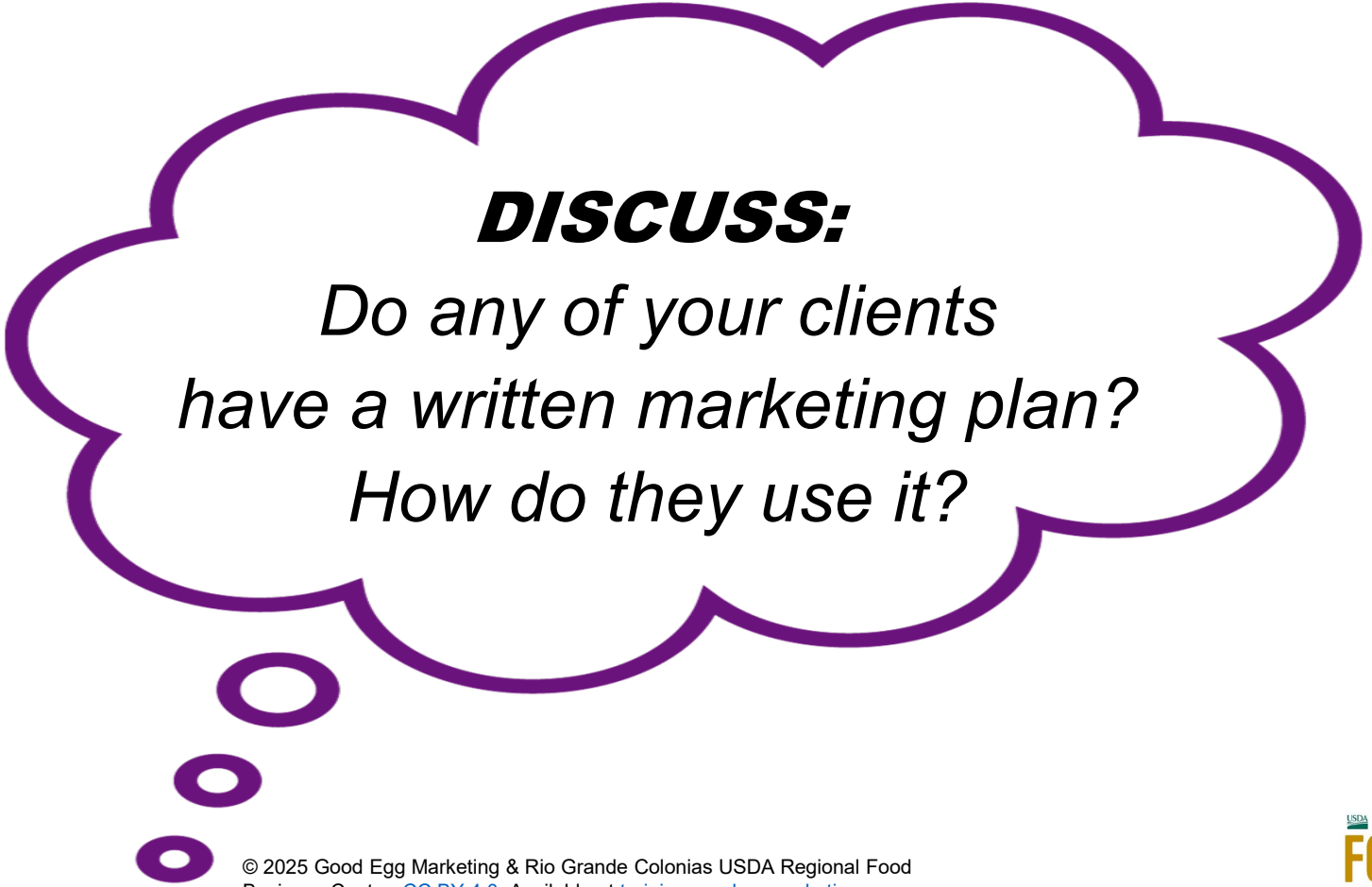
SESSION 3
Planning and Measuring Success

Presented by Myrna Greenfield, Good Egg Marketing & Rio Grande Colonias USDA Regional Food Business Center

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Agenda:
Marketing Plans and Measurement



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Create a Marketing Plan

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A Marketing Plan Is Your GPS



If you need to adjust your stops along the way, the GPS will recalculate your route

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What Goes Into A Marketing Plan?

