

# *brand strategy action plan*

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PREPARED EXCLUSIVELY FOR: STEADFAST BOOKKEEPING CO.

BRAND  
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# Quick Website Tweaks

*A few simple (and free!) one-time changes to the website to improve the user experience and increase conversion rates.*

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## 01.

The pop-up email list opt-in: Explain what the checklist does & why someone needs it.

Something like “Download the checklist of must-do weekly, monthly, quarterly & yearly tasks to keep your books in order and make tax time easier!”

## 02.

Make the WHAT more prominent on the homepage: It should quickly be obvious exactly what you do.

For example: “Steadfast Bookkeeping crunches the numbers so small business owners don't have. We become your accounting department by taking care of your bookkeeping, payroll and bill pay.”

- » Option 1: change the text in the quote image
- » Option 2: Format the text below to make that stand out more and be it's own paragraph.

## 03.

How many free consultation requests do you get from the website? I don't think requiring people to subscribe to your website to get the link to book a free consult is the best way to go. You want to make it easy for people to do business with you. I would suggest swapping the opt-in with a simple link to the booking page.

## 04.

Provide MORE options for users to sign up for your list. Suggestions: a static top bar in Navy and/or a pop up when they become idle or begin to exit the window. These options would be global and work on every page rather than only the homepage. Setting this up is a great task to let a VA handle.

- » [Sumo.me](#) – Wordpress plugin that has free and paid options starting at \$10/mo
- » [MailChimp Top Bar](#) – free Wordpress plugin

# Growing Your Email List

*Organic growth of your email list with people who are interested in the services and products you offer will be a key component to strong sales of your upcoming course.*

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## 01.

More ways to opt-in (see above!). You want to make it easy for people to opt-in and remind them frequently how to and what they will get in exchange.

## 02.

Use your social media profiles to promote what you have to offer. So rather than just listing your website, encourage people to sign up to get your bookkeeping checklist in your bio. Refer to it regularly in posts. This can also be swapped for any other new freebies, the link to sign up for the webinar, the link to your bookkeeping course, etc.

## 03.

Create a free email challenge! These are really popular and with tax time around the corner this could be a good one for you! You could do a 5 day tax ready email challenge with a series of 5 emails, each could hit on something important business owners need to do for taxes like W9s, mileage, what is tax deductible, etc.

- » Promote on your website, social media & in Facebook groups.
- » Perfect opportunity to use LeadPages!
- » This would be a great type of task that a VA could help set everything up.
- » This would be a VERY easy way to build your email list from the RTS webinar!
- » [Here is an awesome blog post on creating email courses](#)

## 04.

Actually start sending emails to your list. As it grows larger, it will be more important to stay in front of them. So starting while your list is small and mostly clients will be good practice.

Here's a few blog posts on ideas of what to send to your list:

- » [7 Creative Content Ideas for Your Mailing List](#)
- » [STARTING YOUR BLOG NEWSLETTER – THE WHO, WHAT, WHEN, + HOW](#)

# Rocking Instagram

*Instagram is probably the one platform that the creative entrepreneurs you want to work with are all on. If you can leverage using it for your brand, you can grow a strong and engaged audience.*

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## 01.

The hashtags you're using are relevant to your business, but if you search the hashtag, all of the images are yours. You want to target active hashtags that your target demographic is using. This was probably the single biggest impact for growing my account quickly.

Below are a few that may be a good fit for you to start using:

#savvybusinessowner                      #smallbusinessowner  
#risingtidesociety                      #communityovercompetition  
#lovemybusiness                      #entrepreneurs  
#ladyboss                      #womeninbusiness  
#makewavesmonday or #makeitworkmonday (on Mondays)  
#Tuesdays together (on Tuesdays)  
#Followfriday #Fridayintroductions (on Fridays)

## 02.

Try to keep your images consistent with your brand colors.

## 03.

An easy way to fill your feed regularly would be to post quotes, tips, etc

- » You can make a [free account on Canva](#) and use their template designs, customize things and then download it already in a square format.
- » Some content ideas:
  - Post the weekly & monthly tips for bookkeeping from your checklist! Then you can refer to opt-in to receive the free checklist.
  - People always love quotes – things on money, organization, taxes would all be a good fit.
- » Researching & creating these would be a great item for a VA to complete for you.

## 04.

Taking a course on Instagram to learn some of the basics could be really helpful to better understand how it can be a tool for your business.

