



Growing Your Business Owner Market

Insights and Practical How-Tos

Learning Objectives

- Define and explain the concept of an integrated marketing strategy, including its key components and benefits.
- Analyze and create a detailed Buyer Persona, considering demographic, psychographic, and behavioral characteristics.
- Implement strategies for effectively filling the lead funnel, utilizing various channels and techniques to attract and capture potential customers.
- Identify and select appropriate content types and formats that align with your target audience and marketing goals.
- Investigate the benefits of building a marketing support team.



Integrated Marketing



"An ~~planning message~~ ~~is designed~~ ~~to ensure~~ ~~that~~ ~~all~~ ~~of~~ ~~the~~ ~~contacts~~ ~~received~~ ~~by~~ ~~a~~ ~~customer~~ ~~or~~ ~~prospect~~ ~~for~~ ~~a~~ ~~product~~, ~~service~~, ~~or~~ ~~organization~~ ~~are~~ ~~relevant~~ ~~to~~ ~~that~~ ~~person~~ ~~and~~ ~~consistent~~ ~~over~~ ~~time~~." – The American Marketing Association



The Goal



- Attract the right people
- Adopt effective marketing strategies (in the age of data)
- Measure business results to improve performance



Who are you talking to?



	Traditionalists	Baby Boomers	Generation X	Millennials
Birth Years	1900–1945	1946–1964	1965–1980	1981–2000
Gen Nicknames	Moral Authority	<i>“Me” Generation</i>	Gen X	Gen Y; Echo Boomers
Key Attribute	Committed to Company	<i>Ability to Handle Crisis</i>	Work/Life Balance	Ambitious But Not Focused
Work Ethic	Pay Your Dues	<i>60-Hour Work Week</i>	Work Smarter, Not Harder	What’s Next?
Views on Money	Pay cash	<i>Buy now, pay later</i>	Save, save, save	Earn to spend
Core Value	Family/Community	<i>Success</i>	Time	Individuality

Buyer Persona

- Personal Background
- Company
- Role
- Challenges
- Goals
- Watering Holes
- Shopping Preferences



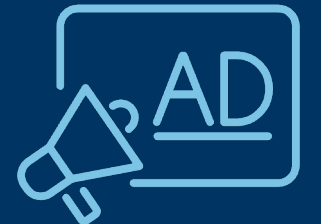
Tailoring Your Message

- How does your Buyer Persona like to be communicated with?
- What values does your Buyer Persona have that affect your message?
- What pain points does your Buyer Persona have?



Lead Sources & Sales Channels

1. Email Campaigns
2. Direct Mail
3. Social Media
4. Website/SEO
5. PR/Media
6. Sponsored Events
7. Purchased Lists
8. COIs & Client Referrals Existing Clients





The Relationship

The Marketing Funnel: Five Key Stages



Gated vs. Ungated Content

	Gated Content	Ungated Content
Main Purpose	Lead Generation	SEO, Brand Awareness
Value Provided	High	Mid
Format	Ebooks, templates, webinars, Whitepapers, Demos, Research	Blogposts, social media posts, YouTube videos, Podcast, Infographic,
Position in Funnel	Decision Stage	Awareness and Consideration
Benefits	Attract more qualified leads, stronger data base, easier to track	Attracts more views, Greater SEO value, user friendly
Cons	Attracts fewer leads, less user friendly	Attracts less qualified leads, harder to track

Digital Conversion Path





Website and SEO

Website and SEO: Tips for Improvement



- Regularly update your website with fresh, high-quality content to improve SEO and engage visitors.
- Optimize your website for mobile devices to ensure a seamless user experience.
- Use relevant keywords naturally in your website's content, headings, and meta descriptions.
- Incorporate internal and external links to improve site navigation and authority.
- Monitor website analytics to track traffic, user behavior, and conversion rates.