Comprehensive Plan

- **Focuses** on company-wide business goals.
- **Analyzes:** The industry and/or market, target customers, peers/ competitors, branding, and current marketing activities.
- **Implementation:** Strategies and metrics are coordinated and tracked across the business.

Campaign Plan

- **Focuses** on achieving 1 or more specific, measurable, time-bound business or marketing goals.
- **Specific segments** (customers with shared characteristics) are targeted.
- **1-3 tactics** (or sequences of tactics) are implemented per goal.
- **Results** are tracked and measured for each campaign.

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Help Your Clients Create a Marketing Plan to Achieve a Goal



- Most farm and food businesses don’t have a written marketing plan unless they’ve applied for a loan or a grant.
- A simple marketing plan set up a series of steps to achieve a specific goal.
- If you show clients how easy it is to create a simple plan, they’ll be more likely to do it.

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Marketing Is a Cycle, Not an End Point



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Simple Marketing Campaign Plan Framework

GENERAL GOAL	SPECIFIC GOAL	TARGET CUSTOMERS	TACTICS/ PLAN	MEASURE/ EVALUATE
Your overall goal, such as: Attract new customers, increase sales, build loyalty.	The specific, measurable change or action you seek and by what date.	The market or type of customers most likely to take your desired action.	1-3 tactics (or sequences of tactics) to be tested; budget; who will do what and by when.	Baseline to measure from; tools/systems needed to evaluate if you achieved the goal.

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STEP 1:
Set Your Goal

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Set Specific, Measurable, Time-Bound Goals

GENERAL GOAL		SPECIFIC GOAL
Increase awareness and attract new customers to our farm	→	Attract 50 new customers to annual spring seedling sale
Increase taco truck revenue by attracting repeat visits	→	Get 100 taco truck customers to make a repeat visit in July
Share our brand story with more customers.	→	Add 100 new email subscribers in Q2

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Here's The Specific Goal We'll Use For Our Sample Plan

GENERAL GOAL	SPECIFIC GOAL	TARGET CUSTOMERS	TACTICS/ PLAN	MEASURE/ EVALUATE
Increase awareness and attract new customers to our farm	Increase the number of customers at our May seedling sale from 250 last year to 300 this year.			

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STEP 2: Identify Your Target Customers

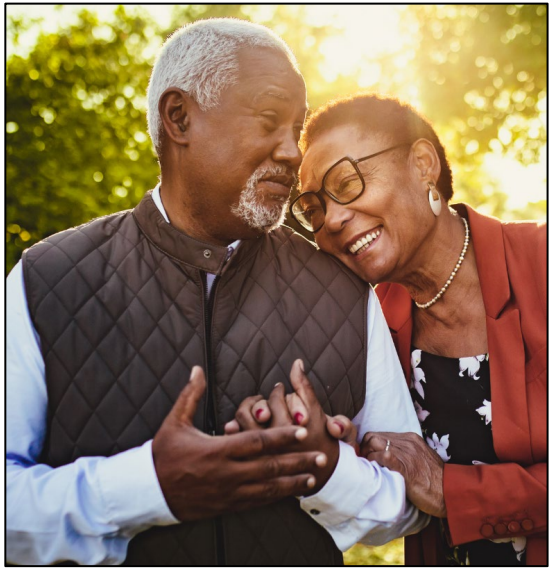
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Which type of customers will you target for your campaign?

