



Local Business Marketing

# Planning Workbook





This Local Marketing Workbook, paired with our [Step-by-Step Guide to Creating a Local Business Marketing Plan](#), will walk you through the steps to creating an effective local marketing plan. From building buyer personas to identifying which tactics and channels help you connect with your customers, this workbook will help you ensure that nothing falls through the cracks.

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# Defining Your Ideal Buyers

## Step 1: Run a Competitive Analysis

A competitive analysis gives you insight into what your competitors are doing. Here's how to run one.

1. Identify 5-10 of your top competitors.
2. Analyze their content.
3. Write everything down and make a plan of action.

Use the following template to put together a competitive analysis.

| <b>Competitor Name</b> | <b>Social Media</b><br><i>How often do they post?<br/>What do they post? Where<br/>do they post?</i> | <b>Website</b><br><i>Do they have webchat? Do<br/>they showcase reviews? Do<br/>they have a blog?</i> | <b>Pricing</b><br><i>How does their pricing<br/>compare to your own?</i> | <b>Online Reputation</b><br><i>Do they have a lot of<br/>reviews? What platforms<br/>are they active on? What<br/>do people say about them<br/>online? Is it easy to find<br/>them online?</i> |
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Make a plan of action—you can list your takeaways and goals here:

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## Step 2: Gather Customer Feedback

### Ask for a Review →

Text makes asking for reviews easy. Here's a template you can use.

Hi :customer\_first\_name:, your honest review helps our local business more than you know. We'd be so grateful if you'd take the time to let us know about your experience. It only takes a minute! Click here to leave us a review: :link:

### Send a Survey →

SMS surveys are a great way to gauge overall customer satisfaction. Here are a couple of survey templates to try.

Were you satisfied with our customer service experience? Please answer "YES" or "NO". Your feedback helps us improve :company\_name:. Thanks!

Hey :customer\_first\_name:! On a scale from 1-10, how satisfied were you with your recent purchase from :business\_name:?

## Conduct Interviews

Conducting a customer interview might seem intimidating—but it will be less intimidating if you go into it prepared. Here is an interview outline to follow:

- ✚ **Get some background information.** Ask them what they do for work, where they spend time, what their hobbies are, etc.
- ✚ **Ask them how they found you.** What pain point were they looking to solve? Was there a specific factor that made them decide to do business with you instead of one of your competitors?
- ✚ **Dig deep into the customer experience.** How did they feel about the purchase experience? Were there any obstacles that almost made them change their mind? What do they wish your business had done differently?



# Building Buyer Personas

Once you've conducted your market research and you know your buyers like the back of your hand, it's time to start building your personas.

You can use the following template to organize all of the information you've gathered.

## Image & Name of Buyer

*You can use a stock image or an image of an actual customer (if you have one).*

## Buyer Bio

*Here you'll add demographic and psychographic information—WHO are they?*

## Value Drivers

*What are their main goals?  
What motivates them to buy from you?*

## Pain Points

*What pain points are they seeking a solution for?*

## Fears

*What is the impact of their pain points? If they DON'T buy from you, what's the negative result?*

## Channels

*Where do they spend most of their time?*

## Common Obstacles

*What might stop them from buying from you?*

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# Creating Your Marketing Messaging

## Marketing Messaging Best Practices

Coming up with messaging can be daunting. Understanding a few key best practices will give you confidence as you brainstorm.

- Prioritize clarity.
- Keep the customer in mind.
- Be original.
- Personalize where possible.
- Keep the customer journey in mind.

## Marketing Messaging Template

You can use the following template to organize your marketing messaging ideas.

**Your Brand's Core Message or Value Proposition**

**Key Message 1**

*What main pain point does this message address?*



**Channels**

*Where might you want to promote this?*

**Key Message 2**

*What main pain point does this message address?*



**Channels**

*Where might you want to promote this?*

**Key Message 3**

*What main pain point does this message address?*



**Channels**

*Where might you want to promote this?*





# Email Marketing

Email offers customizability and trackable, measurable results.

## You just became a Local! ✕

From: marketing@podium.com

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Subject: You just became a Local!

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Thanks for becoming one of the Locals! Whether you're new to the local business world or you've been in the local business world for years, you've come to the right place.

What can you expect from The Local Digest?

Every Friday, we'll slide into your inbox with all the juiciest tidbits from recently published articles on the Podium blog. In the meantime, feel free to check out some of our most popular articles:

- [How Brick and Mortar Retailers Can Prioritize Customer Experience](#)
- [The Always-On Customer—Connecting With Customers Via Text Marketing](#)

Then, respond to this email and let us know what you're hoping to get out of this newsletter. We'll make sure to create content full of the information you want to read.

Welcome to the community,

Podium

If you decide to use email as a marketing channel, use this section to brainstorm topic ideas.

✕



# Social Media Marketing

If social media is a part of your marketing plan, you'll want to create a content calendar to stay organized. Here is a template you can use.

|           | Monday  | Tuesday | Wednesday | Thursday | Friday  | Saturday | Sunday  |
|-----------|---------|---------|-----------|----------|---------|----------|---------|
| Instagram | CAPTION | CAPTION | CAPTION   | CAPTION  | CAPTION | CAPTION  | CAPTION |
| Facebook  | CAPTION | CAPTION | CAPTION   | CAPTION  | CAPTION | CAPTION  | CAPTION |
| TikTok    | CAPTION | CAPTION | CAPTION   | CAPTION  | CAPTION | CAPTION  | CAPTION |

## SEO Checklist

SEO is a must for local businesses. Here is a checklist to get you started.

- Start with keyword research.
- Optimize your Google Business Profile.
- Optimize your onsite content.
- Prioritize page speed.



# Measuring the Success of Your Local Marketing Plan

Tracking the following metrics will help you measure your success and determine if your campaigns are profitable or not—which is essential information when deciding where to allocate resources and budget dollars in the future.

## Cost Per Lead

This metric is important because it gives you an idea of how many leads need to convert into customers in order for your campaigns to be profitable.

Total Cost of a Particular Campaign



Number of Leads Generated from That Campaign



**Cost Per Lead**

## Lifetime Value

This metric helps you understand what kind of return you can expect from the average customer.

Average Total Order Amount



Average Number of Purchases Per Year



Retention Rate



**Lifetime Value**



## Customer Retention Rate

This metric helps you see which strategies are working in terms of keeping existing customers engaged and interested in what you offer.

$$\left[ \frac{\text{CE} - \text{CN}}{\text{CS}} \right] \times 100 = \text{Customer Retention Rate}$$

The diagram illustrates the formula for Customer Retention Rate. The numerator is  $\text{CE} - \text{CN}$ , where  $\text{CE}$  (The Number of Customers at the End of the Period) is in blue and  $\text{CN}$  (The Number of New Customers Acquired During the Period) is in red. The denominator is  $\text{CS}$  (The Number of Customers at the Start of the Period), also in blue. The result is multiplied by 100 to get the Customer Retention Rate.

## Customer Satisfaction Score

This metric gives you an indication as to how well customers think that your product or service is meeting their needs and expectations.

$$\frac{\text{Total Number of Satisfied Respondents}}{\text{Number of Total Responses}} \times 100 = \text{Customer Satisfaction Score}$$

## Conversion Rate

This metric tells you how many people actually took action on something after seeing an ad or engaging with a piece of content.

$$\frac{\text{Total Number of Clicks}}{\text{Total Number of Conversions}} = \text{Conversion Rate}$$

