



DIGITAL STRATEGY
SCHOOL

THINK LIKE A DIGITAL STRATEGIST

*A quick guide to making the
most of your online business*

FOR EVERYDAY ONLINE BUSINESS OWNERS

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INTRODUCTION: WHAT THE HECK IS DIGITAL STRATEGY ANYWAY?

WHAT IS DIGITAL STRATEGY?

A digital strategy is a plan designed to assess, measure and achieve your specific business goals through the use of digital tools, techniques and methodologies.

WHAT IS A DIGITAL STRATEGIST?

A digital strategist is a skilled expert that plans and oversees the strategic vision and implementation of a digital strategy.

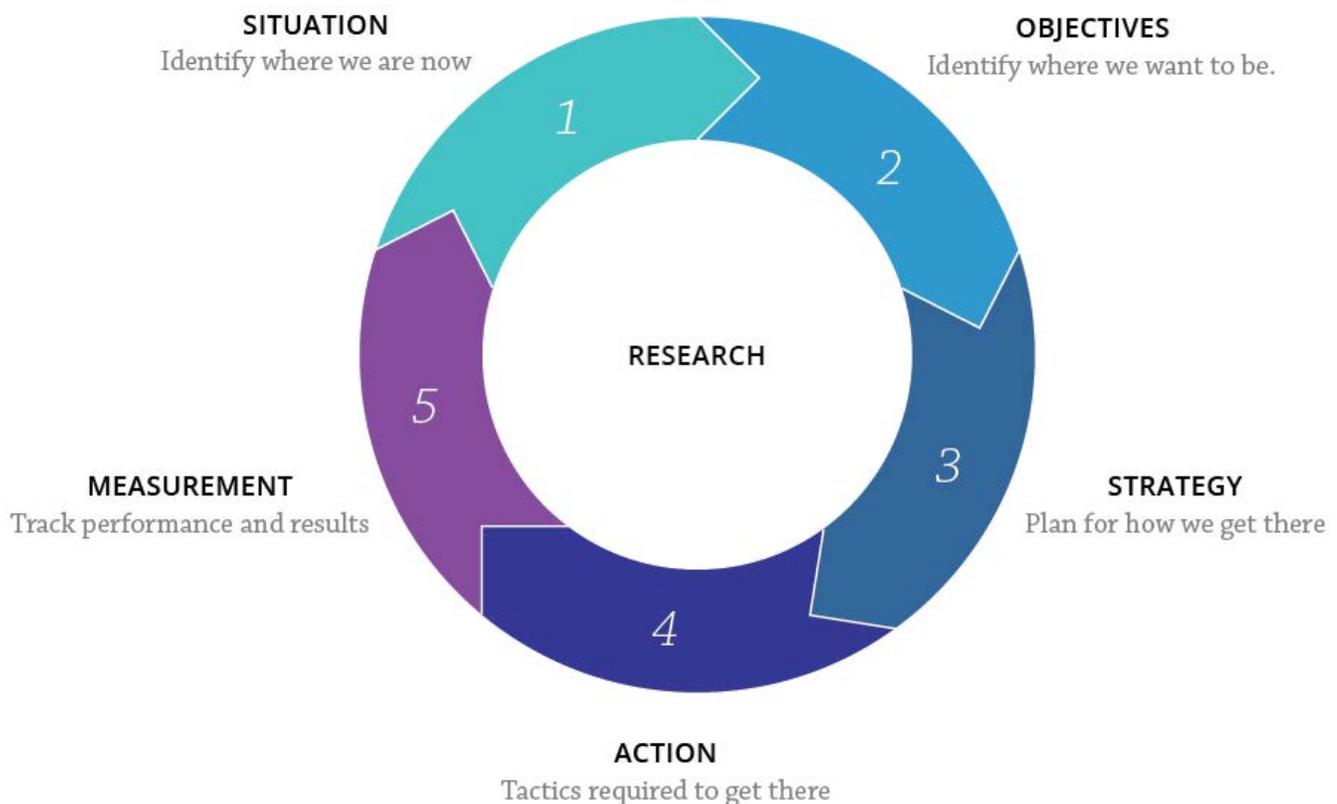
Do a Google search for *digital strategy*, you're going to find a lot of jargon and information that:

1. isn't terribly exciting
2. isn't easily digestible

As I began doing research into digital strategy, I came to the realization that **most of it was really boring**. Yeah, I said it. So many acronyms, so many different metrics... it was overwhelming! Inbound Marketing, Outbound Marketing, Content Strategy, SEO, SEM, Mobile, Pay-per-click, Facebook

Campaigns, etc. Where to begin? Most resources around strategy and marketing are pretty dry, and often geared at medium to large organizations.