- Which of your current or potential customers are most likely to want to buy or do what you offer?
- Do they share any characteristics, such as:
  - Similar age or life stage
  - Similar needs or values
  - Similar behavior (e.g., shop at the same farmers market each week)



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Which Types of Customers Are Most Likely To Want Seedlings?



- People who buy seedlings are **gardeners.**
- **Can you recognize a gardener** just by looking at them? Probably not.
- So, **how can you get the attention of gardeners** in your market area?
- **By their behavior.** People who garden usually buy soil, seeds and tools.
- **Where gardeners buy their tools?** Some buy tools at their local hardware store.

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Let's Enter Our Target Customers Into Our Sample Plan

GENERAL GOAL//	SPECIFIC GOAL	TARGET CUSTOMERS	TACTICS/ PLAN	MEASURE/ EVALUATE
Attract more customers to our annual seedling sale.	Increase the number of customers at our May seedling sale from 250 last year to 300 this year.	Gardeners who buy gardening supplies at the hardware store in our town center.		

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STEP 3: Choose Your Tactics

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What Tactic(s) Might Be Persuasive? How Can We Reach Our Target Customers?



Ways to Persuade

- Discount coupons, promotions, prizes, local celebrities, entertainment, free food, workshops…

Ways to Reach

- Person-to-person, print, digital, partners, outdoor signage…

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Let's Enter Tactics Into Our Sample Plan

GENERAL GOAL	SPECIFIC GOAL	TARGET CUSTOMERS	TACTICS/ PLAN	MEASURE/ EVALUATE
Attract more customers to our annual seedling sale,	Increase the number of customers at our May seedling sale from 250 last year to 300 this year.	Gardeners who buy gardening supplies at the hardware store in our town center.	Print 10% off seedling sale coupons for the hardware store to distribute.	

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STEP 4: Measure and Evaluate

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Let's Enter Measurement Into Our Sample Plan

GENERAL GOAL	SPECIFIC GOAL	TARGET CUSTOMERS	TACTICS/ PLAN	MEASURE/ EVALUATE
Attract more customers to our annual seedling sale	Attract 300 customers to our May seedling sale (250 came last year).	Gardeners who buy gardening supplies at the hardware store in our town center.	Print 10% off seedling sale coupons for the hardware store to distribute. In return, promote hardware store to seedling sale attendees.	Track # of attendees, av. sale/attendee, # coupons used, cost of printing and discounts; compare to past year.

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Evaluating Our Campaign

Measurement and costs

- Baseline: 250 customers came last year
- General goal: Increase awareness and attract new customers to the farm.
- Specific goal: Attract 300 customers to the seedling sale
- Tactics: 500 coupons good for 10% off were distributed at the hardware store

Outcomes

- 325 people attended
- Net profit: $4,875 ($375 over last year)
- 50 people joined the email list; the farm gained 100 Instagram followers
- 250 people scanned the farm's QR code for Pick Your Own strawberries
- The hardware store netted new customers and wants to partner again

So, was it worth it? You decide.

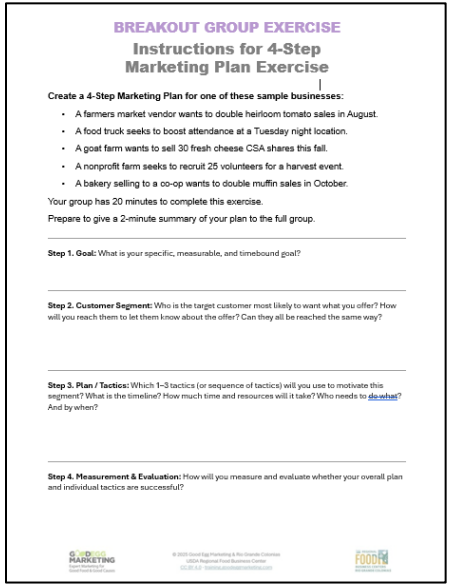
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BREAKOUT GROUP EXERCISE

Create a 4-Step Marketing Plan



BREAKOUT GROUP EXERCISE

Instructions for 4-Step Marketing Plan Exercise

Create a 4-Step Marketing Plan for one of these sample businesses:

- A farmers market vendor wants to double heirloom tomato sales in August.
- A food truck seeks to boost attendance at a Tuesday night location.
- A goat farm wants to sell 30 fresh cheese CSA shares this fall.
- A nonprofit farm seeks to recruit 25 volunteers for a harvest event.
- A bakery selling to a co-op wants to double muffin sales in October.

