

Creating + Executing Marketing Plans Workshop

Topic

Marketing plans

Teacher

Nina L. Kovner

Intention

Provide frameworks, systems, and processes to help reduce your overwhelm and increase your clarity, focus, and execution of your visions + plans.



What You Will Learn









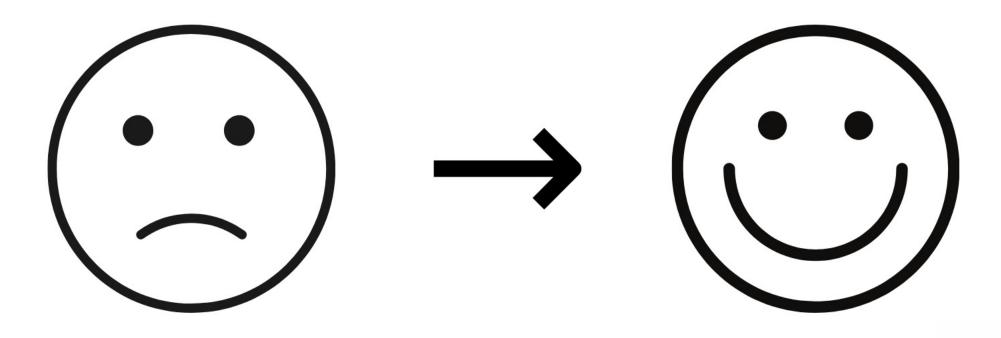


Why Do I Need A Plan?



