Is it any wonder marketers are going social to grow their business?




*Source*

Trouble is that "going social" isn't as easy as it looks. There's a lot more to social media marketing than simply posting to Facebook and Twitter.

In this chapter, we cover the basics of a successful social media program, including methods and metrics, the business roles that should own your social media marketing, and the lingo you'll use to talk about it.

Keep in mind, there's a big difference between a social media manager and a community manager. (Yes, both manage social media efforts, but their focus is different.) Learn more in our article, Social Media Manager vs. Community Manager.

## Methods of Well-Executed Social Media Marketing

There are 4 stages in a successful social cycle:

- Listening
- Influencing
- Networking
- Selling

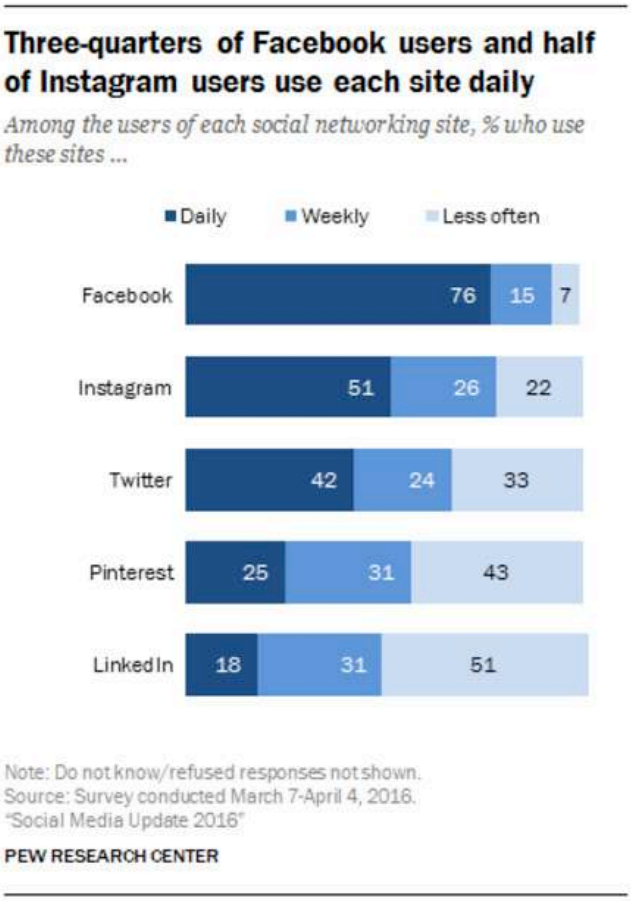



*The social success cycle has 4 stages, beginning with listening.*

All 4 of these stages are key to reaching social media success. But all of it hinges on Stage 1: Social Listening.

Listening gives you the insights you need to perform the other 3 stages well. It helps you develop a strategy that will give you influence, a strong network, and lots of leads and sales.

The key, of course, is to get your information in front of your prospects and customers *where they hang out online.* For most businesses, that includes one or more of these top social networking sites.




*Source*

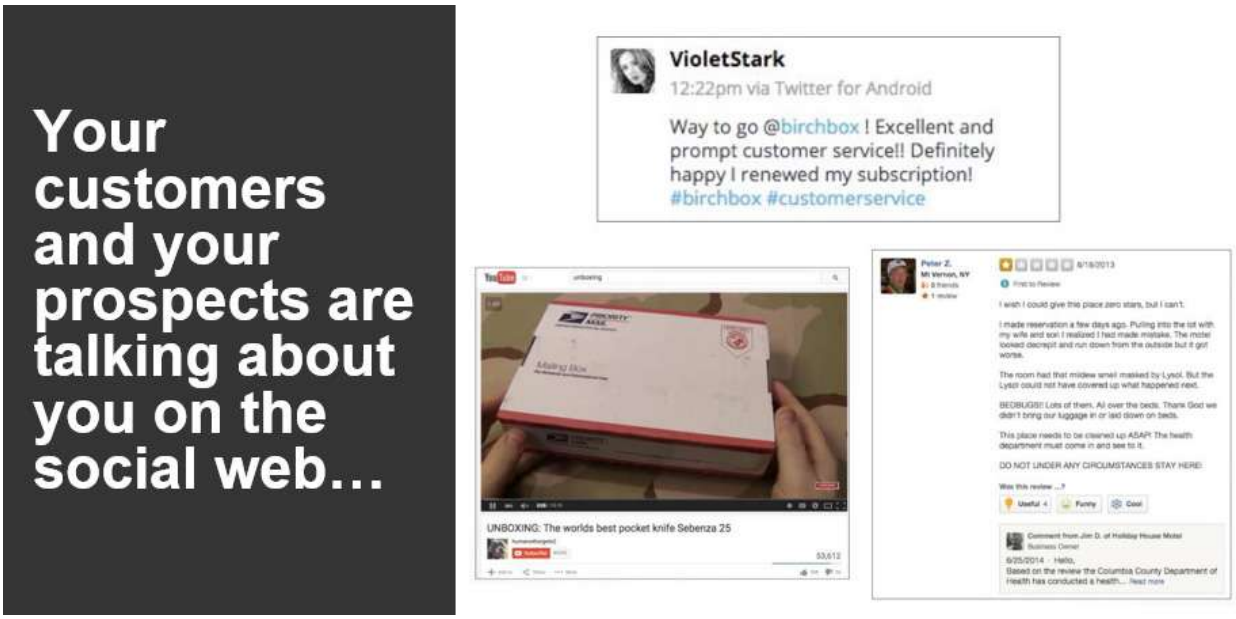
If you're worried about the time drain that social media can be, don't worry. Social media marketing isn't about hanging out with your prospects and customers. It's about executing the social cycle while minimizing costs—which means you need to master the methods and metrics for all 4 of the stages.

## 1. Social Listening

As with any marketing strategy, you need to start with your target audience. That's why social media marketing starts with listening.

This is key to creating a successful social strategy.

Whether you're paying attention or not, people are talking about you and reaching out to you on the social web. They're sharing their experiences with your products. They're talking about the things you're saying or doing. They're even asking you questions.




*Whether you're paying attention or not, people are talking about you on the social web.*

Some comments, like these, are positive. You'll want to celebrate them—and respond with a great big thank-you.




*Negative comments need immediate attention.*

Other comments aren't so positive (and some are downright negative). They need immediate attention so followers know you're present and accessible.

It's a lot like customer support. And in the same way, it can help or hurt your public perception.

Every day, your social phone is ringing.

If you don't answer, it leaves a bad impression. On the social web, it's a bit like leaving your customer service lines unattended.

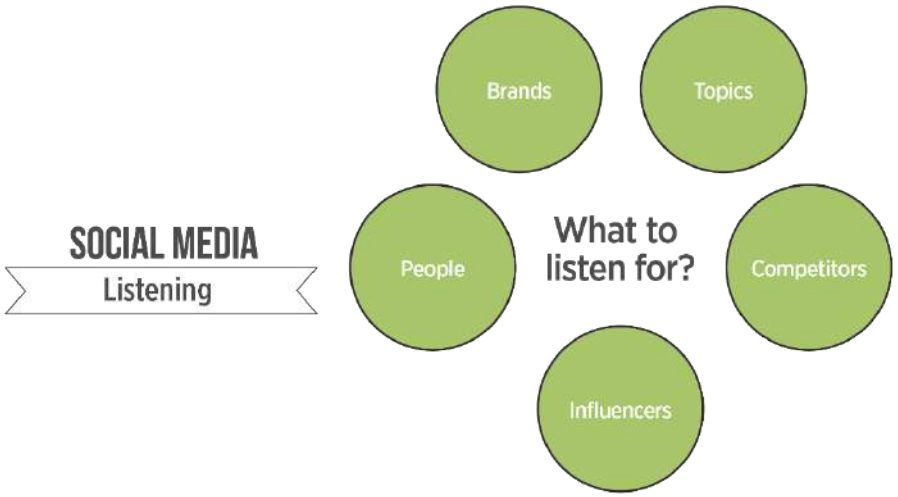
But when you do answer the call, listening and responding appropriately, you can connect with your fans and followers, find and fix issues you may not be aware of, and build incredible good will.

The key, of course, is to make listening your #1 priority and use your insights to inform the other 3 stages of the social success cycle.

## Goals of Social Listening

What are you listening for? When tuning in to social conversations, your goals are to:

- Track public perception of your brand.
- Identify the topics you need to be talking about.
- Keep a pulse on the industry, where it's going, how it's being perceived.
- Perform customer research.
- Conduct competitive research.




*When social listening, you're tuning into 5 key bits of information.*

In particular, pay attention to these 5 things:

- **Your brand** – Watch for mentions of your company name, your products, or any other identifying information.

  *Example*: Apple might watch for mentions of the Apple watch or anything related to iOS.

- **Topics relevant to your industry** – You want to stay on top of the pulse of your industry. So listen to the topics people are bringing up, their questions, and their hot buttons.

  *Example*: Apple might follow conversations around wearable tech or smartphone cameras.

- **Your competitors** – What's being said about them? Is it positive or negative? And what are your competitors saying about you?

  *Example*: Apple's competitors might be Android or Jeff Bezos. They'd be wise to watch for mentions of them.

- **Influencers** – Listen for the topics thought leaders and influencers are talking about, and look at the content they're producing. They're all clues for where the industry is moving.

  *Example*: Apple should probably keep an eye on GigaONE and John Gruber.

- **Public facing people in your company** – Watch for mentions of your leaders and influencers. What's being said? Is it positive or negative?

  *Example*: Mentions of Tim Cook and Arthur Levinson can reveal public perception of the Apple brand.

Your aim is to tune into the pulse of public sentiment towards your brand, your industry, and the topics that relate to your brand. In a sense, it's reputation management. But it can also help you perform real-time customer service and identify product or content gaps that need to be filled.

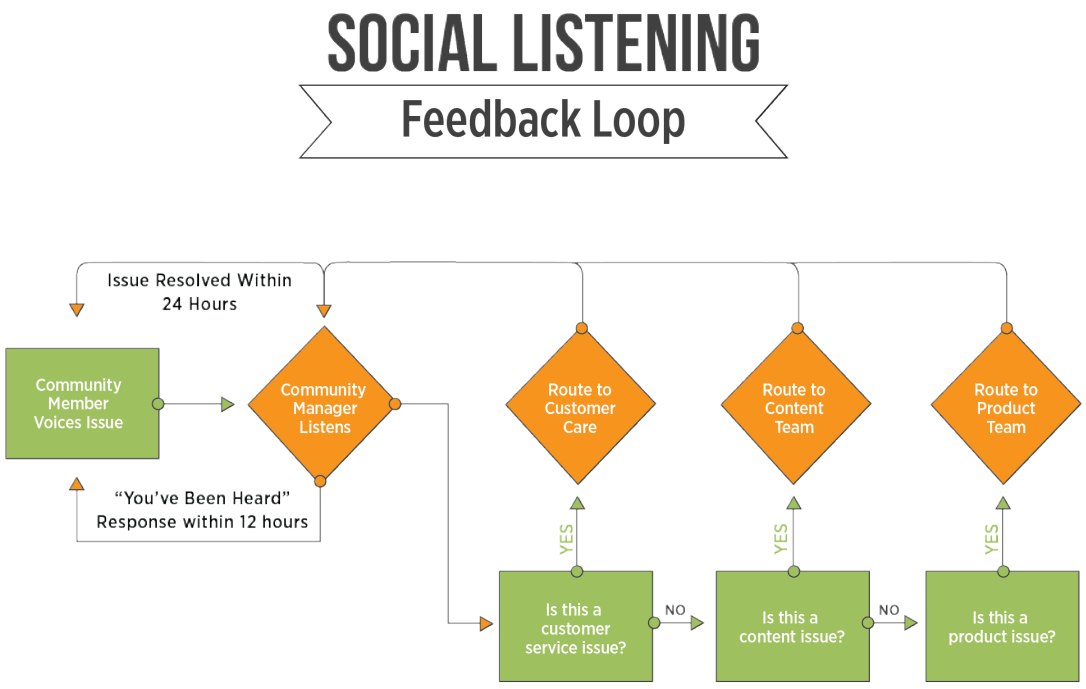
## Putting Your Listening to Work

Listening is only half of the equation. You also need to respond to the things you see and hear.

A strategic "feedback loop" is the best way to do this.

**What is a feedback loop?** It's a process you create for your teams to use when addressing issues that arise during social listening. It clearly maps out the people or departments that issues should be routed to and who has responsibility for resolving them.

Here's how it works…




*You put a social media manager (or team member) in place, actively listening.*

When your social listener sees a complaint or issue, say in Twitter, they'll perform "triage"—responding with an empathetic "you've been heard" response—and then route the issue to the proper team. This happens within 12 hours of the complaint/issue.

Once the issue has been forwarded to the appropriate person, this specialist will then respond to the issue, aiming to resolve it completely within 24 hours.

Here's why it works…

Having a social media listener is well and good, but in the real world, they often don't have the specialized knowledge or authority to resolve the issues that will arise. And sometimes they don't know who should take care of those issues, either.

That's how issues get overlooked and forgotten, resulting in untold damage to your brand.

But with your feedback loop, that won't happen. This flowchart clearly maps out the most appropriate departments for resolving different issues. For example:

- Who in Customer Care will handle customer service issues.
- Who on the Content team will handle content issues.
- Who on the Product team will handle product issues.

So your social listener knows exactly who to alert when issues arise, and your social media team is able to quickly respond to anything they see.

Let's break this down into 3 basic steps.

## The 3-Step Social Customer Service Plan

For social media marketing to work, you need to make it human and authentic. Even when you're dealing with a complaint, your aim is to align yourself with the person, de-escalate the situation, and provide a compassionate, human touch.

Here's the 3-step process for doing that:

1. **Respond quickly.** Social media moves quickly. Make sure you perform triage within 12 hours and resolve issues within 24 hours.

2. **Empathize.** Make an empathetic statement as soon as possible: "I'm sorry you ran into this," "I know this is frustrating," or "I can understand how important this is to you."

3. **Move it to a private channel.** If you can't solve the issue in a sentence or two, take it off public channels. Private messaging, email, or a phone call allow you to talk in detail without the rest of your followers adding their two cents to the discussion.

This approach demonstrates that you're listening. It also allows you to express compassion. And by moving the conversation to a private channel, you make people feel as if you're committed to giving them a real solution.

### Metrics to Watch

What should you measure to track your social listening efforts?

- **Reputation score** (AKA sentiment level). Are people happy or sad when talking about you? Is the tone negative or positive?

- **Retention rate.** Are you retaining customers (and followers)? If not, why?

- **Refund rate.** Are you able to resolve issues without having to issue refunds?

- **Product gaps identified.** What suggestions are people making for new product features?

- **Content gaps identified.** What content should you develop to answer questions and resolve issues *before* they arise?

**EXTRA:** Read more about social listening and Feedback Loops here: http://www.digitalmarketer.com/social-listening/

## 2. Social Influencing

At this stage, your aim is to lead and direct your followers' opinions, attitudes, and behaviors. And since you've been listening, it's relatively easy. You already know the trending topics and conversations taking place, so adding your authority voice is the natural next step.

What are the signs that your influence is growing?

- You get more engagement – people retweeting or sharing your posts, and people responding to your posts.
- Your traffic numbers increase – people click on your links.
- You develop a greater mindshare – people share their questions, thoughts, and opinions with you, and they eagerly seek interaction with you.
- You become a recognized authority and a brand people watch.

Keep in mind, this stage of the success cycle is influenced by the social listening you did in Stage 1. But the reality is that you'll continue listening at every stage. In fact, once the cycle is going, you'll perform every stage every day.

### Goals for Social Influencing

During this phase of the social success cycle, you're trying to:

- Increase engagement with your brand and your content.
- Start conversations around the topics related to your business.
- Boost traffic to your site.
- Build awareness of your products and offers.
- Grow your retargeting list.

Retargeting is an advanced tactic that can significantly boost your bottom line. To learn more about retargeting (or remarketing), read The Remarketing Grid: The Science of Ad Retargeting Audience Segmentation.

### Metrics to Watch

How do you know you're building your social influence? These are the metrics that matter most:

- **Site engagement rates.** Are you getting more social shares and comments?
- **Traffic by channel.** Traffic from your social media channels should increase over time.
- **Offer awareness.** People see and respond to the offers you make in social media.
- **Retargeting list growth.** Through retargeting, you're able to get your offers in front of people who are most likely to buy from you—and they respond by downloading your lead magnets and subscribing.

Need help boosting traffic from social media? The key is to leverage your blog posts in social channels. This post gives you a 6-step process for socializing a blog post.

## 3. Social Networking

It's at this stage of the social cycle that you connect with other influencers and authorities and begin to move the needle.

Social networking is important for all businesses, whether you're just getting started, scaling, or expanding into new markets.

It may help to think of social networking as a live event—except your interactions are online rather than face-to-face. After all, networking is networking, no matter where (or how) it happens. And it can lead to deep and lasting relationships, both with your followers and potential partners.

## The Process of Social Networking

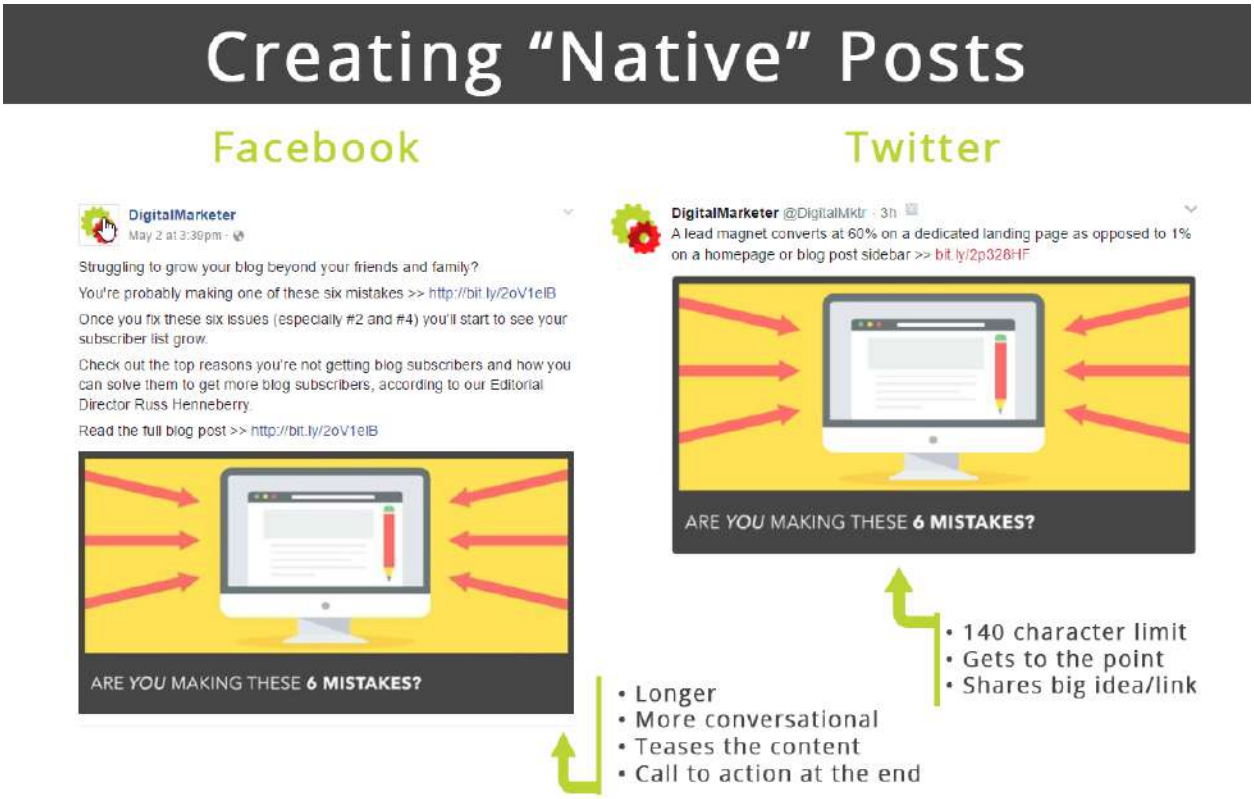
Each time you publish an article on your blog, produce a new piece of content, or have a new offer, you'll create social media posts designed for the channels you're posting to (think "native" content) that get the word out.

You'll share valuable content from peers and, yes, even your competitors. If it relates to your brand's primary topic and helps your followers, it's worth sharing. You'll also engage with people one-on-one, both asking and answering questions.

That's it.

Now let's look at this process in action.

Here's one of our own articles, which we shared in Facebook and Twitter. Notice that each post is appropriate for the channel.



We also post conversational posts, like this one from our Twitter stream:



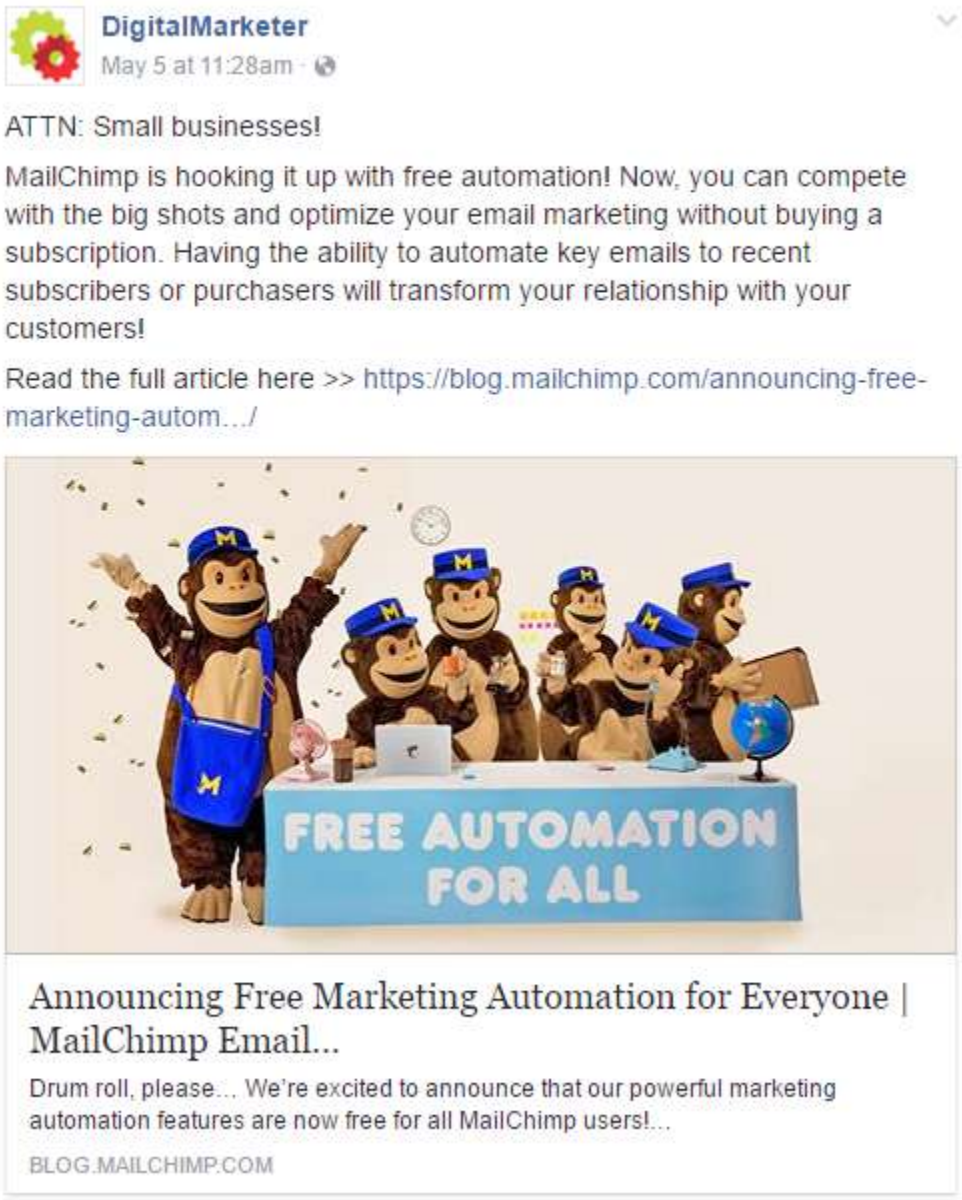

*Conversational Twitter posts*

But we also want to share content that would help beginning digital marketers. After all, they may someday become our customers. So we share back-to-basics content and useful information from other brands.

Take these, for example:




*This post from ThinkwithGoogle aligns with our values.*




*Email marketing is one of the core competencies we teach, so this post from MailChimp is a good fit.*

By adopting a similar approach, you won't just attract happy followers, though you'll have plenty of those. By sharing useful content from other brands, you'll build good will and strong alliances with the brands you share.

For example, we've consistently shared content from Content Marketing Institute, Buffer, and MarketingProfs. Initially, that led to a robust network. But some of those relationships have turned into strong partnerships, as well.

### Your Goals for Social Networking

During this stage of the social success cycle, your aim is to:

- Share content that fills gaps left from your own content. This content may relate topically or target people at different skill levels.
- Create good will with brands that are similar to yours.
- Over time, transform that good will into profitable partnerships.

### Metrics to Watch

To measure the strength of your social network, watch these metric:

- **Number of inbound links.** A strong network will result in more backlinks to your content.
- **Number and description of earned media mentions.** Consider the relevance and value of the mentions, who they come from, and the value of those mentions.
- **Number and description of earned strategic partnerships.** Are you reaching out to partnership prospects, or are they reaching out to you? How relevant are those brands to your business, and what is the value of those relationships?

Getting more clicks from social media requires irresistible headlines. Steal from this headline swipe file.

## 4. Social Selling

The fourth and final stage of the social success cycle is social selling.

This is where social media marketing gets interesting. Finally, after listening to your prospects, building authority in your space, and establishing a strong network, you can start putting your offers in front of people—and converting them.

What does good social selling look like?




*Good social selling integrates with your funnels.*

The short answer is funnels. But you'll use multiple channels for getting people into those funnels, from blogging to retargeting to pay-per-click advertising.

So, for instance, you'll lead with blog content that's perfectly targeted to your audience, and in that content, you'll embed an opt-in offer. Then you'll promote the content in social media (leveraging Stages 2 and 3 of this cycle).

Your social promotion will direct traffic to your content, where they'll see your offer. If they respond, you'll immediately make an upsell offer—a low-priced product designed to convert your new lead quickly into a customer. We call that entry-level product a tripwire.

But what if a visitor doesn't respond to your offer?

You'll retarget them with a relevant ad, so they receive multiple touches that could lead to a conversion after they leave your site. The ad takes them to a funnel, where they're offered the same (or a related) lead magnet—and then an entry-level product.

Of course, you should also try to upsell and cross-sell to existing customers.




*Upsell and cross-sell to existing customers.*

For example, if they buy a patio cover, they're probably in the market for patio furniture. Retarget them with the next logical offer.

The point is this:  Don't simply create one offer. Create a buying path that boosts the lifetime value of every customer.

## Goals for Social Selling

- Your goals at this stage are to:
- Generate leads to grow your email list.
- Acquire new customers and upsell/cross-sell existing customers.
- Increase buyer frequency, turning one-time customers into raving fans.

### Metrics to Watch

To track your success at social selling, watch these metrics:

- **Number of leads.** Over time, your email list show grow.
- **Offer conversion rate.** Are your offers converting? Maybe your offer isn't relevant or isn't close enough to your prospects' bottom-line desire.
- **Buyer recency / frequency.** You want customers to buy repeatedly and often.

We've covered the metrics you should watch for each stage of the social cycle, but maybe you'd like more information. For a deep dive into metrics and social ROI, read 7 Ways to Actually Track Social Media ROI.

## Relevant Roles in Social Media Marketing

Once you understand the basics of social media marketing, you need to identify the people who will be responsible for managing your success.

There's no right answer. It will depend on your organization and goals. But in most cases, you'll find your best solution in one of three departments.



## Marketing

Marketing and social media integrate so closely, it's hard to tell where one ends and the other begins. And most marketers are already involved in social media since it gives them the 3 things they need to do their job well:

- Customer insights.
- Understanding of the trends and conversations influencing their prospects.
- A powerful channel for disrupting the status quo.

Because they're already actively participating in social media, marketing professionals could be a good fit for managing/directing your social media efforts.

## Sales

Like marketing, successful sales depends on being relevant and current. Salespeople often use social media to engage with prospects, identify talking points, and figure out what matters most to people evaluating their products.

That being the case, someone on your sales team may be a good fit for managing/directing your social media program.

## Public Relations

Public relations is another good option for taking responsibility of your social media. PR is all about creating a positive brand perception, and it's already customer centric, which makes it social by default.

## Community Manager

One last source to consider is your community manager, if you have one.

Social media is about being present and truly engaging with your fans and followers. That's pretty much the definition of a community manager.

If you already have an active social community, your community manager could be a good fit for taking on your social media efforts. They already create, maintain, and encourage member-to-member relationships. As your social media manager/director, they'll simply scale those efforts.

## The Lingo You'll Use in Your Social Cycle

Knowing the lingo will help you communicate what you're doing with other professionals. Here are 5 terms you need to know.

### "Value First" Offer

Social media marketing is really just another channel for your marketing, which means you're creating an environment where you can make successful offers.

Offers that are appropriate for social channels include:

- **Valuable content.** Link to content that has embedded offers and CTAs.
- **Lead magnets, or opt-in offers.** These are designed to get cold traffic into your funnels.
- **Tripwires, or deep-discount offers.** Use these to upsell and cross-sell new and existing customers.

### Feedback Loop

You need a system where complaints, praise, and other useful comments "heard" during social listening are routed to the correct person in your organization.

This makes it easy to apply the 3-step social customer service plan:

1. Acknowledge the concerns.
2. Forward the issue to the right person.
3. Take the issue off public channels and resolve it in a timely manner.

## Social Media Bouncing

Much of the success of social media marketing is the frequency of "touches." If you're on more than one social channel, and people see you on multiple channels, you create a j-curve of exposure.

That's what we call social media bouncing: A social media follower on one channel is exposed to your brand on another channel.

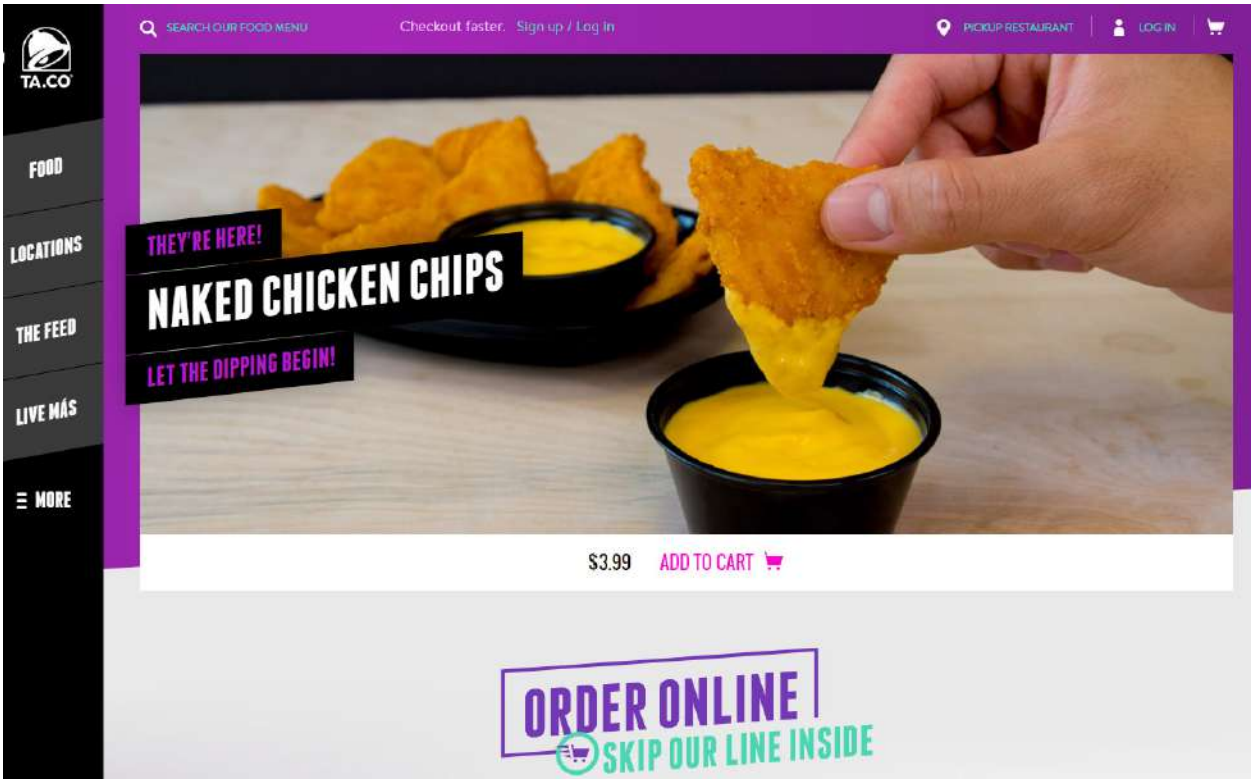
Take Taco Bell, for example.

First, you see them on a billboard.

Then you follow them on Twitter.



Then you click through to their site or a Buzzfeed post where you see them yet again.




Your goal is the same—to engage with your followers on all your channels, fully immersing them in your brand.

## Social Media Topic Map

Two keys to successful marketing are relevance and focus. Your topic map helps you stay "on brand" with both. As a bonus, by narrowing the topics you post about, you actually increase engagement.

Here's how it works…

Take your brand, the products/services you offer, and your primary message. Then figure out the topics and subject matter that are "on brand" to discuss on social channels.

For example, for a health insurance company, the topic map would include the primary topic, insurance. But it could also include financial management and health.

Read more about topic maps here. http://www.digitalmarketer.com/increase-social-media-engagement/

### Long-tail Media Outreach

This is the process of earning mentions from lots of small media players (bloggers, podcasters, etc.) instead of a small number of large media players.

You see, traffic may surge after a mention by a large-media player, but it will soon return to normal. Smaller media channels, on the other hand, have a more targeted audience that's a better fit—and their audiences actually listen to them.

As a result, a few mentions from these smaller players can give you higher quality leads that actually convert. You may not get traffic surges, but your bottom line will get a boost.

The strategy? Figure out who the influencers are in your space, who's listening to them, and whether they're competitors or potential partners. Then build relationship with the small players who are a good fit for targeted outreach.

## Your Social Media Success Metrics

We've talked about specific metrics for tracking the 4 stages of your social cycle, but there are a few more metrics that can show you whether you're nailing your social media strategy overall. Here are 3 you need to watch.

