Marketing Process: Sample

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The Marketing Manager is an essential part of [Company]'s Leadership Team and is involved on many levels in the internal and external promotion of the company to current and potential clients, current and potential employees, referral sources, and the general public. The Marketing Process is the responsibility of the Marketing Manager, with oversight by the Leadership Team, and is accomplished through a series of well-thought-out content and images targeted at specific populations through a variety of mediums,and which are continuously assessed for their effectiveness and relevance.

The following processes describe the main components of [Company]'s marketing efforts. All of these tasks are fully the responsibility of the Marketing Manager, though specific tasks may be delegated if needed to another team member with ability and capacity to help.

Content Approval Process

Marketing concepts regarding content, images, marketing and promotional materials, or anything else, are to be approved by the Director individually, and/or by the leadership team, before being developed through the **Content Creation Process**, and again before they are posted,published, or ordered. This ensures full alignment with the Mission and Vision and Leadership Team, as well as adherence to the approved marketing budget.

1. Brainstorm and design text content and/or image ideas based on brand materials and pre-approved language/messaging. This collaborative step takes place at (and/or in preparation for) either:

    a. Weekly **Marketing Meetings** for client-level concepts such as organic social media posts, ads, website content, and email content.
    b. Weekly **Leadership Meetings** for company-level concepts related to communications with referral sources, phone scripts, website development, market research, internal marketing, crisis management, live events, sponsorship opportunities, community events, and public relations.
    c. Weekly meeting with the Director.

Note: Most often, a given concept will only need to be approved once before many content pieces are produced based on it. For example, the approved concept for "Ads for In-Person Therapy" images might serve as a template for hundreds of ads before it needs to be revisited.

2. Once the concept is approved by the leadership team, the **Content Creation Process** begins.
3. When completed, the polished final draft is brought back to the leadership team, most often during Marketing Meeting, for final approval.

4. Final edits are made and approved if necessary and deployment budget is set, if necessary.
5. Content is downloaded and deployed for the approved purpose.
6. Content is saved to the appropriate file folders on One Drive and, if applicable, on SharePoint.

Content Creation Process

The Content Creation Process is core to the company's marketing efforts, and requires flexibility, skill, a willingness to take smart risks, and openness to feedback. Content is meant to connect meaningfully with the target audience of any given piece, a task that asks for patience and excellence but does not require perfection.

Types of content created may include, but is not limited to:

1. Company Letterheads
2. Event flyers for distribution via email and/or posted on:
    a. Facebook
    b. LinkedIn
    c. Eventbrite
3. Advertising images and content for:
    a. Facebook
    b. LinkedIn
    c. Eventbrite
    d. Other channels
4. Images and content for social media posts to be scheduled via HubSpot for:
    a. Facebook
    b. Instagram
    c. LinkedIn
    d. Twitter
5. Job posts, images, and fliers for:
    a. Handshake
    b. LinkedIn
    c. Indeed
    d. Other hiring or recruiting sites
6. Cover pages for official documents
7. Page banners for social media platforms
8. Promotional materials images and email content for internal events
9. Design for promotional materials such as T-shirts, pens, stress balls, and business cards
10. Hiring fliers with QR codes
11. PowerPoints for online and in-person presentations
12. Handouts and other take-home materials to be distributed at live events

13. Direct-mail advertising materials promoting upcoming events
14. Award certificates
15. Informational/educational brochures
16. Internal marketing pieces
17. Survey content and distribution
18. Recruiting content and materials
19. Video scripts (using VideoScribe)
20. Official email communications – internal and external
21. Outreach emails and/or phone scripts aimed at building relationships with potential referral partners

Notes:

- See Canva for specific examples and past image designs.
- ChatGPT and other AI tools can be useful in brainstorming concepts and content ideas, as well as assisting with outlines and first drafts, but should never be referenced as an authoritative, best practice or final source of wisdom for literally anything.
- The primary purpose of the **Marketing Meeting**, held each week for 90 minutes with the Director and Business Operations Manager, is to report on the performance of past and ongoing marketing, present concepts and final drafts for upcoming marketing, and resolve general questions of marketing strategy and tactics for [Company].

Once a concept is approved for development by the leadership team it is developed following these steps:

1. Develop the best approved ideas, as well as developing others if needed.
2. Run the developed content by a second set of eyes to proofread and offer any suggestions for improvement. This person could be a member of the admin staff or someone else who has capacity, ability, and willingness to assist in this way. The goal of this step is to eliminate minor errors such as typos, mismatched telephone numbers, overlooked design and formatting and errors, etc.
3. Make suggested edits.
4. Submit the polished final draft to the leadership team for final approval (see **Content Approval Process**).