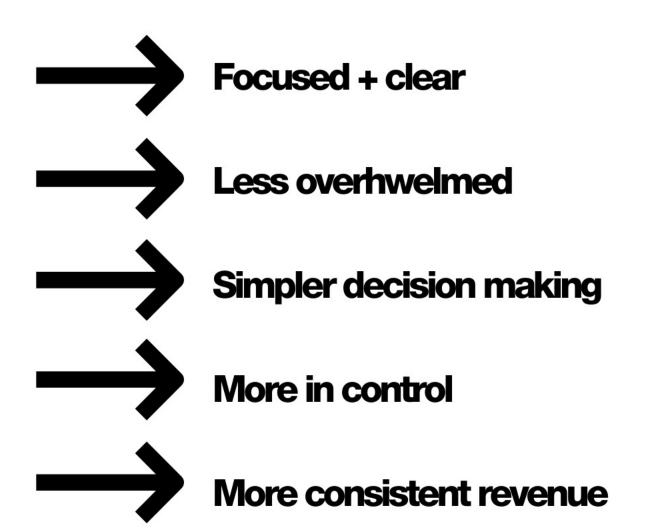
You Before Creating A Plan

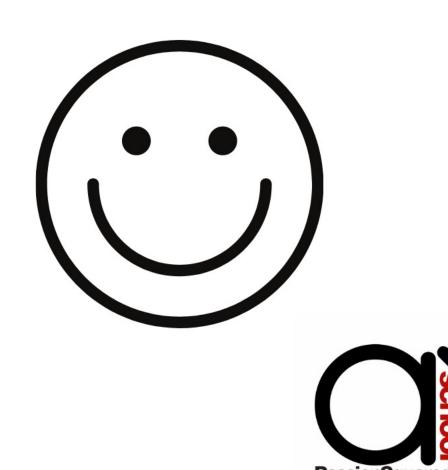
You After Creating A Plan



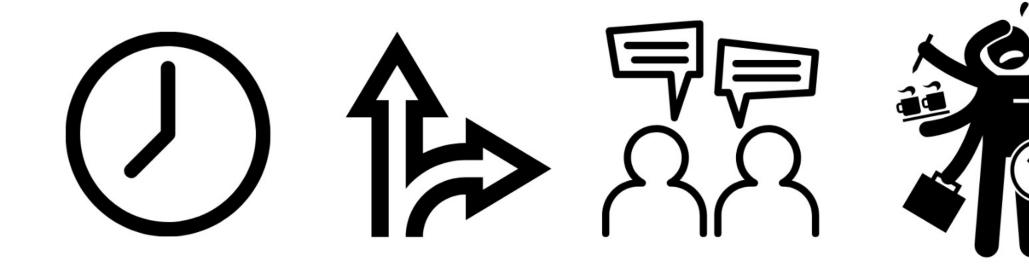


Feelings + Results When You Commit To Planning





the struggle



Time

Direction

Support

Overwhelm



You Do Not See Value S

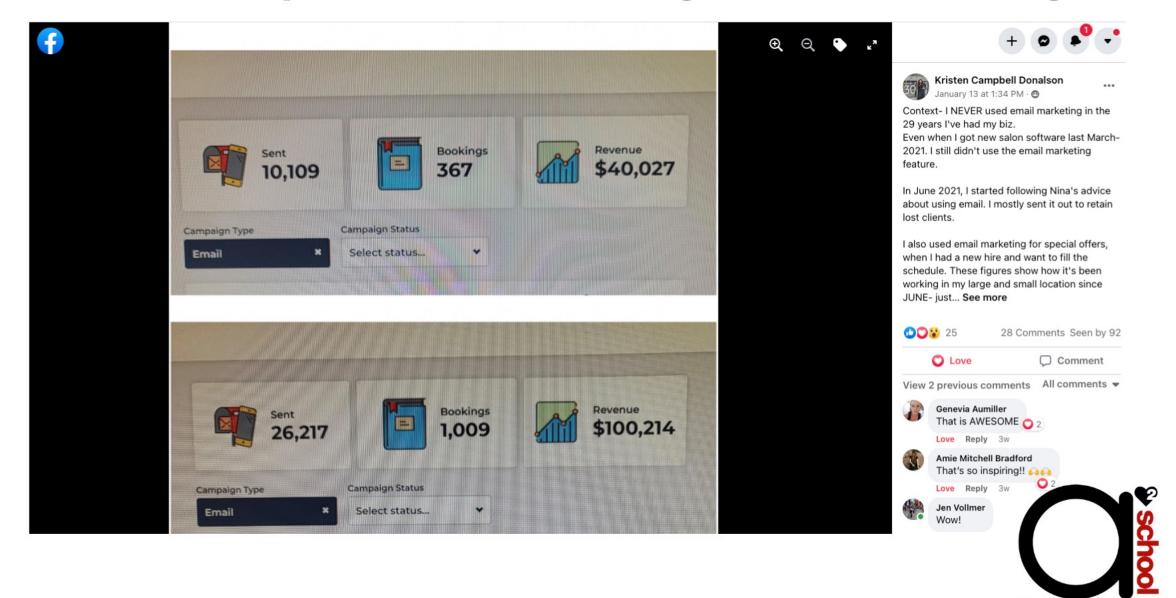
Self-Sabotage







Kristen Shared Her Experience With Committing To An Email Marketing Plan



PassionSquared

What Do You Need?



Do you need to create space + time?

Do you need clearer direction?

Do you need an accountability buddy?

Do you need to delegate other things?

Do you need more courage?



Your Planning Style











Journal

To Do List

Storyboard

Spreadsheet

App



What Are Marketing Plans and Where Do They Fit?



Definition of Words

Plan- The Big Picture

Objective/Outcome- The purpose and outcomes desired

Goal- The monetary results desired

Strategy- The roadmap or framework that supports the objectives and outcomes

Tactics- The Steps Needed

Definition of Words

Plan- a detailed proposal for doing or achieving something.

Objective/Outcome- a thing aimed at or sought; a goal.

Goal- the object of a person's ambition or effort; an aim or desired result.

Strategy- a plan of action or policy designed to achieve a major or overall aim.

Tactics- an action or strategy carefully planned to achieve a specific end.



Business Plan vs. Marketing Plan

Business Plan Template Purpose + Objective Statement

Who is (brand name)?

Our Purpose

Our Promise

Our People

The Brand Experience

Our Services + Products

Our Service Pricing/Position

Offline Marketing Plan

Online Marketing Plan

Operations Plan

Financial Plan

Sales Plan

Education + Training Plan

Budget + Forecast Plan

Passion Squared Business Playbook (example)	Creating Your Awesome Business Playbook	
BIZ STRATEGY Objective	BIZ STRATEGY Objective	
1. Increase referrals	1.	
2. Promote service/product	2.	
3. Introduce service/product	3.	
Become more discoverable	4.	
Vision	Vision	
1, 20 new referrals per month	1.	
2. Sell 20 new services per month	2.	
3. Sell \$100 in new product per month	3.	
4. Obtain 5 YELP reviews per month	4.	
Tactics	Tactics	
Implement referral program in the salon	1.	
2. In-Salon Marketing pieces and dialogue around new product/service	2.	
3. Online content for new product/service	3.	
Create YELP dialogue, add social plug ins, promote on social pages	4.	
Measurement	Measurement	
1. Referral report	1.	
2. Salon services report	2.	
3. Retail sales report	3.	
YELP business owners dashboard/referral report	4.	
5. Google Analytics	5.	
Results	Results	
1.	1.	
2.	2.	
3.	3.	
4.	4.	



Your marketing plan needs to be aligned with your business plan which is aligned with your brand story (purpose, promise, people, product/service)





