

Business Marketing

GUIDELINES / TEMPLATE MANUAL



For all team members
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Copywritten

Prepared by
VA USA Exec. Team

Prepared for
VA USA Employees

Introduction

The purpose of this document is to guide you to **marketing success**.

Our clients often ask for many different services in the realm of social media, marketing, and strategy. This document contains suggestions and virtual assist usa protocol for certain tasks.



Social media and Marketing is different and specific to each individual client and industry. It is important to remember this as you move through this document. These are guidelines and experienced suggestions. The client has the overall say in what happens with their social media marketing strategy.



This is not a set in stone document, please speak with your manager if you have any questions.



Contents of Manual

Overall, our main goal is to maintain the utmost professionalism and customer service to assist our clients in marketing.



Tips for getting started



Expectations regarding the outcome of marketing



Marketing plans and template

Tips for Getting Started

Staying on the same page with your client is crucial to success.

Here are some helpful tips for getting started.

Ask the client the following:

1. What platforms do you want to use?
2. Are you currently set up with those or any other platforms?
3. Do you currently have a brand developed? (If no, see future pages for tips)
4. Do you have high-res logos, branding guides, or photos you'd like to use on social media that you can send to me?
5. What is your main goal with social media?
6. Is there a current social media marketing strategy in writing? or is there a verbal one? (If no, see future pages for marketing plan documents)
7. How often do you want to post? (If they do not know, make suggestions based on their industry and competitive research - see future pages)
8. Would you like to review everything before it gets scheduled/goes live on your pages?
9. Do you currently have an automatted social media posting platform/application?
10. Are they currently using any ads? paid/promotions? If so, are they working? What keywords are they using?
11. Do your best to find their marketing analytics.



Do your research before asking any of the below questions. You should not ask questions that you already know the answer to. The questions below are also suggestions. It is advised to conduct a sweep of their social media before speaking with the client on this topic.



Expectations

As a virtual assistant service to our clients, our social media marketing goals are to assist the client to the best of our ability as a team promoting their company and services through social media.

We are however, limited to the functionalities of each platform. **You will find guidelines below on how to work through some issues that typically arise when working with clientele.**

Overall, our main goal is to maintain the utmost professionalism and customer service to assist our clients in social media marketing.



Facebook

Common issues with managing Facebook for clients.

1. Avoid using your personal information/profile to manage pages. Always use the dedicated VA USA Facebook Profile.
2. Ask the client to give you access to their profile or business page for management and monitoring.
3. If you have difficulties connecting a page or group to third-party schedulers because of security, ask the client to take this initiative.



Instagram

Common issues with managing Instagram for clients.

1. Utilize a client's dedicated email to create an account if they do not already have one. If your client doesn't have an email address to use, create a new one that they can have access to.
2. If you cannot sync Instagram to Facebook due to security reasons, consult your client that they will have to either do this themselves or sync up with you via phone/zoom.
3. Explain to your client that only certain sized images and videos can be used on Instagram.
4. We cannot guarantee followers on Instagram; neither a specific amount or specific increase by a specific date.
5. Buying Followers, Likes, and Comments will result in Instagram banning the account.

Marketing Plans

Included along with this manual is a marketing plan template. Businesses that use social media almost always have a specific goal in mind that they believe social media can help them achieve.

Clients often turn to their VAs to not only manage their social media accounts, but develop and implement a marketing plan.

While we cannot guarantee followers, we can advise and assist on implementing a plan that might work well for the client to achieve their social media goals.

Social Media Marketing Statistics 2021

- As of Q1 2020, 420 billion people are active on social media. ([Statista](#))
- In 2019, 90.4% of Millennials, 77.5% of Generation X, and 48.2% of Baby Boomers were active social media users. ([eMarketer](#))
- 54% of social browsers use social media to research products. ([GlobalWebIndex](#))
- Each person spends an average of 2 hours and 25 minutes on social networks and messaging. ([GlobalWebIndex](#))
- 1.3 million new users joined social media every day in 2020. ([Hootsuite](#))
- Millennials are logged on to social media for an average of two hours and 38 minutes daily, while Gen Z logs on for two hours and 55 minutes. ([World Economic Forum](#))

It is okay to make polite suggestions to clients, whether this is questioning their current strategy or suggesting one altogether.

Websites are at the forefront of marketing nowadays and it is imperative that their website and marketing efforts be cohesive.

Conducting Research

Once you have an idea of what your client would like to accomplish, you can begin to conduct relevant research.