### Applause Rate

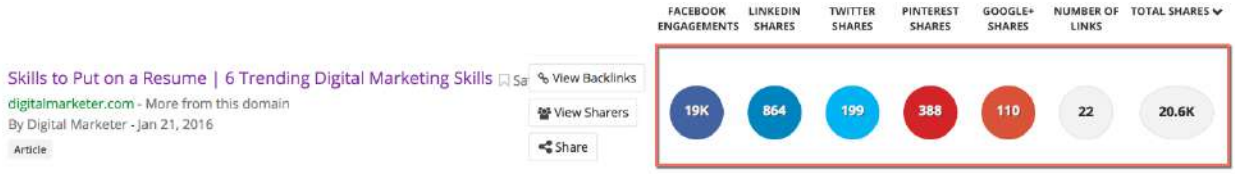
Every social share and mention is a form of applause. Because let's face it, no one shares something they don't perceive as valuable.

Measure the sum total of all social shares (Facebook, Likes, Tweets, LinkedIn shares, etc.) and comments on a piece of content.

### Traffic by Channel

It's important to know where your traffic is coming from. So use a tool like BuzzSumo that can measure your social traffic by channel.

Lots of engagement indicates you've found a topic your audience resonates with. Low engagement tells you you've missed the mark.




Ideally, you want to know who likes your content and how often it's being shared. From that, you can figure out what's working and where you need to improve.

### Conversions from Social Media

Once you know the traffic that's coming from social channels, the next step is to calculate your conversions from social media.

You want to know the percentage of visits from social media that take the action you're driving on a web page. For that, the formula is:

[***traffic from social media***] divided by [***total traffic***]

Ultimately, this is the number you want to impact. The higher your conversion rate, the more successful your social media marketing is.

## Bottom Line

Like it or not, we live in a social world. Your customers are on the social web, sharing experiences and opinions related to you, your brand, and your industry.

Are you listening?

The approach we've shared in this chapter will help you create a strategic social media plan that helps you keep up with the conversations taking place online, as well as getting you in front of your customers—and helping you lead, engage with, and sell to them.

But there's another (more direct) way for you to have conversations with your prospects and customers: email. And it's a vital piece of your digital marketing strategy.

Email is hands-down the most effective way to move prospects through the Customer Journey. It's also your ticket to loyal customers and repeat sales. So don't miss it.

## Become a Social & Community Manager Specialist




Thanks to an ever-changing social landscape, consumers have altered the way they voice criticism and praise, the way they consume information, and, most importantly, the way they buy.

Successful brands must learn to adapt to these changes, and put plans and processes in place to listen, influence, network and sell in this environment.

In this mastery course, you'll learn to assess business goals and employ sound social media marketing practices to meet those goals.

You'll also be trained on the most up-to-date social media marketing practices that work TODAY, and will continue to work TOMORROW.

**Click Here to Learn More »**



CHAPTER 05:

# FOLLOWING EMAIL MARKETING BEST PRACTICES

DIGITALMARKETER

CHAPTER
# 05

After reading the last chapter, we're confident you understand that we live in a social world.

Your own experience probably backs that up. Every day, you chat in real-time with people all over the world.

Does that spell the end of email marketing?

As social media has grown in importance, many so-called marketing experts have predicted the end of email.

Don't believe them! Email marketing is alive and well.

And here's why we say that with the utmost confidence:

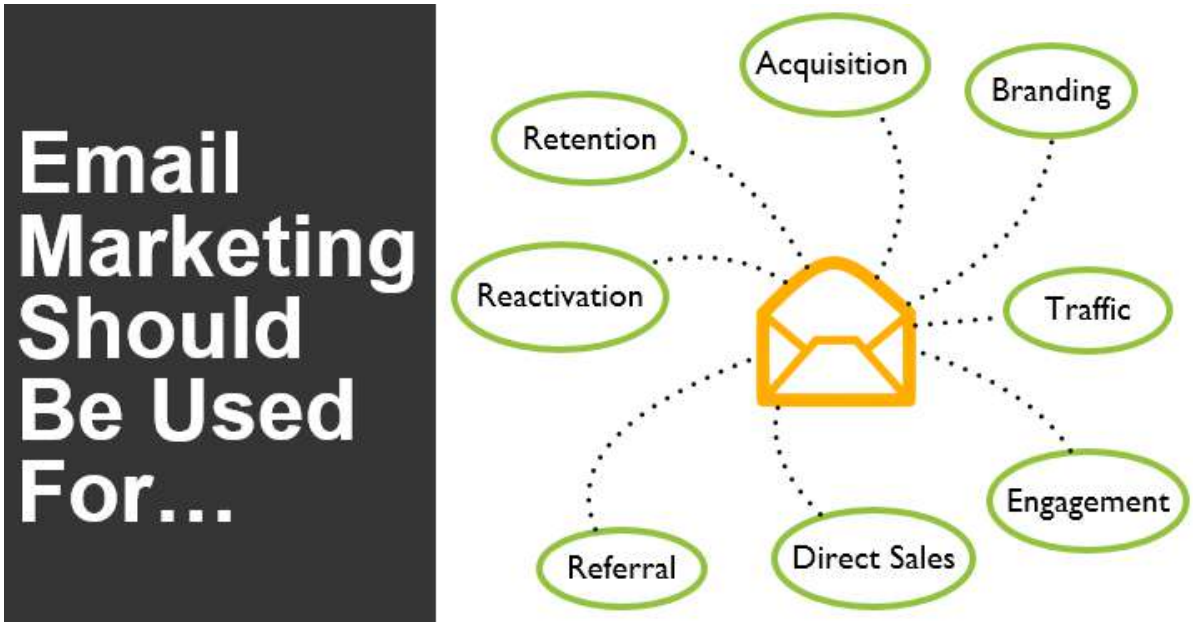
- Traffic and Conversion Summit launched in 2009 with 258 attendees. Email marketing was a big part of the launch strategy.
- Using email marketing to promote the event, T&C grew to 4,500 attendees in just 8 years.
- In only one year, DigitalMarketer generated well over $20 million in revenue from email marketing alone.

Regardless of the rumors, email is nowhere near "dead"—and if you know how to use it, it will help you exponentially grow your business.

With that in mind, in this chapter, we'll review the basics of email marketing, including the methods, the metrics, the lingo you need to know, and who on your team should own email marketing.

But first, let's look at the role email plays in a growing business.

## The Role of Email Marketing



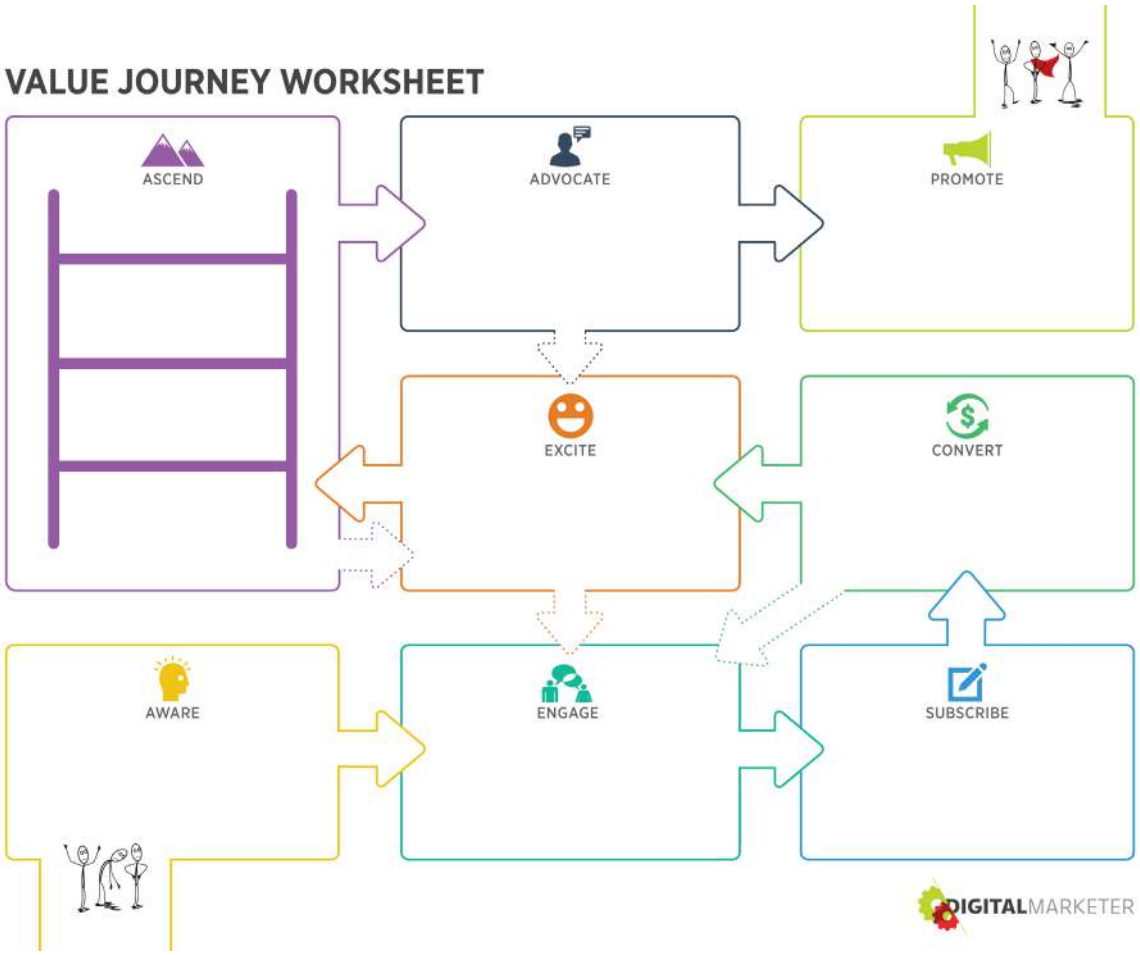

Email marketing can be used for branding, engagement, acquisition, retention, direct sales, reactivation, generating traffic, and getting referrals, making it one of the most versatile tools any business can use to grow their business.

But it's important to understand *why* we use email marketing. Interestingly, it's not for profit or growth.

The outcome of strategic email marketing is indeed profit and growth, but the purpose of email marketing is to move your customers from one stage of the "value journey" to the next.

**The goal of email is to assist and expedite a customer's movement from one stage of the value journey to the next.**

We talked about the "Customer Value Journey" in Chapter 1. But let's review it again.



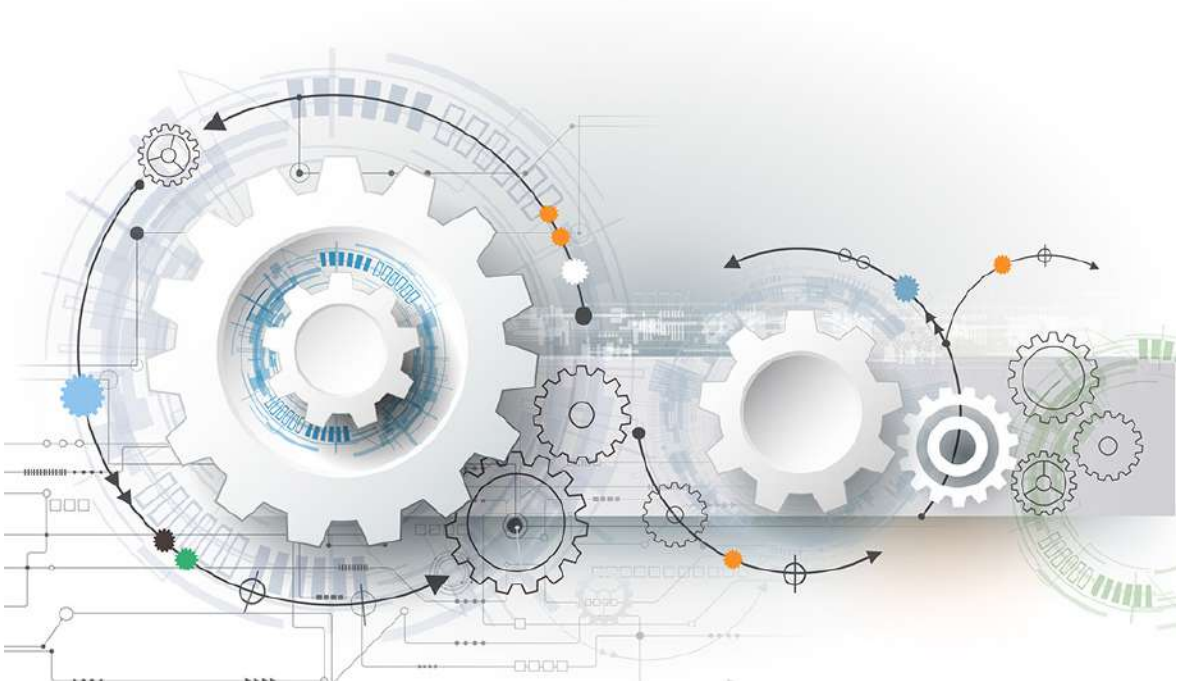

This is your business. Think of it as a path your customers will travel as they get to know you.

In the bottom left corner, they're only just becoming aware of you, but by the time they reach the top right corner, not only do they know you, they promote you to everyone they know because you've transformed their life.

**This journey, from awareness to conversion to promotion, is the customer journey.** As the customer travels this path, their lifetime value increases as well, adding profits and stability to your business. That's why we also call this the value journey.

And it's through email that you expedite the journey—*if you understand the methods that work*.

# Methods of Well-Executed Email Marketing



Email marketing is more than broadcasting an email every time you publish a new blog post. And it's more than sending email alerts when you have a promotion or sale.

To master email marketing, you need to understand the types of emails you'll use, their timing, and the different campaigns you'll use to connect with your subscribers.

## The Types of Emails You'll Use in Email Marketing

There are three types of emails that you'll rely on as an email marketer.

- Transactional – to provide customer service.
- Relational – to engage subscribers and nurture relationship with them.
- Promotional – for generating sales.

As you can see in the chart below, each type facilitates a different interaction with your subscribers.

| | CUSTOMER SERVICE | BRAND AWARENESS | LEAD GENERATION | RETENTION & LOYALTY | ENGAGEMENT & NURTURING | SALES & UPSELLS |
|---|---|---|---|---|---|---|
| TRANSACTIONAL | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| RELATIONAL | | ✓ | ✓ | ✓ | ✓ | ✓ |
| PROMOTIONAL | | | ✓ | ✓ | ✓ | ✓ |

*You'll use 3 different types of emails to engage with your subscribers.*

## Email Type #1: Transactional Emails

These are the emails that get sent out by your automated systems, confirming actions taken by your prospects and customers.

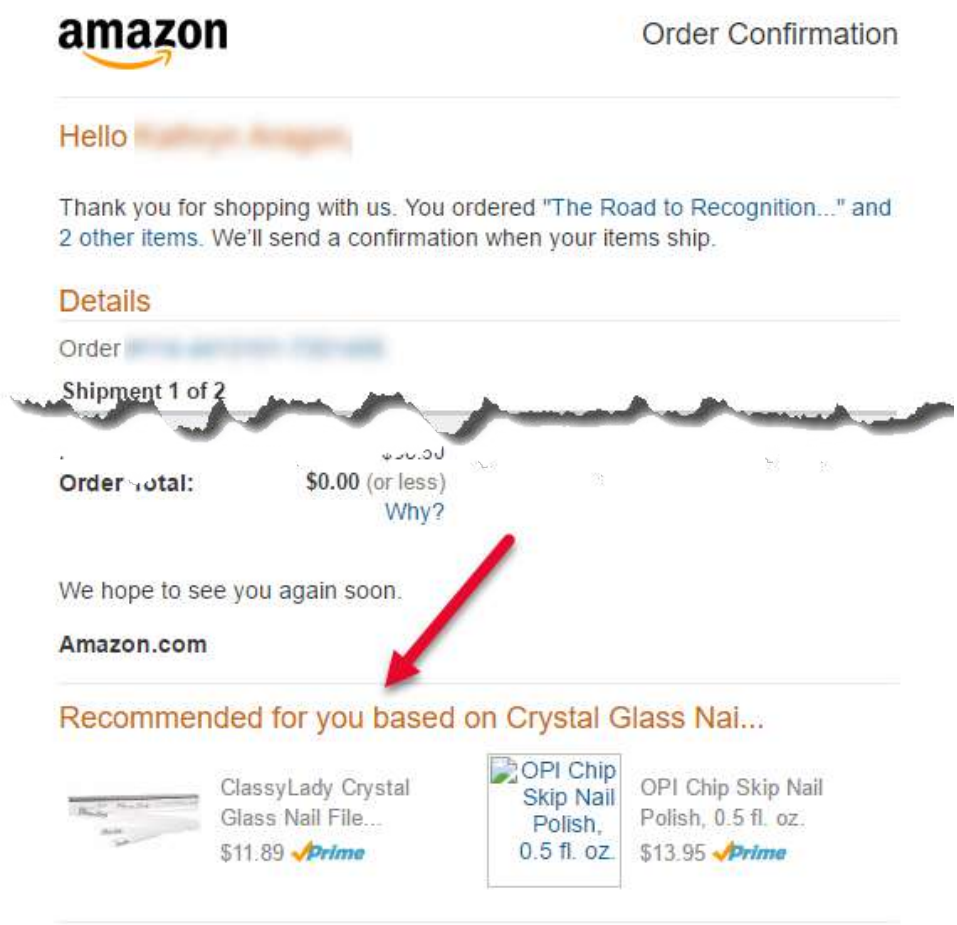
While most transactional emails are templates provided by the marketing systems we use, the **average revenue per transactional email is 2x to 5x higher than standard bulk email**.

Here are the 8 types of transactional emails you can use, along with some tips for raising their transactional value:

### 1. Order Confirmations

Order confirmation emails have a higher open rate than any other type of email. That makes sense if you think about it: the recipient has just given you money and wants to verify the details of their purchase.

Most brands don't do anything to optimize this email for growth. But look at what Amazon does.



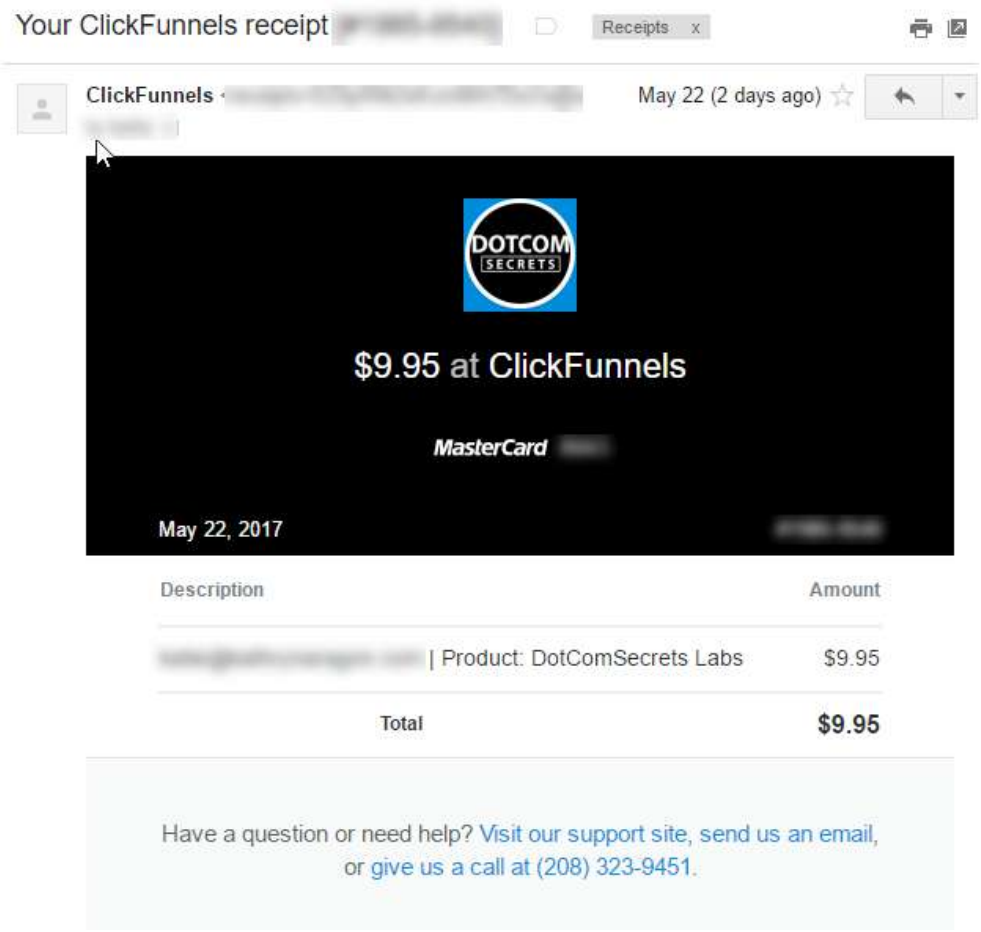

*Yes, emails can (and should) be optimized for growth.*

This email confirms the purchase, sets expectations, and finishes the transaction. The customer is excited about their purchase—which means it's a great time to add an additional offer or ask for a referral.

## 2. Purchase Receipts

Receipt emails, like confirmation emails, have a high open rate, but they're rarely leveraged for growth.

See what I mean:




*Confirmation emails have a high open rate.*

In this example, the template provides space for a "contact us" message. Why not make an offer as well?

## 3. Shipping Notices

Another email that excites your customers is your shipping alert email, telling them their purchase has been shipped and when it will arrive.

Thank you for your order from **Payback Gift - OD!** We wanted to let you know that your order (##37245) was shipped via USPS, USPS First Class Mail on 5/23/2017. You can track your package at any time using the link below.

**Shipped To:**

[redacted]

**Track Your Shipment:** [redacted]

This shipment includes the following items:

| Item # | Description | Qty |
|---|---|---|
| SN1142 | Amazonite Mala Bracelet/Necklace - 8 mm x 108 beads / Amazonite Mala / Blue | 1 |
| SN1229 | Pink Aventurine Mala Bracelet/Necklace - 8 mm x 108 beads / Pink Aventurine Mala / Pink | 1 |

**Thank you for your business and we look forward to serving you in the future!**

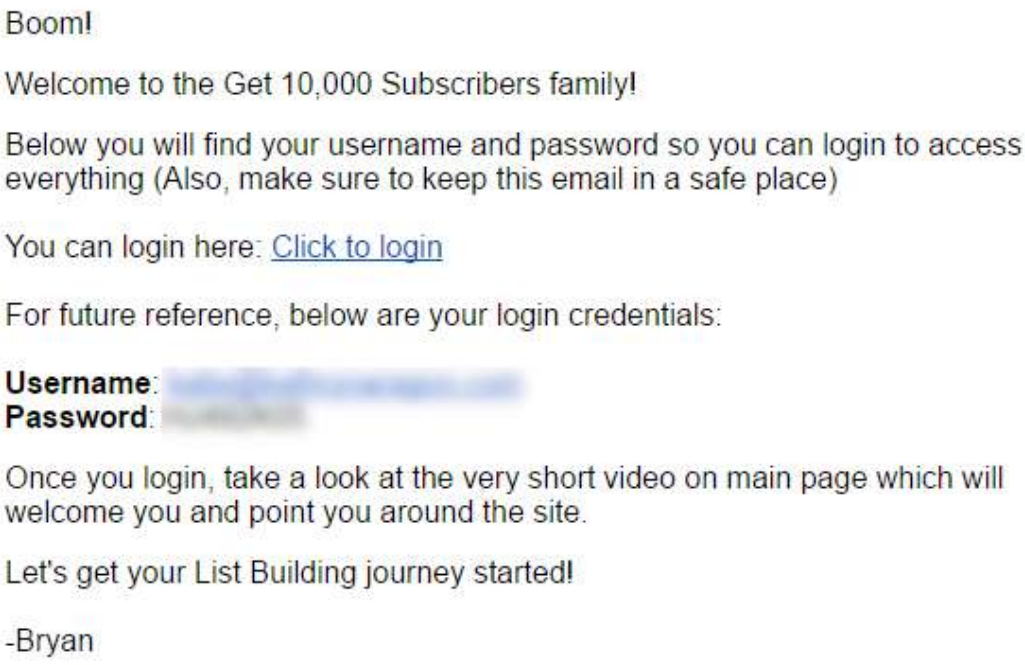
*Shipping alerts get customers excited about their purchase.*

As you can see, there's not usually anything in this email that could expedite the customer journey.

But you've just reminded your customer of their purchase, renewing their excitement about getting it in the mail. What could you add to leverage that excitement? Could you ask them to tell their friends? What about a social share?

## 4. Account Creation

This email goes out when you create an account for new purchases, providing customers their login information.



Boom!

Welcome to the Get 10,000 Subscribers family!

Below you will find your username and password so you can login to access everything (Also, make sure to keep this email in a safe place)

You can login here: Click to login

For future reference, below are your login credentials:

**Username**:
**Password**:

Once you login, take a look at the very short video on main page which will welcome you and point you around the site.

Let's get your List Building journey started!

-Bryan

*Think about how you can leverage transactional emails.*

As with most transactional emails, this email is rarely leveraged. But getting access to a closed group is a bit like getting a present. Your customers are feeling excited and happy. Why not ask them to do something—say, to share their excitement with their friends in social media?

## 5. Return Confirmation

If you sell physical products and someone requests a return merchandise authorization (RMA), this is a fantastic time to make them an offer or give them a coupon. While they aren't happy about the product they're returning, they can get excited about your excellent customer service.

Your goal here is to re-engage customers, perhaps by offering a different product that would fit their needs better or by providing a coupon code.

For example, you might double the refund amount on another purchase. Or for a SaaS product, you could offer to provide whatever help is needed while lowering the price if they stay. Here's an example of that approach:

Thank you for connecting with me today and providing me some details about your concerns. I am sorry that we let you down and I thank you for being a long time customer. If you are willing to give us another chance here is what I can do:

- Connect you with a Performance Expert at no cost
- Reduce 5/30/17 invoice to $25
- Reduce 6/30/17 invoice to $25
- Reduce 7/30/17 invoice to $25
- Normal billing will resume 8/30/17 for $169

Please let me know how you would like to proceed and I will either get your cancellation or credits taken care of.

Thanks,

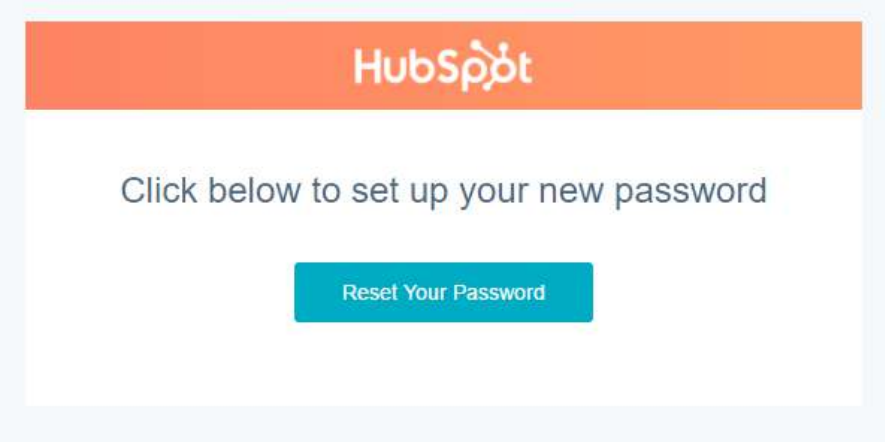
*Creatively addressing customer concerns can help you re-engage them.*

## 6. Support Tickets

As with Return Confirmation emails, support ticket follow-up emails give you an opportunity to add tons of value. If someone received great support, you can easily ask them to share their experience or extend their happiness by giving them a coupon.

## 7. Password Reminders

Most password reminder emails contain little more than a link:




*Typical password reminder email*

Why not make an offer or announce an upcoming event?

### 8. Unsubscribe Confirmations

This email is a standard automated email. But what if you could figure out an offer that would be appropriate for these emails? How much growth would that add to your business? How much more movement would you get through that customer journey?

This is the thinking you need to develop to win at email marketing.

You see, with email, you don't have to make big changes to see big movement. Small tweaks can have very big effects.

Think about the emails you already send. As you've seen, a lot of them are system-generated, which means they contain nothing more than generic messages.

- What could you do with these emails to move people through your customer journey?

- What could you do to transform subscribers into referral partners, ambassadors, or promoters of your brand?

## Email Type #2: Relational Emails

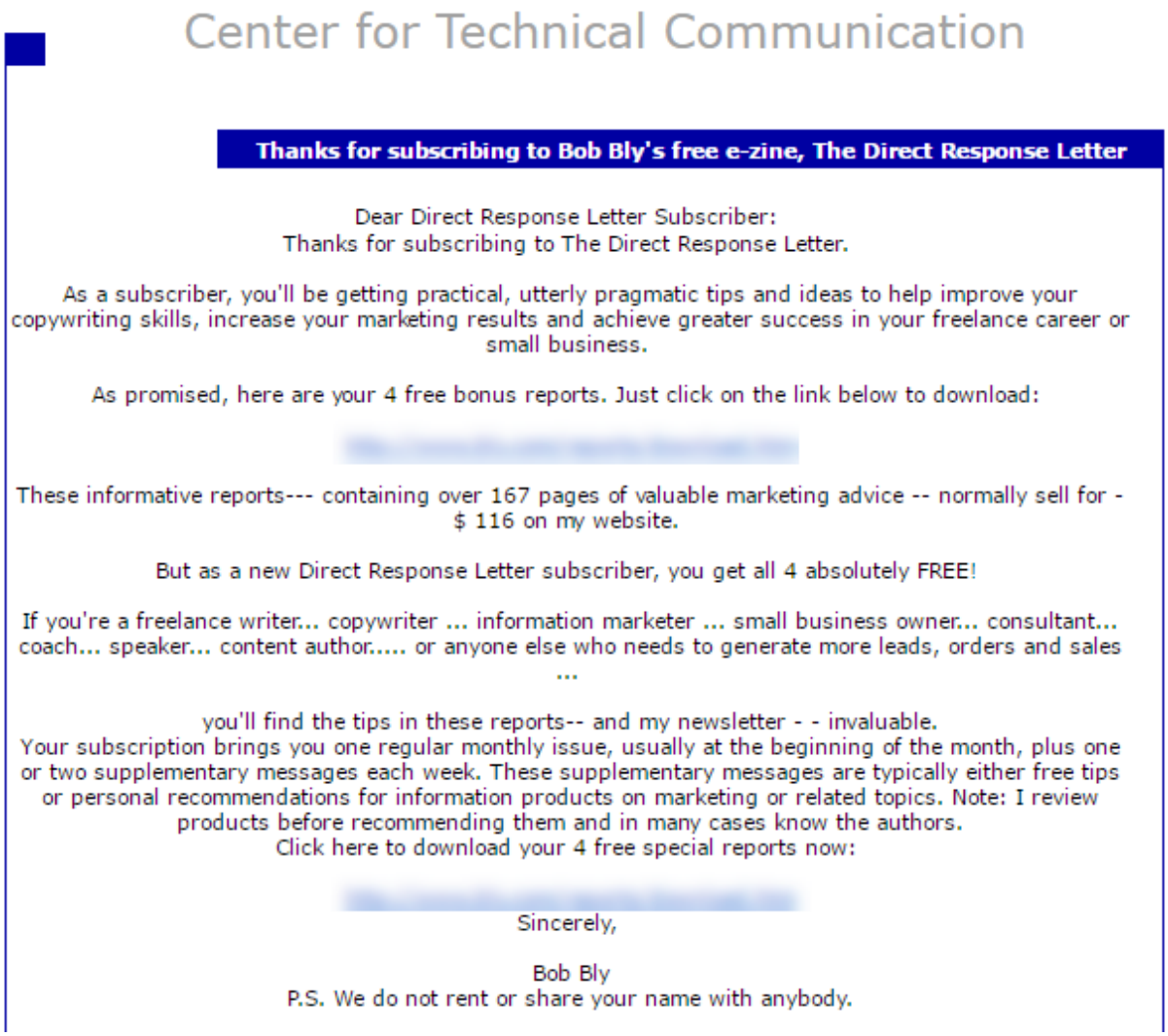
**Companies that use email to nurture leads generate 50% more sales-ready leads at 33% lower cost**.

Here are 8 types of relational emails you can use to get these results for your own business—whether it's digital or brick-and-mortar.

### 1. New Subscriber Welcome

This email should be sent immediately to every new contact. It introduces them to your brand and tells them what to expect, including the benefits of being on your list and the value you intend to provide.

Here's an example that not only sets expectations but also adds value.



Center for Technical Communication

**Thanks for subscribing to Bob Bly's free e-zine, The Direct Response Letter**

Dear Direct Response Letter Subscriber:
Thanks for subscribing to The Direct Response Letter.

As a subscriber, you'll be getting practical, utterly pragmatic tips and ideas to help improve your copywriting skills, increase your marketing results and achieve greater success in your freelance career or small business.

As promised, here are your 4 free bonus reports. Just click on the link below to download:

These informative reports--- containing over 167 pages of valuable marketing advice -- normally sell for - $ 116 on my website.

But as a new Direct Response Letter subscriber, you get all 4 absolutely FREE!

If you're a freelance writer... copywriter ... information marketer ... small business owner... consultant... coach... speaker... content author..... or anyone else who needs to generate more leads, orders and sales ...

you'll find the tips in these reports-- and my newsletter - - invaluable.
Your subscription brings you one regular monthly issue, usually at the beginning of the month, plus one or two supplementary messages each week. These supplementary messages are typically either free tips or personal recommendations for information products on marketing or related topics. Note: I review products before recommending them and in many cases know the authors.
Click here to download your 4 free special reports now:

Sincerely,

Bob Bly
P.S. We do not rent or share your name with anybody.