Marketing Plan ——



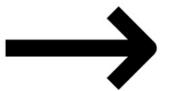
Marketing Calendar

Passion Squared Business Playbook (example)	Creating Your Awesome Business Playbook (Ill in your droums)	
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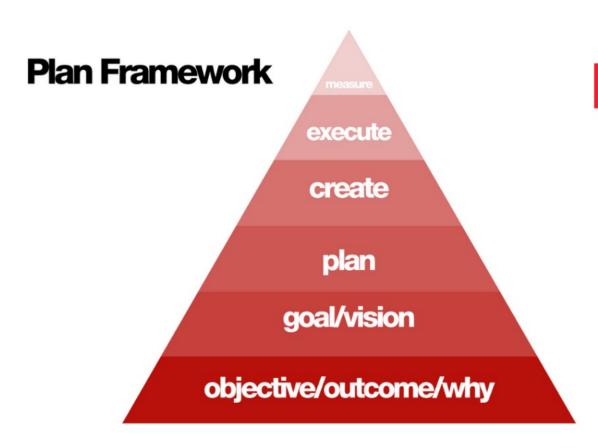
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
General Theme	New Year	Love	Spring	Wedding/ Prom/Earth	Mom	Dad	Summer	Back to School	Fall	Halloween	Winter	Holida
Business Theme												
Service Focus												
Product Focus (include affiliates)												
Education/ Event Focus												
Social/ Digital Focus Email Newsletter												
Text Marketing												
Website												
Instagram												
TikTok												



Marketing Plan ——



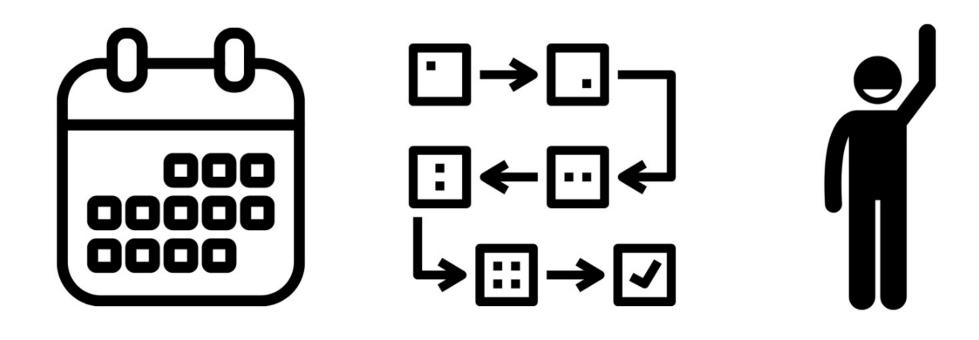
Marketing Calendar



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Text Marketing												
Website												
Instagram												
TikTok												
Facebook												
YELP, Google, Nextdoor												

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Main Reasons Plans Do Not Get Executed



date/deadlines

steps/resources

person responsible



Plan Frameworks



Plan Framework

measure

execute

create

plan

goal/vision

objective/outcome/why



Plan Framework

create execute measure



Examples of "Micro" Marketing Plans



New Client Retention Marketing Plan



New Talent Recruitment Marketing Plan



Email Marketing



Social Media Marketing Plan



New Service/Product Marketing Plan



New Client Retention "Micro" Marketing Plan

review measurements, adjust as needed

start dates, due dates, ongoing milestones. LAUNCH! Measure new client retention and happiness in 3 months.

create post-experience texts, and emails create lapsed client schedule, verbiage + communication design, adjust service timing, update menu's online + off

create more time for experience, consistent postexperience follow up, reach out to lapsed clients weekly, 2 hours per week, no additional budget

increase new client retention rate by 25% for a total of 50% happy clients, happy business

more consistently nurture relationships to increase brand loyalty



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Email Marketing "Micro" Marketing Plan

review measurements, adjust as needed

build and send newsletter send post-experience emails on dedicated days

create newsletter format, focus, and template create post-experience email format and template set deadlines, reserve time on the calendar

consistent monthly newsletter packed with value, post-experience emails 1 week after a visit

Deeper existing client relationships, increase existing client retention to 90% from 75%

more consistently nurture existing client relationships and add more value to increase brand loyalty



measure

execute

create

plan

goal/vision

objective/outcome/why





Creating Your Awesome Business Playbook (fill in your dreams)

PassionSquared,

BIZ STRATEGY	BIZ STRATEGY
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Results	Results
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Creating Awesome Marketing Calender - 12 months

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
General Theme	New Year	Love	Spring	Wedding/ Prom/Earth	Mom	Dad	Summer	Back to School	Fall	Halloween	Winter	Holiday
Business Theme												
Service Focus												
Product Focus (include affiliates)												
Education/ Event Focus												
Social/ Digital Focus Email Newsletter												
Text Marketing												
Website												
Instagram												
TikTok												
Facebook												
YELP, Google, Nextdoor												

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Creating Awesome Social Engagement Planning (one week example, always only focus on the platforms aligned with your brand purpose, promise + people)

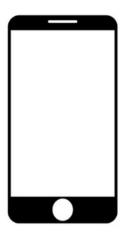
	MON	TUE	WED	THU	FRI	SAT	SUN
Theme	Mindful/Manic/ Marvelous Monday	Thank You Tuesday	We Love Wednesday	Throw-Back Thursday	Fab Friday	Styling Saturday	Sunday Funday
	Focus on tips, products, etc.	Shout out to clients & team	Feature products, people, brands, community businesses "we love"	Business history, milestones, team members	Focus on great deals & promotions	Salon spotlights, real time happenings in the salon	Salon lifestyle, day in the life, BTS
FACEBOOK Post 1 • Pic • Status • Link							
Post 1 • Pic • Status • Link							
INSTAGRAM Image 1 • Copy • Hashtags							
Image 2 • Copy • Hashtags							