Event Planning Process

Whether internal- or external-facing, hosted by the company or hosted by an organization in the community, events are an essential part of [Company]'s strategy to promote the company to current and potential clients, current and potential employees, referral sources, and the public.

Event planning, promotion, and hosting are primarily the responsibility of the Marketing Manager. Specifically:

1. Attending meeting where details of the event are decided, ensuring and maintaining full alignment with the Mission and Vision and Leadership Team,
2. Creating marketing materials and social/ad images for the event and obtaining approval (see content approval process). Once these are approved, order and/or deploy these materials to start marketing for the event as quickly as possible
3. Taking full responsibility for event preparation, set up, and take down, and securing any help and materials needed in plenty of time so the event itself is not rushed and the speaker or presenter can feel at ease and fully supported.

The ideal timeline for planning live presentation events is as follows:

3 Months Before

- Define the event's purpose, target audience, content to be presented, and the cost to registrants.
- Choose a suitable date and time. Block out in the schedule.
- Identify and secure the event location.
- Conduct brainstorming sessions, and review and edit marketing content and images.
- Determine what promotional content and materials need to be developed, and what channels will be best for marketing the event. Allocate advertising budget.
- Establish a page where attendees can register, pay to attend, and indicate dietary or other special needs if necessary.
- Develop advertising and marketing content to promote the event (see Content Approval Process and Content Development Process).

2-3 Months Before

- Craft a compelling event description. Ensure that continuing education (CE) approval is applied for if necessary.
- Publish the registration form on the website for participants to sign up.
- Schedule advertising and other marketing content through approved channels.
- Design and order any print materials and/or swag required for the event.
- Determine catering requirements and secure a supplier.
- Arrange for necessary materials and supplies for goody bags.
- Procure any additional supplies needed for the event.

- Conduct weekly evaluations of marketing efforts, updating the Leadership Team regarding the number, payment status, and screening status (for example, if licensure is required for attendance) of registered guests on an at least weekly basis.

2 Weeks Before

- Inventory of supplies and gather them in a convenient location for easy access.
- Test equipment to ensure functionality.
- Assemble goody bags.

Week of Event

- Confirm the catering order if needed.
- Close registration for the event and ensure advertising campaigns are no longer running.
- Finalize, prepare, and pack up all needed materials for transport.

Day of Event

- Transport supplies and materials to the event location at least one hour prior to the scheduled start time.
- Arrange and set up the physical space and necessary technology. Connect devices to venue internet.
- Ensure a minimum presence of one clinical and one administrative staff member to provide support.
- Coordinate with the speaker to address any specific requirements.
- Welcome and screen guests, ensuring they sign in.
- Organize catering arrangements.
- Manage clean-up and tear-down tasks after the event concludes.

Follow-Up to the Event

- Ensure continuing education credits are distributed, if applicable.
- Update the mailing list with correct participant information as needed.
- Reach out to registered guests who have questions or concerns to provide necessary follow-up.
- Bring attendee evaluation information to weekly leadership meetings. Present to and discuss with the leadership team.

Online Presence Process

Cultivation and maintenance of [Company]'s online presence is an ongoing cycle of creating content, measuring/tracking performance, and making needed adjustments.

1. Continuously monitor elements of the company's online presence, including:
    a. Organic search rankings
    b. Ad performance
    c. Reactions and comments on social media posts
    d. Up-to-date content that reflects current best practices
    e. Website traffic and ease of use
    f. Event effectiveness
    g. ROI of any individual marketing effort, event, or campaign
    h. Reception of physical promotional products
    i. Development of [Company] website elements
    j. Google, Glassdoor, and Yelp reviews. *Note*: Report any negative comments, PR, Google Reviews or feedback to the Director before deleting, hiding, or responding to them.
2. Report back to the leadership team with data on these elements on a weekly basis during **Marketing Meeting** or **Leadership Meeting.**
3. Always secure leadership approval for any substantial adjustment to the website, social media, or other elements of the company's online presence.

Media Requests

1. All media requests made to [Company] are to be forwarded/referred to the Director without comment for her to determine a response to.
2. Create and distribute press releases as needed, following the **Content Approval Process** especially closely.
3. If a non-therapist is asked to comment by the media, it is best to respectfully decline. If a therapist is asked to comment by the media, it is almost always still best to respectfully decline.