*Welcome emails should set expectations and add value.*

## 2. Gated Content Delivery

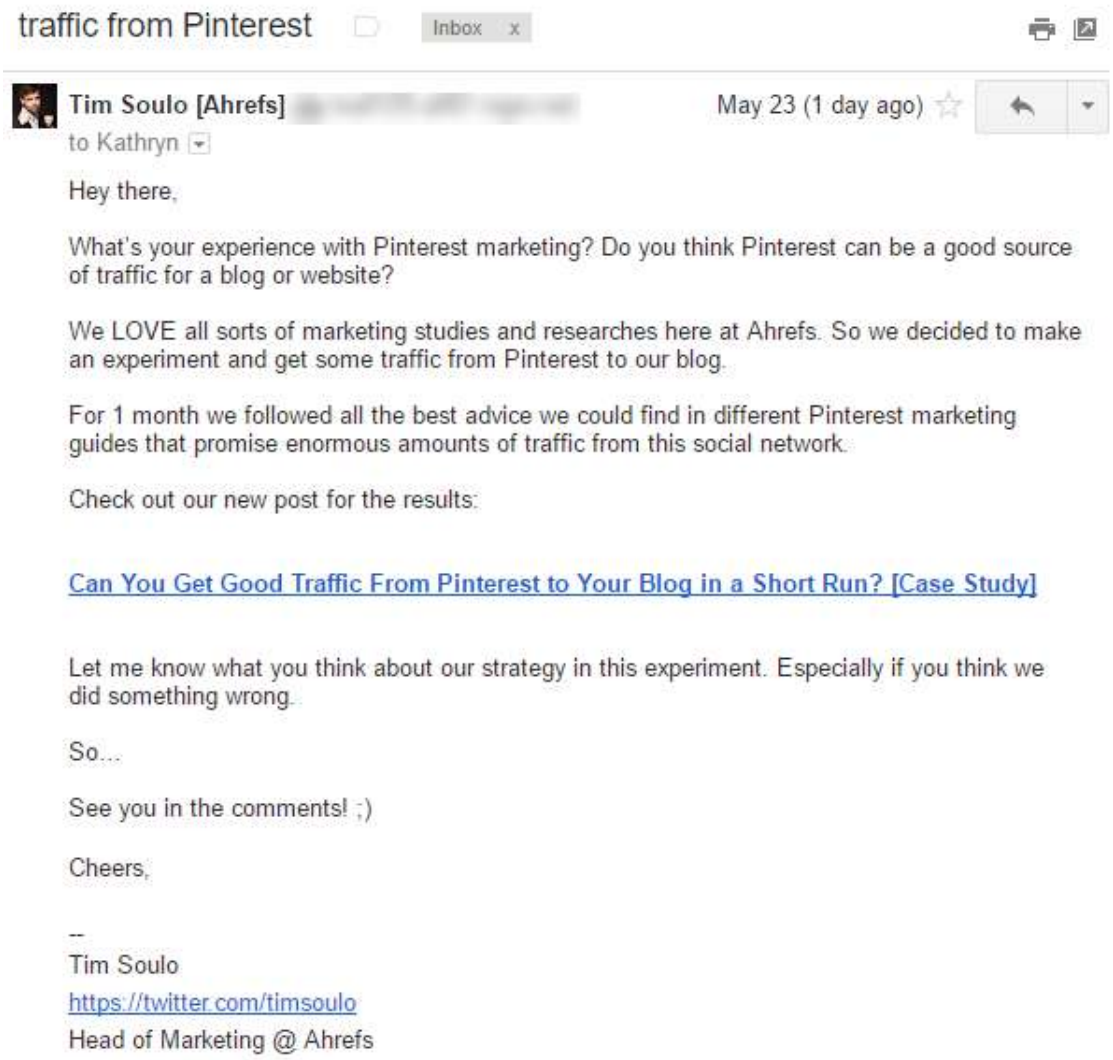
Gated content is valuable information that isn't freely available online. To access the information, you must "pay" with either your email address or a social share. Typically, lead magnets and opt-in offers are free in exchange for the visitor's email address.

This automated email delivers the content that was requested, successfully concluding that transaction. But as with transactional emails, there's lots of room to creatively increase their value.

Notice that Bob Bly's email (above) tells people how to access their gated content while selling the value of being a subscriber. This gets people excited about opening his emails and helps him retain subscribers long-term.

### 3. Newsletters/Blog Articles

Whenever you create content, you should use email to distribute it to your subscribers. These emails can be short and simple, introducing your topic and providing a link to access it.



traffic from Pinterest Inbox x

**Tim Soulo [Ahrefs]** May 23 (1 day ago)

to Kathryn

Hey there,

What's your experience with Pinterest marketing? Do you think Pinterest can be a good source of traffic for a blog or website?

We LOVE all sorts of marketing studies and researches here at Ahrefs. So we decided to make an experiment and get some traffic from Pinterest to our blog.

For 1 month we followed all the best advice we could find in different Pinterest marketing guides that promise enormous amounts of traffic from this social network.

Check out our new post for the results:

Can You Get Good Traffic From Pinterest to Your Blog in a Short Run? [Case Study]

Let me know what you think about our strategy in this experiment. Especially if you think we did something wrong.

So...

See you in the comments! ;)

Cheers,

--
Tim Soulo
https://twitter.com/timsoulo
Head of Marketing @ Ahrefs

*Use email to distribute new blog articles to your subscribers.*

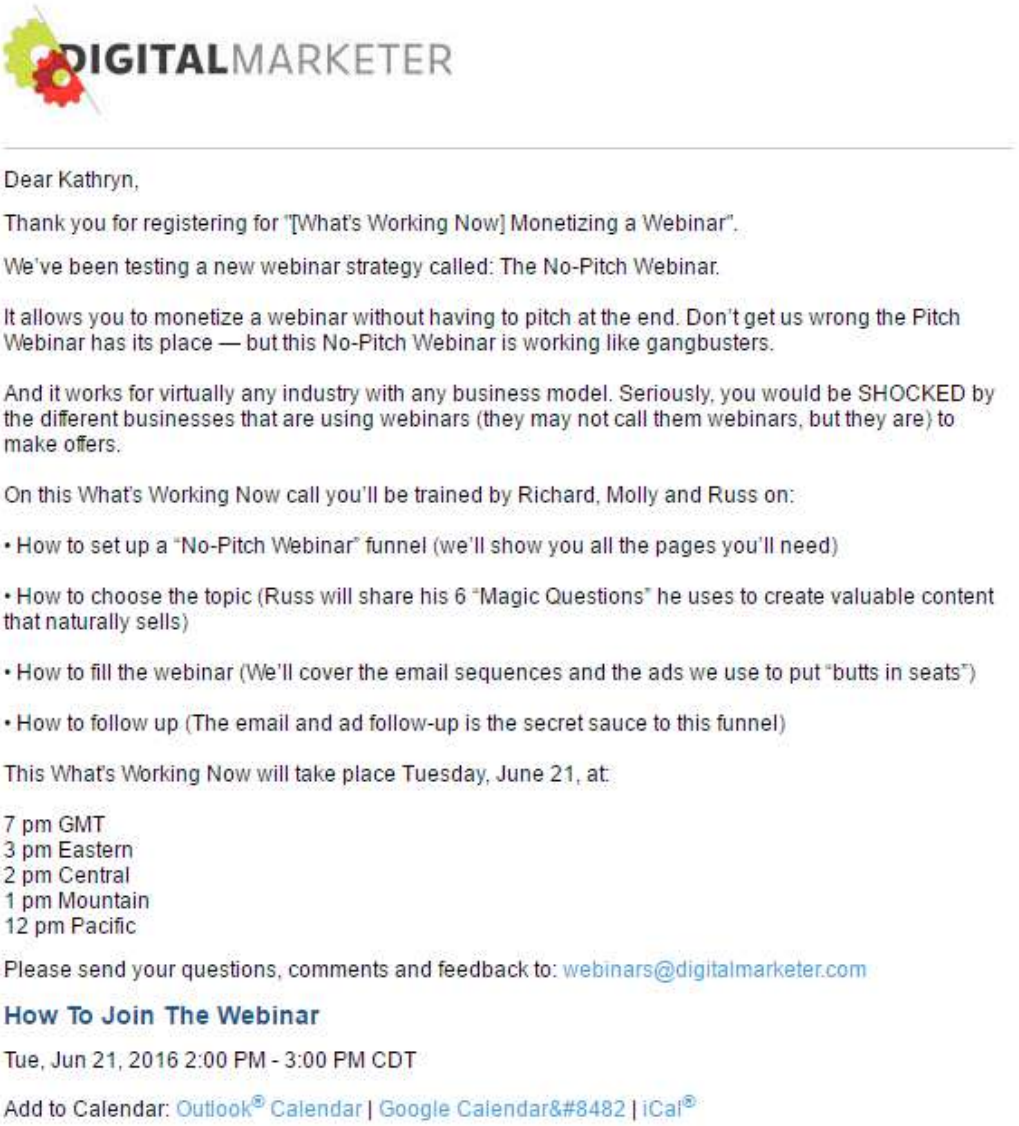
### 4. Webinar/Event Confirmation

This type of email is both *relational* and *transactional*. You've asked someone to block off some time to put you into their schedule. They've made a commitment to you. You need to confirm that commitment.

That's the transactional side of things. You need to send them a confirmation email that spells out the date and time of your webinar, plus any other pertinent information.

But you also want these emails to be relational—because people prioritize time they've set aside for their friends.

Here's a good example from one of our webinars. Notice that we review the information that will be shared in the event, so attendees' interest will stay high.



DIGITALMARKETER

Dear Kathryn,

Thank you for registering for "[What's Working Now] Monetizing a Webinar".

We've been testing a new webinar strategy called: The No-Pitch Webinar.

It allows you to monetize a webinar without having to pitch at the end. Don't get us wrong the Pitch Webinar has its place — but this No-Pitch Webinar is working like gangbusters.

And it works for virtually any industry with any business model. Seriously, you would be SHOCKED by the different businesses that are using webinars (they may not call them webinars, but they are) to make offers.

On this What's Working Now call you'll be trained by Richard, Molly and Russ on:

• How to set up a "No-Pitch Webinar" funnel (we'll show you all the pages you'll need)

• How to choose the topic (Russ will share his 6 "Magic Questions" he uses to create valuable content that naturally sells)

• How to fill the webinar (We'll cover the email sequences and the ads we use to put "butts in seats")

• How to follow up (The email and ad follow-up is the secret sauce to this funnel)

This What's Working Now will take place Tuesday, June 21, at:

7 pm GMT
3 pm Eastern
2 pm Central
1 pm Mountain
12 pm Pacific

Please send your questions, comments and feedback to: webinars@digitalmarketer.com

**How To Join The Webinar**

Tue, Jun 21, 2016 2:00 PM - 3:00 PM CDT

Add to Calendar: Outlook® Calendar | Google Calendar&#8482 | iCal®

*A relational webinar confirmation email*

As with gated content, webinar or event confirmations give you the chance to prove that you can be trusted to deliver what you promise. If you develop a reputation for following through on free transactions, it's easy to believe you'll be trustworthy in paid transactions as well.

The next 4 types of relational email are used less often, but they can still help you engage with subscribers and move them through the customer journey. They are:

### 5. Survey/Review

Surveys can help you learn more about your customers' interests. It can also help you segment them so your offers will be precisely targeted to their needs.

### 6. Social Update

Update your followers on changes in your company or your product. This can help you build excitement as well as preparing them for what's coming up.

### 7. Contest Announcement

Contests build excitement and attract new subscribers. Your current email subscribers should be the first to hear the news, though. After all, they're probably your most avid fans.

### 8. Referral Request

After any positive interaction with your subscribers, it makes sense to ask for a referral. Think new purchase, resolution of a problem, or just a friendly email with a kind word.

Relational emails, regardless of *why* they're being sent, should be "human" rather than scripted. And they should always provide value. Remember to spell out the next steps and encourage people to take those steps right away.

## Email Type #3: Promotional Emails

According to the Direct Marketing Association, **66% of consumers have made a purchase online as a direct result of an email marketing message.** Obviously, promotional emails are a powerful growth tool.

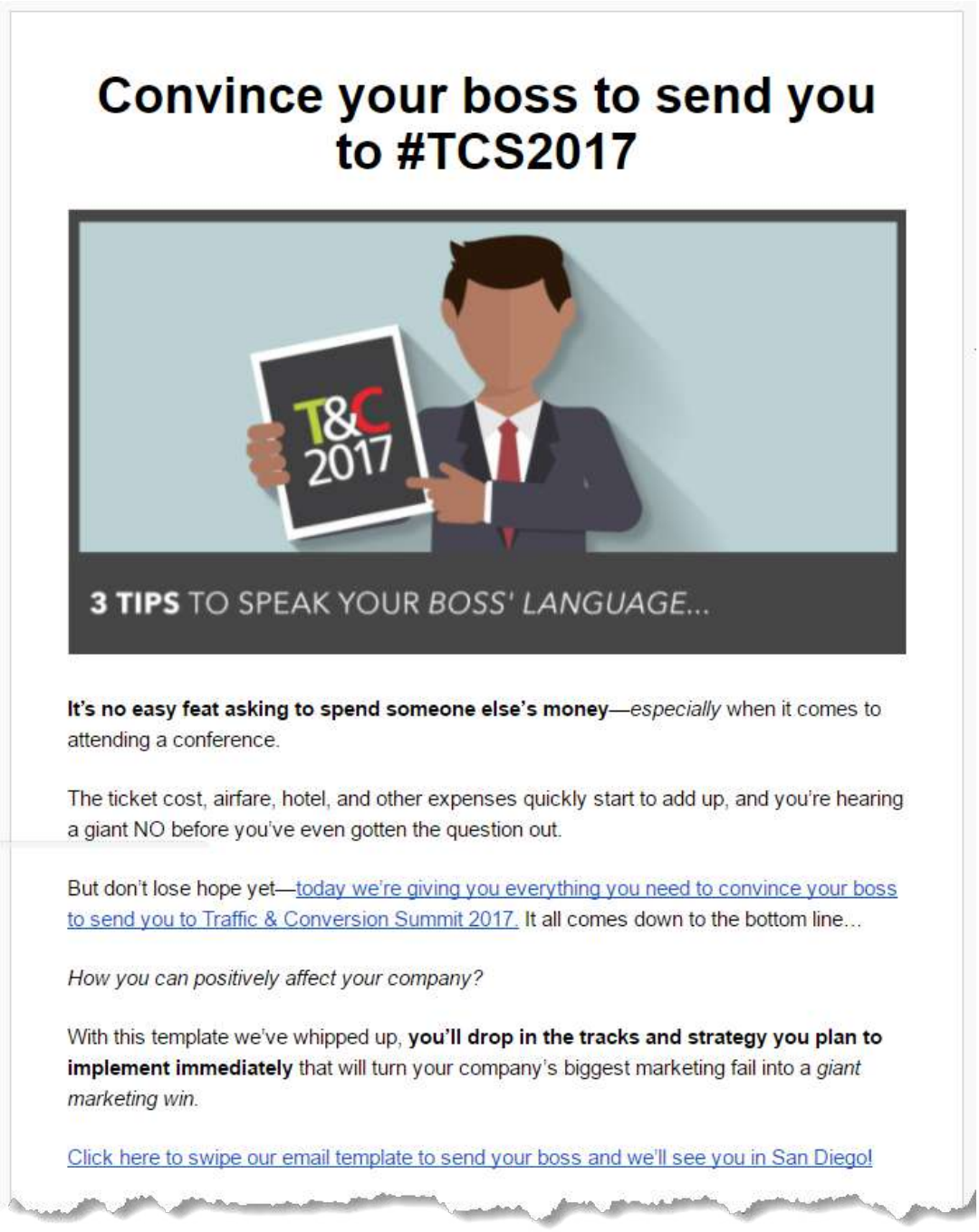
So let's talk about the 8 types of promotional emails you should be sending, including examples from the DigitalMarketer archives.

### 1. Promotional Content

Promotional content is content that's perceived as valuable to your audience while it generates sales for you.

This type of content shouldn't be overused, but balanced with relational content, it's a good way to engage your subscribers.

You can see this dual purpose in action in the example below.



## Convince your boss to send you to #TCS2017



**It's no easy feat asking to spend someone else's money**—*especially* when it comes to attending a conference.

The ticket cost, airfare, hotel, and other expenses quickly start to add up, and you're hearing a giant NO before you've even gotten the question out.

But don't lose hope yet—today we're giving you everything you need to convince your boss to send you to Traffic & Conversion Summit 2017. It all comes down to the bottom line...

*How you can positively affect your company?*

With this template we've whipped up, **you'll drop in the tracks and strategy you plan to implement immediately** that will turn your company's biggest marketing fail into a *giant marketing win.*

Click here to swipe our email template to send your boss and we'll see you in San Diego!

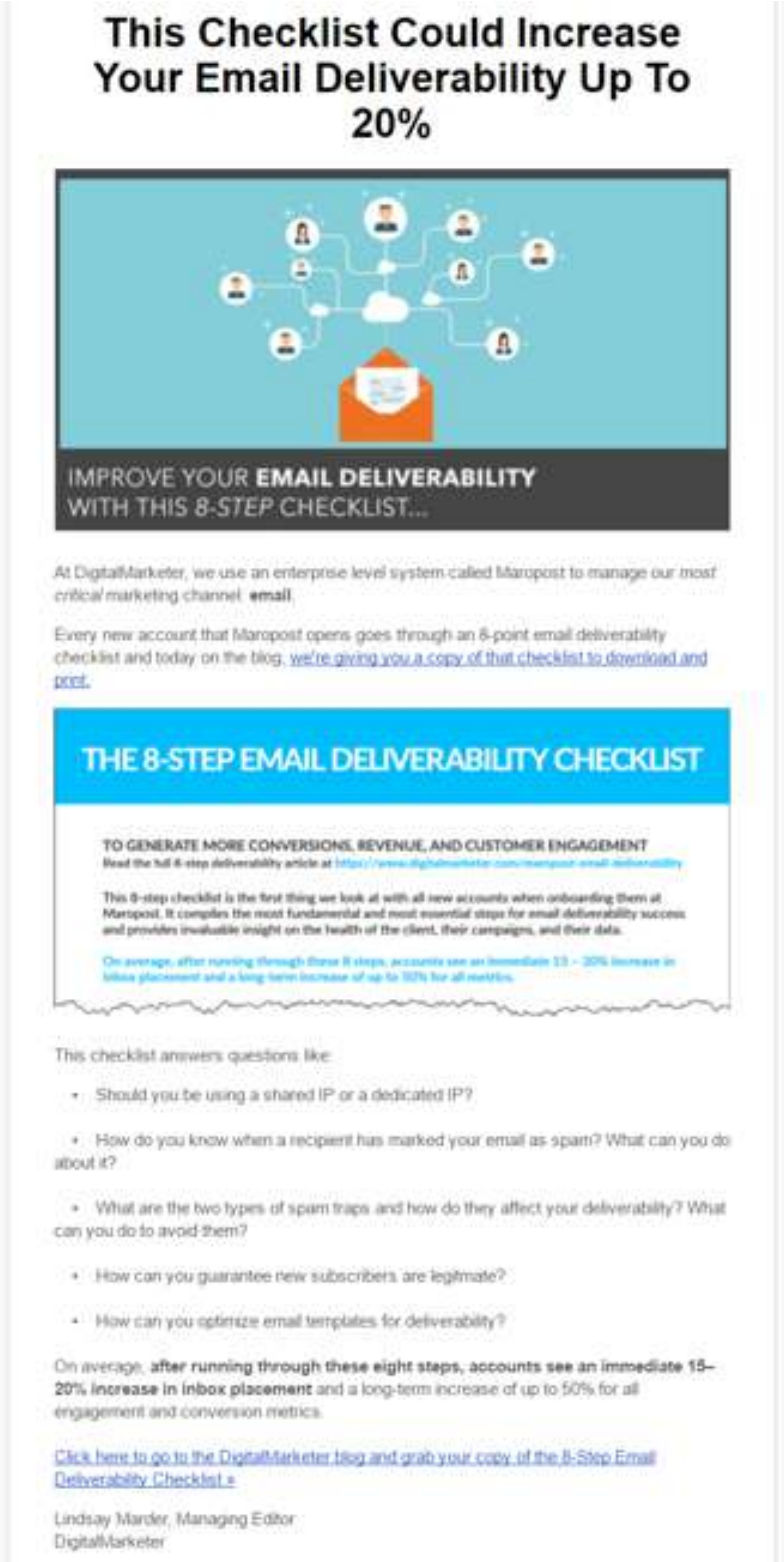
*Promotional content is valuable while generating sales.*

The value to the recipient is a free template, but its goal is to promote the Summit.

### 2. New Gated Content

Gated content aims to attract new subscribers, but existing subscribers are likely to want it as well. Why not send it to your email list to get them re-engaged and move them along the customer journey?

This example has the subject line, "[CHECKLIST] Get up to 20% better email deliverability," which is sure to get noticed. Make sure your subject line is just as compelling.



This Checklist Could Increase Your Email Deliverability Up To 20%

IMPROVE YOUR **EMAIL DELIVERABILITY** WITH THIS *8-STEP* CHECKLIST...

At DigitalMarketer, we use an enterprise level system called Maropost to manage our *most critical* marketing channel: **email**.

Every new account that Maropost opens goes through an 8-point email deliverability checklist and today on the blog, we're giving you a copy of that checklist to download and print.

THE 8-STEP EMAIL DELIVERABILITY CHECKLIST

TO GENERATE MORE CONVERSIONS, REVENUE, AND CUSTOMER ENGAGEMENT

Read the full 8-step deliverability article at

This 8-step checklist is the first thing we look at with all new accounts when onboarding them at Maropost. It compiles the most fundamental and most essential steps for email deliverability success and provides invaluable insight on the health of the client, their campaigns, and their data.

On average, after running through these 8 steps, accounts see an immediate 15 – 20% increase in inbox placement and a long-term increase of up to 50% for all metrics.

This checklist answers questions like:

- Should you be using a shared IP or a dedicated IP?
- How do you know when a recipient has marked your email as spam? What can you do about it?
- What are the two types of spam traps and how do they affect your deliverability? What can you do to avoid them?
- How can you guarantee new subscribers are legitimate?
- How can you optimize email templates for deliverability?

On average, **after running through these eight steps, accounts see an immediate 15–20% increase in inbox placement** and a long-term increase of up to 50% for all engagement and conversion metrics.

Click here to go to the DigitalMarketer blog and grab your copy of the 8-Step Email Deliverability Checklist »

Lindsay Marder, Managing Editor
DigitalMarketer

*New gated content, sent to your subscribers, can get them re-engaged.*

### 3. A Sale Announcement

Sale announcements get more engagement than any other type of email. Clearly, if you want to make a bunch of sales, have a sale.

But you need to use a subject line that's guaranteed to get noticed.

Like this one: [Flash Sale] 7 PROVEN Blog Post Templates (85% off)

Are you frustrated by the lack of shares, comments and TRAFFIC your blog posts are getting?

**Do you know what you need in order to, finally, start your blog...**

...or just post more often to the one you already have?

If you said YES to any of the questions above, then you need to check this out right NOW!

http://go.digitalmarketer.com/get-our-proven-blog-templates

I was frustrated with my blog too (actually I was frustrated with ALL of our blogs)!

I just couldn't understand why **some posts got thousands of shares, dozens of comments and floods of free traffic**...

...while **others got zip**... zero... zilch.

Nothing but (digital) tumbleweeds and crickets...

So I tasked my editorial team to go back and comb through *all of* our sites and stats and evaluate our best, most popular blog posts.

After analyzing over 1,800 blog posts... there were only 7 types of posts that worked consistently (and I mean they REALLY worked.)

Then, I had my team templatize each of those 7 blog posts types and create **step-by-step instructions on**:

- how to find, write or outsource the content
- how to put the blog posts together
- what types of calls to action to use
- the "when" and "where" to deploy them

...and much more.

Now I want you to have them... and for just $7!




**Download These Blog Templates »**

Normally these templates and my "Content Engine" plan sell for $47, but for a limited time you can **get access to everything for 85% off!**

So grab them, today, before the price returns to normal...

...you'll be glad you did. :)

Talk soon,
Ryan Deiss

*Sales announcements get a lot of engagement, provided the subject line is good.*

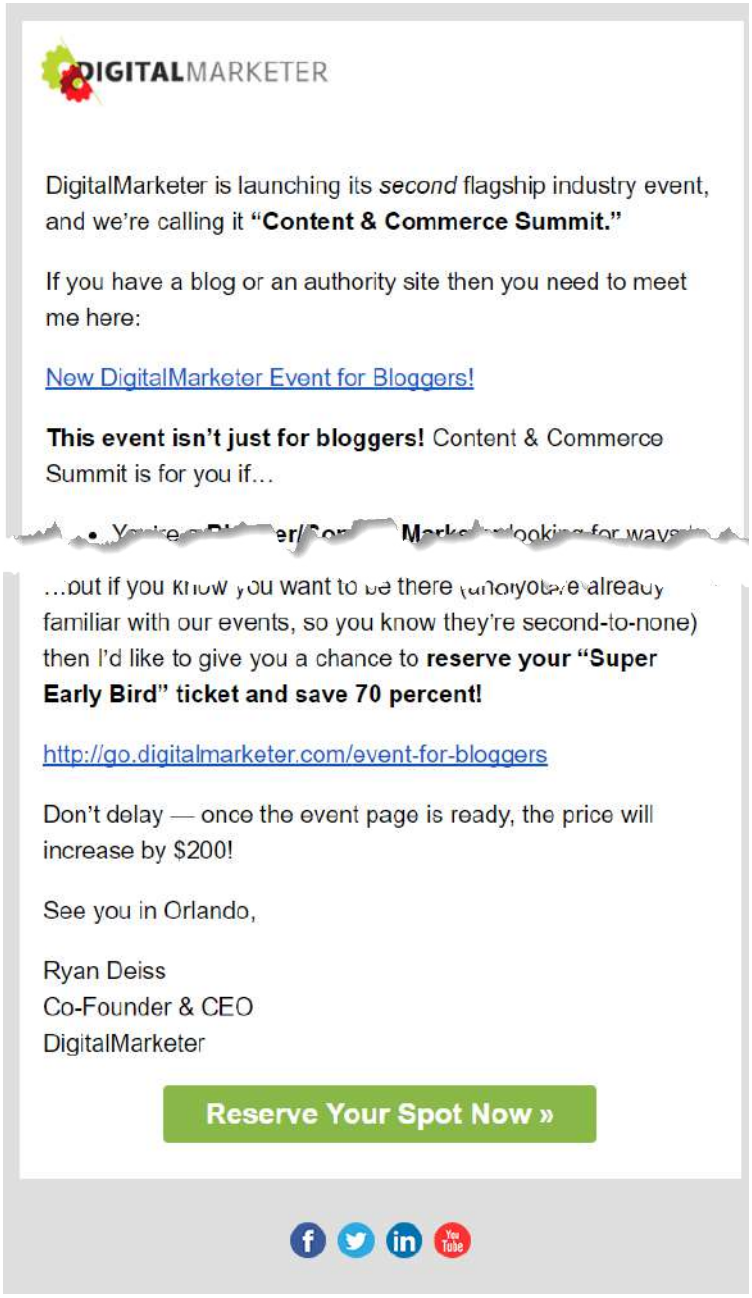
### 4. New Product Release

Your goal as an email marketer is to take new subscribers all the way through the value journey, transforming them into promoters.

Why?

Because promoters are hyper-responsive and typically want everything you produce. That being the case, you should always be producing new products to support these "hyper-buyers."

Then, make sure they know about it by creating a series of announcement/promotion emails like this one, announcing DigitalMarketer's all-new Content & Commerce event in 2016.



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DigitalMarketer is launching its *second* flagship industry event, and we're calling it **"Content & Commerce Summit."**

If you have a blog or an authority site then you need to meet me here:

New DigitalMarketer Event for Bloggers!

**This event isn't just for bloggers!** Content & Commerce Summit is for you if…

…but if you know you want to be there (and you're already familiar with our events, so you know they're second-to-none) then I'd like to give you a chance to **reserve your "Super Early Bird" ticket and save 70 percent!**

http://go.digitalmarketer.com/event-for-bloggers

Don't delay — once the event page is ready, the price will increase by $200!

See you in Orlando,

Ryan Deiss
Co-Founder & CEO
DigitalMarketer

Reserve Your Spot Now »

*Always produce new content to support hyper-buyers.*

In the same way, use these last 4 types of promotional emails to let your subscribers and hyper-buyers know what you're doing to solve their problems.

## 5. Webinar Announcements

## 6. Event Announcements

### 7. Trial Offers

### 8. Upgrade Offers

Now let's talk about the difference between broadcast and triggered emails.

## When to Send Each Type of Email (And to Whom)

Email service providers allow you to send emails in one of two ways:

- **Broadcast** emails are sent manually to your entire list or a segment of your list. They work well for promotions and content emails.

- **Autoresponders** are set up in advance to be delivered when someone performs a triggering action. Most of your email marketing (barring promotions and content emails) should be automated.

Keep in mind, though: *Just because you CAN trigger a message, doesn't mean you SHOULD!*

By segmenting and automating your emails, you're able to send messages that are highly relevant to your subscribers' interests and priorities. That's a win for you and your subscribers.

But just as you can under-automate, you can also over-automate, creating long, complex campaigns that keep your subscribers stuck in a particular phase of their value journey.

The goal, remember is to expedite people's customer journey. And the more emails you create for each stage of their journey, the greater the odds that you'll entrench them in that stage, slowing their overall journey.

## Triggering That Works

Here are the 8 triggers that are most common in email automation.

### 1. New Subscriber

When someone subscribes, you want to automate their welcome and indoctrination to create a great first impression.

### 2. Lead Magnet Request

Most new subscribers will join your list when they opt in to get a lead magnet. Automating delivery ensures they get it within minutes of their request.

Be aware, a new subscriber will likely trigger two automations: subscriber welcome *and* lead magnet delivery—both. That's okay.

### 3. Event Registration

If someone registers for an event, set up a confirmation email that gives them the details they'll need, including date, time, and any access information.

### 4. Purchase

Similarly, if someone makes a purchase, they want confirmation that their order went through. A purchase receipt does just that.

Be aware, though, if they're not currently a subscriber, their purchase may trigger a subscriber welcome automation as well. That's okay.

### 5. Clicking a Link in a Segmentation Campaign

Segmenting allows you to customize your emails to each subscriber's interests. Their behavior—clicking a link in an email, for example—can be used to trigger an engagement campaign. This way, people who don't care about the topic won't see the campaign. But everyone who cares, not only sees your content, they see your promotion as well.

### 6. Excitement About Your Brand

Referral requests can be automated to follow up purchases and other behaviors that indicate they're engaged and excited about your brand.

### 7. Cart Abandonment

One of the easiest ways to increase customer value is to move people off the fence just prior to a purchase. When someone adds products to their cart but doesn't complete the transaction, that should trigger a reminder email.

### 8. Not Engaging with Your Emails

Re-engagement is how you reactivate subscribers who have stopped engaging with your emails.

Each of these triggers should set off an automated email campaign designed to follow up the triggering behavior and encourage people to take the next step in their customer journey.

## Understanding Email Timing

You want your subscribers to be excited about getting your emails, and you want to train them open and engage with them.

There are two approaches you'll need to take to make that happen: segmentation and timing emails to coincide with the customer journey.

Segmentation allows you to send emails to the people who will be most likely to respond favorably. No one sees a promotion they aren't interested in, and people feel like their emails are tailor-made for them.

Timing is about understanding where your subscribers are in their customer journey and only sending them emails that are appropriate for that phase.

## The 5 Phases of Email Marketing



When you understand the phases of the customer journey, it's easier to send the right message at the right time. So let's talk about the 5 phases of email marketing and the stages of the customer journey they align with.

## 1. The Indoctrination Campaign

***Definition:*** *A* ***triggered campaign*** *sent immediately after someone subscribes to introduce them to your brand and set expectations.*

***Stage of customer journey:*** *Subscribe*

***Use this campaign to:***

- Welcome new subscribers.
- Tell them what they can expect.
- Tell them what they need to do next to get the biggest benefit from you and your brand.

This campaign is sent to new subscribers to establish your authority, help them understand the value you're going to provide, and get them excited about you and your brand.

If you do a good job of indoctrinating them, they'll begin to recognize your name in their inbox, and they'll engage with the content you send them.

### Storyboard It

**Step 1**: Start by welcoming new subscribers and introducing them to your brand.

**Step 2:** Re-state in 3-4 bullet points the benefits they'll get as a subscriber. (This is important. If you can't articulate the benefits of subscribing, how do you expect them to understand the benefits of buying from you?)

**Step 3:** Tell them what to expect, using this framework: here's what we're going to do; here's what you need to do after we've done it.

For example:

> *Two to three times a week we're going to send you brand new content and strategies on digital marketing.* [Here's what we do.]
>
> *When you get that email, read it and save it—because when you're looking for a strategy that works, you're going to want to be able to access this information.* [Here's what you need to do after we've done it.]

**Step 4:** Encourage whitelisting by saying something along these lines:

> *The information we provide—even the free information—is very important, and if you're not getting it, you're losing out. So here's what I want you to do:*
>
> - *Whitelist this email address. [Include a link to instructions.]*
> - *Create a folder where you can save all our messages.*
> - *Don't auto archive any of them. (Read them and use them to grow your business!)*

**Step 5:** Put your best foot forward. Send them a "best of" campaign, listing the content your existing subscribers have engaged with the most. For example:

- Your highest shared content, whether it's video or a blog post
- Your highest commented Facebook post or Facebook Live
- A piece of content that has gotten rave reviews

Think of your indoctrination emails as a first date with your new subscriber. Show up in your best clothes, tell your best stories, and focus on building relationship with your new subscribers.

## 2. The Engagement Campaign

***Definition:*** *An* ***interest-based, triggered campaign*** *sent after your subscriber takes a specific action that makes a relevant offer (and sale) to your subscriber.*

***Stage of customer journey:*** *Convert & Excite*

***Use this campaign to:***

- Turn subscribers into buyers by prescribing the next logical step based on what you know they're currently interested in.

This campaign targets subscribers who have just engaged with your brand. For instance, maybe they visited a page or downloaded a lead magnet, but they didn't take the next action you presented.

The goal of this campaign is to engage with the subscriber, reference the positive action they've taken with you, and tell them the next logical action that will end in a purchase.

### Storyboard It

**Step 1:** Acknowledge the action they just took.

**Step 2:** Try to overcome the objections you know they're experiencing. Don't just talk about the tactical, lever-pulling features. Address the thoughts and feelings that keep them from taking action.

**Step 3:** Prescribe the next logical step. Clearly spell it out.

**Step 4:** Ask them to buy.

Email marketing is about building relationships with your followers, sure. But you need to set expectations from the beginning of that relationship. Since, ultimately, you want your followers to become customers, you need to confidently ask for the buy.

## 3. The Ascension Campaign

***Definition:*** *An* ***interest-based, triggered campaign*** *that makes a relevant offer (and sale) to your subscriber immediately following their triggering behavior.*

***Stage of customer journey:*** *Excite & Ascend*

***Use this campaign to:***

- Expedite and accelerate the value journey.
- Turn new buyers into multi-buyers by prescribing the next logical step (or nurturing them until it's appropriate to take that step).