[Instagram Authority](#) - a great free 5-day email course by Alex Tooby. I just finished this and highly recommend it!

# Leverage Facebook

*While Facebook may not be a huge growth tool, it does still matter. There's a few simple things you can do to maximize your presence.*

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## 01.

I don't think you need to do too much here, BUT because of the webinar, you will become visible and RTS has a huge presence within their Facebook group, so people will land on your Facebook page.

For that reason I think it's important for the week or two leading up to the webinar, you've got recent posts.

## 02.

Share the same content as Instagram, but not at the same time. I typically share to Instagram first, and then a few hours later or the next day, I use the share feature within Instagram to share to my Facebook Page. Sometimes I have to tweak the caption slightly, but overall this is very simple. This is also a good task for a VA to complete for you.

## 03.

It's easier to share articles, blogs, news, etc links on Facebook so sharing items relevant to bookkeeping is another great way to keep fresh content.

A VA could research and pre-schedule several weeks worth of content using a scheduling tool like [Buffer](#) or [Hootsuite](#). Both have free plans available.

## 04.

I don't think we hit on this much on our call, but I think being active in a handful of select groups on Facebook prior to your webinar and course launch to get some visibility and promote those things. Most groups don't allow a lot of direct promotion anytime, but they will have certain threads.

Here are the two I would recommend for you to start engaging in:

- » [Rising Tide Society](#)
- » [Savvy Business Owners](#)

# Webinar Marketing Strategy

*This is a sample roadmap of how to maximize the webinar to meet your goals of increasing social media following & email subscribers, while also helping presell your upcoming course.*

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## **Tuesday, March 1**

- » This is likely also when your article will come out (yay!). Post about the article on Instagram & Facebook page.
- » Be prepared for RTS to tag your Facebook page & Instagram account.

## **Wednesday, March 2**

- » Post to Instagram & Facebook - maybe a bookkeeping tip and mention you have a whole checklist available.

## **Thursday, March 3**

- » Post to Instagram & Facebook.

## **Friday, March 4**

- » Do a #fridayintroductions post on Instagram (hopefully with a new headshot!) so the RTS community gets to know you! Mention your free checklist, why it's awesome & how to get it.
- » Spend some time that day searching through that hashtag and engaging with others who are using it. The engagement part could also be tasked to a VA.

## **Saturday, March 5**

- » Post to Instagram & Facebook.

## **Sunday, March 6**

- » Post to Instagram - post something fun and connect it to bookkeeping in a silly way. Like a picture of doughnuts and talk about when buying doughnuts would be tax deductible. People go crazy over doughnuts on Instagram.

## **Monday, March 7**

- » Have course outline & presale page completed
  - Christina's [Cradle to Brave Course](#) is a great example of this.
  - [Teachable](#) is quickly becoming the most popular online course option, it also has a free option.
- » Post to Instagram for #makewavesmonday

## **Tuesday, March 8**

- » This is probably the #TuesdaysTogether March meeting, try to go to a local one & take a group photo for Instagram.

## **Wednesday, March 9**

- » Promote Webinar on Instagram & Facebook!
- » Send your FIRST email newsletter to your list (which has hopefully grown a little by now!)- promote the webinar, mention cool stuff happening at the end, but don't give away the details!

## **Thursday, March 10** - Webinar Day!

- » Announce the PRESALE of your course and offer a special discount to anyone from RTS who pre-purchases.
  - Example: regular price is \$297, use code RTS and save \$50 if you buy within a short window of 5-10 days.
- » Announce Giveaway - this can be whatever you want, but perhaps you offer that email subscribers will get an email to apply for a scholarship seat to the course.

## **Friday, March 11**

- » Post to Instagram & Facebook about how awesome the webinar was, share any replay info, mention course presale.

## **Saturday, March 12**

- » Posting optional.

## **Sunday, March 13**

- » Posting optional.

## **Monday, March 14**

- » Email your list again! It should have grown a lot by now, so stay in front of them.

# Resources

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## **Social Media Management & Strategy**

Sarah Todoroff - The Bold & Creative

hello@theboldandcreative.com

<http://www.theboldandcreative.com>

## **Virtual Assitant (MailChimp, LeadPages, Social Media Posting, etc)**

Brittany Weinfurter

<http://www.brittanyweinfurter.com/how-i-can-help/>

Jocelyn Michel

<http://www.sensiblebusinesssupport.com/work-with-me/>