Content Storyboard



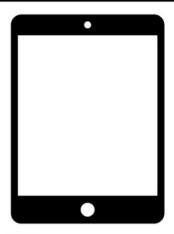
Content Category:

Content Types + Platforms:



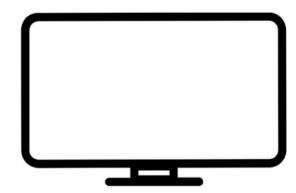
Content Category:

Content Types + Platforms:



Content Category:

Content Types + Platforms:



Content Category:

Content Types + Platforms:



PASSION SQUARED CONTENT STORYBOARD



people passion purpose

The Not So Great Cancellation, Focusing On What You Can Control + Being Where Your



podcast, blog, newsletter, LIVES



Empowerment + Inspiration

Original content + User Generated Content posts



Programs + Services + Promotion

A School, social school, Books, Online Courses, Workshops

How To Take A Social Media Break + Why You Need One

free digital book

Business

Brand, social, marketing posts + LIVES



PASSION SQUARED CONTENT STORYBOARD



people <mark>passion</mark> purpose

Hair Love The Book + Animated Short Film + The CROWN Act with Danielle Green @radicallycurty

Information + Education

podcast, blog, newsletter, LIVES

let's live life out loud.
let's keep our
dreams alive
and explore the unknown.
let's drink passion
and dance with our fears.
let's live life fiercely,
and when it comes
to taking chances,
let's leave nothing left.

drewniverses

Empowerment + Inspiration

Original content + User Generated Content posts



Programs + Services + Promotion

A School, social school, Books, Online Courses, Workshops

PASSION SQUARED EMPLOYEE HANDBOOK



empowering people, passions and purpose.

THE PASSION SQUARED BRAND

They say follow your heart to live your passion + purpose. But where are "they" when you are overwhelmed, over budget + over it? Life can

Business

Brand, social, marketing posts + LIVES



Promotion/Program Planner

objective/outcome	<u></u>	,
goal		
plan		
create		
execute		New York
measure		PassionSquared,

Promotion Planner

objective/outcome

Seasonal menu items create interest, engagement, revenue + joy

goal

Joy for my clients, reduce their stress + overwhelm, generate \$1000 additional \$

plan

Create 3 new menu items, order supplies, create content for socials, newsletter + in salon

create

Have all things created by October 15 for launch. Booked create time.

execute

Launched on time, clients seem excited and are booking the new services.

measure

Generated \$750 in add on revenue and made clients SO happy. I call it a success!



Holiday Email Planner

October

Halloween Hair + Makeup Oct 10- 1st email Oct 28- 2nd email

Holiday Schedule Oct 10- 1st email

November

Holiday Schedule Nov 1- 2nd email Nov 15- 3rd email

Thanksgiving
Fundraiser
Nov 15- 1st email
Nov 27- 2nd email

December

Holiday Schedule Dec 1- 4th email Dec 15- 5th email Dec 30- 6th email

Gift Guide/Cards
Dec 1- 1st email
Dec 15- 2nd email
Dec 30 3rd email

January

New Year rituals

Gift card purchasers

Transformation ideas



Tools + Resources + Next Steps



the FU folder





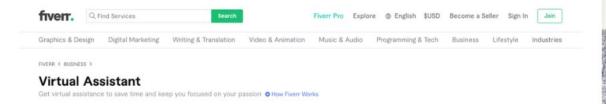
the 25 year list



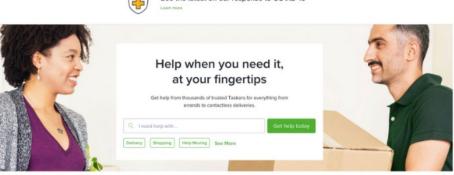


the virtual assistant "project manager"