Website and SEO: 7 Metrics to Track

1. Organic Traffic
2. Average Session Duration
3. Bounce Rate
4. Average Time on Page
5. Conversion Rate
6. Click-Through Rate (CTR) in Search Results
7. Page Load Speed



Website and SEO: Platforms to Use

Website Platforms:

1. WordPress
2. Wix
3. HubSpot
4. Squarespace
5. Weebly
6. Shopify

SEO Platforms and Tools:

1. Google Search Console
2. Google Analytics
3. SEMrush
4. Ahrefs
5. Moz
6. Yoast SEO
7. Ubersuggest
8. SERPstat





Effective Email Marketing

Effective Email Marketing: 9 Critical Components



1. Subject Line
2. Sender Name
3. Personalization & Relevance
4. Body Copy
5. Image
6. Call-to-Action
7. Social Sharing Links
8. Unsubscribe Link
9. Mobile Optimization

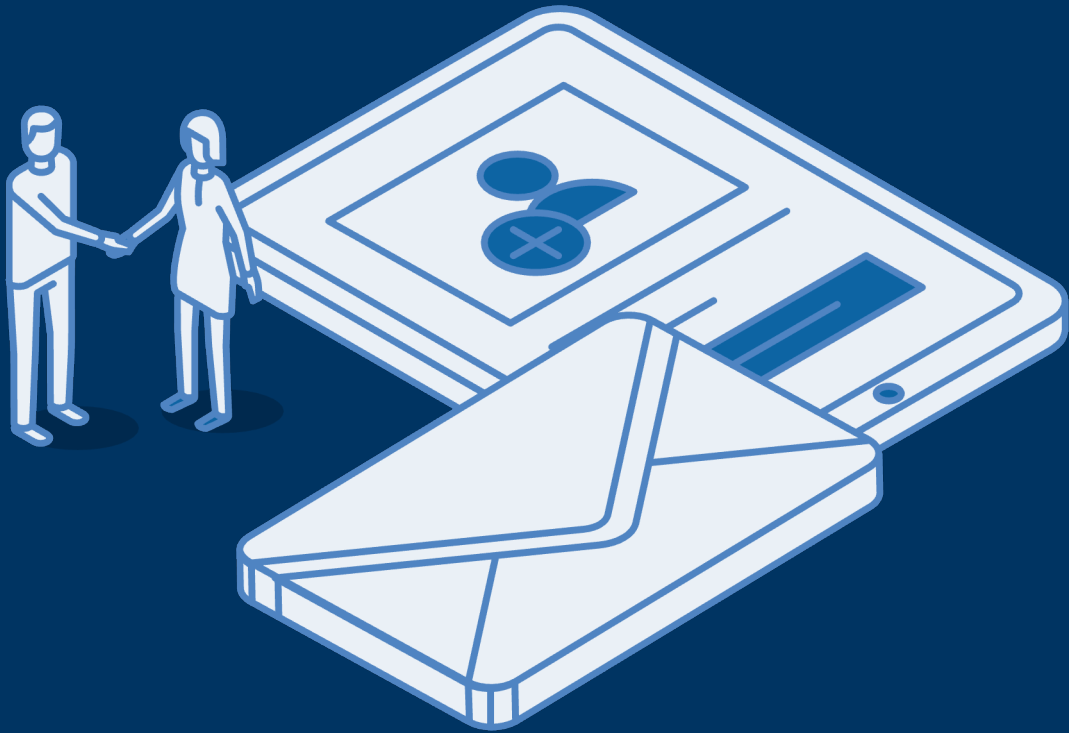


Effective Email Marketing: Platforms to Use



1. Mailchimp
2. Constant Contact:
3. HubSpot
4. AWeber
5. GetResponse
6. ActiveCampaign
7. Campaign Monitor
8. Drip
9. SendinBlue
10. Klaviyo
11. Benchmark Email





Direct Mail

Direct Mail: Tips for Direct Mail

- More Effective if More Methodical.
- Reach a prospect offline
- Gift-giving is one of the most unique and attention grabbing tactics...taking it offline makes it even more memorable
- Send personalized letters and gifts to gain attention and build rapport (Every Family's Business, Walking to Destiny, The Master Plan)
- Target specific contacts and send printed newsletter or quality content



Direct Mail: Metrics to Track

1. Response Rate
2. Conversion Rate
3. Return on Investment (ROI)
4. Cost per Conversion
5. Lifetime Customer Value (LCV)
6. Response Time
7. Customer Retention Rate





Social Media Marketing

LinkedIn Tips

Before they reach out, they check you out.

