

# WHAT, SO WHAT, NOW WHAT?

You've Built It, But Now Will the Customers Come?

*Let Unity Marketing Help You Create a Strategic  
Marketing Plan to Grow Your Business*



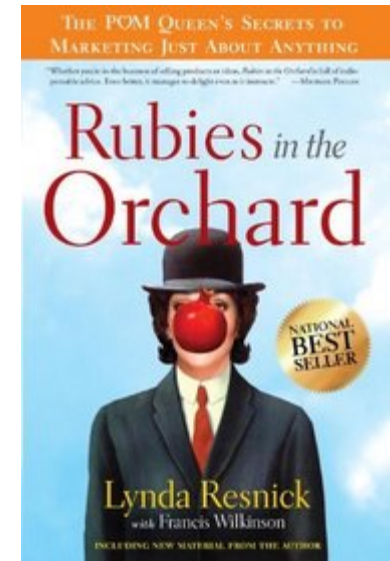
# YOU HAVE A BUSINESS -- YOU NEED A STRATEGIC MARKETING PLAN

- What
  - You've created a product, new service, business concept
- So What
  - You want a return on your investment, to make money from what you created
- Now What
  - You need a road map to market your product, service to find potential consumers and turn them into paying customers.



# MARKETING IS EVERYTHING

- In my last corporate job I worked for Lynda Resnick at The Franklin Mint. Today Lynda is the “POM Queen;” She and her husband Stewart own the POM Wonderful brand of pomegranate juice products, plus FIGI Water, Wonderful Pistachio “get crackin’” nuts, the Halos clementines, Teleflora, and more. Lynda understands in business: Marketing is everything.
  - The American Marketing Association defines marketing:
    - Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.
- When Unity Marketing’s founder, Pam Danziger, worked at The Mint, her job was, just like it is today, to conduct research and present the findings to decision-making executives about the market, the consumers, the competition.
- Before presentations Lynda would say, “Pam tell me the ‘What,’ the ‘So What,’ the ‘Now What.’ The answer to these three questions was the guide to creating all executive presentations.
  - The ‘What’ is what information was discovered through the research.
  - ‘So What’ is why the information is important.
  - ‘Now What’ is the ways to use the information for competitive advantage, to market more successfully.
- Lynda’s book, *Rubies in the Orchard*, helps you get inside the head of this amazing marketer.





# A STRATEGIC MARKETING PLAN IS A ROAD MAP TO FIND CUSTOMERS AND BUILD YOUR BUSINESS

*“If you don’t know where you’re going, any road will take you there.” --*

attributed to Lewis Carroll

# WHO NEEDS THIS?

- This program is designed for small to medium-sized business, specifically for businesses that are independently owned and operated, organized for profit, and not dominant in their field.
- Appropriate for manufacturing businesses; service businesses; retail businesses.
- Unity Marketing's expertise toward the affluent consumer segment provides added-value for businesses that target the upper-middle and higher-income consumer segment.





# WHY THE AFFLUENT CONSUMERS MATTER?

- 'Heavy-Lifters' in consumer market
- Top 20% of U.S. households:
  - 50% of the nation's income
  - 40% of all consumer spending
  - 90% of discretionary income left over after the necessities are paid
- As middle-class gets weaker, upper-middle( HENRYs), affluent and High-Net-Worth (HNW) customers are going to become even more important to all businesses.



## ▶ **Create a Strategic Marketing Plan for your business**

- ▶ It will be your guide for all marketing-related activities, including the 4P's of marketing
  - ▶ Product, Price, Promotion, Placement
- ▶ And the missing P
  - ▶ People

## **OUR PROPOSAL**

Unity Marketing offers a consulting service that leverages the experience we have working with big companies and major brands to put to work helping small and mid-sized businesses.

Unity Marketing works with you to research your business, explore opportunities and develop a strategic marketing plan customized to your business.