I wanted to better understand digital strategy, and at the same time make it more digestible for other business owners, so I use a simplified version of PR Smith's SOSTAC® Planning System:



As I worked with more and more small business owners, I realized that I needed to make this process easily understood and approachable for my clients— without all the jargon.

As a solo business owner with training and experience in graphic design, branding, interactive design, and marketing, I was fiercely curious about how to create websites that actually made a difference to business owners.

What fun is it to design a beautiful website that has no audience or interest?

The obvious answer? Not very fun.

It's also not very fun for the person investing resources in a new website that gets them zero results.

It was only once I went to work at a small but savvy digital agency as a digital strategist that I really learned and understood what digital strategy was. I finally had a term to describe the whole concept of creating the strategic plan behind a design. There was competitive research, audience research, content strategy, design, copywriting, code, analytics, marketing, and everything in between. I felt like a digital Swiss army knife.

As I started my own company and began working with more solo and small business owners, I brought my insights from the small agency and studio environment to these projects. I no longer wanted to be a “web designer,” but a digital strategist. **I wanted my work to have more impact.**

I wanted to help my clients be way more effective, which meant that my

work was taking on much more than “design,” but was veering into strategy: business strategy, content strategy, marketing strategy... *digital strategy*.

I found myself coaching my clients if I could see that they were feeling overwhelmed or unsure. I was recommending tools to help speed up their workflow, and re-writing their copy to resonate better with their customers.

I worked with powerhouse entrepreneurs as their creative director for hire, seeing behind the scenes of their launches and marketing. I was able to gain tremendous insight into their successes, and got to lift the hood on different types of businesses to see what made them hum along.

The more clients I worked with and projects I collaborated on, the more I was able to notice patterns and outcomes, and identify some good “rules of thumb” when it came to getting the most out of online tools.

Over the years I’ve seen successes and failures, epic launches, and massive flops. I’ve seen what works, and where there’s room to grow.

As a small online business owner, you can’t afford not to be strategic about your website and online tools. Digital strategy can take you from *winging it* and *crossing your fingers* to having a much more intentional plan for your online success. You can move forward with confidence, and have real numbers and insights to back up your assumptions.

From your website to your customer experience to your products and services, digital strategy can give you a framework for setting goals, following a plan, and measuring results. It fosters a culture of testing and experimentation.

This guide is not intended to replace the work of hiring an experienced strategist, but will give you a new lens through which to look at your online business. You'll be better equipped and informed when hiring or collaborating with other professionals.

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SITUATIONAL ANALYSIS

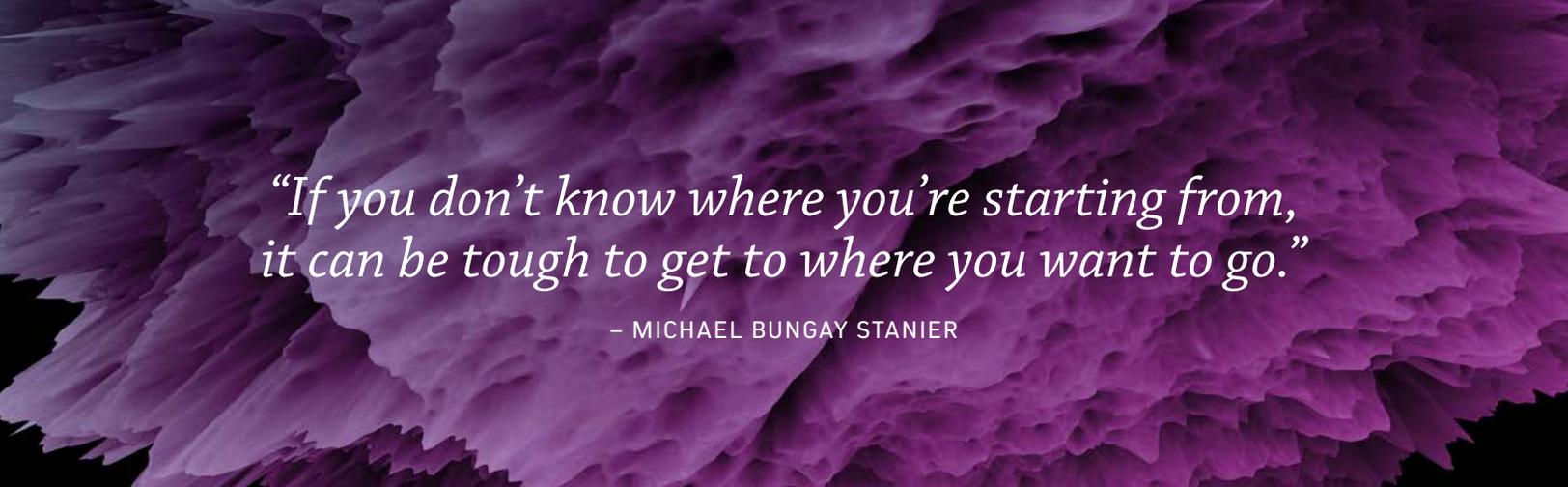
Where are we now?