1. Be authentic
2. Update your profile summary to reinforce what you do for your customers
3. “Link” with other top brands
4. Post and comment regularly and often
5. Post with pictures
6. Link back to your site
7. Make a calendar you can easily follow



Social Media Automation

- Digital marketing efforts can be rapidly streamlined and monitored using automation tools
- Today, many systems can connect all media you choose to engage in one simple platform
- With automation comes data, which helps your marketing become unique and segmented



Social Media Automation

- Hootsuite
- Buffer
- Sprout Social
- SocialBee
- MeetEdgar
- CoSchedule
- Sendible



Social Media: Metrics to Track

1. Reach
2. Engagement
3. Click-Through Rate (CTR)
4. Conversion Rate
5. Engagement by Post Type
6. Follower Growth Rate
7. Social Media Impressions





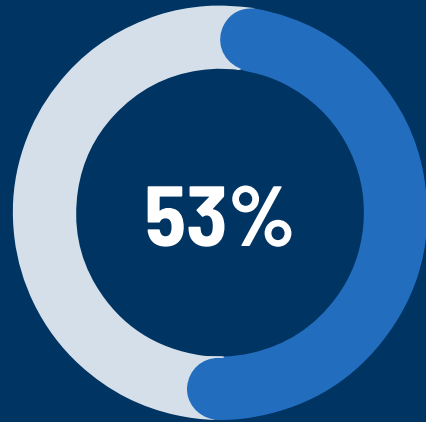
PR & Media

Thought Leadership

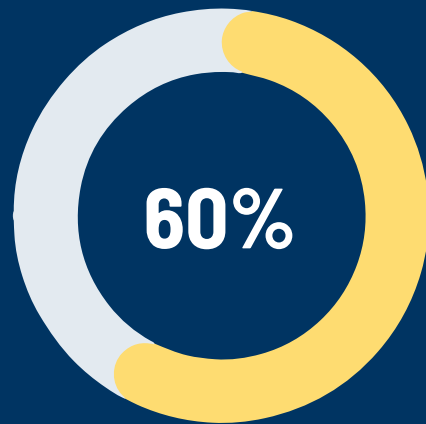
- It is not simply knowing a lot about something and writing about it. Thought leaders take a position and become a regarded expert and specialist in a specific niche area.
- Determine what you are going to build your brand around and focus your outputs on that.



Thought Leadership



of owners increase business with organizations after engaging with thought leadership content

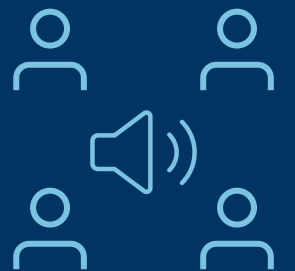


of owners say thought leadership builds credibility when a firm or advisor is not previously known



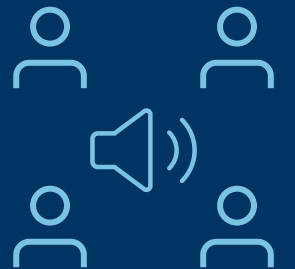
PR & Media

1. Submit articles, whitepapers, and events to industry publications
2. Reach out to local Economic Department, Chamber of Commerce, and owner groups with whitepapers and speaking opportunities
3. Reach out and make relationships with Financial/Economy/Entrepreneur journalists in your local market
4. Showcase yourself as a thought leader
5. Looking for speaking opportunities



PR & Media: Metrics to Track

1. PR Campaign Goals and Objectives
2. Media Mentions
3. Media Reach
4. Share of Voice
5. Social Media Engagement
6. Website Traffic from PR Sources
7. Sentiment Analysis
8. Earned Media Value (EMV)





Content to Use

Incorporating EPI Content into Your Practice

Access to a Catalog of Thought Leadership Content



- Member Center
 - Tools and resources for client engagements
- Quarterly Content Packages
 - Whitepapers, case studies, and infographics
- State of Owner Readiness Research
 - Catalog of national and regional owner research
- Blog Articles
 - Weekly exit planning content
- Webinars
 - Bi-weekly broadcasts
- Exit Is Now Podcast
 - Bi-weekly broadcasts