# PROJECT OVERVIEW





# STEP 1: NEEDS ANALYSIS

- You and your corporate team meet with Pam Danziger to discuss your business objectives, challenges and issues.
  - Pam will conduct activities to help you delve more deeply into needs, opportunities, challenges.
- Together, we define what you want out of this project and what you want to achieve through your marketing program.
- We focus on the end goal of this process to see where we need to, want to go.
- **Specifics:**
  - In-person meeting at your offices; set aside 1 day for introductions, meeting, activities.
- **Deliverables:**
  - Report summarizing goals and objectives of marketing program, defined marketing goals and objectives. You will finalize goals before moving on to the next step.



# STEP 2: MARKETING AUDIT

- Pam conducts a marketing audit to see how you currently market your business and how well your marketing program works. This is the research phase of the project where Pam talks with key staff members about the business; key accounts that sell products/services or key customers that buy products/services.
  - Pam focuses on the 4 P's of marketing – Product, Price, Promotion, Placement/Distribution -- plus the missing P – the people who buy your products, services.
  - This phase will also include a competitive analysis: who your key competitors are and what you can learn from them.
- Resources:
  - You need to provide information about your business, what you do, who does it, how well it performs. As a highly-skilled researcher, Pam will interview your key accounts, key customers, key staff to make them feel special and valued as partners in your business.
- Specifics:
  - Each marketing audit is as different as each business, but usually the marketing audit is conducted remotely, by phone using a script that assures confidentiality.
- Deliverables:
  - Pam will turn over all research materials, interviews, analyses to client upon completion of the strategic marketing plan.



# STEP 3: MARKETING REPORT CARD

- In this phase Pam will review with you and your corporate team the results of the marketing audit. Specifically what issues she uncovered about your marketing efficiency and effectiveness. She will review your marketing strengths, weaknesses, opportunities, threats.
- We discuss what was uncovered in the research about your business, your competitive environment and your customer base. We will review your marketing goals in light of the research results – Are those goals achievable? Are those goals feasible? Should we change the goals, modify the goals, dial the goals up or down based upon the findings from the research?
- Specifics:
  - In-person meeting at your offices; set aside ½ - 1 day for research review, discussion, next steps.
- Deliverables:
  - Report summarizing marketing audit findings, essentially a 'report card' about your business.



# STEP 4: MARKETING STRATEGIC PLAN

- Pam will deliver a detailed strategic marketing plan detailing key strategies for Product, Price, Promotion, Placement/Distribution that will help you connect and build market share with your target market.
- In the plan she will recommend resources to fill specific needs that are identified, e.g. advertising agencies, website developers, internet & social media support, logo designers, brand-building resources, media placement, dm list managers, independent sales reps, sales training, public relations, etc.
- **Specifics:**
  - In-person meeting at your offices; set aside ½-1 day for research review, discussion, next steps.
- **Deliverables:**
  - Detailed marketing strategic plan with strategies, tactics, next steps and resources defined.



# STEP 5: ON-GOING CONSULTATION & SUPPORT

- To help keep you on course and moving forward with your strategic marketing plan, Pam provides a one-hour conference call monthly for up to six months. Thereafter, consultation and support available on an as-needed or monthly retainer basis.





**YOU WILL GAIN NOT JUST FROM THE STRATEGIC  
MARKETING PLAN, BUT FROM THE PROCESS OF  
STUDYING YOUR BUSINESS, YOUR MARKETING,  
YOUR PARTNERS AND YOUR CUSTOMERS**

*“ Plans are nothing; Planning is everything,”* Dwight D. Eisenhower



# TIMING & INVESTMENT

## ▪ Timing

- An average project takes 2-6 months from initial needs analysis meeting to delivery of the final strategic marketing plan. After the first meeting, Pam will provide a detailed project plan with target dates for completion of each step.
- You control the pace at which we progress; for example, you may take a 3-month hiatus after the marketing report card to focus on specific critical issues uncovered in that review.