Your group has 20 minutes to complete this exercise.

Prepare to give a 2-minute summary of your plan to the full group.

Step 1. Goal: What is your specific, measurable, and timebound goal?

Step 2. Customer Segment: Who is the target customer most likely to want what you offer? How will you reach them to let them know about the offer? Can they all be reached the same way?

Step 3. Plan / Tactics: Which 1–3 tactics (or sequence of tactics) will you use to motivate this segment? What is the timeline? How much time and resources will it take? Who needs to do what? And by when?

Step 4. Measurement & Evaluation: How will you measure and evaluate whether your overall plan and individual tactics are successful?

4-Step Marketing Plan Worksheet

Use the Create a *4-Step Marketing Plan Worksheet* to create a plan for one of these businesses:

- A farmers market vendor wants to double heirloom tomato sales in August.
- A food truck seeks to boost attendance at a Tuesday night location.
- A goat farm wants to sell 30 fresh cheese CSA shares this fall.
- A nonprofit farm seeks to recruit 25 volunteers for a harvest event.
- A bakery selling to a co-op wants to double muffin sales in October.

- Your group has 20 minutes to complete this exercise.
- Prepare to give a 2-minute summary of your plan to the full group.

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Break Time!



See you in 15 minutes

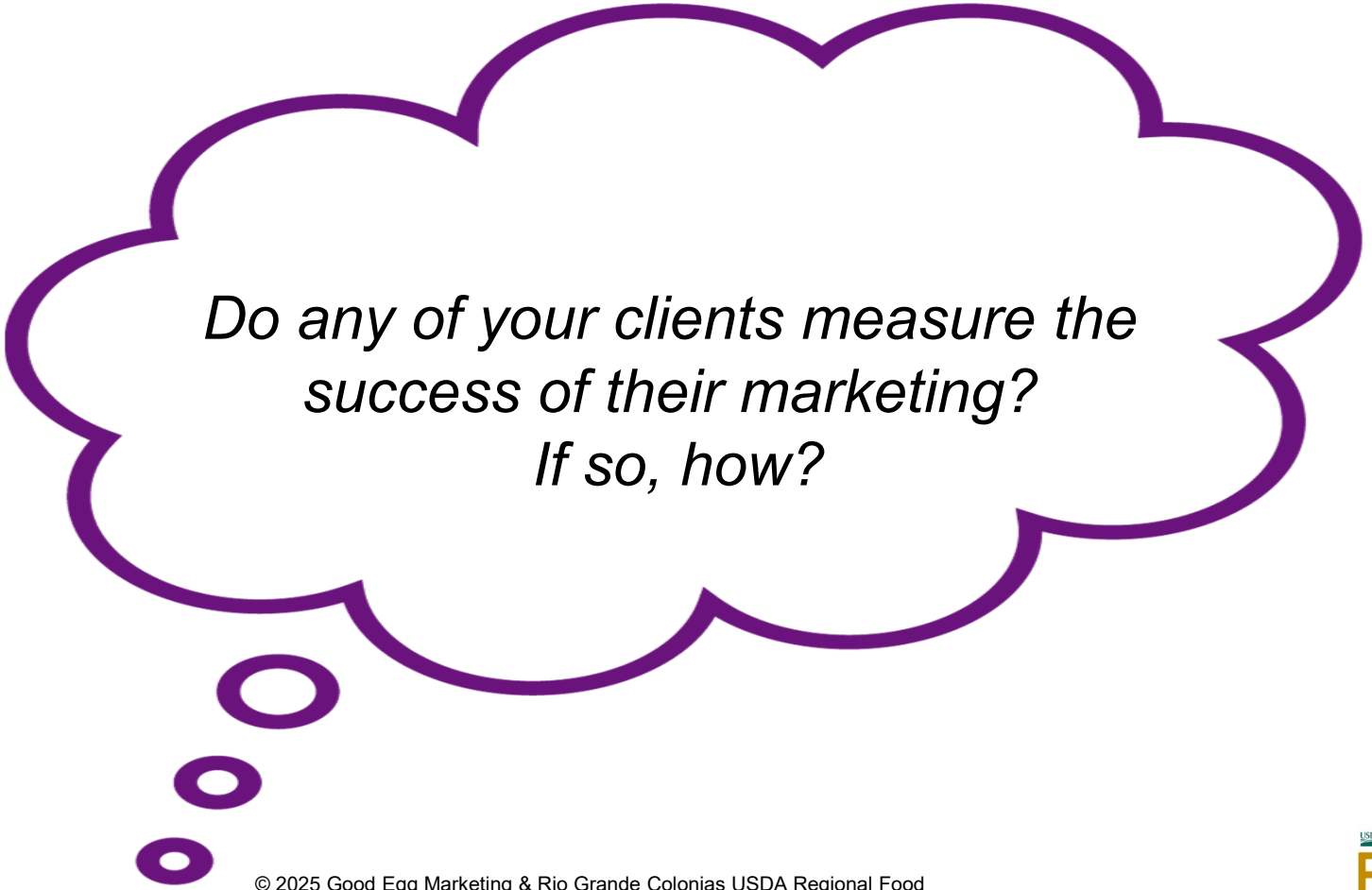
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Measure and Evaluate Your Results