In order to begin making big shifts in our businesses, it's essential to look at where we've come from, what we've accomplished, what customers we serve, and what kind of work is meaningful to us.

It's time to take a look at your business with an open-minded and critical eye, so you can begin to make changes in your business that support your greater goals (and delight your clients and customers along the way).

Some things to consider:

- How old is the brand, website, and/or products? Is this a new property, or extension of an old property?
- How are people currently accessing the site (mobile, desktop, etc.)?
- Current analytics, trends and results.
- Customer personas: Who is the ideal customer? Who is currently the most valuable customer? How do they currently find you? Where do they currently engage?
- Competitor Analysis: Who are the competitors? What keywords are they using? How effective are their websites, platforms, social media outreach? What is your competitive advantage, etc.
- Market trends, opportunities and threats.



*“If you don’t know where you’re starting from,
it can be tough to get to where you want to go.”*

– MICHAEL BUNGAY STANIER

Other things you could assess: What are you currently doing to measure your success? What services and products are you successfully selling? Where are their pain points, wasted time, or unhappy clients? What channels are you currently using to engage with clients? What are your competitors doing? What metrics are already being measured and tracked?

I typically look at these key pillars when I’m doing discovery work with a client and want to get a really clear picture of what we’re starting with:

BRAND

SOCIAL MEDIA

SEARCH

CONTENT

E-COMMERCE

MARKET

DESIGN

COMMUNICATION

Let’s take a closer look at what you’ll want to take into consideration when assessing your current situation.

BRAND

- Do you have a solid, established brand?
- How is your brand perceived in the market?
- Is there a consistent brand voice?
- What are the brand's mission/vision/values? Are they clear?
- How well known or recognized is the brand?
- Is there an identifiable wordmark or logo?

CONTENT

- How effective is the existing content (website copy, marketing copy, blog posts, newsletter etc.) in serving the brand? Connecting with customers?
- What products or services are available?
- Is there an inbound marketing strategy?
- Is there an established content strategy?
- Is there an email list and newsletter?
- Is there a blog?
 - What value is it delivering?
 - Can the posts be easily shared?
 - Do the posts lead to calls to action?

DESIGN

- How effective is the current design of the website and other materials?
- How user friendly is the website?
- Is there high quality photography or illustration?

- Is the design aligned with the brand positioning?
- Is the content easy to read? (headers, bullets, white space, etc.)
- Is the information organized in a way that makes sense?

SOCIAL MEDIA

- What channels are being used for social engagement?
- How well known is the brand across different social channels?
- What channels are the most effective?
 - Where are they most engaged?
 - Which lead to actual revenue?
 - Which drive the most traffic?
- How might you use social media in ways you haven't explored yet?
(webinars, twitter chats, periscope, etc.)
- Where does your audience spend time online? (Facebook groups, twitter chats, forums, etc.)
- Is it extremely easy to share your blog posts?
- Do you have a consistent schedule for social updates or posts?

E-COMMERCE

- What products and services are available for purchase?
- How clear and easy is the path to purchase?
- How delightful is the check-out process? (Is there a follow up process?)

- Is there solid automation in place? (Confirmation messages, receipts, integration between cart and email lists)
- How are you tracking customers?
- Do you have an upsell process?
- Are your purchase policies clear?