Project Management Fundamentals

updated 1-26-09								
	J/F 09	M/A 09	M/J 09	J/A 09	S/O 09	N/D 09	J/F 10	M/A 10
New Products		Blanding System, Texture System, Liquid Treatment			Express Color, Hi-lift reds, Express Styling Products			Olive
Meetings		National Trainers, AD Meeting: Gathering 09 and '10 Spring Collection	Present Q 3 & Q 4 at Regional Meeting	Euro Distributor Roundtable	National Trainers, AD Meeting: Gathering '10 and '11 Fall Collection	Present Q 1 & Q 2 at Regional Meeting		National Trainers, AD Meeting: Gathering 09 '10 Spring Collection
Education Trainings	Euro Train the Trainer	PMTS Grow Your Business, PAC Biz Training	Train NT and PAC Q3& Q4 collections and new products	Launch New Education Program, Euro Train the Trainer		Train NT and PAC Q1& Q2 collections and new products	Euro Train the Trainer	Summit
	Associate Updates Spring 09	Associate Updates Spring 09	Associate Assessment	HairCamp & Associate Updates Fall 09	Associate Updates Fall 09		Associate Updates Spring 2010	Associate Updates Spr 2010
Trade Shows		Chicago ABS, BSG San Jose, Cosmoprof, Intercoiffure LV	Premiere Orlando	Cosmoprof USA, Salon Life NCA	Salon International, Intercoiffure Paris and NYC			Chicago ABS, BSG Sar Jose, Cosmoprof, Intercoiffure LV
Events	Hawaii Seminar, PMTS Caper, Photo Session Shoot	PMTS Summit		The Gathering	ABC Forums, PMTS Summit	ABC Forums	Hawaii Seminar	
DVD Shoots	Shoot Fall 09	Shoot ABC	Shoot Spring 10			Shoot Fall 10		Shoot ABC
Mailers	M/A mailer & Store Kit ships	M/J Mailer & Store Kit ships	J/A mailer & Store Kit ships	S/O Mailer & Store Kit ships	N/D mailer & Store Kit ships	J/F mailer & Store Kit ships	M/A mailer & Store Kit ships	M/J Mailer & Store Kit ships
		Q2 Bus Dev. Kit ships March	Q3 Bus Dev. Kit ships June		Q4 Bus Dev. Kit ships Sept.	Q1 Bus. Dev Kit ships Dec.		Q2 Bus Dev. Kit ships March
Publications	PM Planner	Cut & Dry, PM Planner	PM Planner	PM Planner	Cut & Dry, PM Planner	PM Planner	PM Planner	Cut & Dry, PM Planner
	Update Get Started, Behind the Bottle, Experience Marketing				Update Get Started		Update Get Started, Behind the Bottle, Experience Marketing	
	What's the Deal	What's the Deal	What's the Deal	What's the Deal	What's the Deal	What's the Deal	What's the Deal	What's the Deal