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MEASUREMENT PRINCIPLES

When You Choose Your Tactics, Also Decide How and What You'll Measure

As you create a plan, decide:

- Which systems and tools will you use to track and measure results?
- Are there likely to be external factors with potential impact on the results that you should also track? If so, what might they be?
- If the tactic seems to be failing, will you stick to your plan or modify it along the way to try to improve results?

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MEASUREMENT PRINCIPLES

Keep Records



- Keep a digital or physical notebook and/or a digital “dashboard” to record metrics.
- Update it weekly (or at least monthly).
- Note any external factors that you decided to monitor.
- Note customer or staff comments.

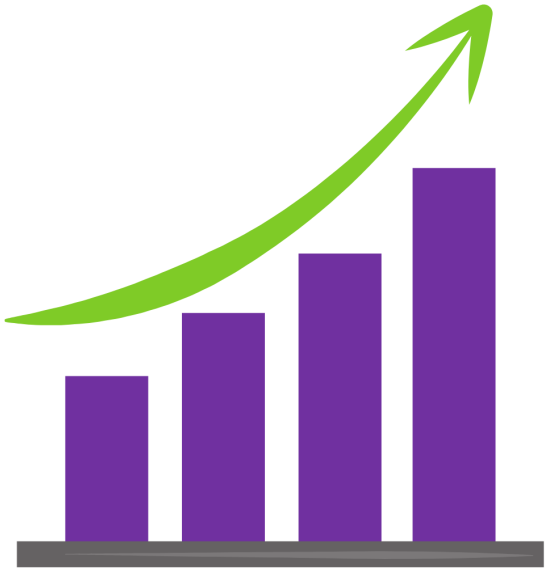
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MEASUREMENT PRINCIPLES

Record Your Baseline (Pre-Tactic) and Results (After-Tactic)



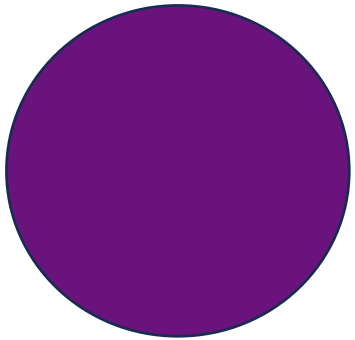
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MEASUREMENT PRINCIPLES

Try to Test One Tactic at a Time—It's Easier to Evaluate If It Worked





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MEASUREMENT PRINCIPLES

Measure What Matters

- Many social media metrics, such as how many Facebook likes you have, are really “vanity metrics” with relatively little value for most businesses.
- Focus on metrics that impact your bottom line (such as sales) or advance you towards a goal (such as ranking higher in Google’s local search listings).