## ▪ Investment

- Each company is different, so each project to develop a strategic marketing plan is unique. A typical marketing strategic planning project as outlined here ranges from \$5,000-\$15,000. Variables include size of your business; number of people/contacts to interview; number of discrete distribution channels; depth and range of product lines; number of on-site meetings.
- Payment options include:
  - Two payments: half upon commencement and half at completion of strategic marketing plan;
  - Three-payments at commencement, completion marketing audit and delivery strategic marketing plan; or
  - Six monthly payments, first payment due prior to needs analysis meeting.
- Travel and expenses include air fare or other transportation, hotel and per diem for meals to cover two Unity Marketing principals.



# DIY STRATEGIC MARKETING PLANNING

- If you are the DIY-type, there are a number of books Unity MarketingI recommends to guide you in the process of developing a strategic marketing plan. Check out:
  - Paley, Norton, *How to Develop a Strategic Marketing Plan: A Step-By-Step Guide* (CRC Press, 2000)
  - Cherney, Alexander, *The Marketing Plan Handbook, 3rd Edition* (Cerebellum Press, 2011)
  - Luther, William M., *The Marketing Plan: How to Prepare and Implement It, Fourth Edition* (AMACOM, 2011)
  - McDonald, Malcolm and Hugh Wilson, *Marketing Plans: How to Prepare Them, How to Use Them, 7<sup>th</sup> Edition* (Wiley, 2011)



# LET UNITY MARKETING BE YOUR STRATEGIC PARTNER

Today's consumer marketers face an increasingly competitive environment with many business and marketing challenges.

Unity Marketing leads with research to help businesses gain insights into their core customers and their best target customers – the affluent who have discretionary income to spend.



17

- **Affluent Consumer Tracking Study**
  - Two full-on waves
    - Spring Product & Services Track
    - Fall Shopper Track
  - Two mini-waves with custom tracking
    - Overview of product/services & shopping behavior
    - LCI predictions
    - Client-specified custom studies
      - More in-depth brand studies
      - Investigate category specific attitudes and motivations
- **Millionaires Market Monitor**
  - Partnership with American Affluence Research Center, a study of millionaires (net worth of \$1 million or more) about their consumer attitudes and motivations
  - Fills a gap in millionaire consumer insights
  - Wealth & affluence are different
- **Millennials on the Road to Affluence**
  - New study with important implications for every brand that wants to continue to do business after 2020

## **UNITY MARKETING'S 2015 SYNDICATED RESEARCH INITIATIVES**

Unity Marketing's syndicated research studies deliver actionable insights to marketers about the best potential customers in the U.S. consumer market today – the affluent top 20%.



- Qualitative expertise
  - Focus groups, IDIs
  - Expert, influential & channel partner studies
- Quantitative expertise
  - Survey design
  - Data analysis including statistical data analysis
  - Analyzing survey results for key take aways
- Marketing & branding consulting
  - How to use research to create more powerful brands and more compelling marketing

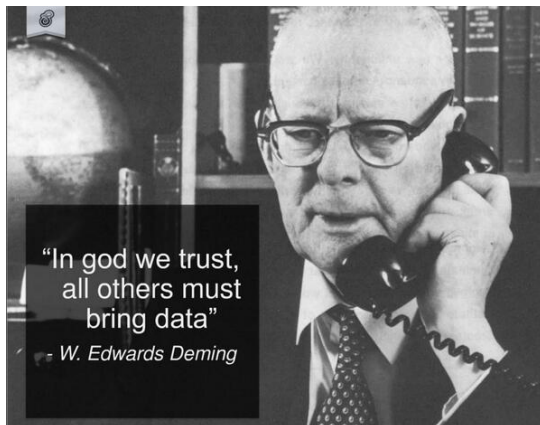


## UNITY MARKETING LEADS WITH RESEARCH

We are a boutique marketing research and consulting firm.

We specialize in business insights into mind of affluent consumer with incomes \$100k and above.