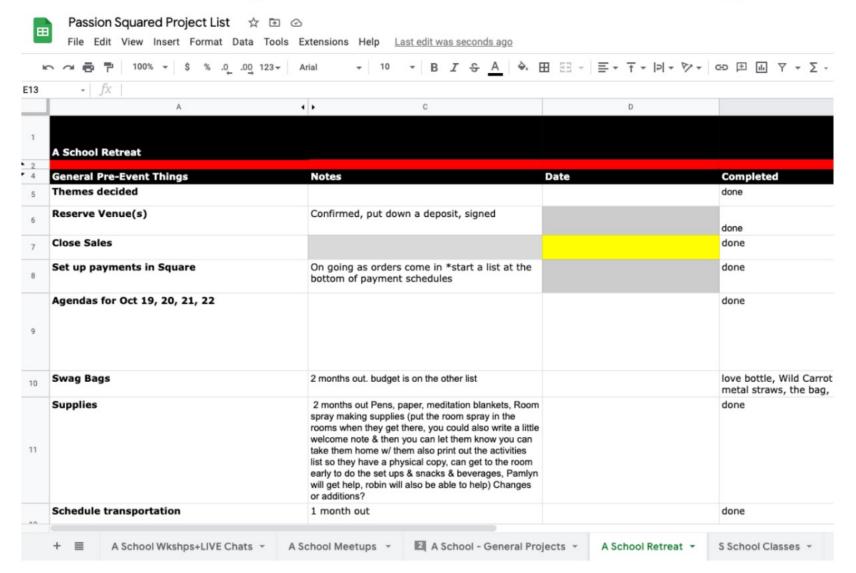


Project Management Fundamentals

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BW	Overview of Show & Education planning	Kristin meetin	g with LUKE		_	_		_							_			_			_	_	_		
Team	Show Strategy 09-10	_	_																						
ve.	Future Professionals @ shows policy update	14.6																							
KF	Show Guide Book	16-Ju	4																						
LB	2008 Fall/Winter SHOWS	_	210	210	180	180	150	120	90	90	90	9/	40	90	30	30	_	30	30	30	3/	21	1 1/	1 -	
Ela/	PAC /TF Training	11/16/08	210	210	100	100	130	120	70	08/18/08	7.	7.	60	30	17-Oct	30		30	10/17/08	30	3	10/26/08	- 14	11/14/08	Art Directors
SW		11/17/08					_			00/10/00					17-00				10/17/00			10/20/00			Dana
AG	Focus Roundtable - Las Vegas			-	-		-	-			_	_	_		_		_	\Leftrightarrow	_		_		_	11/10/08	
AG	Focus Roundtable - Rocky Hill	11/17/08		_	-		-	-							-	_	_	>				_	_	11/10/08	Bob Budds
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DQ	RCC Training	12/3/08	\sim		-	sales	1/4	\sim		9/4/08	B B		\sim		11/3/08	1/2		11/3/08	11/3/08	(A	11/3/08				Steph & Robert
SW	Distributor Meeting - Santa Monica	12/6/08				sales		><			-		\geq		11/6/08			11/6/08	11/6/08	-	11/6/08	11/15/08		12/3/08	
	2009 Spring/Summer SHOWS		210	210	180	180	150	120	90	90	90	90	60	30	30	30		30	30	30	30	21	14	7	
KF/DE	Video Shoot	Jan or Feb	_	_	-	-	-	-			_	_	_		-	_	-	_			_	_	-	_	
DQ	Euro Train the Trainer - Spring 09 Canadian Roundtable	1/11/09		_	-	_		-					_		_		_							_	
KF	PTL Training	1/20/09			_	_		_	10/22/08						12/21/08			12/21/08						12/20/08	DJ & Lucie
SW	Hawaii Seminar	1/27/09					+		10/22/08				11/28/08		12/21/08	12/28/08	_	12/21/08	12/20/20		12/28/08	1/6/09	_	1/6/09	Art Directors
	ISSE - Long Beach	1/31/009							10/27/06				11/20/00	S	12/20/00	12/20/00	12	12/20/00	12/20/00		12/20/00	1/0/07		1/6/07	All Directors
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SW	Canbran Training	2/9/09		7/14/08		00/40/00		_	11/11/08	11/11/08		11/11/08	N 10		_			1/7/07	2					1/25/09	Naane Lajam
DQ	Takara Belmont Look & Learn	2/9/09		//14/00		08/13/08			11/11/08	11/11/08		11/11/08	12/11/08				ves							_	Lenny King
DQ KF	Belgium Show	2/15/09				08/13/08			11/11/08	11/11/08		11/11/08	12/11/08				yes								Angus M/Robert
NF	Sessions Artist Group Photoshoot	2/13/07	7,07.00	80400		00/20/00			11/24/08	11/24/08		11/24/08	1.002.000					1/23/09				2/1/00		2/15/00	Lucie
	aessoris Arisi Group Photosrioot	2/22/09	7/27/08	8/26/08		08/26/08			11/24/08	11/24/08		11/24/08	1/23/09					1/23/09		0		2/1/09		2/15/09	
EM	PMTS Caper Event	2/25/09	\sim	>	08/29/08	X	9/28/08		11/27/08	11/27/08	11/27/08	11/27/08	12/27/08			1/26/09		1/3/09	1/24/00	1/26/09	10400	2/4/09		2/18/09	Angus, Colin, DJ, Steph, Robert, Scott & Linda
SW	Korea Educator Training	March		#VALUE!	00/27/00	#VALUE!	7/20/08		#VALUE!	#VALUE!	11/2//08	#VALUE	12/2//08			1/20/07	2	1/3/07	1/20/07	1/20/07	1/20/09	2/4/07		2/10/07	nobeli, scoli a cridd
DQ KF	PMTS Color Training	3/1/09		#VALUE!		#VALUE!			#YALUE!	#YALUE!		# VALUE!					1							_	Lucia
	Montreal ABA	3/8/09	alten en e		from Croin	_																			Lucie
ND ND	Loeffier Color Evolve - Rochester	3/22/09		show request to 08/24/08	9/23/08	9/23/08	9/23/08		12/22/08	12/22/08		12/22/08	1/21/09		2/20/09	2/20/09	V	2/20/09	2/20/09	2/20/09	212212	3/1/09	3/1/09	3/15/09	
	America's Beauty Show	3/22/07	8/24/08	08/24/08	11/1/08	9/23/08	10/29/08		12/22/08		12/28/08	12/22/08	1/21/09	2/26/09	2/26/09	2/20/09	Yes	2/26/09	2/26/09	2/26/09	2/26/09		2/26/09	3/15/09	Angus M & ARCS
ND ND	Toronto ABA					7/27/06	10/29/08		12/20/00	12/28/08	12/20/06	12/26/06	1/2//09	2/20/07	2/20/09	2/20/09	_	2/20/09	2/20/07	2/20/09	2/20/09	2/26/09	2/20/09	3/21/07	nergus m a naco
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LB	Regional Banner & Image Wall	4/1/09								0									1	- 3				_	Dahad S Jaam
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ND ND	BSG Fargo Art of Hair Show Winnipeg ABA	4/4/09 4/5/09		show request t	10/6/08	10/6/08	11/5/08		1/4/09	1/4/09	1/4/09	1/4/09	1/4/09	ž		3/5/09	yes	3/5/09	3/5/09		2	3/14/09		3/28/09	Val, Stephen & Toby