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MEASUREMENT PRINCIPLES

Some Tactics Are Worth Using, Even If They're Harder to Measure



Look for ways to capture customer comments, opinions, and reactions.

- Observation
- Reviews
- Open-ended questions
- One-to-one interviews
- Focus groups

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MEASUREMENT PRINCIPLES

Evaluating Tactics vs. Campaigns

Evaluating an individual tactic

- Did it have any measurable impact on the campaign goal?
- Did it support the success of other tactics?
- What was the financial cost?
- How much time and other resources did it take?
- What did we learn?
- Is it worth repeating?

Evaluating an overall campaign

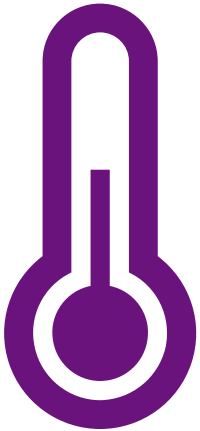
- Did we achieve our goal?
- Were there other benefits?
- What was the financial cost?
- How much time and other resources did it take?
- Which tactics worked best?
- What did we learn?
- Is it worth repeating?

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Once You've Collected the Data, It's Time to Evaluate Your Campaign



Evaluate

- Do you have enough data to decide if it worked?
- If not, what does your gut say: Does it *seem* like a success?
- Did weather, emergencies, or other variables skew results?
- Can you attribute your success to a specific tactic?

Decide:

- If it seems like it worked, should you repeat it?
- If it didn't work, was it the wrong goal, message, channels, or tactics? If so, should you change one aspect and try again?

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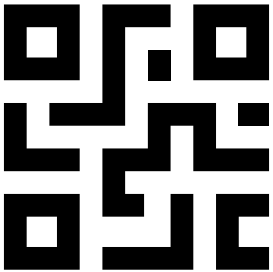
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MEASUREMENT TIPS AND TOOLS

Simple Ways to Measure Tactics





- Count customers using a hand tally clicker
- Assign unique promo codes to each customer segment.
- Create unique QR codes for each location or partner who promotes an event.
- Use your POS system to track total sales, # of transactions, average sale per visit, # of new customers acquired monthly, etc.

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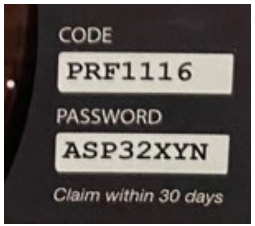
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MEASUREMENT TIPS AND TOOLS

Print isn't dead—and it's trackable





- Want to test which drop-off location generated the best response for your flyers or coupons?
- Print a unique code on postcards or flyers distributed at each location.
- Individualize each printed piece using "variable data printing." (See example on the left.)
- To save money, you can hand code postcards down the side with a unique color stripe for each location.