COMMUNICATION

- Is the brand voice and tone consistent across all channels?
- Have all points of communication been customized with brand assets and voice? (automated emails, thank yous, confirmation emails, etc.)
- Are you customers and prospects clear about the value of your products and services?
- How easy is it to contact you?
- Is there any formalized communications plan?

SEARCH

- How do clients/customers/prospects currently find you?
- Are there any paid campaigns in place? (Google adwords, FB ads, Youtube)
- What are the greatest sources of referral traffic?
- Are you regularly checking your analytics?
- Are there any goals set up in Google Analytics?
- How optimized is your website for on-site SEO?

MARKET

- What are the current market trends, opportunities and threats?
- Is there a large enough market demand for this product/service etc?
- Are there potential collaborators, partners and affiliates?
- What is the audience begging for?
- How satisfied are the current customers? Are they evangelists for your products and services?

TAKE ACTION:

- Assess your current situation honestly.*

While you don't necessarily have to answer all of the questions in the situational analysis, I do recommend going through and determining some key areas that can use improvement. Make sure you have a really good picture of what's currently happening so you can create goals that make sense for your business.

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OBJECTIVES

Where do we want to be?

Depending on the nature of your business, and how long you've been around, you're going to have your own unique set of goals and objectives. Start with some general overall business objectives, and then get more specific with SMART goals.

Here are some examples of common *overall* objectives:

- Increase brand recognition
- Increase “wow factor” for new site visitors
- Improve retention rates of membership or continuity program
- Increase list size and grow audience
- Increase word of mouth referrals
- Streamline and automate sales funnels
- Reduce costs, inquiries or returns
- Increase sales
- Improve online customer experience

SMART GOALS

You're going to want to set some SMART goals so that you can measure the effectiveness of your strategy.

SMART goals are:

SPECIFIC / Answer the six "W"s: who, what, where, when, why, which

MEASUREABLE / How much? How many?

ATTAINABLE / They may "stretch" you but are still feasible.

REALISTIC / It should be possible and sensible to the business.

TIMELY / There should be a time-frame for when the goal can be achieved

Here are some examples of common SMART objectives:

- Increase mailing list size by 600 by the end of 2015
- Increase traffic via social media sources by 10% next month
- Increase sales of digital product to \$500 monthly by end of 2015

TAKE ACTION:

- Set 3-5 key objectives for your business.*

I recommend having a combination of both overall objectives and smart goals for your business. Choose 3-5 key objectives that you can focus on over the next 3-6 months.

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How are we going to get there?

Now, obviously every business's strategy is going to be somewhat unique, but there are some go-to strategies that I've seen work time and time again for many types of businesses.

Examples of effective high level strategies:

- **Re-branding and re-positioning**
Re-defining your brand voice, new brand identity work, etc.
- **Strategic partnerships**
Identify market leaders and partner with potential collaborations via webinars, guest posting, co-creation, co-promotion, etc.
- **Search engine optimization**
Optimize for mobile marketing and optimization.
- **Communications Strategy**
Creation of editorial calendar, social media strategy, newsletter frequency.
- **Business (re)modeling**
Consider alternative business models such as creating productized services, online courses or programs, changing distribution models, etc.
- **Streamlining and automating marketing funnels**
Custom landing pages for products, email automation, cart integration etc.
- **Design or re-design products/services**
May also involve upgrading or removing products and services.

CUSTOMER JOURNEY

Below is a digital marketing overview that outlines the basic strategies and tactics that you'll want to focus on based on where the customer is on their journey (from awareness of your product, to being a happy and loyal customer).