Member Center Resources



- Hundreds of engagement tools to use in client meetings
- Incorporate resources in your social media content and email campaigns
- Member Contributed Content

A screenshot of the Member Center Resources page. The page has a dark blue header with the title 'MEMBER CENTER RESOURCES'. Below the header is a navigation bar with a 'Back to Resources' link, three dropdown menus for 'Assessment Tools', 'Content Type', and 'Chapter', and a search bar. The main content area features three featured resource cards: 'Exit Planning Client Questionnaire', 'Personal Readiness Scorecard', and 'Business Readiness Scorecard'. Below these are three category cards: 'Business Development and Marketing Materials', 'Assessment Tools', and 'Presentations'. Each category card includes an icon, a title, a brief description, and a 'Learn More' button.

MEMBER CENTER RESOURCES

← Back to Resources

Assessment Tools Content Type Chapter Search

EXIT PLANNING CLIENT QUESTIONNAIRE
INTRIGUE OR PREP AN OWNER IN THE EARLY STAGES

EXIT PLANNING Client Questionnaire
The First Step in exiting a business on your own terms.

PERSONAL READINESS SCORECARD
DETERMINE PERSONAL READINESS AND FIRST STEPS

Personal Readiness Scorecard
See how ready an owner is and what steps they should take first when preparing for

BUSINESS READINESS SCORECARD
DETERMINE BUSINESS READINESS AND FIRST STEPS

Business Readiness Scorecard
See how ready an owner is and what steps they should take first when preparing for

Business Development and Marketing Materials
Go to market and customize your practice with official CEPA logos, images, and content.

Assessment Tools
Intrigue, empower, and educate business owners.

Presentations
Enhance your speaking engagements, owner education sessions, networking events, or professional development.

Learn More Learn More Learn More

Quarterly Content Packages

- Library of 21 in-depth exit planning content pieces
 - Deep Dive Whitepapers
 - Visual Infographics
 - Real owner and advisor Case Studies
- Over 30,900 views of this content from over 6,200 people
- EPI offers download request forms to CEPAs and Partners for their use
- Be a featured contributor in this content



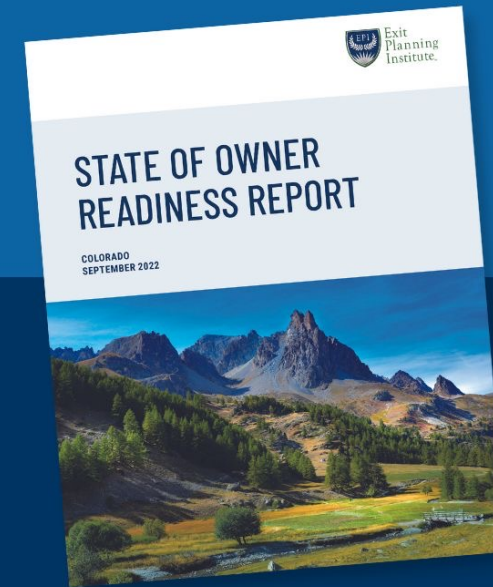
**DO YOU KNOW HOW THE 5 DS
IMPACT YOUR BUSINESS VALUE?**

[DOWNLOAD OUR LATEST CONTENT](#)