Like the engagement campaign, this campaign is triggered by a subscriber's action—generally a purchase—and presents the next logical step with your brand.

In many cases, it fills the gaps in your funnel, improving your results.

You see, each additional offer is a stopping point where customers might decline and exit your funnel. This sequence is designed to follow up that offer, provide extra incentives to buy, and overcome any objections for not buying.

### Storyboard It

**Step 1:** Start by referencing the action they just took. (Don't address the action they *didn't* take: "We noticed that you *didn't* buy our core product, so I'm sending you this email.") Congratulate them. Acknowledge their excitement. Build on that positive energy.

**Step 2:** Address and overcome the objections that might be keeping them from taking the next step.

**Step 3:** Clearly spell out the next logical step, so they know what they need to do.

Your goal is to turn one-time buyers into multi-buyers. To do that, you must articulate the value you're providing, remind them of the benefits they'll receive, and increase their interest and excitement.

But before you immediately start pushing a sale, ask yourself two important questions:

**QUESTION #1:** *What is the next step I want them to take?*

**QUESTION #2:** *Do I have any reason to believe they are ready to take that next step?*

These questions are important because (believe it or not) *it can hurt to ask!*

What do I mean by that?

Your offer must be appropriate for the stage of the relationship. If you move too fast or push too hard, you'll make your subscribers uncomfortable, and they'll leave.

If they're not ready to take the next step in your value ladder, don't ask. Nurture that subscriber until the time is right, and then make your offer.

## 4. Segmentation Campaign

***Definition:*** *A manual promotional campaign* ***sent to your entire database*** *with the goal of segmenting your subscribers by interest.*

***Stage of customer journey:*** *All*

***Use this campaign to:***

- Pique the interest of subscribers who are "stuck" in their value journey.
- Get them to segment themselves based on what they're interested in now.

This is one of the only email campaigns that isn't automated and triggered by a subscriber's behavior. Instead, you broadcast this promotion to your entire database (or a large segment of it) with the goal of segmenting your subscribers by interest.

You want your subscribers to raise their hands and say, "Yes, I'm interested in this topic." And when they've done that, you should have an engagement campaign set up to continue speaking to them about it.

The goal is this: to send more emails to the people who engage with your campaign and fewer emails to the people who don't.

This approach may seem counterintuitive, but it works because it demonstrates that you're listening. And from our experience:

- If you listen to what your subscribers are saying, they'll give you more money.
- If you listen to what they want, they'll engage with your brand more.

### Ideas for Segmentation Campaigns

**Idea 1:** Use content to segment your list: blog posts, video, or gated content. Then, when someone engages with that content—indicating interest in the topic—send them an engagement campaign with promotional content based on that topic.

**Idea 2:** Use special offers: coupons, flash sales, or special promotions. High-value, time-sensitive offers give people a good reason to take immediate action, which can help you expedite their value journey.

**Idea 3:** Use events: webinars, demos, workshops, or even one-on-one phone calls. Time is money, as the saying goes. After investing the time to attend an event, people are more inclined to invest their dollars as well.

## 5. The Re-Engagement Campaign

***Definition:*** *A* ***triggered campaign*** *designed to re-engage any subscriber who hasn't opened or clicked an email in the last 30 to 60 days.*

***Stage of customer journey:*** *Any*

***Use this campaign to:***

- Call out inactive subscribers and get them to start engaging with your emails again.
- Get them re-excited about you and your brand.

The reality is that not everyone will engage with your emails. Their interests or circumstances will change. And no matter where they are on the customer journey, they can become inactive.

What then?

You send a re-engagement campaign designed to re-capture their interest and get them opening and clicking your emails once again.

**Storyboard It**

**Step1:** Identify your inactive subscribers—anyone who hasn't clicked on an email in the previous 30 to 60 days.

**Step 2:** Give them a reason to re-engage with your emails. For example, you could take the direct approach, and ask if everything's okay:

> *I noticed you haven't been opening or clicking my emails, and I just wanted to send an email and ask, "Is everything O.K.?"*

**Step 3:** Remind them of the benefits of being a subscriber.

**Step 4:** Tell them what they've missed. As you would in an indoctrination campaign, send them some of your best content.

If this campaign works, you'll have re-engaged your inactive subscribers and, hopefully, put them back on their value journey.

But what if it doesn't work?

Simple. Stop emailing them.

Inactive subscribers raise your costs and hurt your deliverability. They're also the ones most likely to complain when they see your emails in their inbox. So there's no need to feel guilty. Clean your list on a regular basis.

## Using These 5 Campaign Types to Expedite the Customer Journey

The 5 types of email campaigns we've just reviewed will help you engage your subscribers at every stage of their value journey. But it's important to remember that your goal isn't merely to engage people.

Email marketing is about quickly move your subscribers from one stage of the value journey to the next.

Typically, that journey begins when someone becomes aware of your brand and decides to subscribe. Once that happens, your job is to:

- Turn your new subscriber into a customer.
- Get them excited about the brand.
- Ascend them by getting them to buying more, higher-value products.
- Turn them into an advocate.
- Turn them into a promoter.

The 5 campaigns we've reviewed will help you achieve each of these goals—and quickly turn new subscribers into active promoters.

## The Metrics: How Email Marketing Is Measured



Sending the right emails to the right people at the right time is only one aspect of email marketing. To optimize your efforts, you also need to measure your results.

Here are the top performance metrics that will help you manage your email marketing.

### List Growth

For this metric, you want to watch the number of new subscribes as compared to the number of unsubscribes. As you might expect, you want the ratio to be positive.

### Delivery Rate

The percent of messages delivered to the recipient's inbox relative to the number of emails sent. Aim for a delivery rate of 95+ percent.

### Open Rate

The percent of messages opened by the recipient relative to the number of emails sent.

### Click-Through Rate (CTR)

The percent of email messages clicked relative to the number of emails sent or, in some cases, relative to the number of emails opened.

### Unsubscribe Rate

The percent of emails that lead to an unsubscribe relative to the number of emails sent.

### Complaint Rate

The percent of emails marked as Spam relative to the number of emails sent.

TIP: Your email delivery rate will go up if your open rate and click-through rates go up and unsubscribe rate goes down.

This is why we encourage segmented email campaigns that target people at their specific stage in the value journey. Our approach to email marketing is strategically designed to boost opens and click-through while minimizing unsubscribes.

## The Lingo Email Marketers Use

What are the terms you need to know as an email marketer?

### Customer Journey

Also known as the value journey. The development of a relationship with a prospect that takes them on a path from awareness of your business, products, and brand to rabid fan.

### Broadcast Email

An email sent out to all email subscribers or a segment of your email subscriber list.

### Triggered Email

An email sent automatically when a customer or prospect performs a specific action. For example, a relevant offer might be sent to someone who fills out a lead form.

### Promotional Calendar

The 30-day and 90-day calendars containing the planned email campaigns that will intentionally move a prospect through the customer journey,

### Email Storyboarding

The process of planning the structure, timing, and content of an email campaign.

## Relevant Roles




Who in your organization should be trained in email marketing?

Three different departments should be proficient at and understand the role of email marketing.

### Marketing

Every marketing professional should understand how email marketing can be leveraged to move prospects through the customer journey—especially your monetization team.

### Sales

One of the most effective ways to create sales-ready conversations is to engage prospects through email.

### Editorial

Your editorial team will use email to distribute the content they create and add value to subscribers on an on-going basis.

## Bottom Line

Email marketing consistently generates the highest ROI of any marketing activity, but sadly most businesses are doing it wrong (or ignoring it completely).

Email is most effective when you coordinate it with your content and advertising campaigns—to indoctrinate your new subscribers, nurture those relationships, and move them quickly through the Customer Journey.

It may take you a while to master the tactics we discussed in this chapter, but the effort is well worth it. Email marketing will drive growth as no other strategy can.

The next step in mastering digital marketing is search marketing, and we'll cover that in the next chapter.

## Become an Email Marketing Specialist




In this chapter, we've covered the basics, but you may still have questions. If so, let us know in the comments.

Or, for more in-depth answers, consider becoming a certified email marketer.

In our Email Mastery course, you'll learn the three types of email campaigns, as well as HOW and WHEN to use them. You'll also learn how to architect the perfect promotional calendar and how to use automated email marketing to literally "sell while you sleep."

By the time you finish, you'll be able to effectively monetize any email list, while simultaneously increasing engagement with your subscribers.

**Click Here to Learn More »**



CHAPTER 06:

# DESIGNING YOUR SEARCH MARKETING STRATEGY

DIGITALMARKETER

CHAPTER
# 06

Algorithm updates. Semantic markup. Search intent.

One thing's for sure: search marketing ain't what it used to be!

Luckily, all these changes are good news for digital marketers like us. Because we're not trying to game the system…

And when you're an honest marketer trying to deliver real value, you're building a solid foundation for search marketing success.

That being the case, search marketing can help you boost your website's traffic and visitors' trust while supporting your other digital marketing disciplines too.

In this chapter, you'll get an overview of the methods that are working now, including the lingo you'll use to talk about it, the metrics that will measure your success, and the business roles that should own your search marketing strategy.

Before we dig into the details, though, let's cover a few foundational principles.

## The Big Picture

First, SEO is a broad field divided into 2 big camps.

1. **The structural, or technical, side.** People in this camp focus on the technical details of your website rather than the quality of your content.
2. **The content side of things.** People in this camp know how to create well-optimized content, build links, and boost social shares.

Which camp is best?

There's no contest. To succeed at search marketing, you need both. When you need to create link assets or get more backlinks, you need an SEO content specialist. But if Google doesn't seem to see those assets, and you're not ranking, you've likely got structural issues. You need an SEO technician.

Another thing to keep in mind is that SEO isn't a once-and-done task.

Hundreds and thousands of websites are constantly battling for the #1 spot in search engines for their target keywords—and securing that spot is kind of like playing the kid's game, "king of the mountain."



*SEO is a bit like the kid's game, King of the Mountain.*

You may knock off the guy who's sitting there now, but someone is coming behind you, trying to knock you off as soon as you get there.

Which means your content needs to be finessed, updated, and promoted to rise in the search engine result pages (SERPs) and secure your top-ranking spot. Meanwhile, everything needs to be working right from a technical perspective.

Finally, search constantly changes. Google's algorithm isn't static. It's based on artificial intelligence, and it's learning more every day.

As a result, the rules change too. The tactics you use today won't be the ones you use next month or next year. And that's okay.

Expect to continue learning and adjusting the tactics you use. Don't resist; just accept it as part of the process—because the only way to win at this game is by following the rules.

## The Methods of Well-Executed Search

Search has evolved more than any other marketing discipline. Today, you *must know* the rules of search. Otherwise, you can hurt rather than help your brand.

So let's start by reviewing the methods that are working well today.

### Search Marketing Today

#### Today, Search Is Mobile

People are conducting searches from their mobile devices. That means your pages must be easily accessible from phones and tablets as well as computers.

It's important to adopt a "mobile first" mindset.

#### Today, Search Is Structural and Technical

As mentioned above, if your site isn't set up right, Google won't even see you. But once your structural issues are resolved, you'll focus mostly on content and basic on-page optimization.

The key to SEO is simply to build a better page than anyone else on the web.

For each search query, Google wants to put the absolute best page at the top of the SERPs. So your page needs to be the most relevant and the closest match for searchers' intent.

How do you do that?

You research what's already ranking for your target keyword and build something 10x better than those pages.

That's it.

There's no hack and no easy button. Just a lot of hard work.

But on a positive note, if your content is 10x better than anything else on the web, your pages *will* rank.

**Today, Search Is White Hat**

Gone are the days of keyword stuffing. You must do what Google wants—and what they want is to provide a superior experience for their users.

Old-style gray-hat and black-hat SEO tactics were borderline illegal, and they're definitely unethical. So that's NOT the approach we're going to take.

The tactics we cover will give you a sustainable business that's reputable and trustworthy. And honestly, it's the only way to grow your business long-term.

**Today, Search Is Everywhere It Matters**

What comes to mind when the topic of search marketing comes up?

Google, right?

They're the premiere search engine, but be aware, they aren't the only search engine in town.




*Google is just one of many search engines you can optimize for.*

Today, every channel that uses search has an algorithm that you can learn and leverage for success.

That means you aren't limited to optimizing for Google. It may be more lucrative for your business to focus on Google Maps or iTunes.

Let me explain…

Google's search bots are incredibly smart, which makes it hard to rise to the top of their SERPs. But most other search bots—think Amazon, Yelp, or Pinterest—are less complex and easier to understand. Not only that, there are likely fewer people competing for their top spots, so it's an easier game to win.

We tend to equate search marketing with Google. But there's a lot more to it than that. Search marketing is about producing the right content and publishing it on the right channels to attract the right customers, then doing what it takes to make your content rise to the top—whether that's for Google or any other channel.

Approaching it this way, you're taking the search game to a smaller playing field. While there may be fewer people searching those other channels, you'll create content that's optimized specifically for them.

### Today, Search Is About More Than Traffic

When it comes to SEO, we talk about winning, ranking, and beating out the competition. You'd think that ranking at the top of Google (or whatever channel you're using) is your top goal for search marketing.

But it's not.

You can't pay your bills with rank. And you can't take traffic to the bank. In reality, those metrics are fluff. The real question is this: Are you making money from search?

The reason we do search marketing is to get more leads and sales, right? So in the next section, we'll talk about a simple 6-part model for doing just that.

**Wondering how your site is doing in search?** Perform a DIY SEO Audit: High-Impact SEO in 5 Minutes or Less and find out.

## The 6-Part Model for Winning at SEO

There are 3 stages of search marketing, each with 2 priorities. Let's take a look at what they are, and then we'll look at the entire 6-part system in action.

## Intent & Context



SEO starts with user intent.

What do we mean by that?

Essentially, everyone who types a query into Google's search bar is looking for something. Regardless of the keywords they use, they have a specific intent.

But that intent exists within the context of what they're doing and what they want or need. Both the intent and the context are critically important for you to understand.

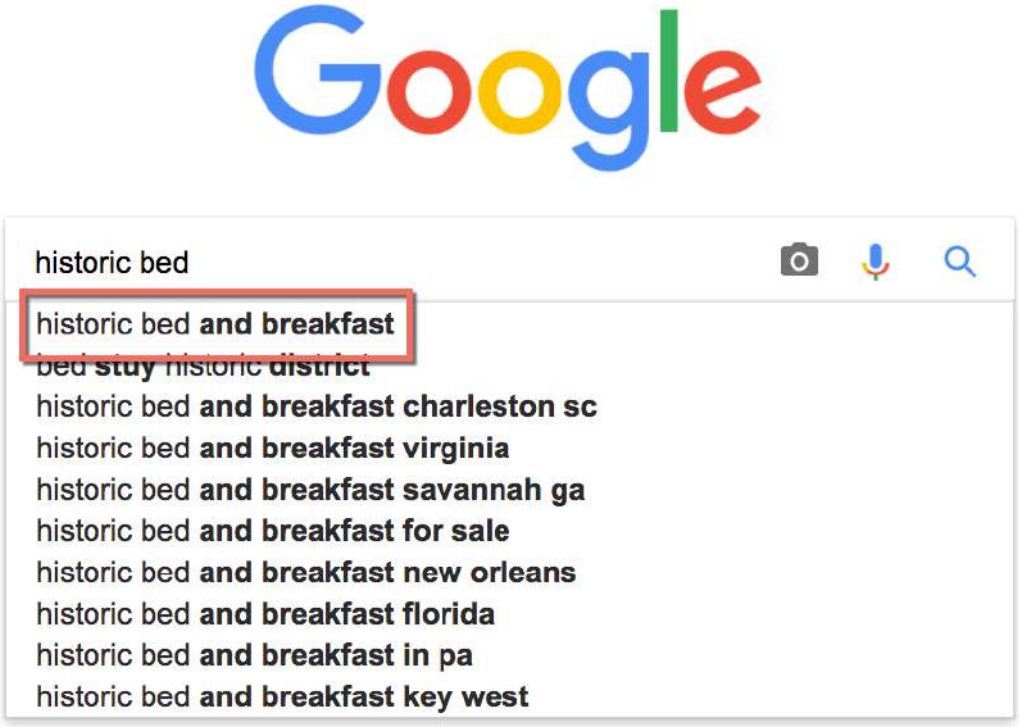
For example, maybe they're:

| Intent | Context (why they have this intent) |
|---|---|
| Hungry | They're on the road and want to know the restaurants that are near them. |
| Lost | They need directions to the store they're looking for. |
| Worried | Some weird symptoms have shown up and they want to know what could be causing them. |
| Stuck | They're installing tile in their kitchen and need instructions on cutting tiles. |
| Making plans | They have an anniversary or other celebration coming up and are exploring their options. |

If you're targeting a keyword, you must understand the user intent *and the context* that's behind the search.

Ask yourself: What is the prospect searching for? Why do they likely want this information?

For example, if they're typing in "historic bed and breakfast," here's what may be going on:




**Intent** = find a B&B

**Context** = anniversary is coming up

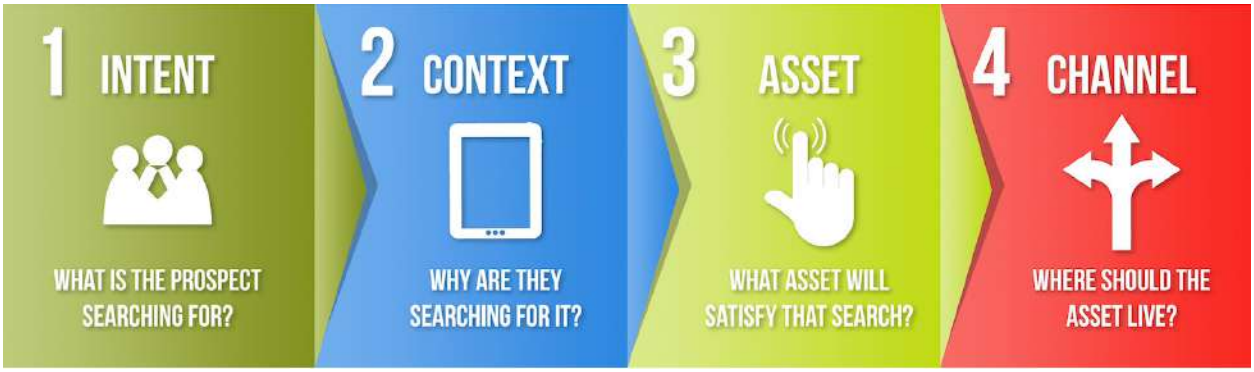
The context is vital information, and you need to ferret it out, because it will help you know what information to provide in your content.

Fortunately, the best research tool on the planet is easily accessible. It's your own brain. Think about your customers. What searches are they performing when looking for or using your product? Why are they searching for that information?

Identify the keywords they're likely using, then try to understand the intent and context around those searches. The idea is to anticipate their needs.

To help, do a quick Google search. Begin typing the keyword into Google and look at the autosuggestions Google provides (see the image above for an example). These suggestions are the most common searches related to the words you're typing in, and from them, you can guess what people are looking for.

## Asset & Channel

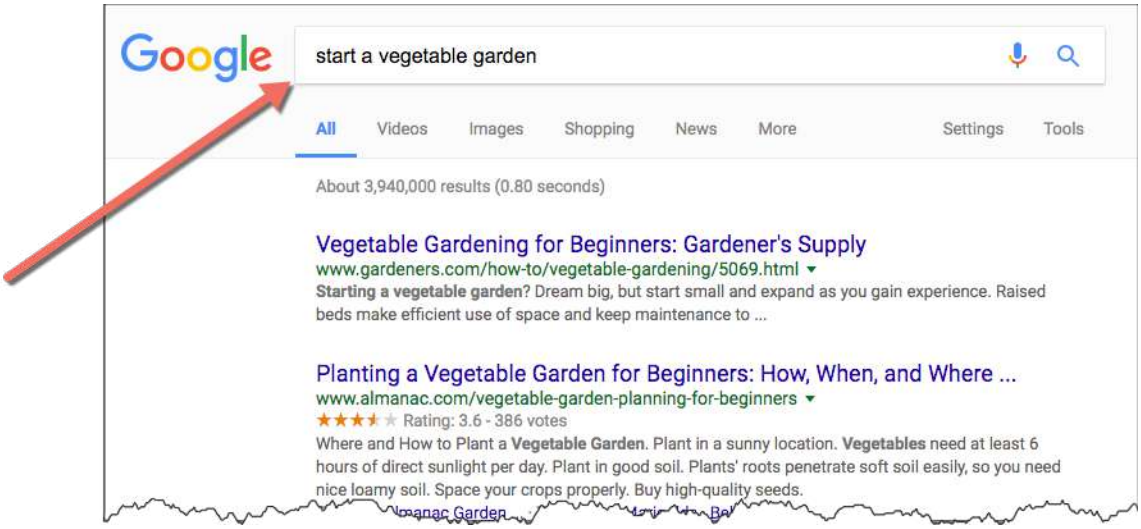



Once you know the information people are looking for and why they likely want that information, you need to build a unique asset for each of those needs.

This stage of the process is all about content creation. Before you start, ask yourself these questions:

- What keyword/intent am I targeting?
- What asset will satisfy that search?
- Where should the asset live?

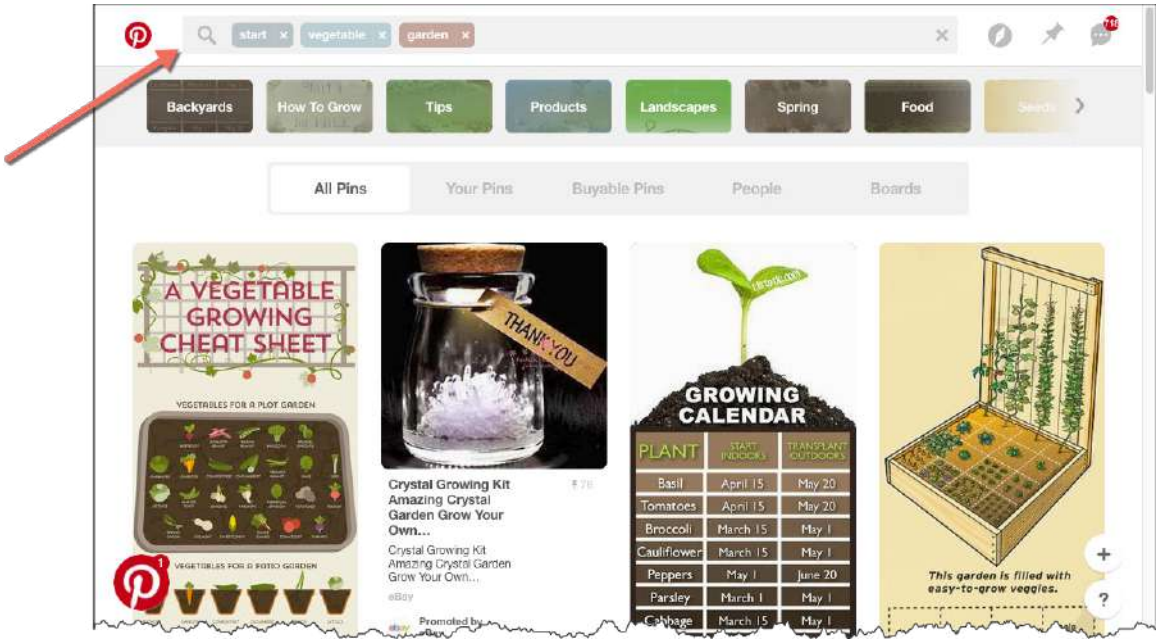
Let's say the query is, "start a vegetable garden." The asset could be a blog post. Since people search for blog posts in Google, that's the channel you'll optimize for.




**Asset** = blog post

**Channel** = Google search

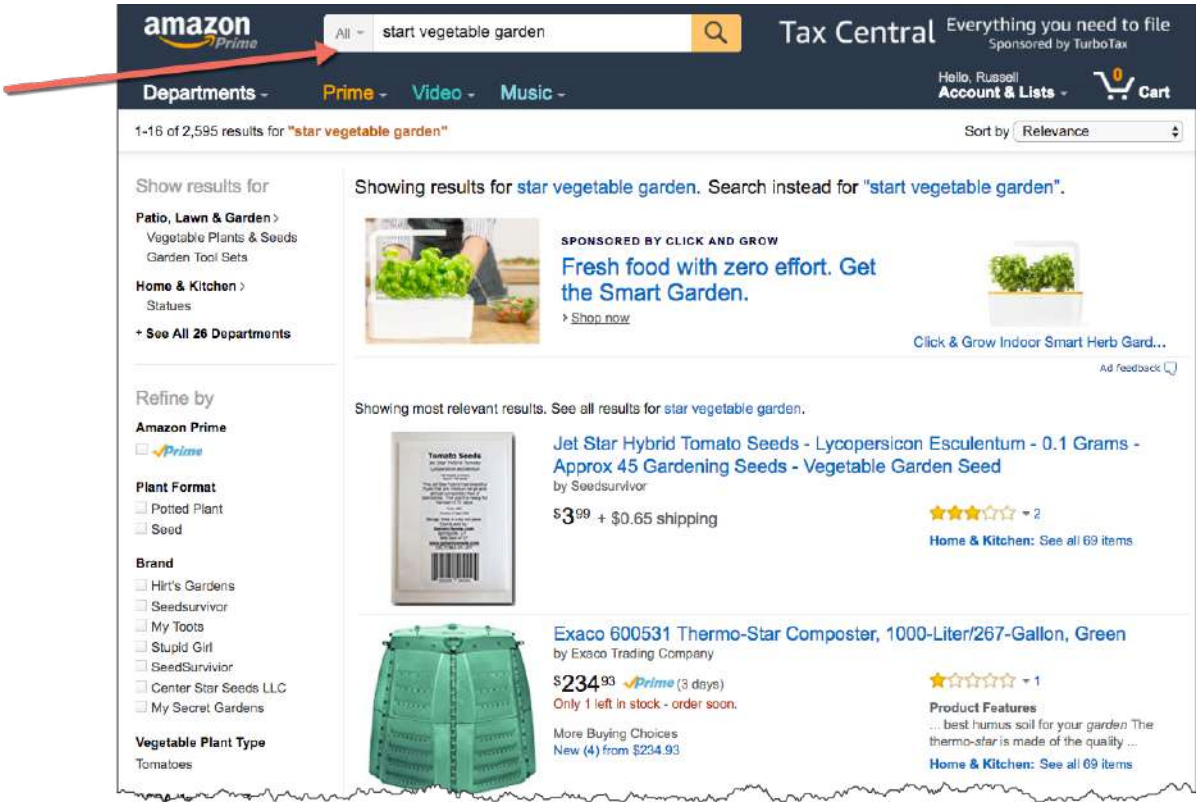
But Google isn't the only option. What if they're looking for images to inspire them?




**Asset** = Pinterest pin

**Channel** = Pinterest

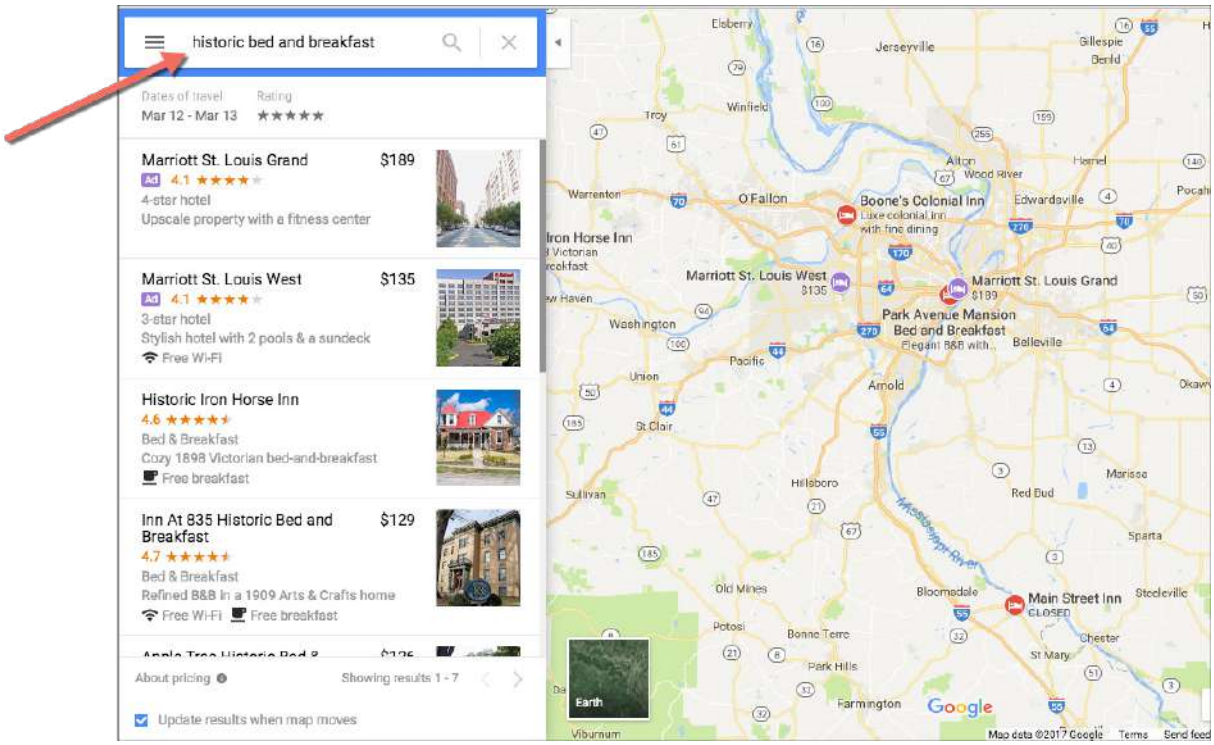
Or maybe they want to create the best garden in their community and want in-depth information:




**Asset** = Book

**Channel** = Amazon Kindle

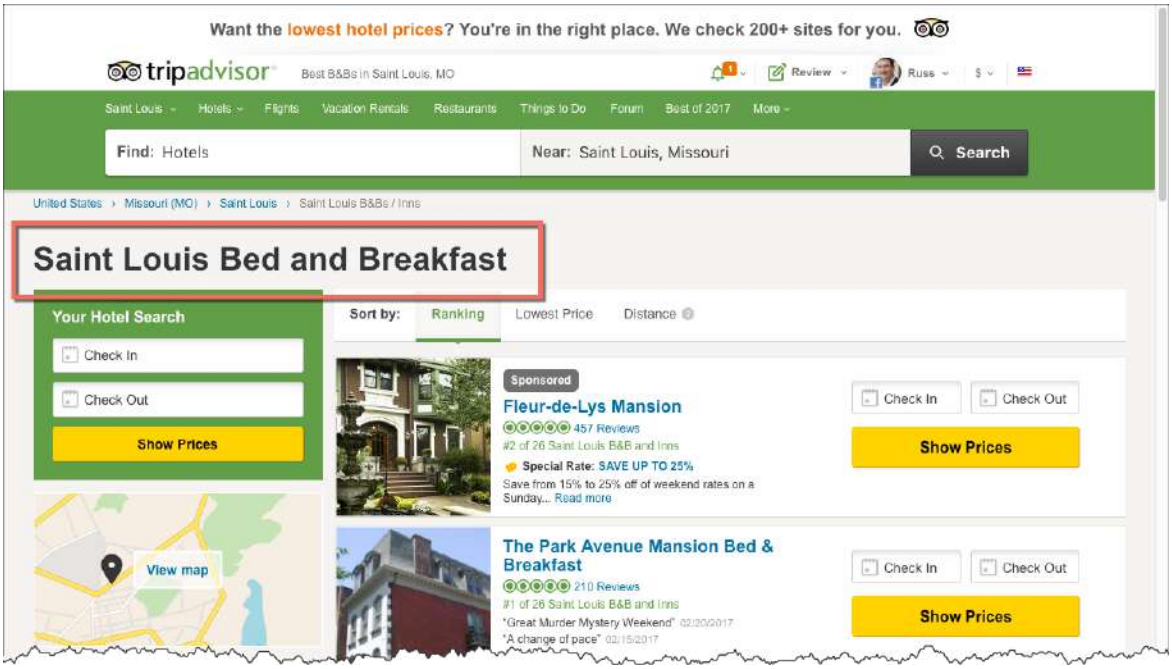
This same approach works for brick-and-mortar businesses. Let's go back to the B&B example we used earlier. What if people are looking for a B&B in St. Louis for their anniversary?




**Asset** = the B&B's business listing

**Channel** = Google maps

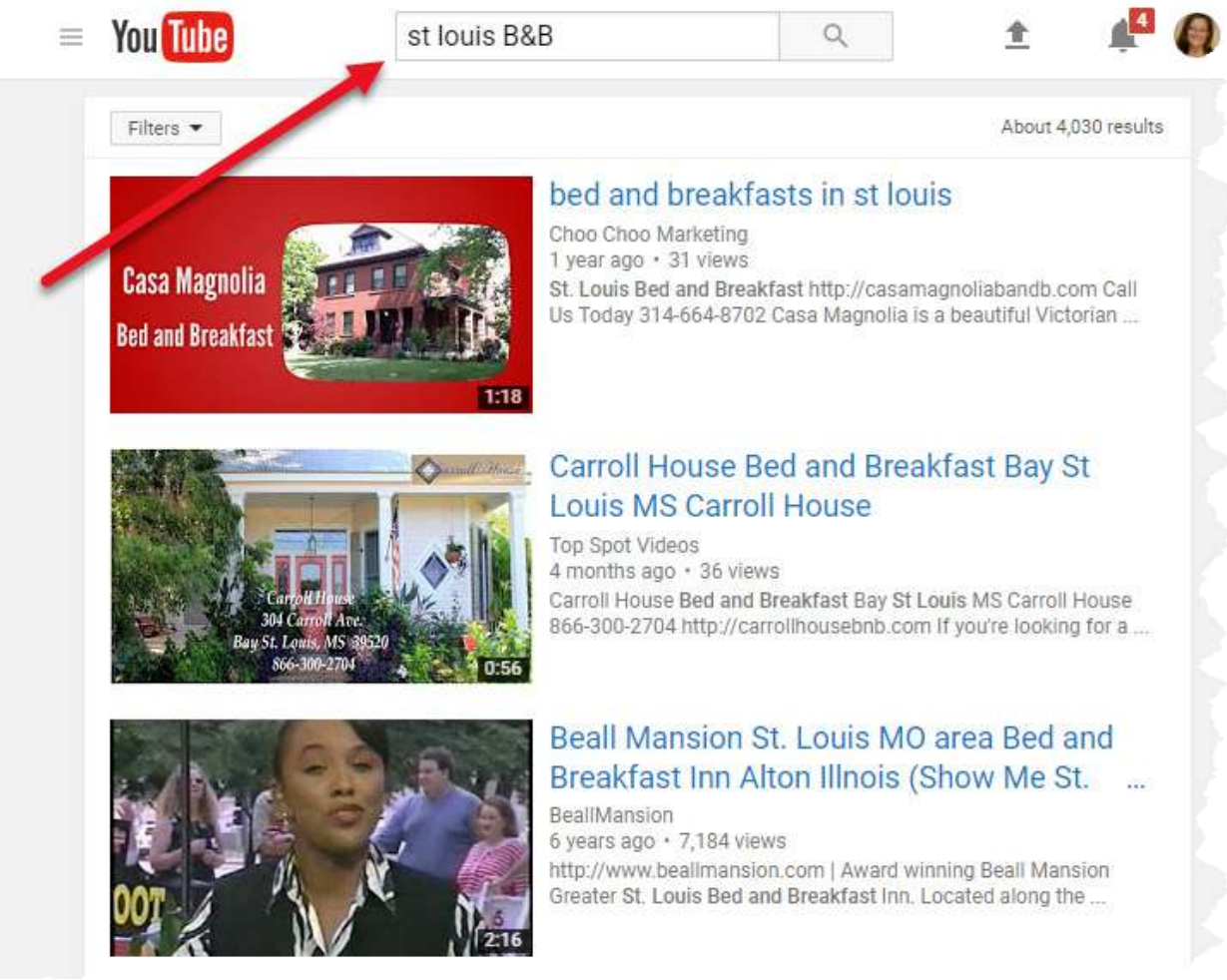
Maybe they're looking for reviews and suggestions:



**Asset** = trip advisor listing

**Channel** = Trip Advisor

Or maybe they want to see it in HD video.