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MEASUREMENT TIPS AND TOOLS

Use Built-In Platform Tools or Free/Low-Cost Alternatives

Meta

INTUIT mailchimp

LinkedIn

Google Search Console

Google Business Profile

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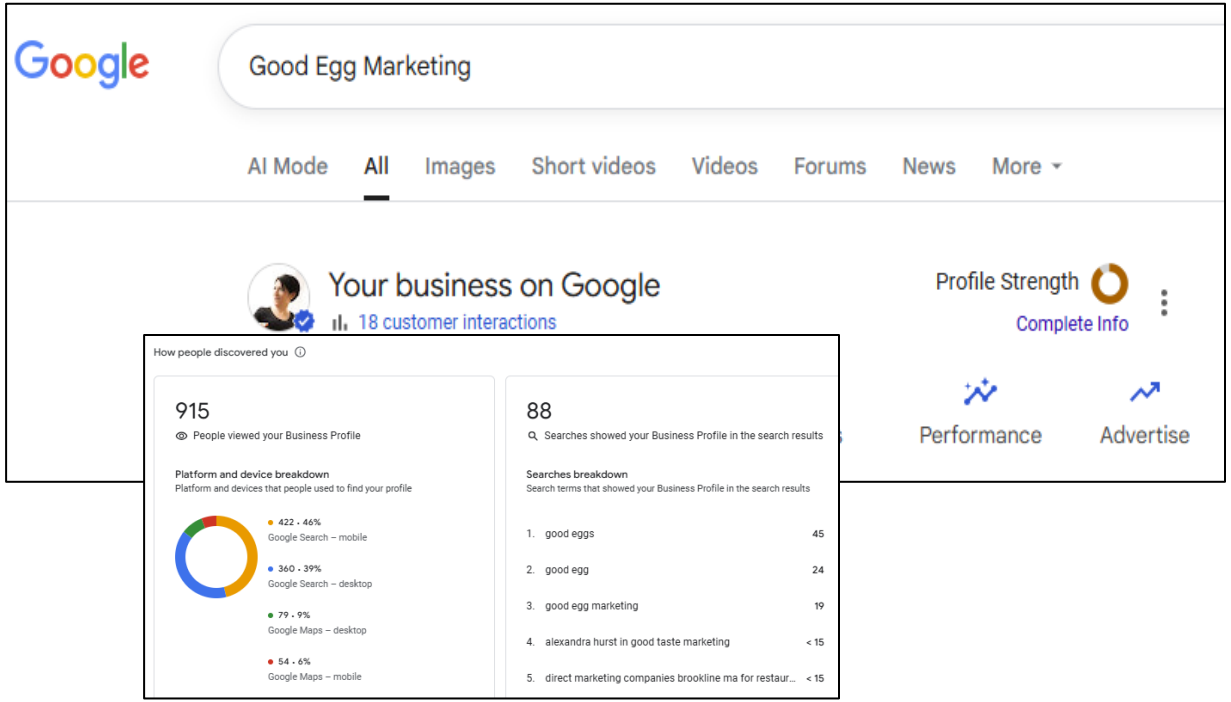
MEASUREMENT TIPS AND TOOLS

Use Shortened URLs and QR Codes

- Use bitly, Linktree, shorturl or other free/low-cost sites to shorten and track your links to your website or social media.
- Get metrics like location, devices, frequent times, how they got referred to the site, and more.
- Create QR codes and track similar metrics.

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Read Your Google Business Profile Reports



Google Business Profile (GBP) provides monthly performance reports that tell you the number of clicks your site's getting from GBP, your users' platforms and devices, and their search terms.

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ADVANCED MEASUREMENT

Choosing a Tool for Measuring Website Analytics

- If your client has a website, they should have a tool that tracks website traffic, referral sources, most popular pages, online sales, and other analytics.
- Many website platforms, such as Squarespace and Wix, offer built-in analytics.
- Google Analytics used to be the industry standard, but the latest version is harder to set up and use.
- There are low-cost alternatives, such as Plausible and Fathom Analytics, that are more user-friendly.