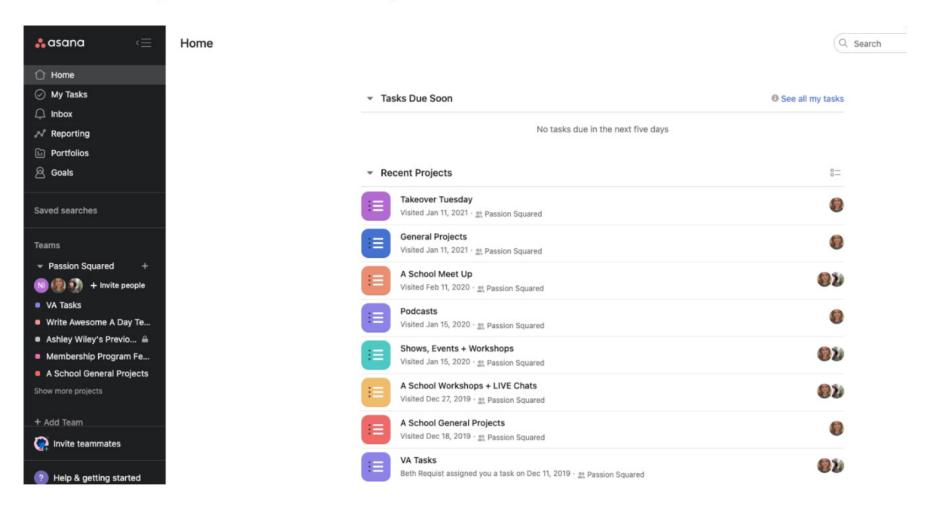


Project Management Tools: Google Sheets



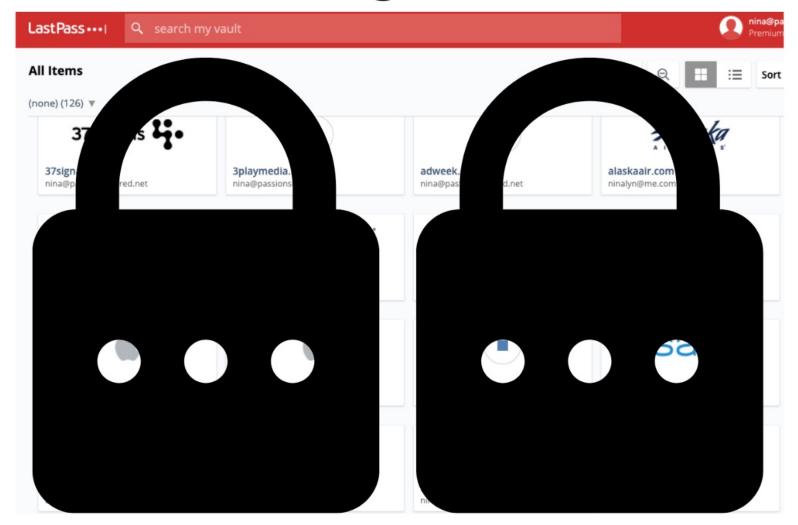


Project Management Tools: Asana



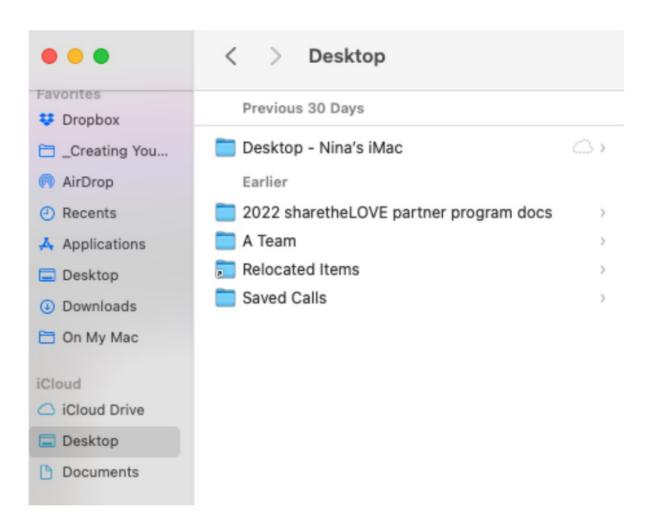


Stress-Reducing Tool: LastPass



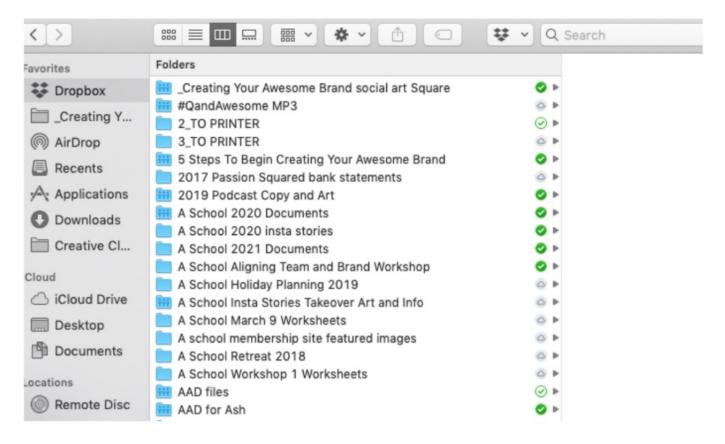


Computer Folders





Dropbox





Phone Albums









Phone Notes



Black history month movie of the week

Week 1 Triple Feature Madam cj doc Madam cj movie Hair love short

Week 2 King richard

Week 3 She Did That

Week 4 Hidden Figures





Leadership workshop

Part 1 Context

Intersection of brand, boundaries, leadership.