**Asset** = video

**Channel** = YouTube

Your goal is to choose an asset that will best answer the intent/context you've identified, then choose the channel the asset will live on.

Once you've done that, you're ready for the last stage of the optimization process.

## Optimization & Ascension




At this point, you've created the assets to address specific search queries, and you're ready to upload them to their appropriate channels.

Now it's time to optimize it for each channel's search algorithm and develop your customer ascension plan. For this, you'll need to answer these questions:

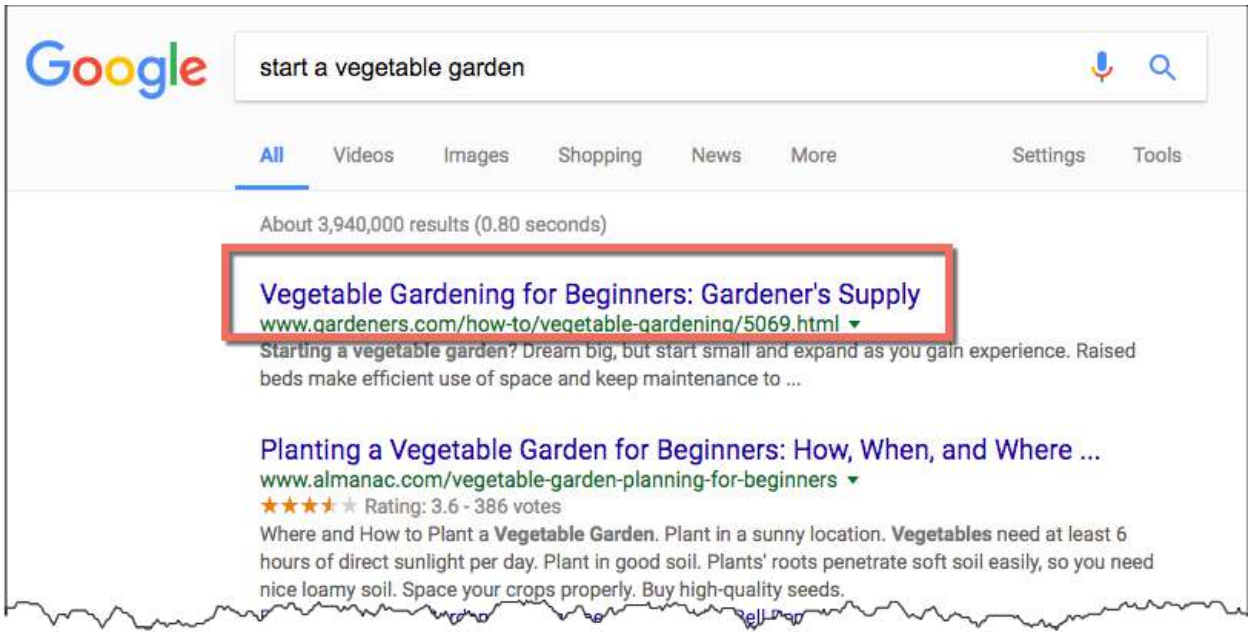
How will the prospect find this asset?

What is the next step in the customer journey?

Traffic isn't your end goal, remember. Your ultimate goal is to create leads and sales. So you always need to tell visitors what their next step is, and those directions need to be built into the asset.

Let's look at some examples.

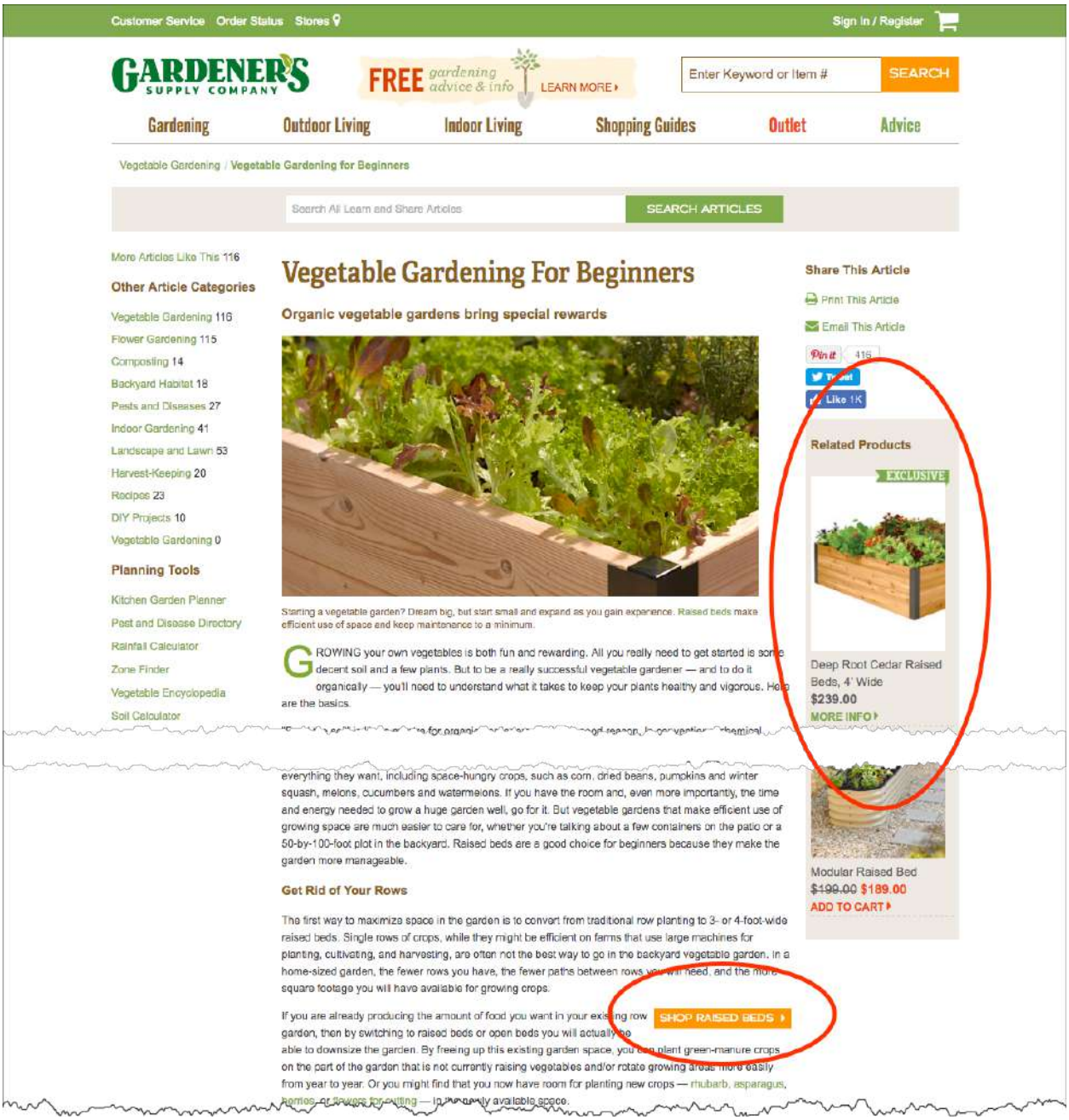
We'll start with our vegetable garden search. Notice in this image that the asset is a blog post and its title tag is optimized for Google.




*The asset is a blog post, and the title is optimized for Google.*

**Want to learn more on-page optimization for blog posts?** Read How to Do On-Page SEO in WordPress.

If we click through to that blog post, we can clearly see the ascension path.




*Visitors can easily identify their next step.*

Notice the button embedded within the content and the product offers in the sidebar. Clearly, this site has developed an ascension path that looks something like this:

**Google search > blog post > shop > purchase**

They aren't merely optimizing for search traffic. They're optimizing for sales.

That's what you want to do as well: pull traffic in and convert it. And here's how you can get started now.

Go onto Google Analytics and find the pages on your site that get the most traffic.

Think about the logical next step for the traffic on those pages.

Put a call to action (CTA) somewhere on the page leading visitors to that next step.

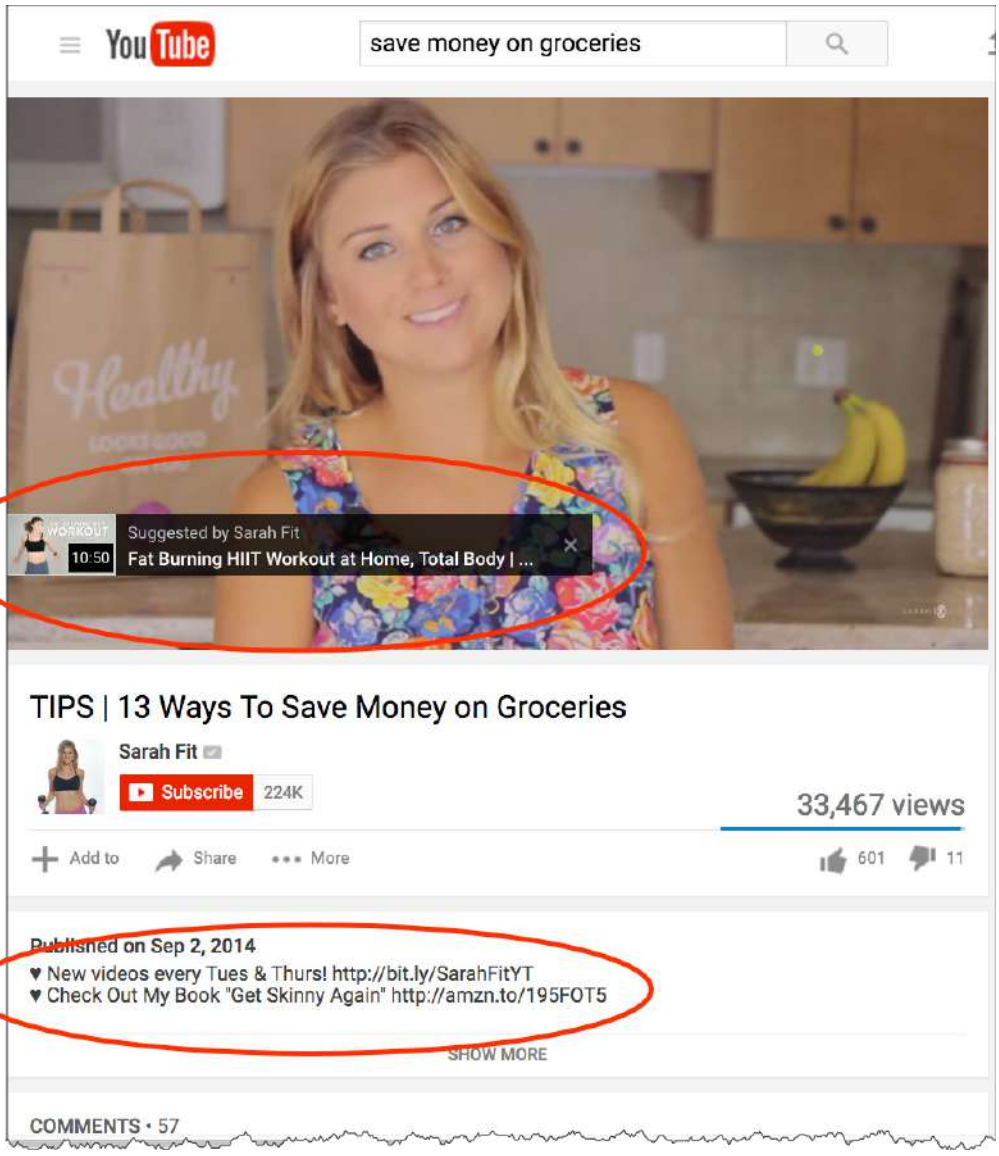
This is what search marketing is all about. It's organic, so it's free money. And all you need to do is put an ascension path on your high-traffic pages.

It's the same on YouTube. In this example, the video title is optimized for the keyword, "save money on groceries."




*Keyword being optimized for: save money on groceries*

You can see the ascension path is both *in* the video and *under* it. Within the video are links to a fat-burning workout product. Below the video is a link to her new book.




*Ascension path tells viewers what to do next.*

Most SEO training focuses solely on traffic. The goal is primarily to rank at the top of Google.

But as you can see, people are searching for information in multiple channels, so there's no reason to limit yourself. If ranking on Page 1 for Google isn't possible, ranking #1 in Pinterest or YouTube might be a better option.

And traffic isn't the end goal. Conversions are. So think beyond traffic. Clearly promote your ascension path within your assets, spelling out what they should do after consuming your content.

Now let's look at the entire process, from start to finish.

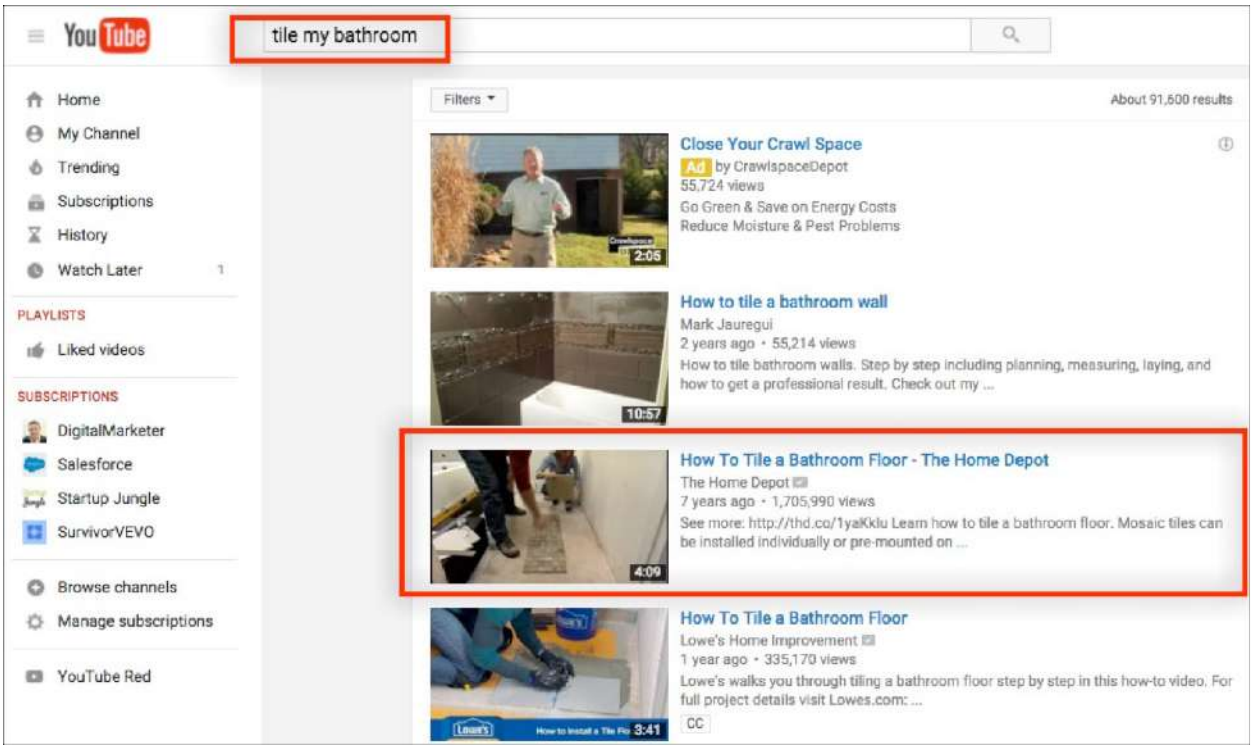
## The 6-Part System in Action

Let's assume I'm Home Depot and want to create some YouTube videos targeting the keyword, "tile my bathroom." I start by identifying the intent and context around that search query.

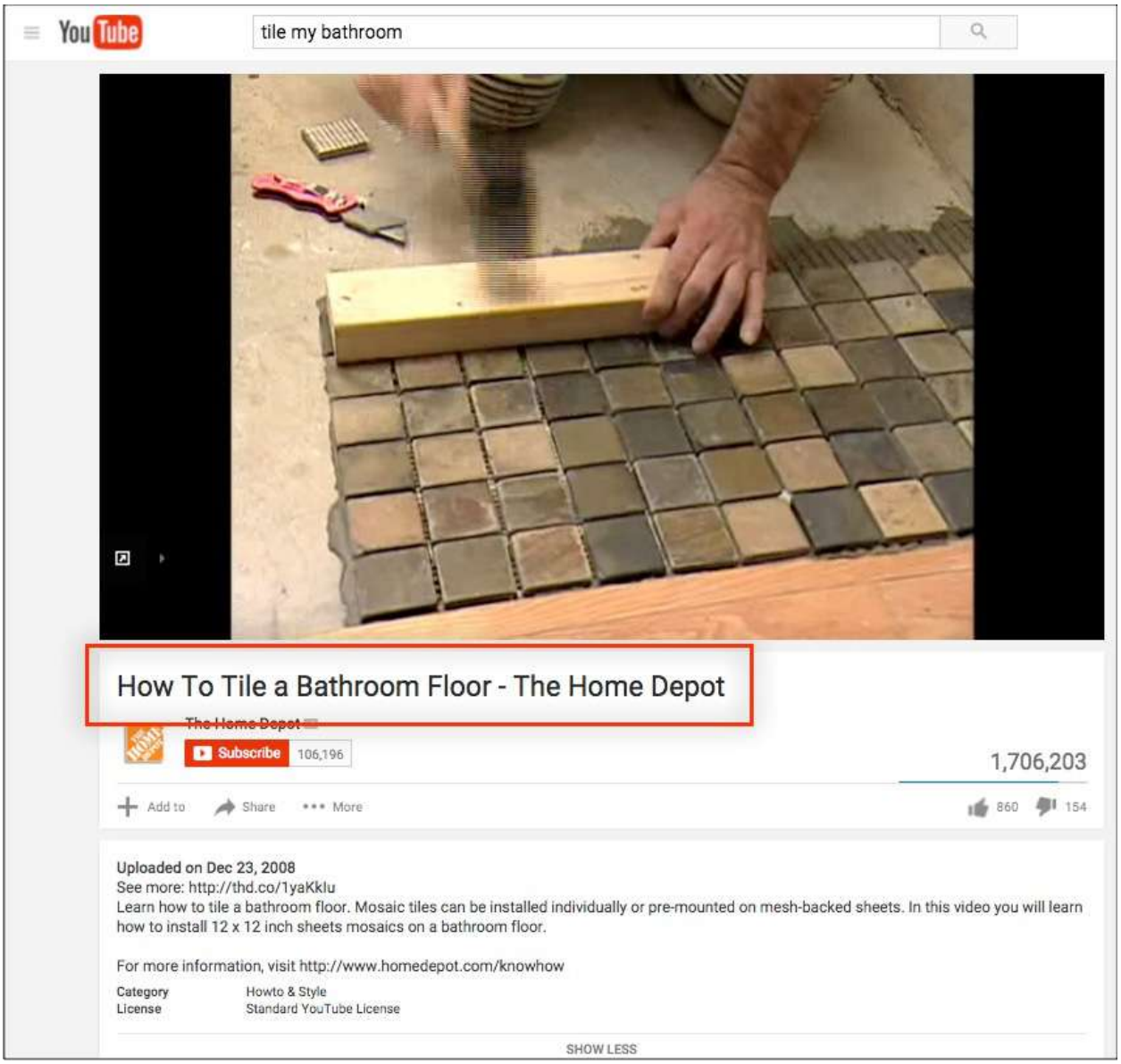
**Keyword** = "tile my bathroom"

**Intent** = to tile my bathroom

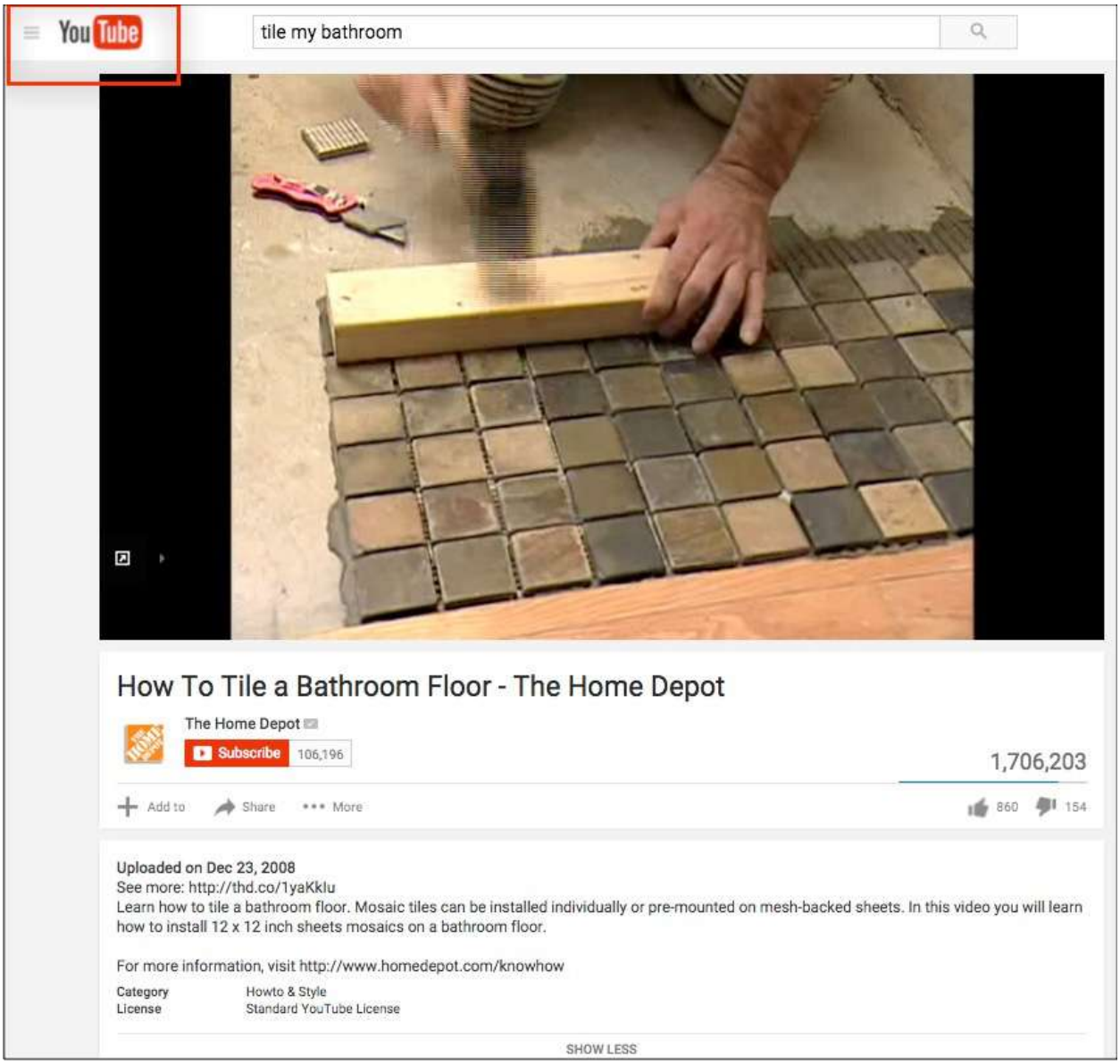
**Context** = My wife hates the old tile in our bathroom.



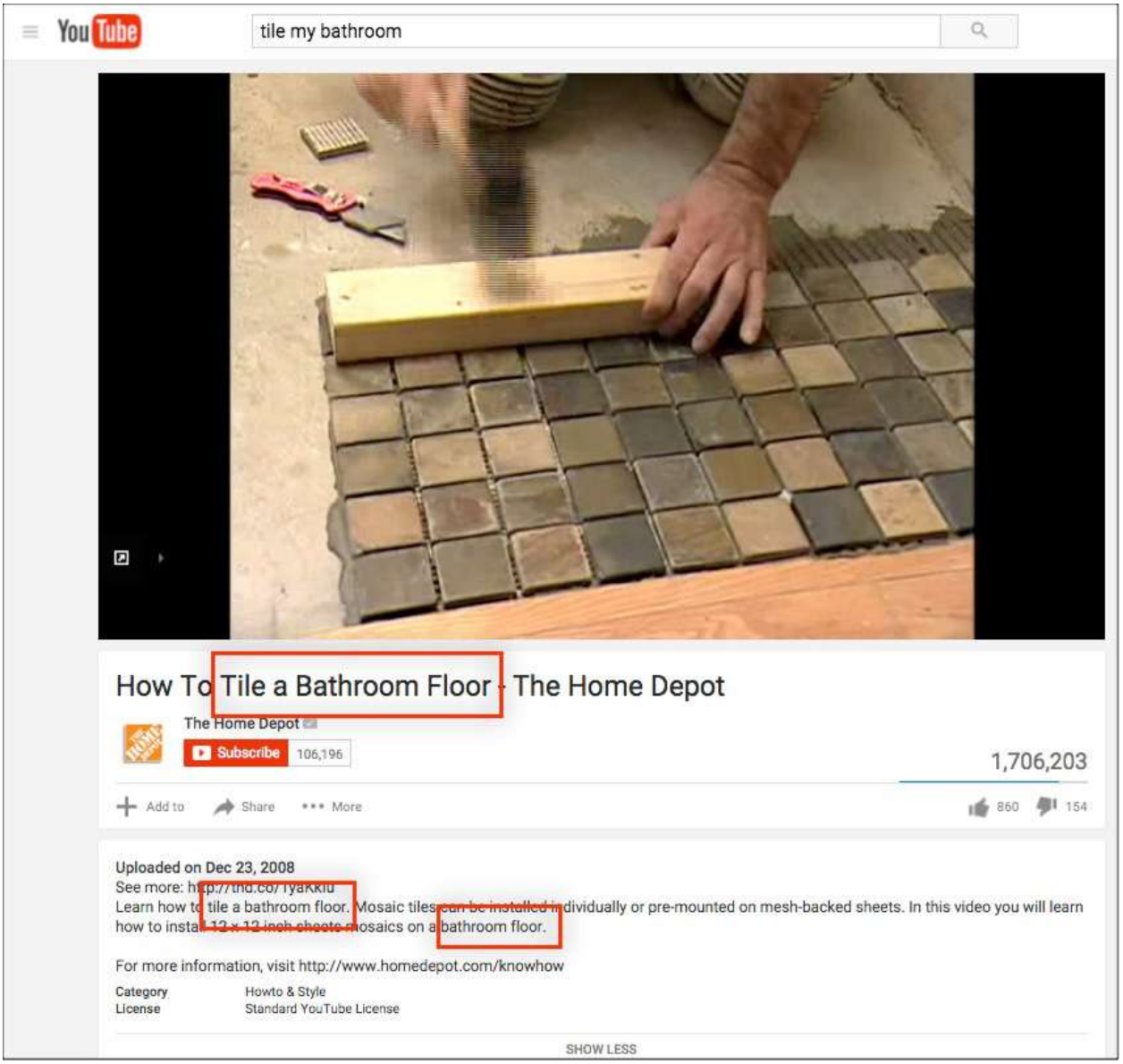
**Asset** = video on how to tile your floor



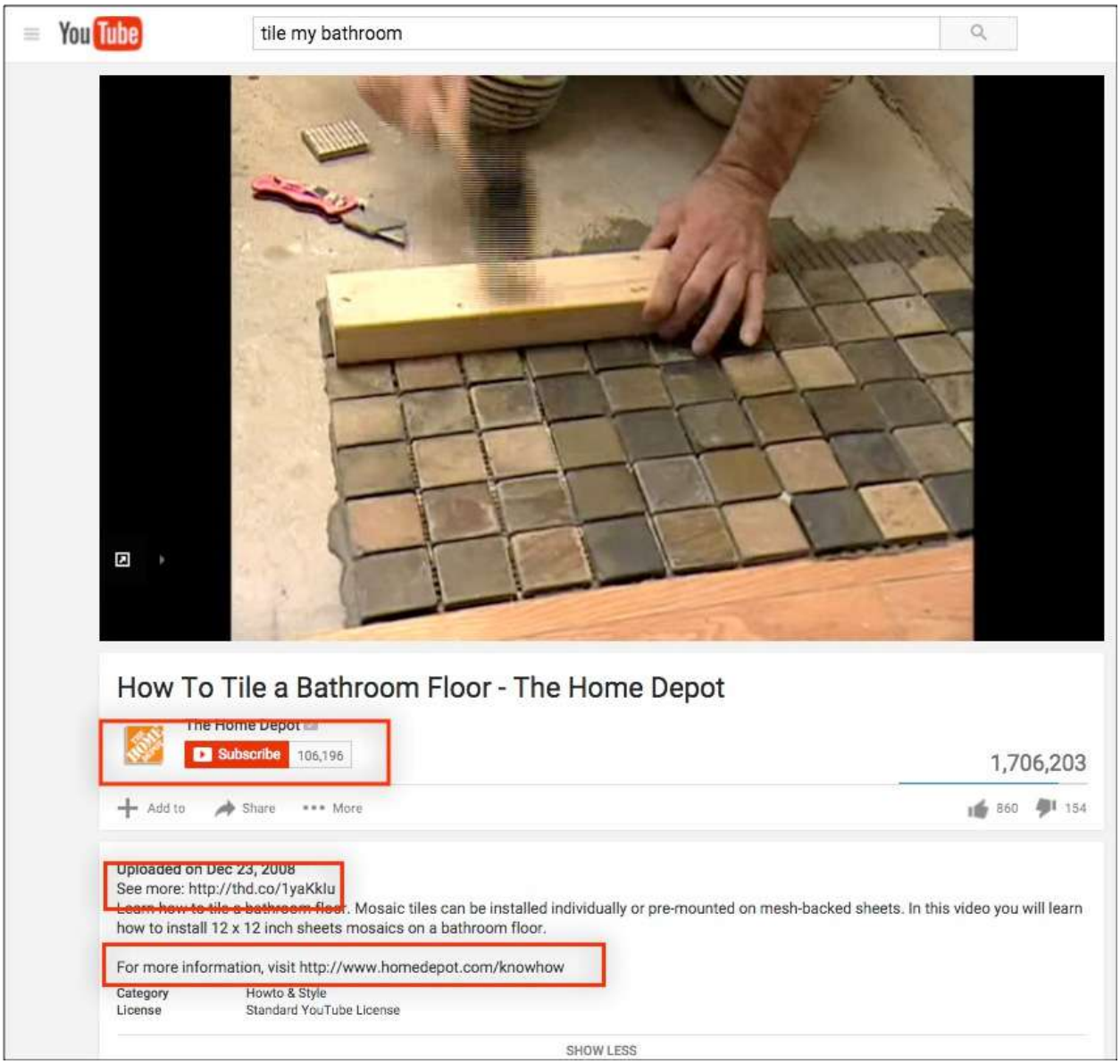
**Channel** = YouTube



**Optimization** = Use the intent-based keyword in the title and description (basic YouTube SEO).



**Ascension** = Leverage YouTube's built-in ascension paths.




As you can see, this isn't hard. In fact, it gives you a logical workflow that will help you create better content that meets the real needs of your best customers.

You simply need to figure out what you want to rank for, look at the top-ranking content, and create something better. Then optimize and create your ascension path.

Now let's look at the lingo used by search marketers.

## The Lingo: How does a Search Marketer Talk?

What are the terms you need to know as an SEO? These 4 terms will give you a solid foundation for talking about search marketing.

### Technical SEO

Technical SEO is about optimizing the structure and code of a website so search engines can find, understand, and send traffic to that site.

This is a smart focus if you're technically minded. Technical SEOs are skilled at tweaking code, setting up servers, and finding the technical issues that keep a search-engine spider from understanding what your site's about.

When are technical SEOs called in?

Most websites use a good content management system like Wordpress or Shopify. Both are built with solid technical SEO in place, so right out of the box, their technical SEO will be good.

But as a site gets bigger, especially if more than one person can make changes to the site, it's almost guaranteed it will develop technical SEO problems at some point.

Site hacks are another issue that technical SEOs can help with. Google won't send you traffic if your site gets hacked, and they'll put you in the penalty box until the issue gets resolved.

That's just two scenarios, but there are countless technical issues that can keep your site from performing well in search engines. That's why technical SEO is so important. When you remove the tech problem, your search position can get an immediate boost.

### Intent

A person's goal when typing a search query on the web. What information are they looking for? What are they hoping to achieve with that information?

If you know your customers' intent, you'll be able to find the keywords that are most relevant to your business. Make a list of the reasons people might buy.

Those are your top keywords.

### Asset

The content produced to satisfy the intent of a customer or prospect. It may include blog posts, product pages, social media profiles, podcasts, videos, and more.

Once you know the intent of a customer's search, you need to design an asset to satisfy that intent.