- Greater access to new **AFFLUENT** consumer **SAMPLES**
- In-depth data about **HIGH-END & LUXURY** customers
- Understanding of **BRAND USAGE & AWARENESS**
- Key **COMPETITOR BRAND** usage & awareness
- Purchase & usage **TRACKING STUDIES**
- **CUSTOMER SURVEYS** and studies to identify new opportunities



## **DOES YOUR COMPANY NEED MORE DATA?**

Unity Marketing can provide more data about the affluent consumers, combining both qualitative and quantitative research strategies.



- **UNDERSTAND** your best prospective **CUSTOMERS'** needs and desires
- Get the **COMPETITIVE EDGE**
- Develop more effective **MARKETING STRATEGIES**
- **RESEARCH** your market
- **SHARE** customer **KNOWLEDGE & INSIGHTS**
- Evaluate **NEW PRODUCTS**
- Find best **CHANNELS OF DISTRIBUTION**
- Track **TRENDS** in the market

*The challenge:*

Provide insight that integrates demographics, attitudes and behavior and turn raw data (numbers or statements) into meaningful, actionable information

## **DO YOU NEED HELP TO USE DATA MORE EFFECTIVELY?**

Unity Marketing can help you use the research data you have on hand to greater effect to drive growth for your business.

We consult with companies of all sizes, from small to mid-sized to large multi-nationals.

We support retailers, manufacturers and marketers in both B2C and B2B marketing strategies.



In addition to syndicated market research reports, Pam Danziger and the Unity Marketing team offer a range of tools and resources to help marketers and retailers identify their best customers and channel partners and how to reach them most effectively with targeted marketing strategies and tactics.

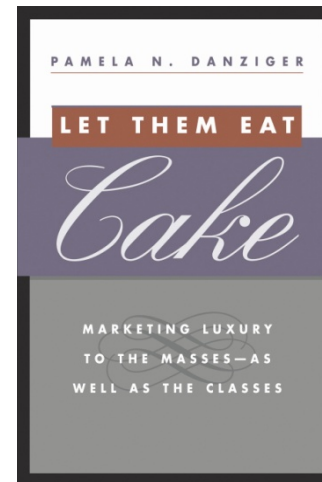
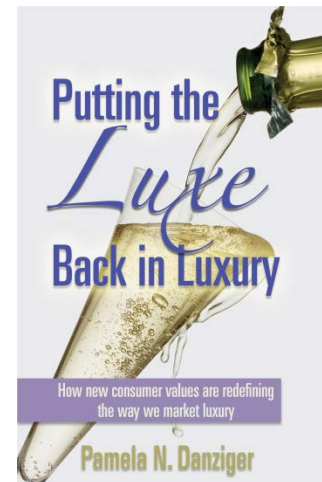
## UNITY MARKETING CAN HELP YOU FIND YOUR BEST TARGET CUSTOMERS & MARKET MORE SUCCESSFULLY TO THEM

Unity's research-based approach can help marketers and retailers find new opportunities for growth in their businesses.

Email [Pam188@ptd.net](mailto:Pam188@ptd.net) or call 717.336.1600 to discuss your marketing challenges.

# MORE ABOUT PAM DANZIGER & UNITY MARKETING

- Internationally recognized expert in business insights for marketers targeting the upper-middle and affluent consumer segment. Pam is president of Unity Marketing, a boutique marketing consulting firm founded in 1992.
- Leadership in luxury marketing recognized through Global Luxury Award presented by Harper's Bazaar, London May 2007.
- She was named to *Luxury Daily's* **Luxury Women to Watch in 2013**. She is a member of **Jim Blasingame: The Small Business Advocate's Brain Trust** and a contributing columnist to *The Robin Report*.
- Currently Pam is working on two new books: *Shops that Pop!* and *Millennials on the Road to Affluence*
- Most recent book, *Putting the Luxe Back in Luxury: How New Consumer Values Are Redefining the Way We Market Luxury*.
- Previous books, *Shopping: Why We Love It, Let Them Eat Cake: Marketing Luxury to the Masses as well as the Classes & Why People Buy Things They Don't Need*





# SOME CLIENTS UNITY MARKETING HAS SUPPORTED...