Note: The role of earned media in [Company]'s marketing strategy will be evaluated at least quarterly. Proactive PR of any kind is expressly *not* a priority of [Company] at this time.

Market Research and Brand Development

Market research is a living process, and continuous learning and development of marketing efforts and the company brand and influence is always an active goal:

1. Monitor visible elements of the brand(s) and make recommendations when adjustments or changes would improve performance, remaining in full alignment with the Mission and Vision and Leadership Team.
2. Report findings to the leadership team for their consideration.
3. Following the **Content Development Process**, collaborate with outside graphic designers, tech support, and other providers as needed.
4. Secure approval for any adjustments or changes as needed before deploying.

Website Development Process

The website development process is a vital part of [Company]'s **Online Presence** and **Market Research and Brand Development** Processes. The Marketing Manager oversees this process, ensuring the website effectively represents the company to current and potential clients, employees, referral sources, and the public. The website serves as a platform for sharing relevant content and engaging with specific target audiences. The following steps outline the website development process:

1. Initial Planning:

- Collaborate with the Director, Leadership Team, and relevant stakeholders to define the website's goals, target audience, and desired functionalities.
- Determine the content structure and layout, ensuring alignment with the company’s stated mission, vision, and objectives.
- Identify specific features and integrations required for optimal user experience, such as online registration forms, blog sections, or resource libraries.

2. Content Creation and Approval:

- Brainstorm and design text content and/or image ideas based on existing brand materials and pre-approved language/messaging, following the **Content Approval Process** and the **Content Creation Process** particularly closely.

3. Design and Development:

- Transform the approved content into an aesthetically pleasing and user-friendly website. Collaborate with web designers and developers if necessary.
- Ensure that the website design aligns with the company's branding guidelines, maintaining consistency and visual appeal.
- Incorporate appropriate web themes, plugins, and visual elements, such as images, videos, and infographics, to enhance the overall user experience.
- Implement necessary functionality, such as responsive design for mobile devices, search engine optimization (SEO) best practices, and integration with HubSpot, Therapy Appointment, and any other relevant tools or platforms.

- Conduct thorough testing to ensure the website functions properly across different browsers and devices.

4. Deployment and Maintenance:

- Set a deployment schedule, considering factors such as peak website traffic times and ongoing marketing campaigns.
- Coordinate with the IT representative to ensure a smooth launch of the website.
- Regularly monitor the website's performance, including loading speed, functionality, and user engagement metrics.
- Make necessary updates and improvements to the website based on user feedback, analytics data, and evolving marketing strategies.

Next State Launch Marketing Plan

Choose a State

Begin with those where we currently have a therapist licensed and are authorized to do business.

Optimize Job Post

Revise approved job post highlighting the benefits of a remote-only fee-split arrangement, such as:

- Increased flexibility
- Improved work-life balance
- Ability to join a passionate team regardless of geographical location
- Access to weekly training with engaged peers
- Access to training, workshops, and resources to further their careers.

Showcase testimonials from current remote employees who have thrived working remote-only on a fee-split basis. Feature video testimonials or written interviews where they share their positive experiences working with your practice and the supportive remote work environment. Direct people to the website or Glassdoor or "check us out on Glassdoor."

Communicate Mission and Values

Create marketing materials for organic social, ads, email campaigns, and print materials that can be mailed that showcases [Company]'s values, uniques and philosophy and commitment to employee well-being. Choose verbiage that will resonate with potential candidates and differentiate [Company] from competitors in the area.

Deploy

- Use existing online channels to promote openings via organic content, and find and use location-specific Facebook pages and sites.
- Simultaneously run marketing efforts via email and organic social media (online ads would be less effective) announcing that [Company] is "Coming Soon to [State]!"
- Explore advertising options such as Psychology Today, LinkedIn, Good Therapy, and local online and print media.

Measure and Track

- Data such as effectiveness and conversion rates should be tracked continuously and reported back on a weekly basis as part of Marketing Meeting.
- Use metrics like application rates, click-through rates, and conversion rates to refine the approach.

Refine

Revisit and refine based on results thus far. Make listings clearer, optimize for SEO, highlight the qualifications and skills more specifically. Adapt language from state to state, especially when it comes to licensure acronyms and the job titles therapists from that area are most likely to search for. Consider including familiar references to local insights, support networks, or cultural elements that might appeal to potential candidates in those areas.