Examples of aligned and misaligned. Case study style.

Generational shifts World shifts

Well-being

Mental health care

Purpose

Values

Value/Worth

Flexibility/ 4 day work week

Safety













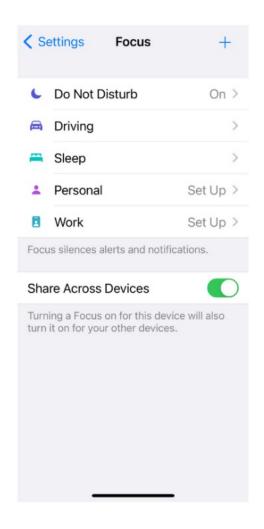






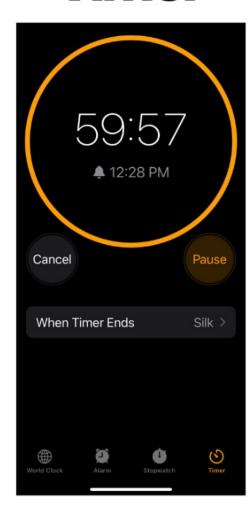


Focus aka Do Not Disturb



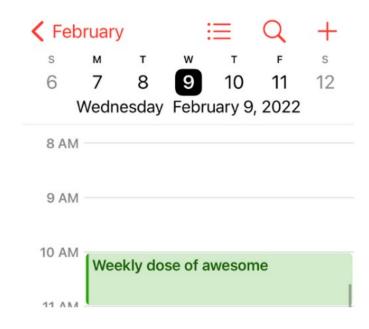


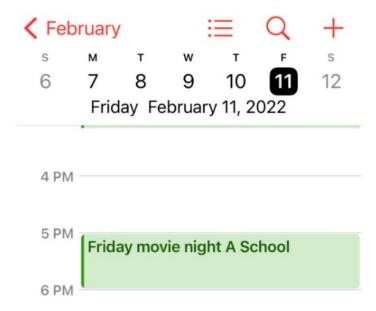
Timer





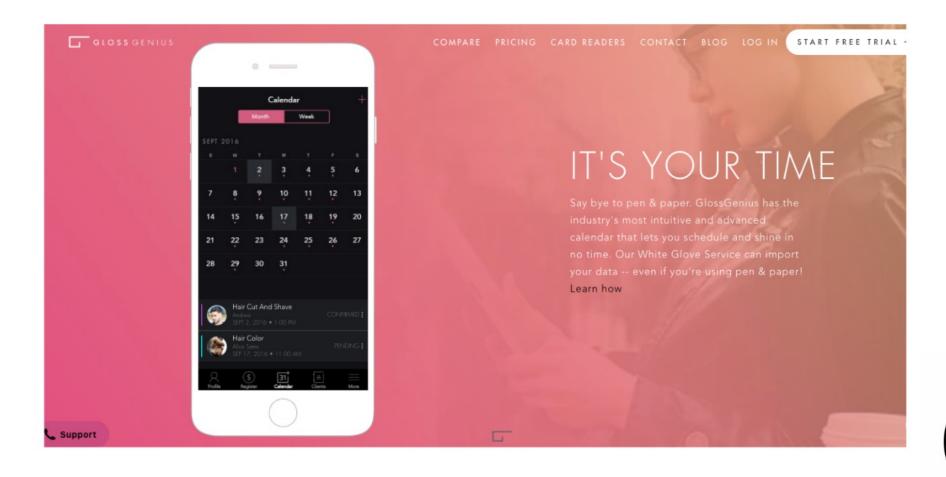
iCal or phone calendar







Salon Software/App





Email Platforms

Campaigns

Create Campaign

Current audience

#1 AAD (7am) >

Your audience has 1 contacts, 1 of these are subscribers.

List View Calendar View	N .	
View by Status	Q Find a campaign by name or type	Sort by Last updated 🕶
All	You can also search by all audiences.	
Ongoing		
Draft	February, 2022 (3)	
Completed	Morning Love Note 2/5 Regular · #1 AAD (7am)	Pause And Edit 💙
View by Type	Scheduled for Sat, February 5th 7:00	



Next Steps



Take some time to get clear on your blocks and planning style



Decide that creating a marketing plan matters to you



Choose one area of your business you want to start



Create and execute a marketing plan focused on that one area



Celebrate your major accomplishment + choose the next area





Change the system, change the result.





Creating + Executing Marketing Plans Workshop

Topic

Marketing plans

Teacher

Nina L. Kovner

Intention

Provide frameworks, systems, and processes to help reduce your overwhelm and increase your clarity, focus, and execution of your visions + plans.