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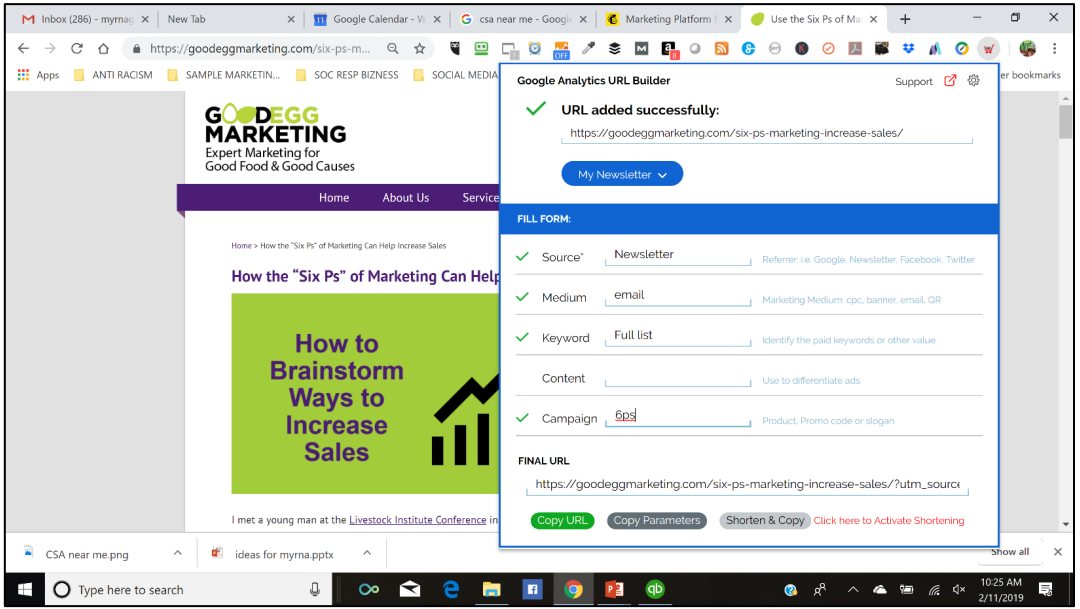
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ADVANCED MEASUREMENT

Use UTM Parameters

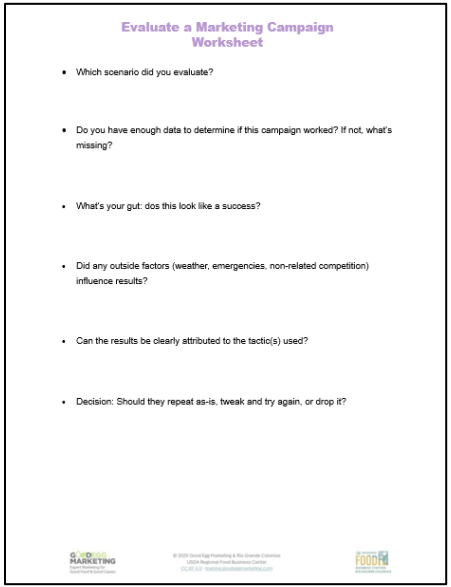
- UTM parameters are tracking codes.
- The codes are generated when you complete a UTM tracking form.
- If you set up UTM tracking for emails, posts, and ads, your analytics software will show you which ones are driving website traffic, sales, sign-ups or other activity.



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SOLO EXERCISE

Evaluate a Marketing Campaign


Evaluate a Marketing Campaign Worksheet

- Which scenario did you evaluate?
- Do you have enough data to determine if this campaign worked? If not, what's missing?
- What's your gut: dos this look like a success?
- Did any outside factors (weather, emergencies, non-related competition) influence results?
- Can the results be clearly attributed to the tactic(s) used?
- Decision: Should they repeat as-is, tweak and try again, or drop it?

Evaluate a Marketing Campaign Worksheet

- **Goal:** Practice evaluating whether a campaign was successful.
- Choose a business from the Sample Marketing Campaign Scenarios and complete the Evaluate a Marketing Campaign worksheet.
- Analyze the results. Was the campaign successful? Is it worth repeating, changing, or discarding?
- You have 15 minutes for this exercise.
- You'll share your verdict with the full group.

GOOD EGG MARKETING
Expert Marketing for Good Food & Good Causes

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USDA REGIONAL FOOD BUSINESS CENTERS RIO GRANDE COLONIAS

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