State of Owner Readiness Research



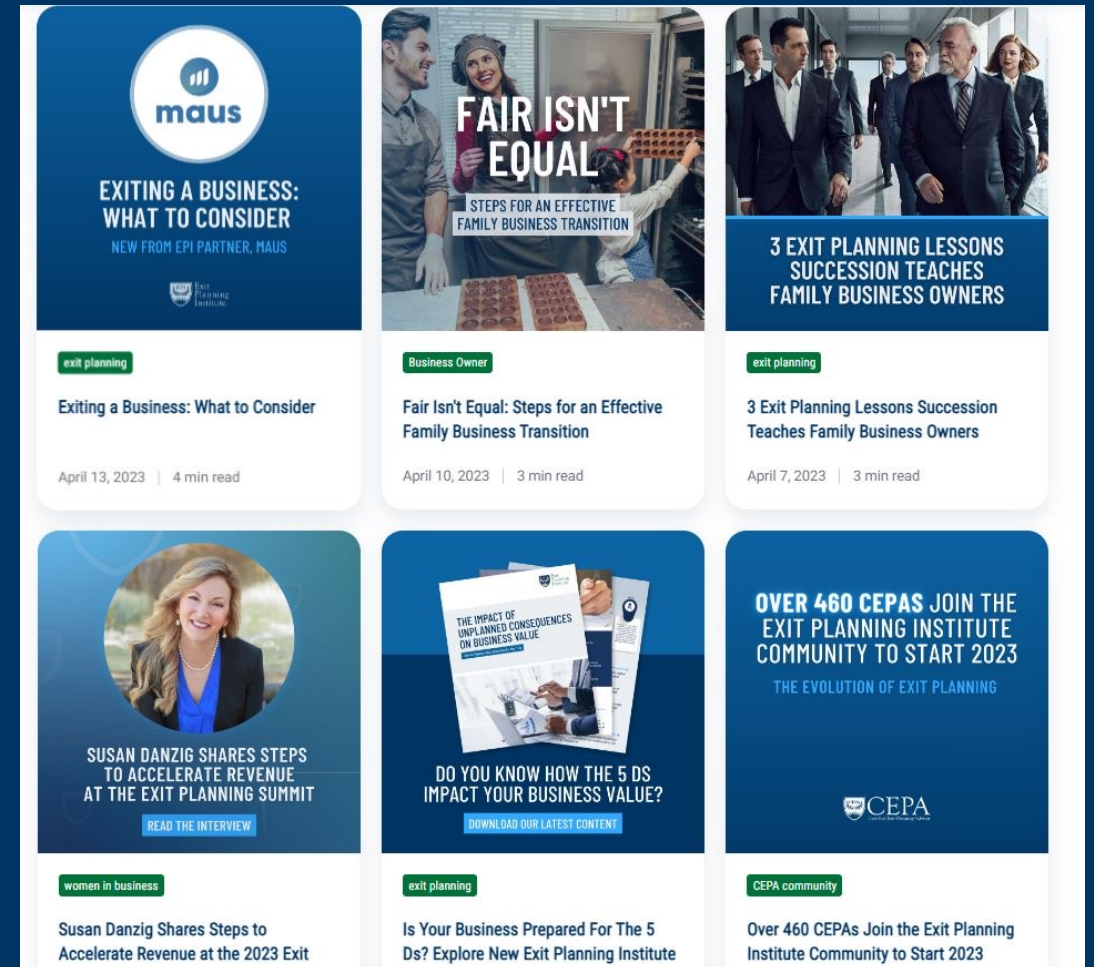
- 10 years of owner research
- In-depth reports and Quicklook statistics available
- Include statistics in prospecting campaigns
- Highlight importance of exit planning and owner readiness with your clients and prospects



**REQUEST NEW EXIT PLANNING
INSTITUTE RESEARCH**

Weekly Blogs

- EPI releases 2-4 trending exit planning pieces a week
- EPI ranks very high on search engines
- Share topical articles on your social media platforms and in email campaigns
- Award Winning Blog



maus
EXITING A BUSINESS:
WHAT TO CONSIDER
NEW FROM EPI PARTNER, MAUS

exit planning
Exiting a Business: What to Consider
April 13, 2023 | 4 min read

FAIR ISN'T EQUAL
STEPS FOR AN EFFECTIVE
FAMILY BUSINESS TRANSITION

Business Owner
Fair Isn't Equal: Steps for an Effective Family Business Transition
April 10, 2023 | 3 min read

**3 EXIT PLANNING LESSONS
SUCCESSION TEACHES
FAMILY BUSINESS OWNERS**

exit planning
3 Exit Planning Lessons Succession Teaches Family Business Owners
April 7, 2023 | 3 min read

**SUSAN DANZIG SHARES STEPS
TO ACCELERATE REVENUE
AT THE EXIT PLANNING SUMMIT**

women in business
Susan Danzig Shares Steps to Accelerate Revenue at the 2023 Exit
[READ THE INTERVIEW](#)