Nurture

Create and distribute thoughts about therapist mental health, productivity tips, the value professional growth and development within the practice, as a way to nurture contacts, especially those who do not jump on the opportunity to partner with [Company] or apply to work here right away.

Try Something New

- Consider hosting virtual events and webinars focused on mental wellness, remote work tips, and resume tips.
- Consider partnering with mental health influencers or advocates who support the remote work movement. Their endorsement can attract talent and boost your practice's credibility.

Optimize – and Repeat

Continuously track the performance of your marketing efforts and adjust strategies based on data-driven insights. Then use the wisdom gained to move forward to the next state!

Conclusion

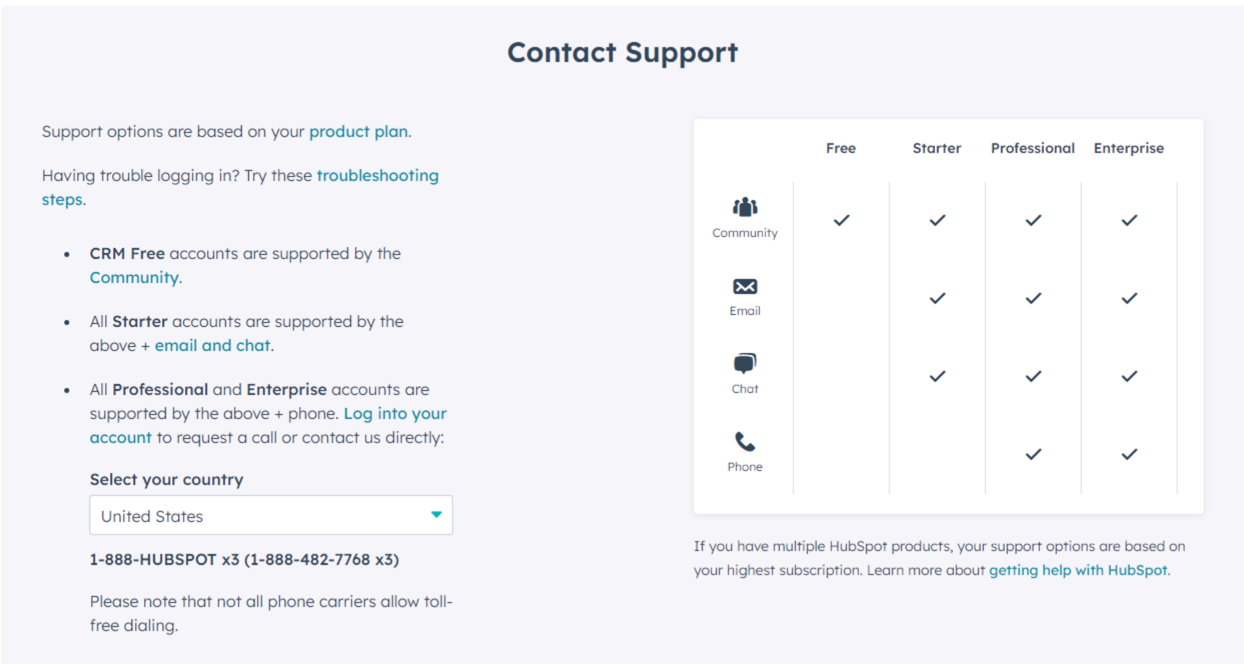
The Marketing Process at [Company] involves a comprehensive and strategic approach to promote the company's services and engage effectively with target audiences. Through careful planning, content creation, event organization, online presence management, and ongoing market research, the Marketing Manager ensures that all marketing efforts align with the company's objectives and resonate with the intended audience. By continuously evaluating and adjusting marketing strategies, [Company] strives to stay at the forefront of their industry and maintain strong relationships with clients, employees, and referral partners.

Addendum 1: Getting Support

Connecting with the support team of any organization can be frustrating and time-consuming. Here is a guide on how to get what you need from the major players behind the scenes at [Company]:

HubSpot

Visit help.hubspot.com and scroll down to roughly the middle of the page. This will show you the best way to contact support at every level.



As long as [Company] is on the Professional Plan, you can also call 1-888-482-7768 from the office or your cell phone, and dial extension x3.

Occasionally HubSpot will send out emails inviting you to chat with a specific person, and these will link to their calendar for a specific time. It's almost always a good idea to schedule these and meet with the person to learn more about the platform and how to use it more effectively and efficiently.