Here are a few tips for conducting research on social media:

1. Ask yourself: What types of posts are best for accomplishing your client's goal?
2. Find out what type of posts perform the best on the platform you want to use.
(Example: Live Videos, Videos, Posts with long captions, etc).
3. Look at their competitors. What can you learn from them? What are they doing or not doing that is relevant to your client?
4. Look at the most popular social media accounts in the same industry as your client.
What are they doing that seems to be working? What could they improve on?
5. Research which schedulers/applications would work best for your client's work style and preferred posting platforms.
6. Find out who your client's customers are. What age range? What professions do they have? Find out which platform would be best to reach them and which platforms would be a waste of time.
7. Conduct research on their industry. What problems are your clients solving for their target audience? What works best for their industry and target market? For example, an interior design company would perform better on Pinterest, while it may not be the best use of time to focus on Twitter postings.
8. What are good statistics for their industry? What are good conversion rates for leads, emails, website clicks, etc.
9. Check out their website, is it functioning properly. What happens when a new lead comes to their website? Do they have call to action items front and center on their website?

When conducting research, make sure your client knows exactly where you are spending your time. Listen to them when they talk, have they given you the answers to some of these questions already in your initial call with them?

Marketing Plan Template

How to write a marketing plan with your client.



Start



Starts with a
Converation



Lead experience



Automations



Templates/Docu
ments



Write out a
strategy



Execute/Website
/Social Media

Marketing Plan

An annual marketing plan helps you set marketing on the right course to make your clients company's business goals a reality. Think of it as a high-level plan that guides the direction of your clients campaigns, goals, and growth.



Whether you are starting from scratch, editing an existing document, or just following a clients current document, this marketing plan can be of valuable information. When completed you should have a solid word document.

Starting from Scratch:

Be sure to not force any part of the marketing strategy on a client. Communicate, communicate, communicate.

Editing an existing plan:

Combining a clients current marketing plan and putting a new spin on certain aspects is a way to restart and rejump their marketing strategy. Make sure to incorporate what they currently have in order to be mindful of the work they may have already put in to play.

Following a clients lead:

It is okay to make suggestions. A client may not be fully using a robust marketing plan and may be missing aspects of the below text.

Here are a few introductory topics to starting thinking about:

- Conduct a situation analysis.
- Define your target audience.
- Write SMART goals.
- Analyze your tactics.
- Set your budget.



Whether you are starting from scratch, editing an existing document, or just following a client's current document, this marketing plan can be of valuable information.

Marketing Plan

To get started, read the below and analyze what steps you need to take, and/or what may have already been done.

Remember all clients are different and depending on industry and target audience your tactics will vary.

- **Conduct a situation analysis.**

What are the client's strengths, weaknesses, opportunities, and threats? (SWOT analysis)

- **Define your target audience.**

A buyer persona should include demographic information such as age, gender, and income. However, it will also include psychographic information such as pain points and goals. What drives the audience? What **problems** do they have that your product or service can fix? The biggest product/services solve a problem. What is your client's solution?

- **Write SMART goals.**

SMART goals are specific, measurable, attainable, relevant, and time-bound. This means that all the goals should be specific and include a time frame for which you want to complete them. Be sure these are reasonable expectations. We DO NOT guarantee any amount of followers in a specific amount of time.

- **Analyze your tactics.**

What are you going to do to help your client achieve these goals? Strategic goals such as posting on specific hours/days, or offering discounts on purposeful days. All of these should coincide with other marketing efforts such as when certain emails go out.

Ex: If the goal is to increase your Instagram followers by 15% in five months, your tactics might include hosting a giveaway, responding to every comment, and posting three times on Instagram per week and sending out an email campaign to compliment this.

- **Set your budget.**

Is your client looking to maintain a set number of hours dedicated to marketing?

Marketing Template

Where to begin? Utilize the marketing plan to complete the below and combine into a document.

1 Start with a Complete Business Summary

What makes the company tick?

What is the vision and mission statements?

2 Projects – Marketing

What projects need to be conducted in order to meet the overall marketing goals? Make sure to set deadlines and expectations.

3 Market Research

This element of your marketing plan will help you describe the industry you're selling to and your buyer persona. Who is the target audience?

4 Competitive Analysis

Price comparisons, network, offerings and services, etc. What are the differences, pros and cons.

5 Add in the SWOT analysis

See marketing plan for details.

6 What will your business offer your buyer personas that your competitors aren't already offering them? What makes your client stand out?



7. Budget

Make sure to include ad budgeting, hourly budgets, platforms, etc. Sponsored posts? Google Ads, FB Ads, LinkedIn, Instagram, etc.