**THE IMPACT OF
UNPLANNED CONSEQUENCES
ON BUSINESS VALUE**

**DO YOU KNOW HOW THE 5 DS
IMPACT YOUR BUSINESS VALUE?**

exit planning
Is Your Business Prepared For The 5 Ds? Explore New Exit Planning Institute
[DOWNLOAD OUR LATEST CONTENT](#)

**OVER 460 CEPAS JOIN THE
EXIT PLANNING INSTITUTE
COMMUNITY TO START 2023**
THE EVOLUTION OF EXIT PLANNING

CEPA community
Over 460 CEPAs Join the Exit Planning Institute Community to Start 2023

Webinars

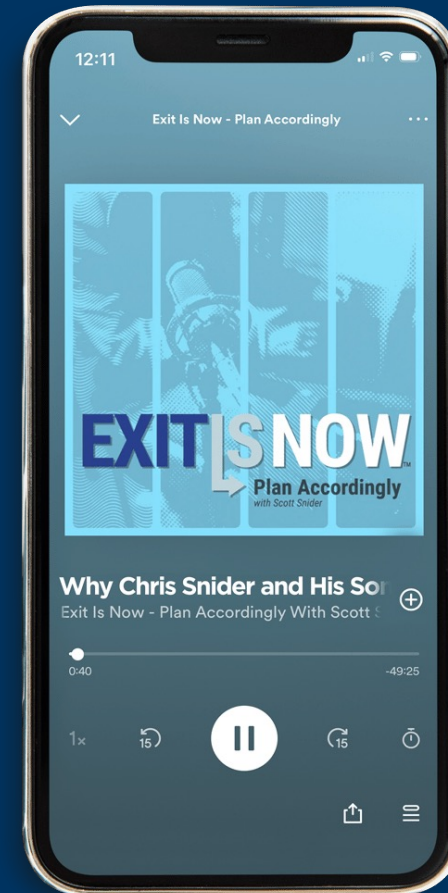


- Over 200 attendees per webinar
- EPI has a dedicated marketing campaign for each webinar
 - Social posts
 - Email messaging
- Speakers and their organizations are promoted heavily
- One hour commitment from speaker for more than 200 leads

Webinar Title	Speaker	Date	Time
CYBERCRIME - THE #1 FINANCIAL RISK TO SMALL BUSINESSES IN THE U.S.	Daniel Metcalf, Managing Partner at Cyberfin	June 13, 2023	1 P.M. EST
CAPITALIZ ON THE VALUE POTENTIAL OF YOUR CLIENTS' BUSINESSES	Dr. Craig West & Nicholas FASTER	June 27, 2023	3 P.M. EST
ESOPs AS AN EXIT PLANNING STRATEGY	Mark Russell, Senior Managing Director at SES ESOP Strategies	July 11, 2023	1 P.M. EST
HOW TO GET MORE DONE IN LESS TIME WITHOUT BURNING OUT	Purdeep Sangha, EMBA, FEA, CEPA, Founder & CEO at Business Brothers	July 25, 2023	1 P.M. EST
TAX ADVANTAGED BUSINESS SALES	Tiffany House, CAP, CEPA, FCP, President at Tax & Estate Strategy	August 6, 2023	1 P.M. EST
HOW CEPAs USE TECHNOLOGY TO PREPARE BUSINESS OWNERS FOR A SUCCESSFUL EXIT	Michael Brady, Account Executive - US at Nexus Software	September 5, 2023	1 P.M. EST

Exit Is Now Podcast

- Over 3,000 listeners
- In-depth Value Acceleration Methodology discussions
- Share with owners working through the same issues
- Share on social media and add your thoughts on the topics discussed
- Award Winning Podcast



Next Steps

- Build out your editorial calendar:
 - Get Organized
 - Make a manageable plan
 - Make deadlines and outline posts in advance
 - Automate!
 - Link back to your site, landing page, offer capture forms
 - Measure your efforts





**What does a marketing
coordinator/team do**



**Download the Practical Guide
and How-Tos Workbook**



Questions?



Pre-Order the "Selling to Business Owners" Course and Receive **\$100 Off!**

Launches October 13 on the EPI Academy platform