Facebook

As you look to access Facebook support, keep in mind that the likelihood that this process will change between my typing this and you reading it are high, so be patient with yourself if you can't follow along. If one kind of support turns out to be inaccessible, or your ticket is closed before you catch it, keep trying. If you end up talking to someone, but not the right someone, ask them to connect you to the right team and they may be able to help you get there.

Technical Support

This team handles ad pixels and A/B testing, and nothing else. But, they are excellent at those things and will allow you to share your screen so they can walk you through, one step at a time, how to set this up in the back office of Meta and integrate with the company's WordPress site, and possibly also HubSpot. They won't do it for you, though, which is good because you can learn as you go.

The way to access this team is to click an icon that looks something like this , at the top of a page in the ads area. If you found it, congratulations! I clicked it and got a call directly from the tech support team, shared screen, and got some pixels set up and integrated on two different WordPress pages, and now I can't find it to show it to you. As I said, Facebook moves things!

All Kinds of Support

1) From the Facebook Page Manager (which should pop out automatically but can also be accessed by clicking the little house icon), choose Ad Manager.

[Note: Screenshots under each step have been removed.]

2) Check to make sure the correct Ad account is selected.

3) Now click the Question mark in the bottom left menu.

4) Now you can open a ticket. This option may be at the bottom or somewhere else on this menu another time, but right now I can "Create new case."

As of this moment, the URL for this page is https://adsmanager.facebook.com/adsmanager/manage/campaigns?act=738285140900205&business_id=1297807204117096&global_scope_id=1297807204117096&nav_entry_point=am_local_scope_selector

5) Choose an issue from the options presented, or choose "Other issues."

6) Select asset (either [Company] or [Education Brand]) from the options presented.Please note, some of these are business pages and others are ad accounts; these are not interchangeable. As of this writing, only [Company] has an ad account associated with it, so that would be the one to select.

7) Select an issue option. You can type your issue into the search box to help you narrow down the options if you wish. You can also type in/select "Other ad account issue."

8) Now you can finally enter in your preferred email address and phone number, attach a screenshot of what's going on if desired, and start the chat.

9) They will send you a chat message to your personal account within that time frame, and close out your whole ticket if you don't respond. To avoid having to jump through all those hoops all over again, you'll need to navigate out of the business account and into your personal account to receive the chat. But before you do that, you need the last four digits of the business account number for the page.

10) Click the hamburger menu on the left.

11) This will expand to show more options. Click "Business Settings."

12) On the Business Settings page, scroll down to the bottom of the left-hand menu and click "Business info."

13) This is the info you need. In this case, the last four digits, so 7096.

    As of this moment, the URL for [Company]'s page is https://business.facebook.com/settings/info?business_id=1297807204117096.

Now hurry over to your own personal account so you don't miss the chat!

LinkedIn

Connecting with LinkedIn is, thankfully, much simpler. From anywhere on LinkedIn, anyone with administrative access can open a ticket.

1) Click on "For Business" in the top right of the menu, and then select "Admin Center" from the menu that appears.

2) At the top menu here, click "Support" and select "Open a support ticket."

3) Then select the issue type, type in your issue, attach a screenshot if that's helpful, click "Submit," and you're done!

Addendum 3: Voice

“Brand voice is the distinct personality a business curates to communicate with its target audience across mediums. It includes a unified approach to tone, style and messaging to build brand recognition and nurture connection with the audience.” Source: Sprout Social

Refer to these guidelines when creating content, copy, images, and other materials for [Company] and [Education Brand] for the best possible results.

[Company]’s Voice

When creating content, copy, or images for [Company Name], review [Company]’s Mission and Vision document and refer to it often. Everything [Company] says should pass through the “Mission and Vision Filter,” so to speak. If additional guidance is needed, please refer to the following:

Adjectives that describe [Company]'s voice:

- Approachable
- Steady
- Encouraging
- Soft, but not squishy

On Social Media:

- Encourages self-care and mindfulness, but not cotton candy positivity.
- Steers decisively clear of victim mentality and potentially divisive issues
- Expresses gratitude, celebrates goodness, supports members of the community going through difficult times.

Over Email:

- Direct
- Concise
- Measured
- Grateful
- Never funny
- No emojis
- All the information you could want is in the first email.

Brand examples with a similar voice:

- Dean Transportation
- Lake Trust