### Channel

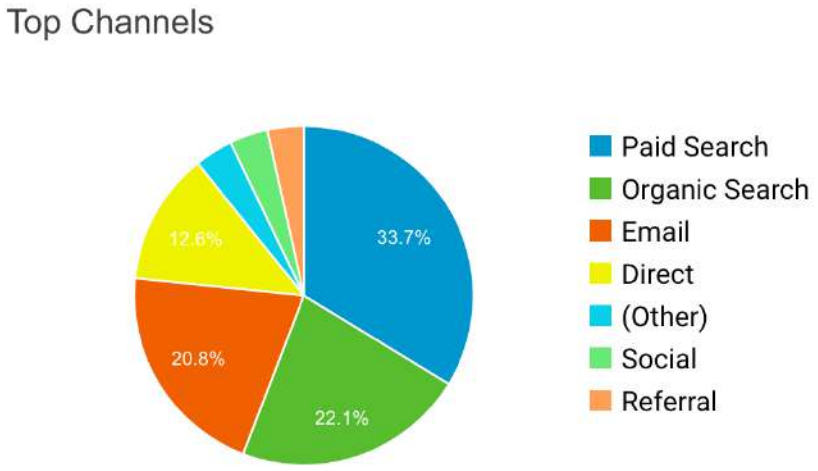
The digital "home" of an asset designed to meet the intent of a customer or prospect. Assets might live on a website or blog, but they may also live on large content hubs like Amazon, Pinterest, iTunes, and TripAdvisor.

### Metrics

What are the metrics that will help you track and improve your search marketing? Here are 4 to start with.

### Traffic by Channel report

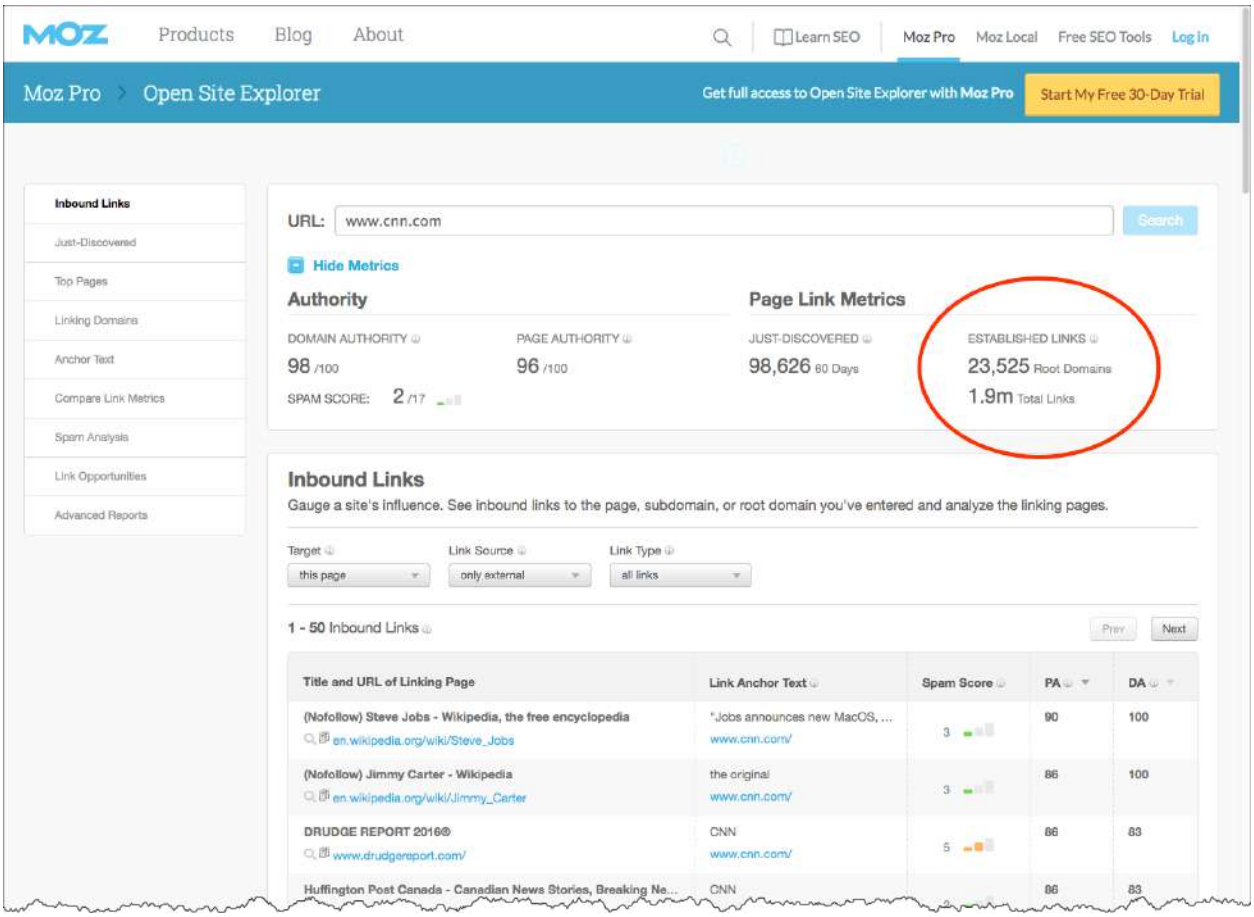
In Google Analytics, this is the first report we typically look at when we get access to a site. It tells you a lot at a high level: Where are we hurting? Are your traffic sources relatively balanced or does traffic come from just one or two channels?



When sites don't do search marketing, their traffic tends to come from Direct or Email. Once search marketing has been implemented, though, you'll begin to see more balance.

## Quantity/Quality of Backlinks

Here at DigitalMarketer, we use Moz Open Site Explorer for this metric. But you can use other free tools, such as MonitorBacklinks, or paid tools, such as Ahrefs.



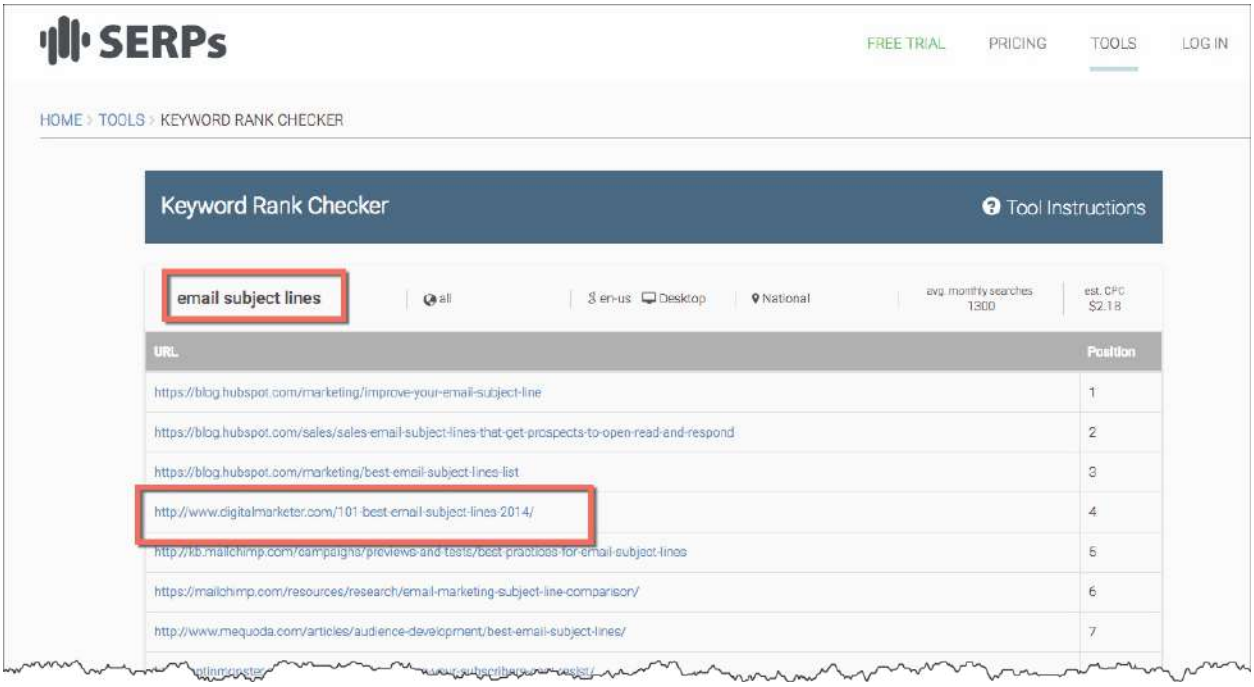

*You want to track how many websites are linking to your site.*

You want to run this report monthly or quarterly to track how many websites are linking to your site. That number should be trending upward, with more and more quality sites linking to you.

## Keyword Rankings

Once you've identified the keywords you want to rank for, you need to track your position for those keywords.

For this, you can use the SERPs Keyword Rank Checker. Just type in your keyword and see where you rank.



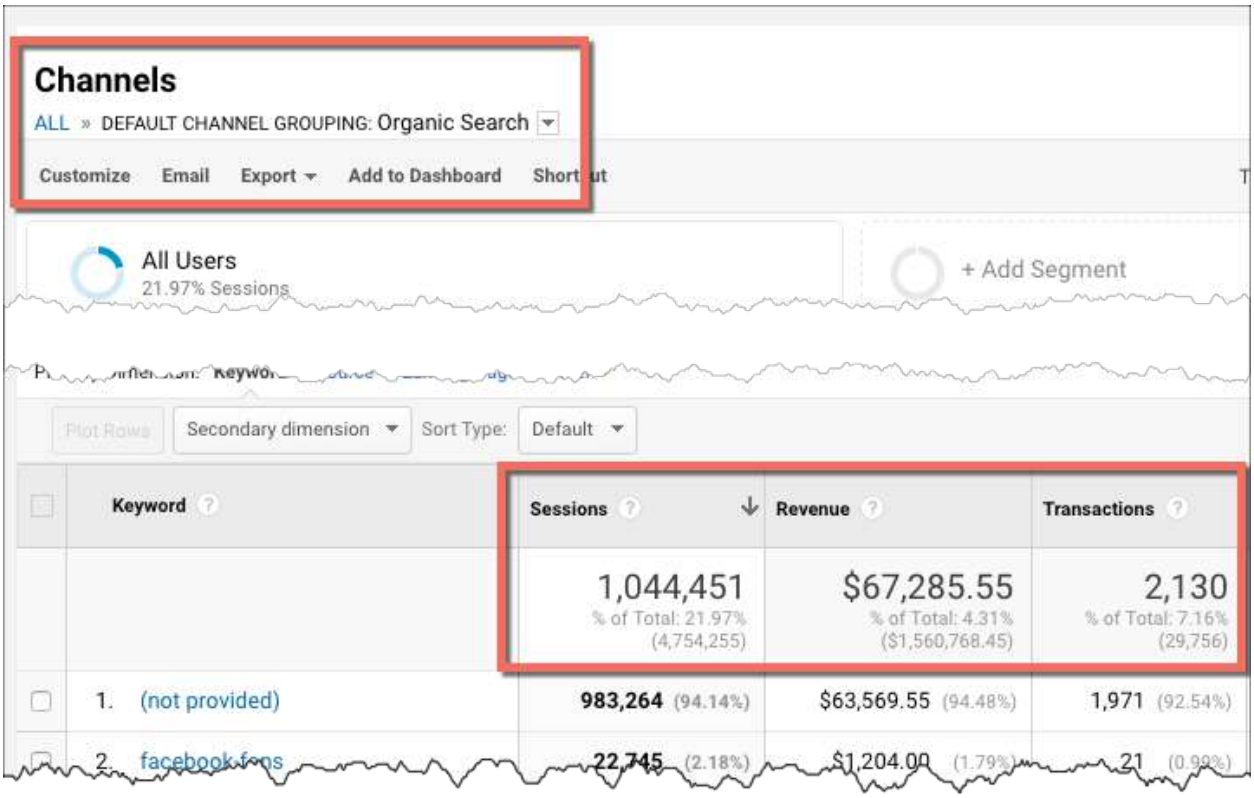

*Track where you rank in the SERPs for important keywords.*

In this example, we typed in "email subject lines," and as you can see, we rank #4 for that term.

You can also see who's outranking you. To make your page rank better, review their content and update yours to be 10x better.

## Conversions from Search

If you've set up Ecommerce or Goals in Google Analytics, you can go to the Channels report and look at the top-line revenue and number of transactions over time.




*Google's channels report is important if you've set ecommerce goals.*

The metrics to focus on are Sessions, Revenue, and Transactions. Here, we have $67,000 from 2,000 transactions. To calculate the conversion rate, divide revenue by transactions.

$67,285.55 / 2130 = $31.59 per transaction

## The Roles: Who Has Responsibility for Search Marketing?

To succeed at search marketing, you need 3 teams to have input and responsibility.




### The Content Team

Search and content go hand in hand. Understanding SEO will help your content team bring in more organic traffic from multiple channels.

### IT and Tech Teams

Technical SEO is your tech team's domain. If they don't have training in technical SEO, they're probably throwing up some speed bumps that keep you from ranking well in search.

### Public Relations

As with the content team, your PR team need to understand search marketing to achieve their goals.

## Summing Up

Search marketing doesn't happen in a bubble. Ideally it will integrate with every aspect of your marketing, from customer research to content creation to customer value optimization.

We've provided a good overview of how you can do this—but it's a lot to take in at once. The good news is you'll get better over time. Just start where you are, and over time, you'll see improvements in your page rank and traffic.

The next chapter will help as well—because SEO and analytics go hand in hand. And you'll appreciate our down-to-earth approach to analytics. (It takes the fear—and a lot of the pain—of numbers out of the equation.)

## Become a Search Marketing Specialist




With all the "noise" in today's world, it's critical that brands and business get found when a customer or prospect is looking for them.

It's also critical that your brand is shown in a positive light when the right person is looking for a solution that YOU provide.

And that's exactly what you'll learn how to do in this mastery course:

How to leverage search channels such as Google, Amazon and even local channels such as Yelp.

How to ensure that your brand gets found.

And when it's found, how to ensure the message your prospects see is a positive one.

**Click Here to Learn More »**



CHAPTER 07:

# APPLYING WEBSITE ANALYTICS TO YOUR DIGITAL MARKETING

DIGITALMARKETER

CHAPTER
# 07

What's your emotional reaction when you hear the word, *data*?

Stress? Fear? Frustration?

Fortunately, data and analytics don't have to be scary. In fact, it can be fun (or at least interesting) if you know how to turn all those numbers and reports into actionable intel you can use to grow your business.

In this chapter, you'll learn the methodology for doing analytics and data in your business, the metrics that matter most, the lingo you'll use to talk about it, and the teams or roles that should be responsible for it.

But first, let's talk about why data and analytics are so important to a successful business.

## Why Data Matters

Data comes in two flavors: not enough and too much.

The challenge most people struggle with is how to turn numbers into meaningful decisions. Static numbers, in and of themselves, are meaningless.

So why would you want to do analytics?

To understand the answer, let's review some examples:

### The Oakland A's Athletics Club

Billy Beane took over as the General Manager of the Oakland A's in 1997. There, he applied statistical analysis (known as *sabermetrics*) to players, radically changing the way they acquired players.




*Billy Beane, General Manager of the Oakland A's* (Source)

Beane's approach was to focus on specific metrics, such as batting and runs, to find undervalued players no one else was noticing. This approached made the Oakland A's one of the most cost-effective teams in baseball and carried them through 20 consecutive wins, playoffs, and even the world series.

Essentially, data made the A's competitive with much bigger clubs while working on a budget a third of the size.

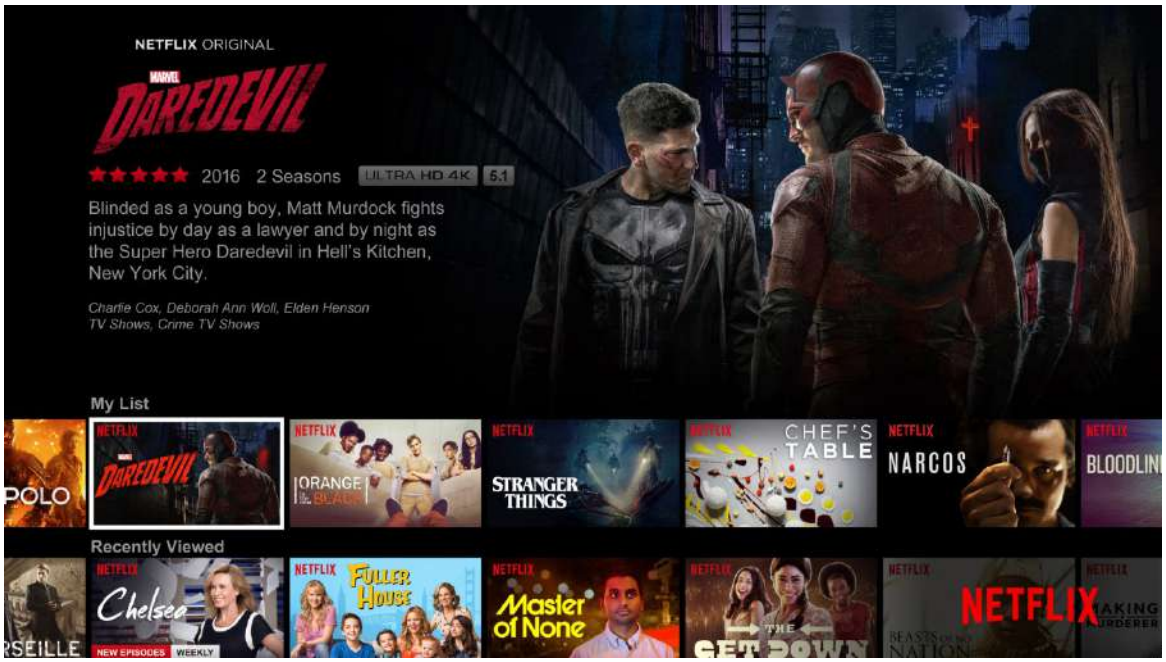
### Netflix

Netflix's core belief is that customization wins customer loyalty, a belief that puts data at the center of their corporate strategy.

When they were still a DVD rental company, Netflix invested heavily in data mining technology to develop a movie recommendation algorithm, leading the way in using data to provide a great customer experience. And it worked. Recommendations drove 50% of their traffic.

After adopting a streaming model, this data-first approach continued, and it's made them one of the top streaming video-on-demand services available.

Today, it's giving them the customer insight they need to create massively successful original content like *Daredevil*, *House of Cards* and *Orange is the New Black*.




*Netflix's data gives them the insight to develop massively successful content. (Source)*

None of this would have been possible without data.

## DigitalMarketer

We're no strangers to data either. I'll get into more detail later in this chapter, but here at DM, we rely on data to help us make business decisions that are all but guaranteed to work.

Our belief? Gut instincts may be good, but data never lies.

The challenge, of course, is in your methods. How do you go from the spreadsheet to strategic decisions that grow your business? Let's take a look.

## The Methods of a Well-Executed Analytics & Data Strategy

To master analytics and data, you need to master 3 guiding principles:

- **Give data a job.** This is the foundation of data analysis. Every piece of data you gather should help you answer questions and make smart decisions.

- **Use hypothesis testing to convert questions into strategies.** This is what makes data meaningful. It's the process of transforming raw data into business decisions.

- **Apply context to account for the unmeasurable.** Some things are hard to measure. For those situation, you need to contextualize the data.

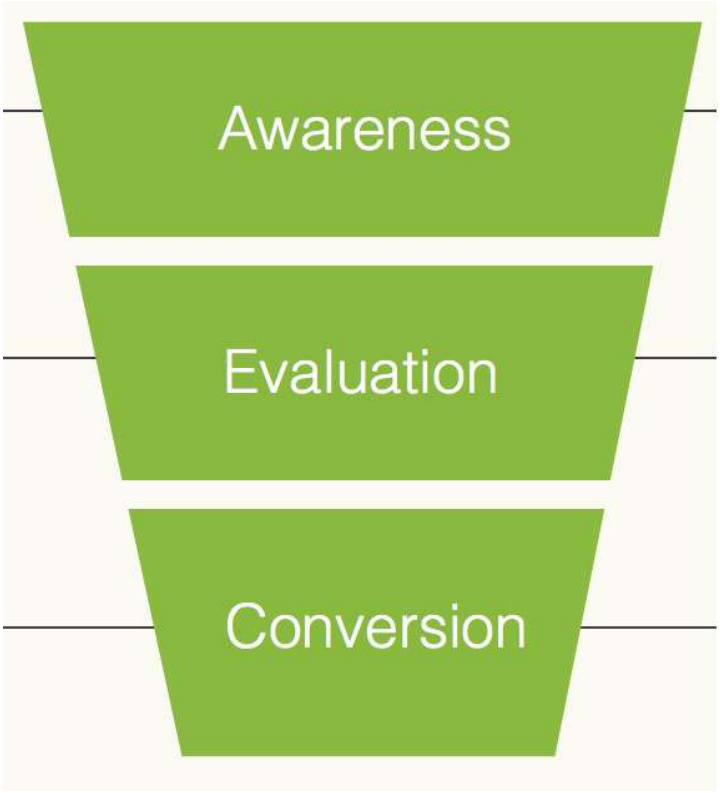
Analytics and data shouldn't be stressful. But it's easy to feel that way when there are so many sources to draw from, each formatting the data differently, sometimes even giving different numbers for the same metric.

Where do you put your attention? How to compare the data from different sources?

To start, give your data a job.

### Principle #1: Give your Data a Job

One of the easiest ways to understand data is to think of the marketing funnel.

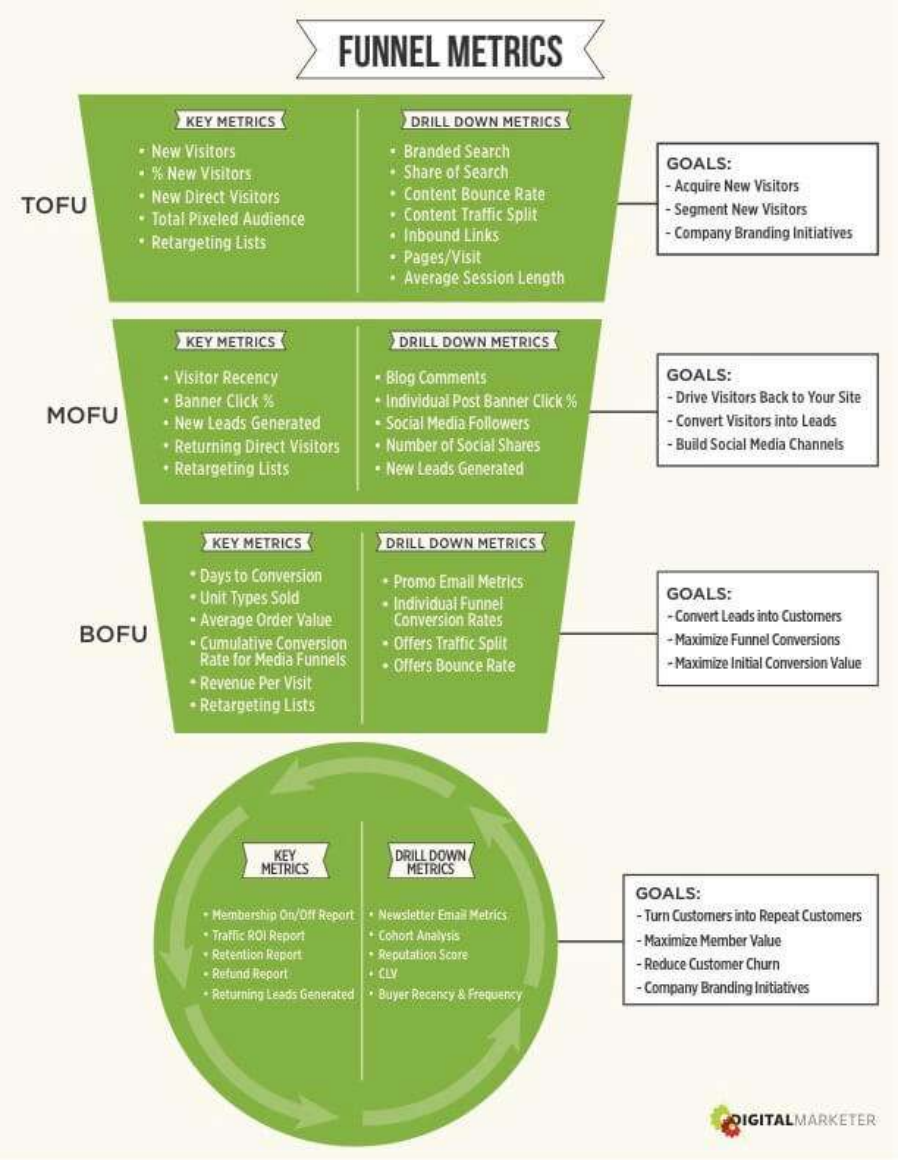



*The marketing funnel*

This is a foundational concept that makes it easy to visualize customer acquisition in marketing. Your brand marketing creates awareness and attracts new visitors to your website. Some of these new leads will be interested enough to evaluate your business and products, and a percentage of them will go on to become customers.

For sales, that's a good model, but we need to tweak the funnel to work as well for analytics and data.

This model is a funnel metrics flowchart that not only maps the stages of a customer's journey, it also lists the metrics that should be measured at each stage.




*Funnel Metrics Flowchart*

With this approach, we use the same 3 phases of the funnel but rename them like this:

1. **TOFU**, or top of funnel, is the awareness phase

2. **MOFU**, or middle of funnel, is the evaluation phase

3. **BOFU**, or bottom of funnel, is the conversion phase

But we don't want to stop there. We also need to measure what happens after someone becomes a customer.

So we add one more stage: the **post-conversion phase**, which focuses on how customers can be turned into repeat customers, life-time subscribers, and advocates for your business.

This is how you give your data a job. You don't look at all your data at once. You assign different metrics to each stage of the funnel.

Rather than measuring your business's health only by its bottom-line numbers, you measure its health at every phase—identifying leaks in your funnel, finding strategic ways to plug them up, and making it easier to convert.

To begin, let's identify the funnel metrics you need for each stage of your customers' journey.

## Categorizing Data by The Stage of the Funnel

### TOFU (Top of Funnel)

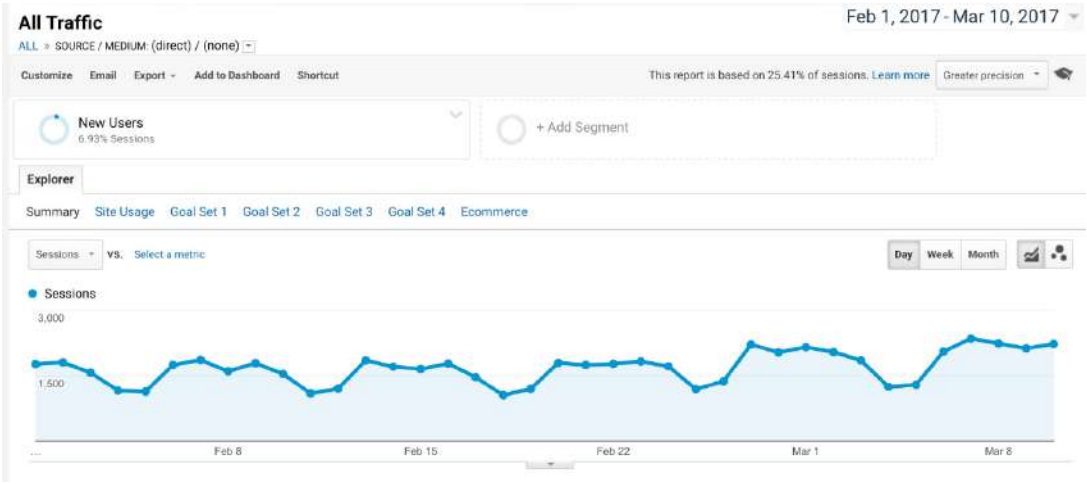
Your goal for this stage? New visitors.




*Top-of-the-Funnel metrics*

The key question when choosing metrics for this stage is this: Does this metric give me insight into brand-new visitors?

A good example of a TOFU metric: Direct new visitors.




Direct new visitors is the number of people who are typing your website URL directly into Google? It can measure the effectiveness of online and offline advertising:

If you've been running awareness ads, you should see spikes from people trying to learn more about you.

If you have billboards that include your URL, you should see a spike in the geo-areas surrounding the billboard as they visit your site.

**MOFU (Middle of Funnel)**

Your goal at this stage? Converting new visitors into leads.




*Middle-of-the-Funnel metrics*

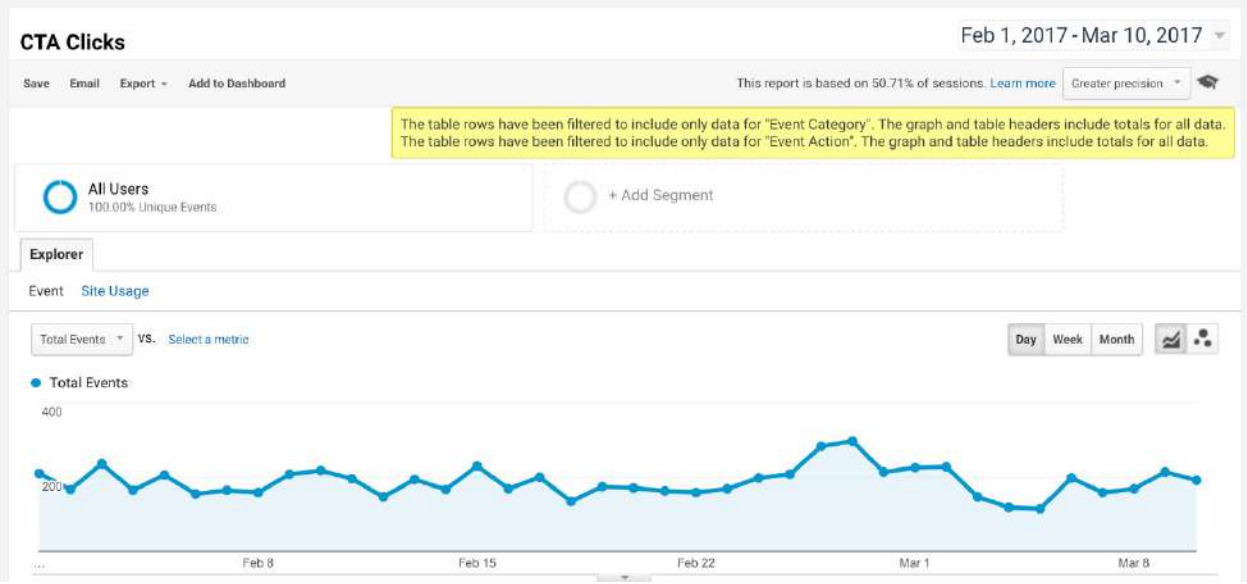
Your guiding question when deciding whether a metric is right for the middle of the funnel is this: Does this metric give me insight into how well I'm getting visitors to commit?

"Commitment" can be definied as:

- People subscribing
- People filling out a webform
- People following you in social media

It's about people giving you permission to reach out to them and offer more value.

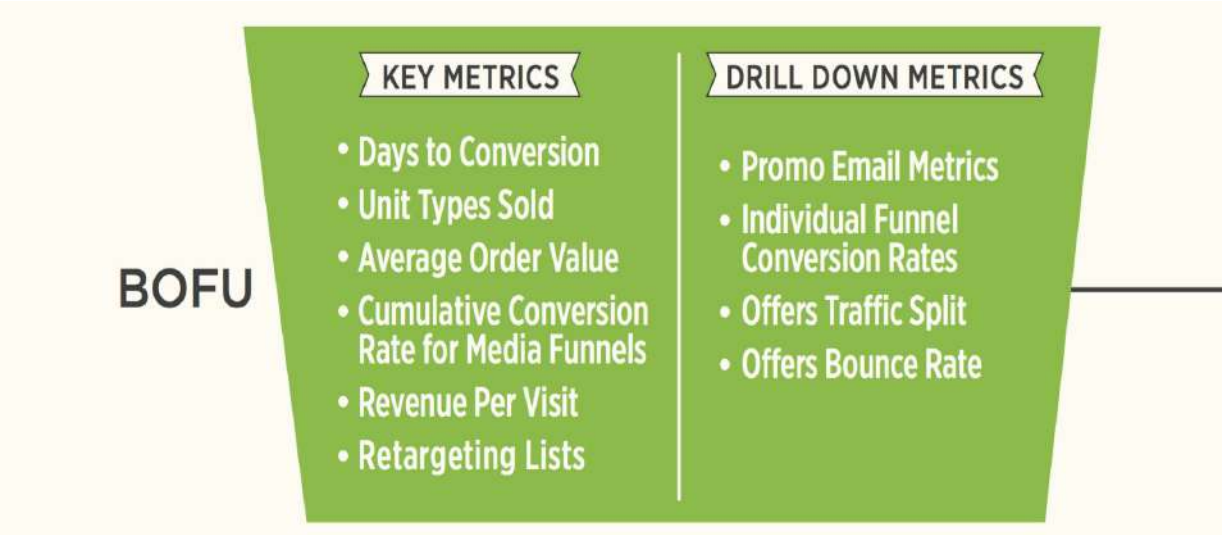
A good example of a MOFU metric: CTA clicks.




If you have a blog post with a banner to learn more about one of your products. You need to know how many clicks that banner is getting and what percentage of your blog visitors are clicking so you can evaluate how well your content is converting visitors into leads.

## BOFU (Bottom of Funnel)

Your goal? Converting prospects into customers.




*Bottom-of-the-Funnel metrics*

Your guiding question when choosing metrics for this stage: Does this metric give me insight into how well prospects convert into customers?

This stage is especially important because, once someone buys something from you—even something small and inexpensive—the likelihood that they'll buy again increases 10-fold, and their willingness to invest in the relationship significantly increases.

An good example of a BOFU metric: conversion percentage.

| Date | Unique Visits | Content Engine EP Units | EP Collected $ | Content Engine Conversion % |
|---|---|---|---|---|
| **TOTALS** | 7,667 | 815 | $5,705.00 | 10.63% |
| 2/28/2017 | 2,142 | 233 | $1,631.00 | 10.88% |
| 3/1/2017 | 3,203 | 237 | $1,659.00 | 7.40% |
| 3/2/2017 | 2,322 | 345 | $2,415.00 | 14.86% |

How many people clicked or purchased from a brand communication? This tells you which offers are working and what kind of offers you should make to new customers.