8. Marketing Channels

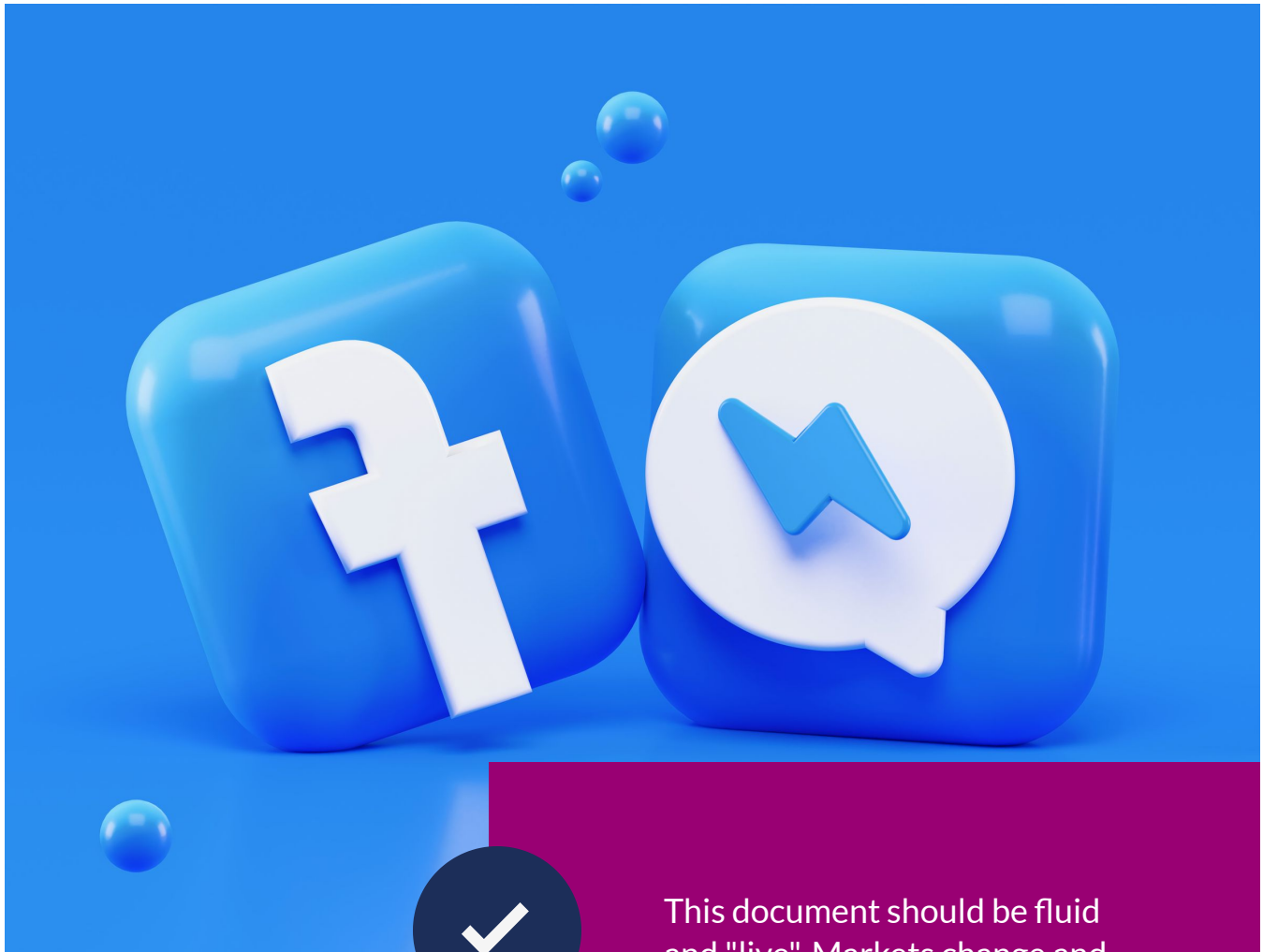
Platforms, campaigns, automations, integrations. This is an extremely important step in the implementation process. What is going to be set up in this web of marketing to obtain the overall goals. What means will be used? Social Media, Website, Lead Pages, Campaigns, Email, etc.

9. Analyze

What is currently being done and how can we improve upon it. What are the conversion rates? What does the audience respond best with, is it phone calls? Emails? SMM?

10. Final Next Steps, where do you being – make a timeline.

Remember to tweak things as you move along and obtain more data.



Execution

Now that you have all the tools at hand, it is time to being putting your marketing plan in place.



This document should be fluid and "live". Markets change and so do marketing plans.



Schedule meetings to check in on the progress.



Be proactive and innovative. If something isnt working make suggestive changes!