## Retention & Monetization (After Conversion)

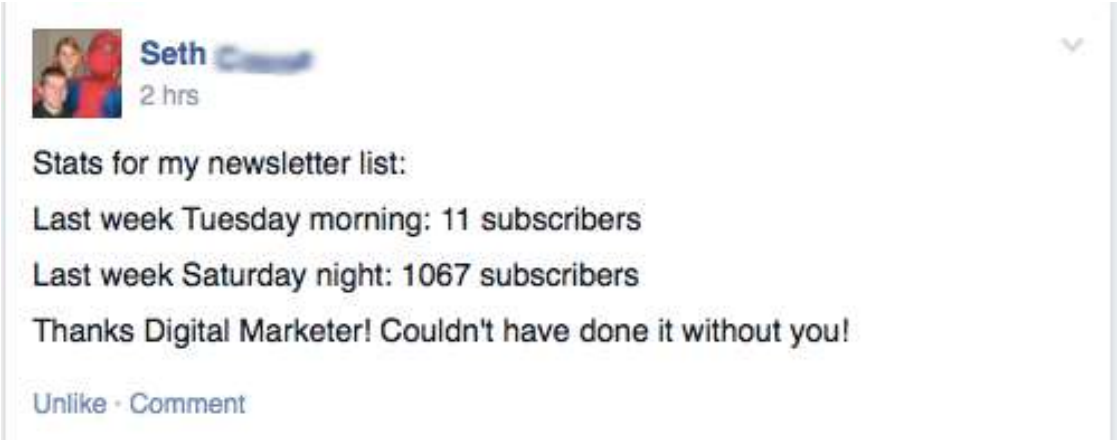
Your goal for this stage? Customer satisfaction. You want to increase membership, traffic ROI, retention, and customer lifetime value.




*Post-Conversion metrics*

The guiding question when looking at post-conversion metrics: Does this metric give me insight into how satisfied our customers are?

You're looking for metrics that describe real results from using your product. Something like this:




*Post-sale metrics give you insight into customer satisfaction.*

This data isn't waiting for you on Google, so it's harder to come by, but satisfied customers are usually willing to share them. Here at DM, we look for positive reviews from people in our membership area. That tells us how well we're helping people reach their goals.

Keep in mind, these aren't vanity metrics. They help us know what it takes to keep people in DM Lab and encourage them tell their friends about the Lab.

Example of a post-conversion: the Members On/Off report

| | Weekday | Members Added | Cancellations | Payment Fails | Total Members Removed | Net Change | Total Members |
|---|---|---|---|---|---|---|---|
| Totals | - | **150** | - | - | **86** | **82** | - |
| 1/4/2016 | 2 | 43 | 22 | 7 | 29 | 14 | 517 |
| 1/3/2016 | 1 | 40 | 35 | 12 | 47 | -7 | 503 |
| 1/2/2016 | 7 | 25 | 5 | 10 | 15 | 10 | 510 |
| 1/1/2016 | 6 | 20 | 3 | 7 | 10 | 10 | 500 |
| 12/31/2015 | 5 | 22 | 5 | 6 | 11 | 11 | 489 |
| 12/30/2015 | 4 | 25 | 3 | 7 | 10 | 15 | 474 |
| 12/29/2015 | 3 | 15 | 2 | 5 | 7 | 8 | 466 |
| 12/28/2015 | 2 | 28 | 5 | 4 | 9 | 19 | 447 |
| 12/27/2015 | 1 | 15 | 6 | 7 | 13 | 2 | 445 |
| 12/26/2015 | 7 | 16 | 5 | 6 | 11 | 5 | 440 |

This report tracks how many people we're adding to a subscription product, how many people we're losing, and how we're losing them.

These metrics tell us how healthy the product is, and when they're combined with other reports, we can see the things we do that drive cancellations or boost membership. This information is critical for a membership product because member retention drives profits.

## Categorizing Data by Type

We've just reviewed TOFU, MOFU, and BOFU metrics, which is a way of categorizing metrics by the stages of your funnel. But there's another ways to categorize metrics, and that's by the type of information they provide.

There are 2 *types* of metrics:

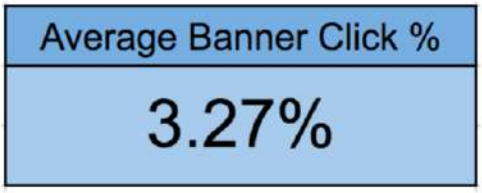
**Key metrics dictate overall health.** These metrics are like a thermometer for your business. For a metric to be key, you need to be able to look at it and know immediately whether your business is doing well or not.

**Drill-down metrics answer big questions.** These metrics are more granular and help you understand what's going on in specific areas of your business.

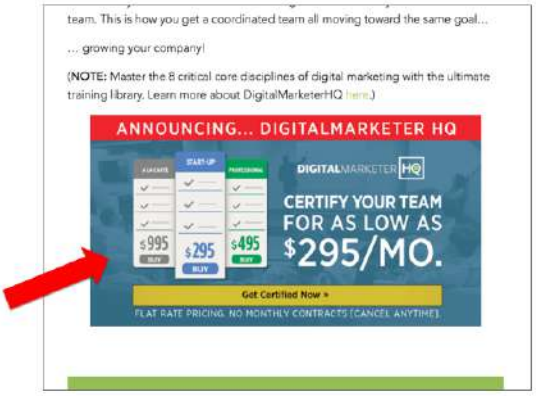
Typically, you use both types of metrics together, not one or the other. If key metrics tell you things are going well, you use drill-down metrics to help you understand why, so you can replicate your success.

For example:

### Improving On-site Banner Clickthrough




KEY METRIC




DRILL-DOWN

The Average Banner Click % is a key metric. It tells you, across your entire site, how likely it is for a visitor to click on a banner ad in one of your articles.

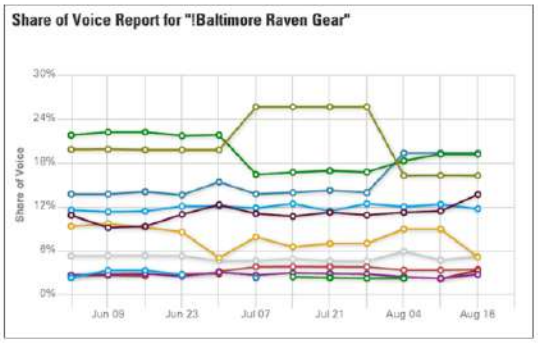
To help us understand why the click rate is 3.25% and how we can improve that number, we need a drill-down metric: How likely is a visitor to click on a banner ad in one specific article?

Not long ago, we did this for the DM blog. After reviewing all our blog posts and drilling down for specific metrics, we were able to identify the factors that impact the click rate. After applying our findings, we improved the banner ad clickthrough rate by about 2% across the blog.

## Improving Search Traffic




KEY METRIC




DRILL-DOWN

In this example, the key metric is New Visitors: How many first-time visitors are landing on your website?

To learn more, the drill-down metric would be Share of Search: What percentage of search traffic is owned by what person or brand?

Here, you'd compare how much search traffic you're getting for a keyword to how much your competitors are getting from that same keyword. This would allow you to find areas where you can compete with much larger businesses because you own the keyword. Alternatively, it will tell you which keywords you need to put some work into.

## Improving Ecommerce




KEY METRIC



DRILL-DOWN

And in this example, the key metric is Average Order Value. To drill down, you'd need to look at actual orders.

You want to know where the bulk of the revenue from your Average Order Value is coming from. This could reveal that you need to move things around in your sales funnel or that you need to push one promotion over another because its average order value is much higher.

As you can see, there are 2 ways you can give your metrics a job.

- You can assign them to a specific stage of the funnel: TOFU, MOFU, OR BOFU.

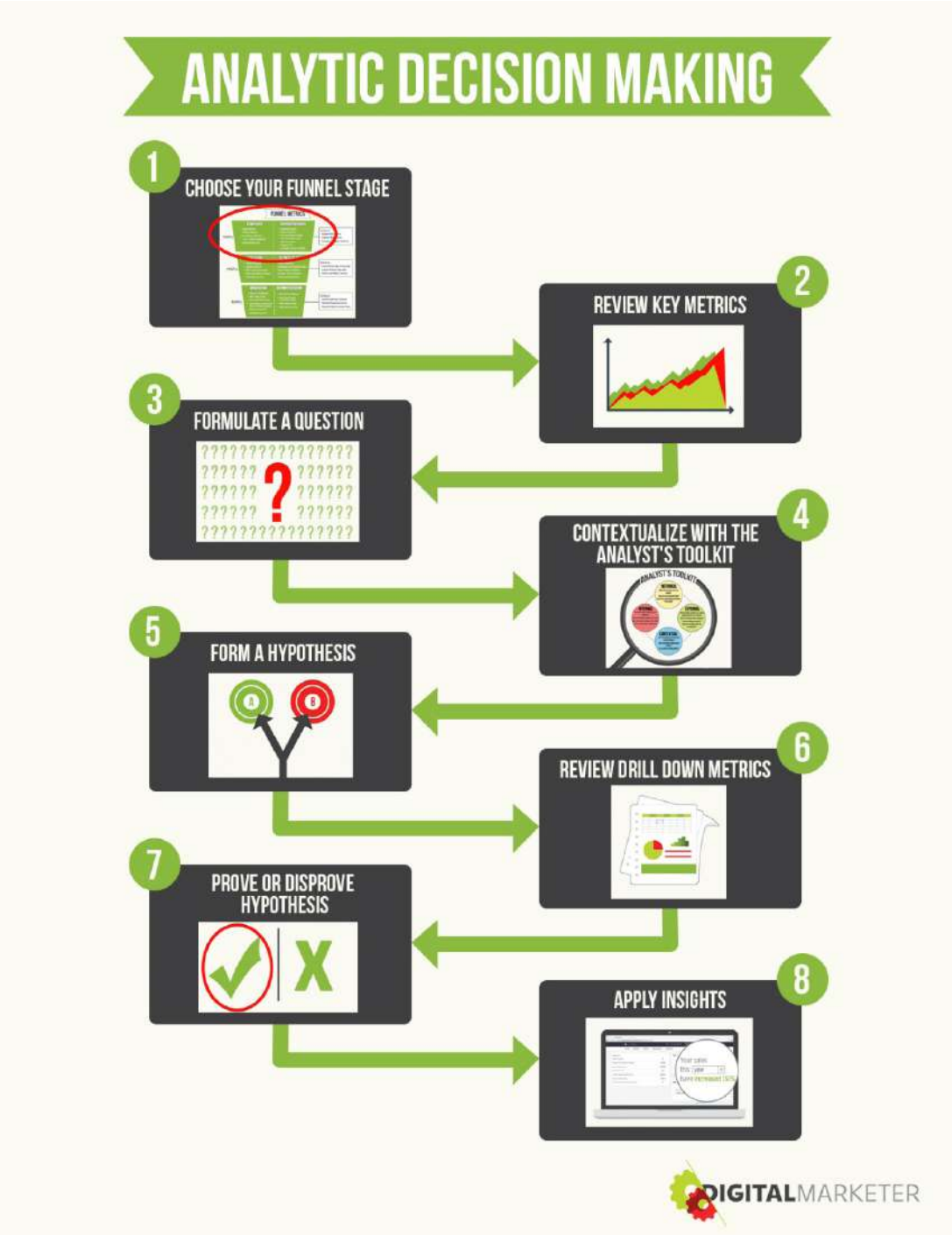
- You can use them to measure the health of different areas in your business and then answer deeper questions about how and why.

Once you understand the overall health of your business and where things are working (or not), you can begin to use metrics for problem solving.

## Principle #2: Using Metrics to Solve Problems

Data is collected on a dashboard, right? But on the dashboard, it's raw data. Your job, as data analyst, is to turn raw data into active data.

For that, you use the analytic decision-making process.




This process works a lot like the scientific method, except it's based on metrics.

In the scientific method, you start with questions and hypotheses, and then you make predictions about what might happen if you test different hypotheses.

It's the same with data and analytics. You review your data and start asking questions about it. You make hypotheses about what might happen if you could impact any of those numbers. And then you devise a test to see if you're right.

Simply by reviewing the results, you can clearly see what needs to be done to improve your business. Making decisions is no longer about your gut instincts, but about what the data is telling you.

That's the theory, anyway.

But in practice, we often don't know enough to know what questions we should be asking. In those situations, it often helps to take another data dive.

## Reviewing Key Metrics to Inspire Questions

When you don't know enough to know what you should be asking, your metrics will often give you the insight you need.

**Step 1. Start by Reviewing Your Key Metrics.** Identify the places where your performance is better than expected or, perhaps, trending downward. In many cases, this will inspire questions.

- This blog post's traffic is double most other blog posts. What made it perform better?
- We're getting new subscribers every day, but our total subscriptions are staying the same. What's happening? Where are we losing subscribers? Why?
- Every time writer SM writes a blog post, traffic and shares are higher than normal. What makes her blog posts better than anyone else's?

As an example, when reviewing the Member's On/Off report for the DigitalMarketer Lab, we saw some weird inconsistencies in the Members Added column

| Monthly Churn | Weekday | Members Added | | Members Request Cancelation | Members Failed Out (Payment Issue) | Misc Lab Cancels (Duplicate Accounts, etc) | Total Members Removed | Net Change | Total DM Lab Members |
|---|---|---|---|---|---|---|---|---|---|
| | 5 | 15 | | 16 | 1 | | 17 | -2 | 8302 |
| | 4 | 33 | | 10 | 2 | | 12 | 21 | 8310 |
| | 3 | 59 | | 18 | 8 | | 26 | 33 | 8289 |
| | 2 | 60 | | 14 | 3 | | 17 | 43 | 8265 |
| | 1 | 63 | | 3 | 5 | | 8 | 55 | 8222 |
| | 7 | 42 | | 4 | 10 | | 14 | 28 | 8167 |
| | 6 | 131 | | 9 | 24 | | 33 | 98 | 8136 |
| | 5 | 58 | | 1 | 15 | | 16 | 42 | 8038 |
| | 4 | 77 | | 1 | 9 | | 10 | 67 | 7998 |
| | 3 | 112 | | 11 | 32 | | 43 | 69 | 7931 |
| | 2 | 106 | | 8 | 51 | | 59 | 47 | 7855 |
| | 1 | 70 | | 8 | 23 | | 31 | 39 | 7808 |
| | 7 | 86 | | 4 | 9 | | 13 | 73 | 7769 |
| | 6 | 20 | | 5 | 22 | | 27 | -7 | 7696 |
| | 5 | 11 | | 0 | 20 | | 20 | -9 | 7699 |
| | 4 | 21 | | 8 | 4 | | 12 | 9 | 7708 |
| | 3 | 11 | | 3 | 9 | | 12 | -1 | 7699 |
| | 2 | 11 | | 1 | 3 | | 4 | 7 | 7700 |

*The Member's On/Off report for DigitalMarketer Lab*

Some weeks, we'd add 131, 112, or 106 new members. In other weeks, we'd only add 11 or 21. After seeing these numbers, some questions sprang to mind:

- What's causing these spikes in subscriber conversions?
- What's causing these periods of lower conversion?

**Step 2. Generate a Hypothesis About What's Happening.** Make some predictions about what's going on. For our Member's Added inconsistency, we made three guesses:

- The $1 trial is a better offer because it converts more visitors for all traffic sources.
- The $1 trial churn is higher than that of full-pay members, meaning it doesn't contribute to our goal of growing the lab.
- People keep restarting the $1 trial offer after their time expires, inflating conversion percentages.

Hint: Don't settle for just one hypothesis. It's best to consider multiple explanations—ideally 5 to 7 hypotheses—and test them all. Otherwise you limit your ability to learn what's going on.

You see, in most cases, there isn't just one reason for the issue you're seeing. Several factors may contribute to the success or failure you want to understand. The more hypotheses you have, the better your chances of isolating all the factors involved.

**Step 3. Use Drill-Down Metrics to Test Hypotheses.** For this, you'll use more detailed, granular data to figure out what's causing the issue you're trying to understand.

This data isn't usually reviewed on a daily basis, but it exists, and you know where to find it. It's also the data that helps you answer these kinds of questions.

For this particular question, we used cohort analyses to test our 3 hypotheses. We developed 7 cohorts, or different ways you could group the people in DM Lab, including cancellation date, average percentage paid, how long they were active, and more.

After reviewing all that information, we realized that the $1 trial was a better front-end offer than the full-pay offer.

**Step 4. Take Action Based on Your Findings.** The conclusion of our data analysis was that the trial offer generates more paying customers than average. For every 100 people we put into DM Lab, 21 came from the trial, while 20 came from the full-pay offer.

While that's not a significant difference, over time, it can add up. So we changed our front-end offer. The $1 trial offer is now our primary offer, and so far, it's yielded an extra 1,000 Lab members.

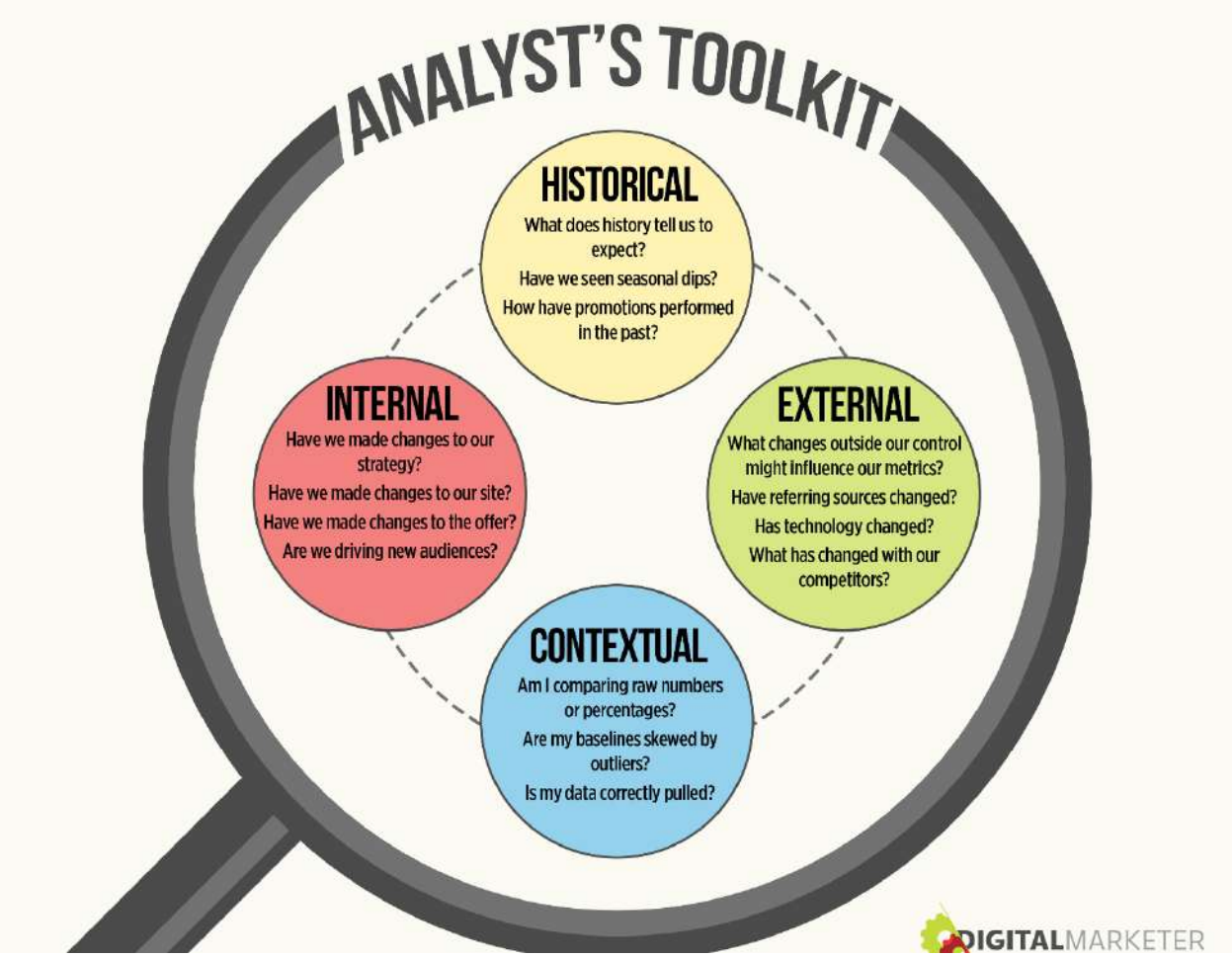
## Principle #3: Contextualizing Data to Account for the Unmeasurable

It doesn't matter how good your data is, sometimes it doesn't tell you everything you need to know.

For instance, let's say you're reviewing your data and you see a trend. Why is that trend taking shape? Maybe you ran a campaign during that period. Maybe your competitors did something unique. Or maybe you had a technology problem that skewed the data.

If you don't consider these factors when evaluating your data, you're likely to make an assumption based on a false set of data. Your conclusion won't be valid.

In these situations, context helps you account for variances in your data. And there are 4 contexts you need to consider.




*4 contexts help you interpret your data.*

## Historical Contexts

What does history tell you to expect? By reviewing data through a historical lens, you can understand trends and typical behavior among your customers.

For instance, at DigitalMarketer, we've noted that sales dip in the summer. Consistently. Every summer.

So rather than worrying about lower numbers, we've come up with strategies for boosting sales in late spring. We also reduce ad spend in the summer because we know the ROI won't be as good.

## External Contexts

What changes outside our control have influenced our metrics? Maybe a new competitor has entered the market. Or maybe technology has changed, necessitating major changes in the way you do things.

## Think Google algorithm updates.

External factors may be outside your control, but you need to keep them in mind when evaluating performance.

## Internal Contexts

Have you made changes to your strategy that impact your performance? Have you made changes to your site or launched a campaign?

This is more of a self-review. Think through the changes you've made internally that might have affected your numbers.

## Contextual Contexts

This has to do with how you're pulling the data. Are you comparing raw numbers or percentages? Are your numbers skewed by outliers? Do you have data that doesn't make sense because of an internal or external factor?

Together, these contextual factors help you account for the *immeasurable* things, the things you can't foresee or explain in your data. And they help you evaluable the validity of your data.

## Making Data Actionable

As you can see, the 3 principles of well-executed analytics and data can help you turn random numbers into actionable tasks for your business.

You need to assign roles to your data so you know the stage of the funnel they relate to and whether they help you know something (key metric) or give you information to answer a question (drill-down metrics).

You also need to use data to make smarter decisions for your business. Use it to test your ideas about what's working and what's not and how you might improve results. When you review the numbers to answer a question, you know what you're trying to prove or disprove.

Then finally, you need to put your data into context by evaluating the factors that might be driving numbers up or down. By tying data to the real world, the numbers will make more sense and it will be easier to use them in your business to drive growth.

## The Lingo Analysts Use

There are 5 terms you must understand to talk intelligently about analytics and data.

### Analytical Decision Making

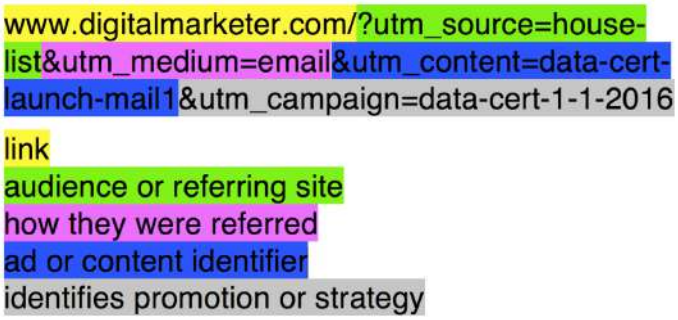
This refers to the data scientist's scientific method. It's the process you'll use to identify the questions you should be asking and the best methods for answering them.

### Analyst's Toolkit

These are the tools, templates, and resources you'll use to turn concepts and ideas into data and reports. Your toolkit will help you ask the right questions and develop a process that makes data analysis easier.

## UTM Parameter

This refers to the code you can append to a URL to give you more information about where your traffic is coming from.




*How to use UTM parameters*

In this example, the yellow highlight shows you the actual *link*. Everything after that is a UTM parameter. It's this extra information that helps you track your traffic sources.

- Green highlights the *source*, which tells you the audience or referring site (house list).
- Pink highlights the *medium*, which tells you how this traffic was referred (email).
- Blue highlights the *content*, which is your ad/content identifier (data cert launch email1).
- Gray highlights your *campaign*, which identifies the promotion or strategy this traffic came from (data cert 1-1-2016).

When you add UTM parameters to your links, anyone who clicks on those links will be tagged, and you can track those tags in Google Analytics.

This allows you to see which sources and communications are giving you the best traffic.

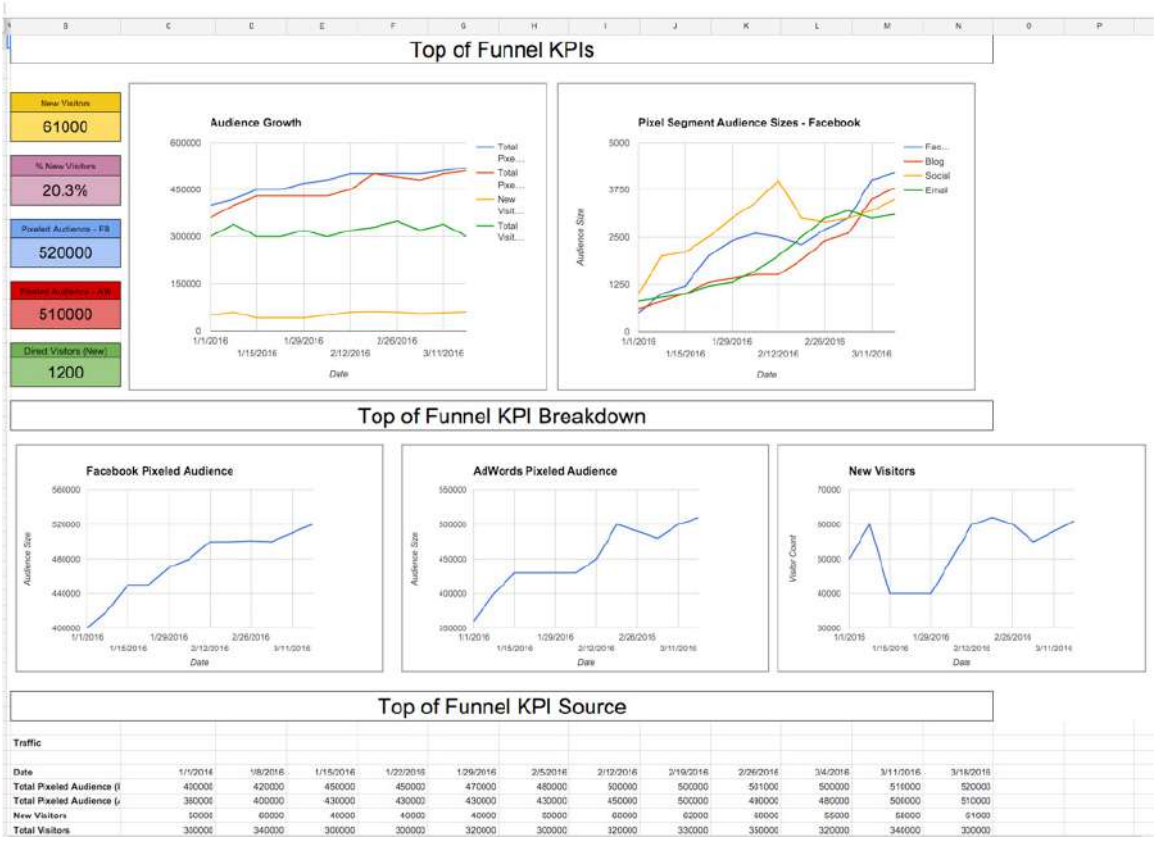
## Key Performance Indicator (KPI)

KPI is another way to refer to a metric in general, and it's usually used to talk about a metric that someone thinks is driving their business. *KPI* is another way to talk about a *key metric*.

## Dashboard

A dashboard is a web page that collates your metrics from a particular source. You'll likely have a dashboard for each data source: Google Analytics, your email service provider, your social media platforms, and more.

Most dashboards also provide graphs that turn your data into visuals, making it easy to see how well you're performing.




*Dashboards give you at-a-glance understanding of what's working.*

Dashboards should be available to everyone on a team. They help you easily understand what's going on in a business, which helps team members see how their work is impacting the success of your business.

## The Roles: Who Needs to Be in the Know?

Who should own your business's data? Where in the company does data analysis live?




### Data & Analytics

The analytics team (or individual) should have primary responsibility for gathering, vetting, and interpreting your data and analytics.

Larger teams may also have a data implementation manager, who aggregates all this information and turns it into a beautiful dashboard that's easy to understand.

### Marketing

Every marketer worth their salt needs to know a little about analytics and data. Whether you're running Facebook campaigns, tweeting 50 times a day, or posting articles to your blog, you need to know what's working and what's not.

### Conversion Rate Optimization (CRO)

The people who run tests to optimize your marketing rely heavily on data to develop their hypotheses, set up tests, and measure performance.

## Summing Up

Analytics doesn't have to be scary or overwhelming—even if you're not a numbers person. You simply need a process for dealing with the numbers, a way to figure out which ones will help you identify opportunities and which ones to ignore.

Once you've got your process in place, you may actually find you enjoy analytics. There's no better feeling than knowing without a doubt that your marketing plan is working—and it's the metrics that will give you that confidence.

We're nearing the end of our digital marketing overview. The next (and final) lesson is conversion rate optimization, which is a simple process for improving your marketing results over time.

Honestly, conversion rate optimization, or CRO, as it's often called, is the secret sauce for your digital marketing strategy, and you'll love how it focuses your energy on the tasks that matter most.

## Become an Analytics & Data Specialist




Data and analytics are essential to a modern digital marketing strategy—and they're key to growing your business.

To succeed today, you need to master the 3 principles covered in this chapter and develop an effective process for organizing all your data, evaluating it, and turning it into smart business decisions.

DigitalMarketer's Analytics & Data Specialist Mastery course gives you the training you need to:

- Build a compete analytics dashboard that reveals the overall health of your company in one glance.
- Turn raw numbers into meaningful action, using an 8-step flowchart that guides you step-by-step through the process.
- Identify the traffic sources that are most valuable to your business, so you get the best possible ROI from your marketing.

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CHAPTER 08:

# LEVERAGING CONVERSION RATE OPTIMIZATION TO DRIVE GROWTH

DIGITALMARKETER

CHAPTER
# 08

You know what's sad?

Only a fifth of businesses are satisfied with their conversion rates*.

One fifth!

Which is why smart businesses are making conversion rate optimization (CRO) an integral part of their digital marketing strategy.

But conversion rate optimization is a bit of a misnomer.

*Conversion* doesn't just mean a sale. It's whatever you definite it to be. And unless you define what you mean by "conversion," you can't improve the experience.

Here's the bottom line: if you want to improve your conversion rates, you must learn to articulate things better and improve the experience so people can perform the action you're asking them to take.

In this Guide, we've covered the foundations of an effective digital marketing strategy, everything from content and advertising to social media and email marketing to SEO and analytics.

But to succeed as a digital marketer, you also need to know how to optimize your marketing over time—making small tweaks that can turn 1% returns into 10% or even higher returns.

In this chapter, we'll help you do just that. We'll talk about the optimization methodology, a repeatable process you can go through to improve results on your website. We'll also cover the lingo you need to know as an optimizer, the metrics you need to be measuring, and the roles within your organization that will be responsible for it.

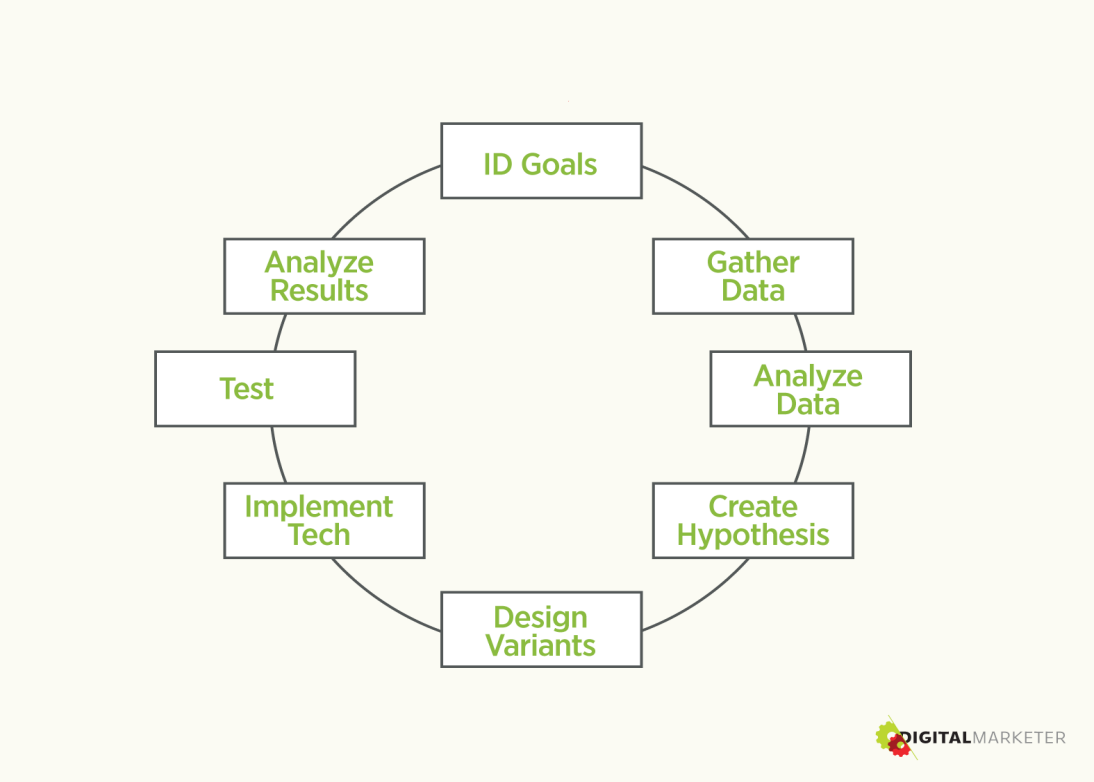
## The Methods of Well-Executed Conversion Rate Optimization

Let's begin with some basics…

The main goal of optimization is to improve conversion rates of the traffic you *already have*, and generally, with the assets you already have.

It's also important to understand that optimization is a dedicated, repeatable process. It's not a once-and-done activity. You'll work through the process, then begin again. And since you can always improve your results—no matter how much you improve them—you'll continue optimizing as long as you're in business.

That's why we describe the CRO process as a cycle:




*The CRO Cycle*

You start by identifying your goals. You gather relevant data, analyze it, and create a hypothesis. You design your variants, implement technology and test your hypothesis. Then you analyze results, which will give you new insights and ideas for new tests.

Then the process starts all over. With optimization and testing, this cycle never ends. At least, not if you're doing it right.

Now let's talk about what you'll do at each stage of the cycle.

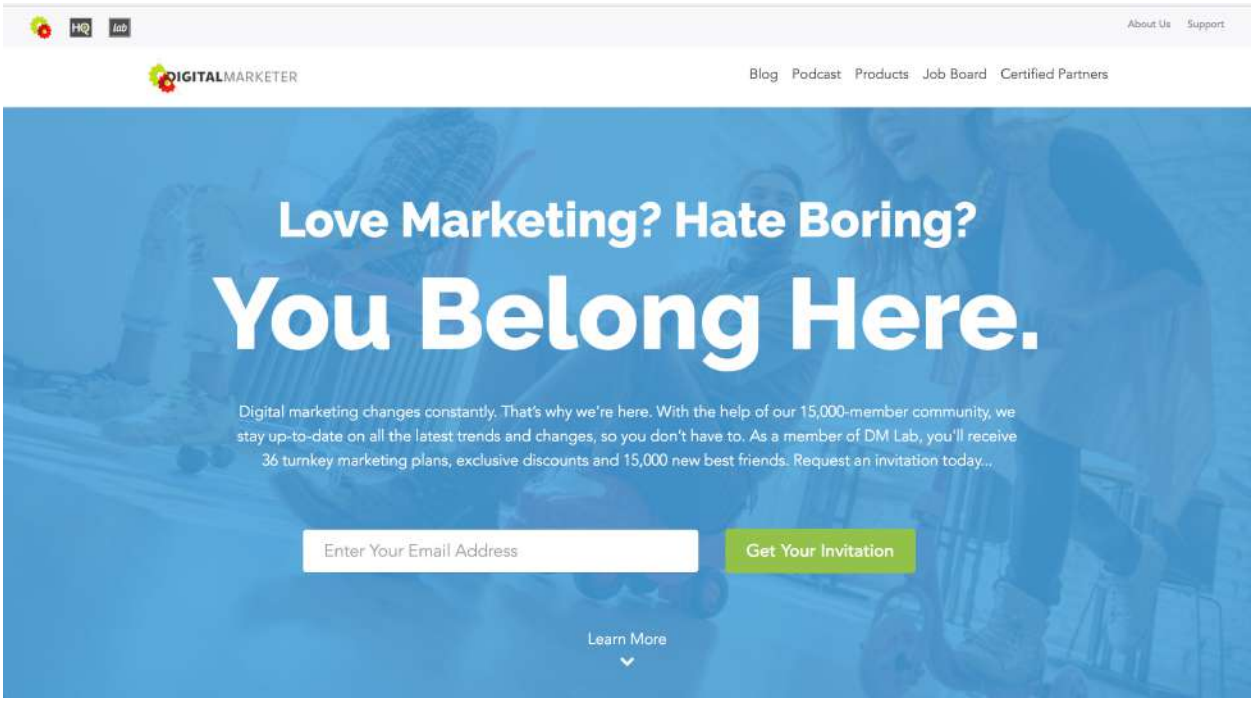
## Identify Your Goals

The process starts with a clearly articulated goal. Remember, without clear goals, you can't optimize anything. You must know what you're trying to achieve.

So let's say you're trying to optimize your homepage. We'll use the DigitalMarketer homepage as an example.

Keep in mind, though, homepages are actually one of the most difficult pages to optimize because they've got to perform so many different tasks—and everyone wants to prioritize their own goals. The sales team is looking for qualified leads. The acquisition team is looking at how they can convert the traffic into emails.

You get the idea. Everyone is competing for shelf space on the homepage.




*Your homepage is your "you are here" message*

But here's the bottom line: A homepage is your "you are here" message for new visitors. They're trying to figure out if your business is relevant to them, and if so, where they are and where they need to go.

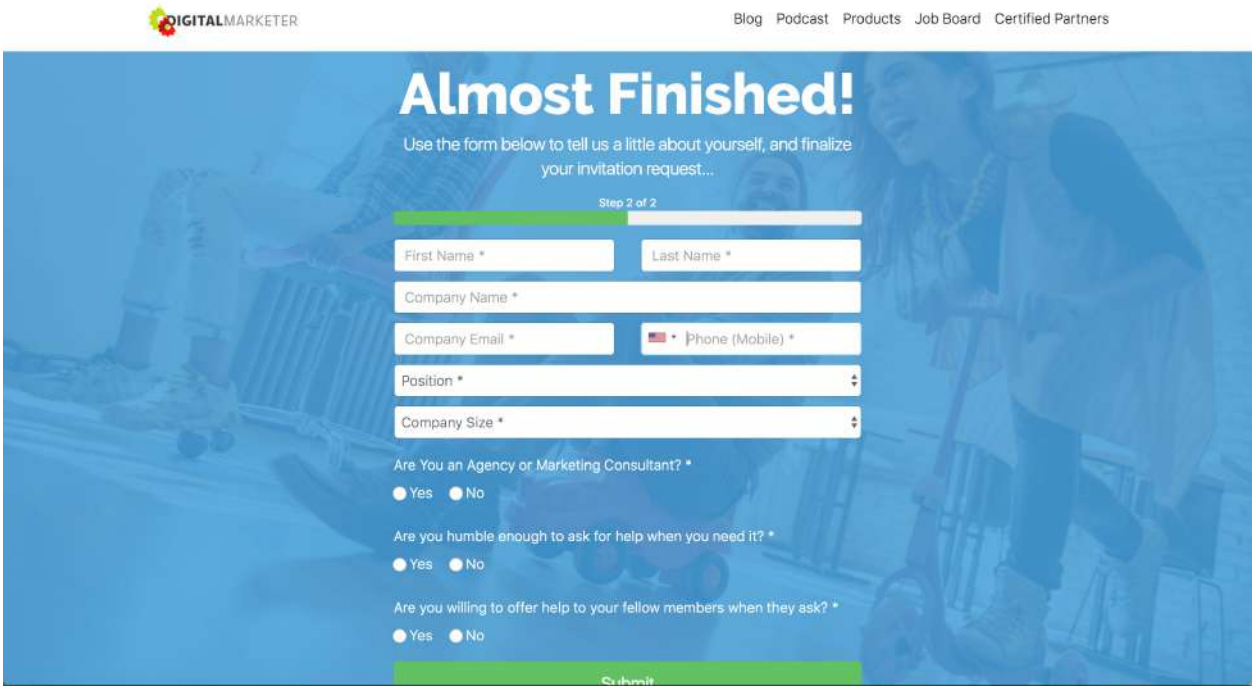
To optimize this experience, you'll need to set one or more of 3 goal types:

1. An immediate goal, such as clicks or on-page form completion.
2. A campaign goal, such as leads generated or purchases.
3. A long-term goal, like impacting your long-term value, net revenue, average order value, or lead quality.

Looking at the DM homepage, you can see our top goal is the first type, an immediate goal. We want to get people to give us their email address.

But we need to optimize the entire experience, so let's look at the page they land on when they click the "Get Your Invitation" button.

They land on this page…




*Optimizing for a long-term goal: identifying the right product for new prospects.*

This page achieves the 3rd type of goal, a long-term goal, and it helps us on the front-end and the back-end. The information we gather here lets us qualify people for the right product, either DM Lab or HQ.

For us, this is important because it helps us gauge the quality of the leads we're generating, and it helps us drive new subscribers to the product that's best for them.

## Gather Data

Once you've set your goal, you need to set a baseline for your metrics. For each, log your current number, your aspiring number (the number you're aiming for), and your user data.

Gather that data prior to making any assumptions.

Which brings us to rule #1 for optimizers: leave all assumptions at the door.

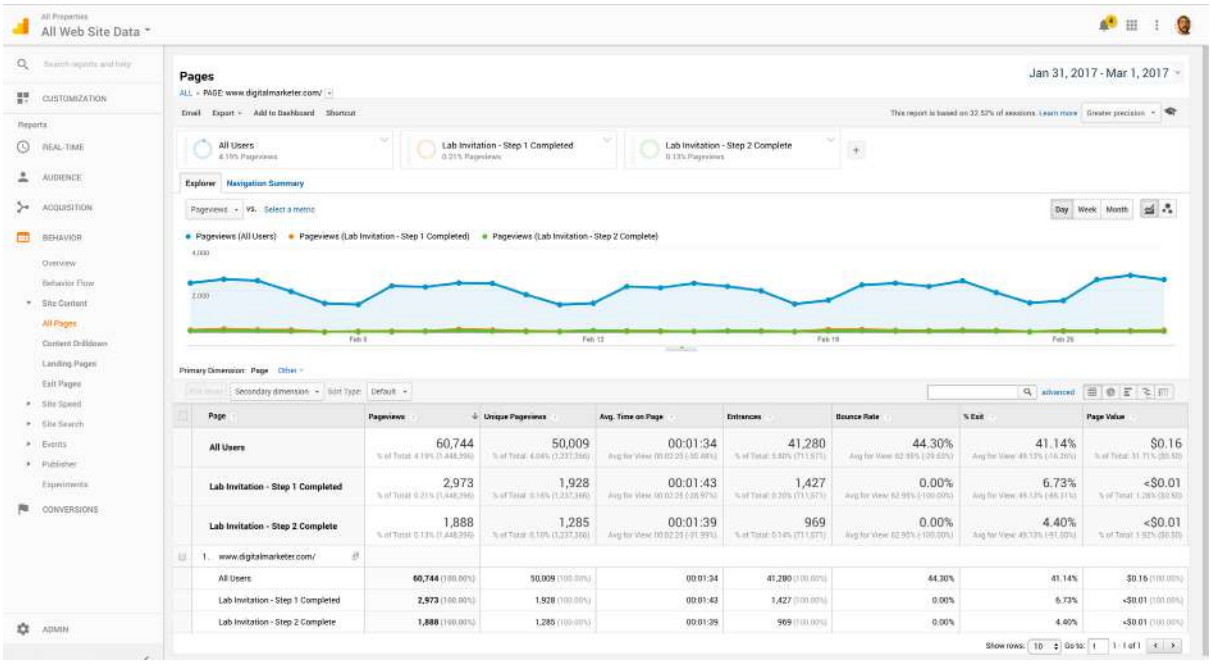
You and everyone else in your business have ideas about what works, what doesn't work, what your visitors are looking for, and more. But those ideas are merely assumptions.

You must never make decisions based on assumptions. Test your ideas, and let your visitors tell you what works for them.

So where do you get your data?

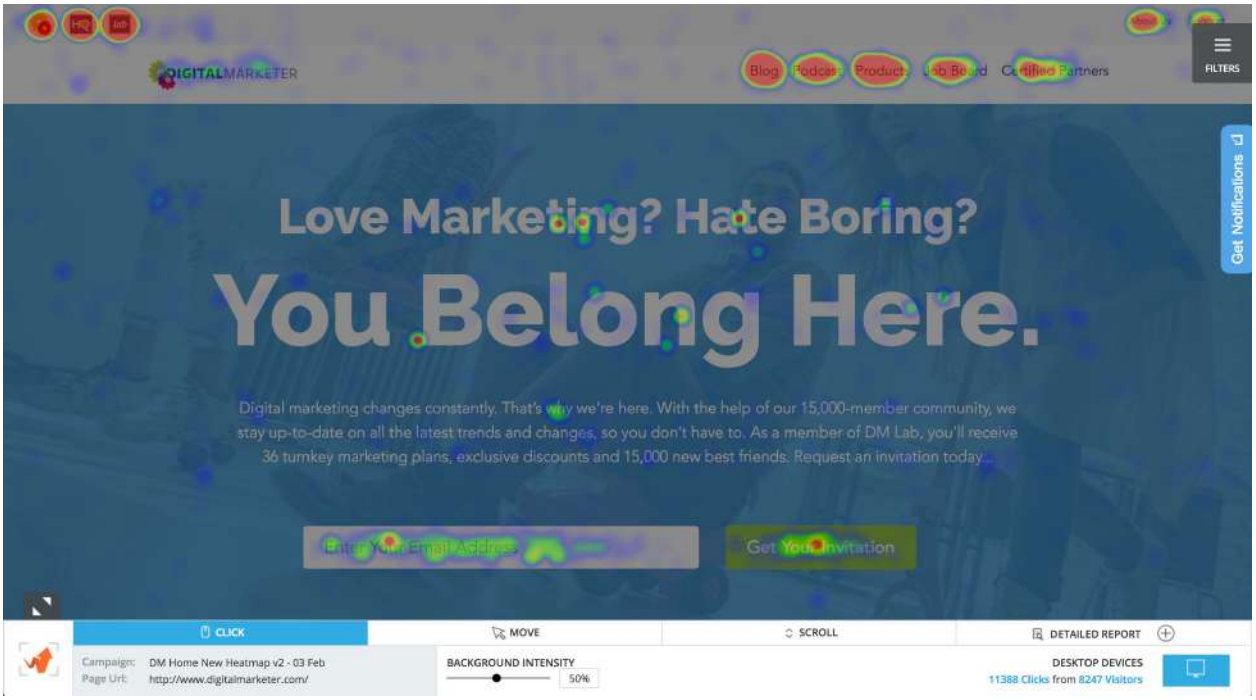
- For site metrics, go to Google Analytics.
- For user behavior metrics, use a tool like TruConversion.
- For customer and email data, use the data provided by your email service: ConvertKit, Infusionsoft, Aweber, etc.
- For payment data, look at your payment processor: Stripe, Paypal, etc.

Different types of data are shared in reports like this one from Google Analytics, which tells you about the traffic on the page you're trying to optimize.




*Google Analytics is a good source for data.*

User behavior reports might look like this one from TruConversion. It shows us where people are clicking when they're on the page, uncovering areas where we could improve the user experience.




*TruConversion behavior reports tell you where people are clicking on the page.*

## Analyze Data

The key to CRO success is to use relevant data (which you just gathered) to develop meaningful optimization campaigns.

Review your numbers and ask yourself questions like these:

- **What's my conversion rate? (And is it acceptable?)** Use analytics or CRM data to find the answers.
- **What's hurting my conversion rate?** Use the user behavior data to figure this out.

- **How or why is it hurting my conversion rate?** To answer this question, you'll move to the next step in the CRO process and develop a hypothesis.

## Develop Hypotheses

This is where all optimization begins.

If you don't have a hypothesis, you can't optimize because you don't know what you're trying to improve.

At this stage of the process, you have your data and you've identified the elements that are likely hurting your conversion rates. Now you need to make some guesses about how you could fix the issue you've identified.

How do you make a hypothesis?

It's as simple as creating a statement containing these 3 elements:

1. The change or approach you plan to test.
2. Who you're targeting with this change.
3. The outcome you expect to see.

The format should be something like this:

*We believe that doing **[1]** for **[2]** will make **[3]** happen*

Notice that your hypothesis is about your intent. You need to be very precise about the outcome you're aiming for. You also need to be sure it's something you can measure and will improve your results in a specific way.

## Design Variants

You'll use your new hypothesis, along with your data, to create the variations you're going to test.

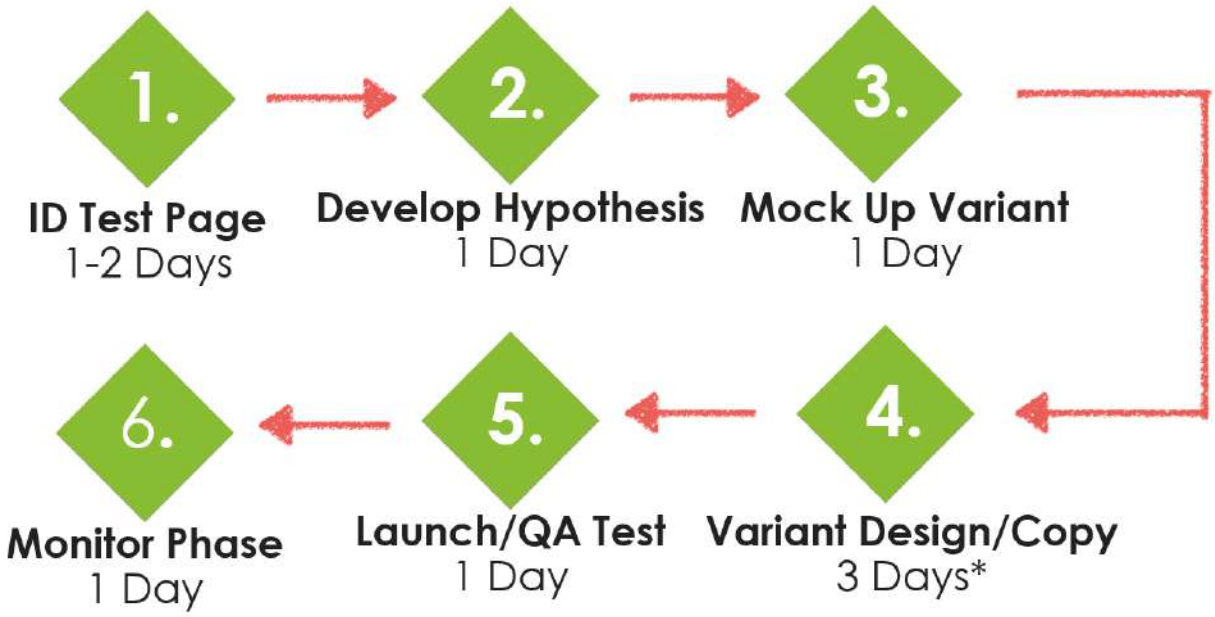
Keep in mind, testing takes time—not just to create the set up the tests, but to run them.

And while there's no limit to the number of tests you can run on a site at any given time, if your site doesn't get a lot of traffic, you'll need to limit the number of tests you run—it simply takes too long to run a test and get valid results if your site is small.

That being the case, if you don't get a lot of traffic, plan to run no more than about 29 tests per year.

Which means you need to pick the right tests to run. You'll need to hone your ability to identify and justify the page you want to optimize.

Here's a typical timetable for setting up and running a test:




*Typical timetable for CRO tests*

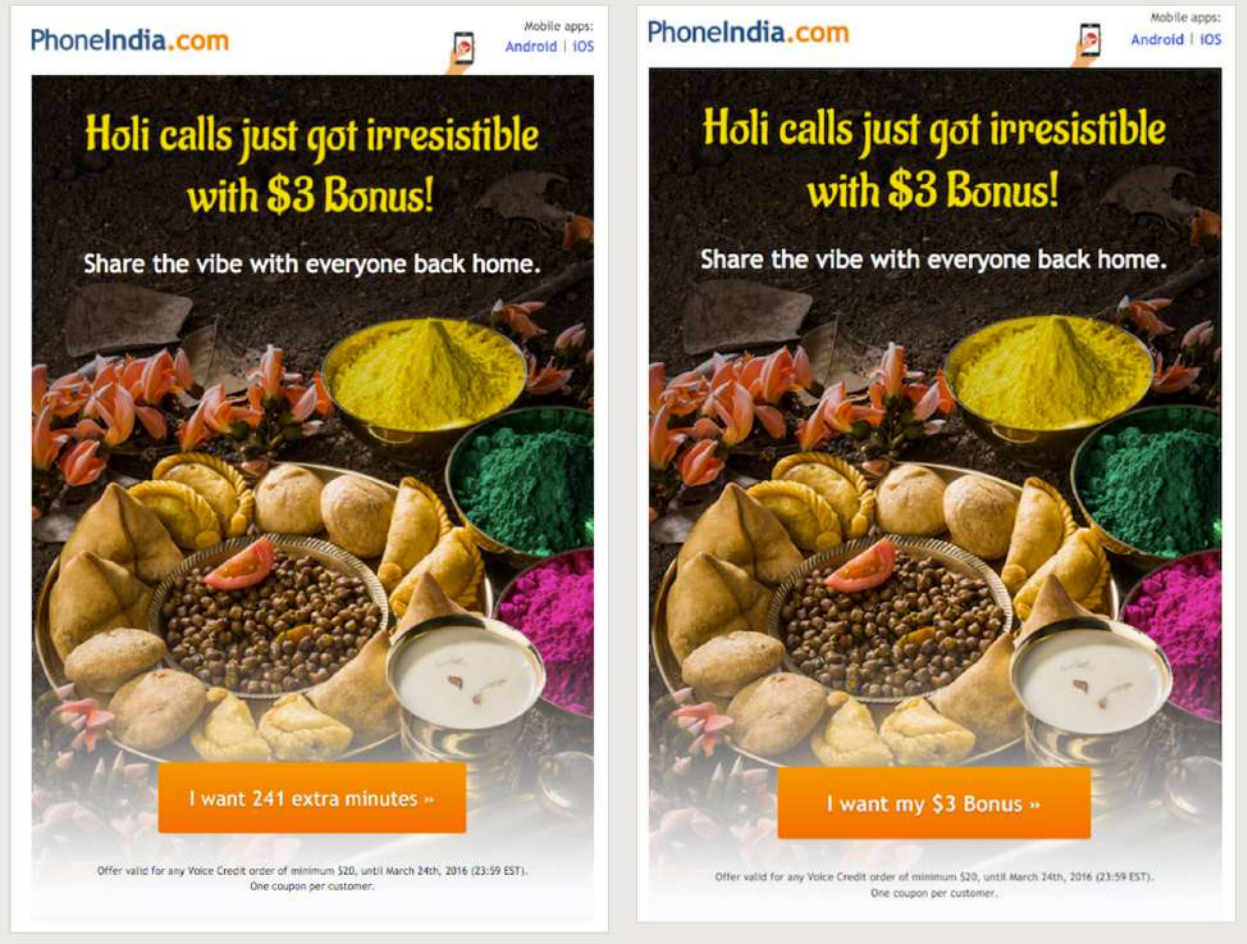
Notice Step 6 is to monitor your test. Once a test is running, you want to monitor it carefully on the first day it's live. In particular, look for anything that's broken or isn't working as planned.

If you've designed a simple test and nothing's broken, it will take 9 to 11 days to get it up and running. But hiccups happen, so be prepared for tech issues and other glitches that could add a few days to this timetable.

Now let's look at how that might play out in real-life testing situations.

## Changing the Button Copy

This test is braindead simple. It only involves a few copy changes, which means it could be set up quickly. But it's not very meaningful, and it's not scalable at all. What you learn from this test won't impact other tests in a significant way.




*Testing the button copy*

## New Tripwire Control Page

This test, for the DigitalMarketer site, is a lot more complicated. Because it's a major redesign, it will take longer to set up and to implement. But we'll learn a lot more, and our findings can be applied across our other tripwire pages, so it's very scalable.




*Testing a page redesign*

TIP: For a complicated test like this one, you'll want to create a mockup, then build it in a landing page builder. Once your variant has been tested and proved, you'll then want to scale it across all similar offers, so the results you gained from this test can be applied to all related pages. In this case, it took a month to do that.

## Implement Testing Technology

Once your variant is made, you want to implement all the necessary technology to make the changes you're testing.

You can't do this without the right technology. You're going to need some tools like Visual Website Optimizer, Google Analytics, and TruConversion.

## Run Your Test

It's as important to know when and when *not* to run a test. For that, you need to qualify your test.

First, ask yourself: *can* you run the test?

| Minimum Number Of Conversions Per Day | | | | |
|---|---|---|---|---|
| **Test Period (Days)** | **2 Variants** | **3 Variants** | **4 Variants** | **5 Variants** |
| 7 | 29 | 43 | 58 | 72 |
| 14 | 15 | 22 | 29 | 36 |
| 21 | 10 | 15 | 20 | 24 |
| 28 | 8 | 11 | 15 | 18 |
| 35 | 6 | 9 | 12 | 15 |
| 42 | 5 | 8 | 10 | 12 |
| 49 | 5 | 7 | 9 | 11 |
| 56 | 4 | 6 | 8 | 9 |

*The length of your test depends on the number of variants being tested and your conversions/day.*

Every test should run until it achieves *statistical relevance*—otherwise you can't trust the results of your test. But the length of time it takes to reach statistical relevance depends on the number of variants you're testing and the number of conversions you have per day.

**What is "statistical relevance"?** It's how you mathematically prove that your test's outcome is reliable. If you end a test too early, you won't have enough data from the test to verify that your hypothesis was true. It might not be—and if you had run the test longer, the numbers would have proven it.

But statistical relevance is hard to get when you don't have much traffic. No traffic means no data, after all.

So if you're testing 2 variants in your test, and you get 5 conversions per day, you'll need to run your test for 49 days to be able to trust your test's results. (See the chart above.)

If you're testing 3 variants and get 3 conversions a day, guess what? You're not on the chart. You've got to ask yourself: *should* you run the test.

Not only that: not all tests need to be completed.

Once you've set up your test, if you see indications that it's broken or obviously failing, you can pull the plug. (It's okay. Really.)

For instance, on Day 1, if your results tank, something is broken. Stop the test and diagnose the problem. If, on Day 12, your numbers are still 80% down, the test isn't working. You need a pragmatic approach to know how to respond.

As a CRO, your goal is to mitigate risk while testing new ideas. So if a test is performing badly and the traffic source is organic, you can probably afford to keep it running. If it's a paid traffic source, you're losing money the longer a failed test runs. You should probably end it sooner than later.

Here's the test for whether you should run a test:

- Is this a functional issue with no ambiguity toward the solution? If it's just a functional issue, you don't test.
- Does this page directly impact long-term or campaign goals? If yes, run the test.
- Is there something else you can test that will have a bigger impact? If so, do that instead.
- Are these learnings scalable to other parts of the site? If not, tread carefully. You'll get more value from a test whose results impact multiple pages on your site than on a test that only tells you one thing.

- Can I launch the test (or winning variant) in a reasonable timeframe? If you don't have the resources to run the test or implement the winner, you shouldn't run the test—it's a waste of time.

### Analyze the Data

After running a test, you need to analyze the results. This gives you the "why" and fuels your next campaign.

During this stage of the process, you perform 5 essential tasks:

- Share lifts or losses
- Figure out "why"
- Write a report
- Archive your data
- Share the results with stakeholders

In your report, you want to include the name of the test, the timeline, metrics, visually, show the variants, and break down the long-form numbers. Then move into what you learned from the test and what needs to be done as a result.

During analysis, you need to ask these questions:

- Did you see a lift, loss, or a null?
- If results went against the hypothesis, why?
- Is it worth retesting? Maybe there were unusual circumstances around the test that make the results questionable.
- How can the data be used in future experiments?

Now, use these findings to set new goals and begin the process again.

As mentioned above, testing and optimizing should become a normal part of your marketing plan. Each test should lead to another, and every small improvement will add up to significant growth.

## The Lingo of Optimization and Testing

These are the terms you need to know to talk intelligently about conversion rate optimization.

### Conversion

The visitor action you're hoping to improve with the campaign (e.g., registering for a webinar, adding a product to the shopping cart, etc.).

Be aware, you must define your conversion actions. Clearly identify what you're testing, what you're aiming for, and the metric that matters most in measuring your results.

### Control

The page in the experiment that does not receive the treatment. In conversion testing, the control is the version of the page that currently converts best. Any new variation is tested against the control.

So in an A/B test, the control is A. Your test version, or variation (see below), is B.

### Variation

The page in the experiment that has received the treatment you're testing. For example, the variation page might have a shorter lead form than the control page.

TIP: Name your variants in the test so it's easy to identify the key element in each. Something like this:

- Control – full form
- Variant 1 – shortened form

- Variant 2 – email only
- Variant 3 – form + survey

### Quantitative Data

This is any data that can be measured numerically. The "number stuff," such as:

- Unique visits
- Sign-ups
- Purchases
- Order value
- Qualitative Data

This is the descriptive data. The "people stuff" that's more difficult to analyze but often gives context to your quantitative data. This would include:

- Heatmaps
- Session recordings
- Form analytics

## The Metrics

Optimizers live and die by the numbers. So what are the numbers that matter most when you're testing?

### Conversion Rate

This is calculated by dividing the number of conversion (whatever you defined) by the total number of visitors to the page you're testing.

For example:

$$\frac{\text{Leads Generated}}{\text{Unique Visits}}$$

## Lift Percentage

The percentage change between two variants (not the difference between the two numbers).

To calculate lift percentage, use this formula:

Control Conversion Rate: 10%
Variant Conversion Rate: 11%

$$100\left(1 - \frac{10\%}{11\%}\right)$$

In this case, while the *difference* is 1%, the *lift percentage* is 10%.

## Confidence Rate

Technically speaking, this is: "The percentage of instances that a set of similarly constructed tests will capture the true mean (accuracy) of the system being tested within a specified range of values around the measured accuracy value of each test."

In layman's terms, you're trying to avoid false positives. So the confidence rate shows how sure you are that your test is accurate.

For instance, let's say your confidence rate is 95%. That would indicate that if you were to run the campaign 100 times, 95 of the tests would show your variant a winner.

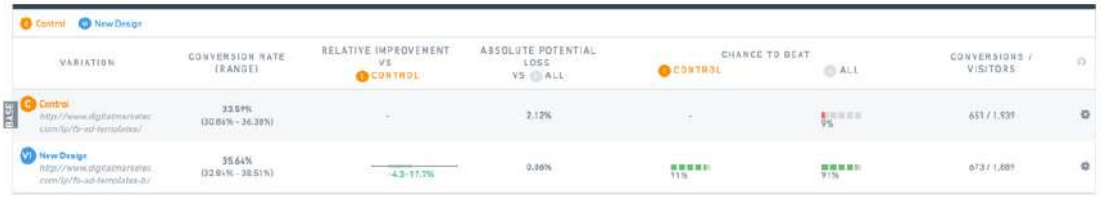
A common mistake is to interpret this as the "odds" of you getting your same results. As if a 95% confidence rate meant there's a 95% chance you'll get the same results from another test.

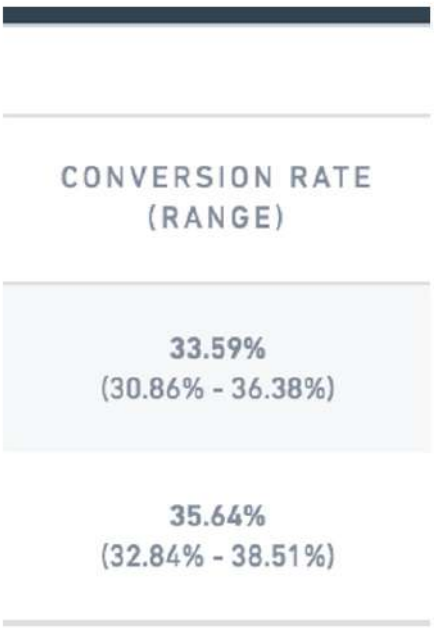
We're not talking odds. We're calculating the accuracy. In every test, you'll see slight differences. The confidence rate indicates you'll see difference but not the degree of difference.

## Conversion Range

"Conversion rate" is a misnomer. It makes it sound like your tests will give you one precise number that you can call the "conversion rate."

In reality, expect to see conversions within a range—not as a precise number. So 30.86% to 36.38%, with 33.59 as the mean.




*The conversion rate (range) should not overlap as it does here.*

Notice that the two tests overlap slightly. Your goal is to break the overlap, so your winning variant is a clear winner.

## The Roles: Who on Your Team Owns CRO?

These are the 3 roles that typically have responsibility for optimization and testing.




### Acquisition

Anyone responsible for acquiring new leads and customers should know how to optimize for more conversions.

Even when this role doesn't do the actual optimization, they need to be able to identify whether lower-than-expected results are from poor targeting or on-page issues.

### Marketing

Every marketing professional should understand the strategy behind conversion rate optimization at every stage of the funnel.

They need to understand the basics of optimization (at the very least), so they can identify the source of whatever issues arise—whether they're a problem with optimization, acquisition, or qualifying.

### IT/Web Developer or Designer

Conversion rate optimization often has technical elements that require the assistance of the tech team members who build web pages.

Be sure these people know what your tests are about. Sometimes, the changes you're asking for aren't best-practice from a designer's point of view, and it helps them to understand what they're creating and why.

Also, if you're using optimization tools that allow you to make changes on your own, give all stakeholders a heads up about your test. Otherwise, they'll see the changes on the website and wonder why the "approved" language or design has been changed.

## Bottom Line

If you don't want to be one of the marketers who are unhappy with their conversion rates, you've got to change your approach to digital marketing.

You can't just wing it and except to see results.

The *only* way to raise your conversion rates is to begin testing and optimizing.

These aren't once-and-done activities, either. They need to become part of your business' culture if you're serious about growing your business.

Which brings us full circle…

We created *The Ultimate Guide to Digital Marketing* to help you understand the tactics that you need to master to succeed as a digital marketer.

So what's next?

Click through to the final chapter, and we'll give you your next steps.

***NOTE**: The study revealing that a 4 out of 5 businesses are dissatisfied with their conversion rates can be found at Econsultancy.

## Become an Optimization & Testing Specialist




With DigitalMarketer's Optimization Specialist training, you'll learn the skills covered in this chapter and more.

The critical pages that need immediate optimization—in most cases, the well-performing pages would perform even better with a little optimization.

The 3 crucial factors for prioritizing your optimization campaigns.

The 3 most effective tools for collecting user data (and how to use them).

How to create a report to show your findings so the test is implemented properly and you get the credit you so richly deserve.

**Click Here to Learn More »**



CHAPTER 09:

# WHAT'S NEXT?

DIGITALMARKETER

CHAPTER
09

## Congratulations!

You've completed *The Ultimate Guide to Digital Marketing*, which means you're part of an exclusive group of marketers who know how to attract, engage, and convert your customers in a social, digital environment.

Simply by applying the lessons you've learned in this Guide, you'll have a huge advantage over your competitors.

## So what's next?

The foundations you've laid as you've gone through this Guide are solid—they'll help you grow your business and start making headway to meet your goals.

We can say with utmost confidence you'll likely see improved metrics across every area of your business.

But the wonderful thing about digital marketing is that ***there's no limit to what you can achieve***. Your next step is to develop your skills in each of these areas, so you can outpace your competitors and anticipate the needs of your customers.

That's how you achieve real growth as a digital marketer: creating and optimizing your Customer Value Journey.

## For Startups, Agencies, or Business Owners

If you want to create the ultimate marketing dream team capable of implementing everything you've learned in this Guide, you're going to want to join DigitalMarketer HQ.

We'll help you:

- Build a new team
- Training your existing team
- Track their progress
- Improve retention
- Grow your sales

The secret is to cross-train all 8 CRITICAL Core Disciplines of Digital Marketing, so everyone is on the same page, working together.

As a member of DigitalMarketer HQ, your team will be trained and certified in the following disciplines:




You'll rest easy knowing your marketing is being done right. We'll make sure your teams stay up to date on what's working *now*.

## For Digital Marketing Professionals and Students

Maybe you're currently employed as a digital marketing professional. Maybe you sell digital marketing services, or you're a student hoping to land a great job in a fun, in-demand, high-paying field…

Your next step is to become certified in the marketing discipline that's you use most.

**Get Your Team Trained & Certified Today »**