	AWARE ATTRACT	CONSIDERING ENGAGE	CONVINCED CONVERT	LOYAL DELIGHT
OBJECTIVES	Build brand awareness and attract new customers, visitors, influencers, etc.	Build trust and engage with audience, persuading them to take the next step to purchase.	Optimize sales funnels and capitalize on segmentation and marketing automation.	Delight existing customers, keep them satisfied, and turn them into advocates.
STRATEGY	Publish and promote content , enable sharing, and draw people to your platform. Use both paid, earned and owned media to reach a wider audience. Use customer personas to identify optimal communication channels.	Use content marketing to become a reliable source of valuable information for potential customers. Use customer profiles for more relevant segmentation and understanding of personas. Design customer journey.	Define approach to conversion rate optimization . Define a brand communication strategy. Review analytics, current customer feedback, social engagement, etc. for insights into optimization.	Create long-term relationships with existing customers, build loyalty and create raving fans. Social proof, repeat sales and referrals are essential. Social sharing is also key for word-of-mouth advocacy.
ACTION	<ul style="list-style-type: none"> <input type="checkbox"/> Inbound marketing (content creation) <input type="checkbox"/> Search Engine Marketing and Optimization <input type="checkbox"/> (Re)branding & Positioning <input type="checkbox"/> PR + influencer activities <input type="checkbox"/> Social media marketing 	<ul style="list-style-type: none"> <input type="checkbox"/> Create editorial calendar <input type="checkbox"/> Create relevant content assets <input type="checkbox"/> Optimize landing pages <input type="checkbox"/> Personalize customer journey <input type="checkbox"/> Create content upgrades for advanced segmentation <input type="checkbox"/> Engage with customers (social) <input type="checkbox"/> Create outreach plan 	<ul style="list-style-type: none"> <input type="checkbox"/> Optimize sales funnels <input type="checkbox"/> Use marketing automation to improve purchase path <input type="checkbox"/> Conduct A/B testing <input type="checkbox"/> Use retargeting and site personalization <input type="checkbox"/> Optimize internal processes 	<ul style="list-style-type: none"> <input type="checkbox"/> Map all customer touch-points <input type="checkbox"/> Review customer satisfaction <input type="checkbox"/> Personalize communication for existing customers (email) <input type="checkbox"/> Identify opportunities for incremental sales or upsells <input type="checkbox"/> Engage with existing customers (create unique experiences)
METRICS	<ul style="list-style-type: none"> • Unique visits • Value per visit • Fans and follows • Social mentions 	<ul style="list-style-type: none"> • Leads • Inquiries • Time on site • Shares, comments, likes • Engagement 	<ul style="list-style-type: none"> • Sales, Revenue, Profit • Order Value • Landing page bounce rates • Cart abandonment/ conversion 	<ul style="list-style-type: none"> • Customer satisfaction • Referrals • Repeat purchases • Advocacy • Affiliates

AWARENESS: they're just discovering your business (*attract them*)

CONSIDERING: they're considering your products & services (*engage them*)

CONVINCED: they're convinced or want to learn more (*convert them*)

LOYAL: they're your advocates, raving fans and influencers (*delight them*)

TAKE ACTION:

Decide on 3-5 strategies to help you meet your goals.

Choose 3-5 key strategies that you can implement over the next 3-6 months.

Here are some specific strategies I've seen work really well:

- Simplify by minimizing the number of pages that a potential client needs to visit in order to make a purchase (or get more information)
- Automate marketing funnels (reduce the need to send custom emails)
- Create custom landing pages for your email newsletters
- Produce valuable free content (inbound marketing) to nurture your audience

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What tactics will we use?

Tactics are the specifics of how you will implement your strategy: the specific actions that you'll take, what tools you'll use, when and how you'll use them.

- **Re-branding and re-positioning**

Hire brand partners (designers, copywriters, brand strategists, etc.)

- **Strategic partnerships**

Contact partners or collaborators and develop tailored content for your audience(s). Guest post on relevant websites, and arrange written and/or podcast interviews with key influencers in your niche etc.

- **Search engine optimization**

Identify keyword strategy and modify website as required (hire an expert to implement this for you if SEO is going to be a major focus of your strategy). Set up goals in Google Analytics, clean up on-page SEO, decide on paid vs organic campaigns.

- **Communications Strategy**

Create and implement editorial calendar, create and curate relevant content across different channels, and establish a plan for how you communicate with your email list (frequency and format). Decide which key social media channels you'll use to engage with your audience: Facebook, Twitter, LinkedIn, Quora, Reddit, Youtube, Pinterest, Instagram, Tumblr, etc.

- **Business (re)modeling**

Identify new opportunities for revenue generation. Create product matrix, and consider new ways to deliver value.

- **Streamlining and automating marketing funnels**

Custom landing pages for products, email automation, cart integration etc.

- **Design or re-design products/services**

May also involve upgrading or removing products and services.

You'll want to decide on what social media channels make the most sense for your business, and how to best engage with your audience. Create a content marketing strategy, and begin to streamline specific company systems and processes. This could mean switching email service providers to allow for much-needed features, or improving analytics tools, or identifying and using any number of social media management tools. The idea is not to use every single social media platform, but to identify the ones that make the most sense and have the best return on investment (ROI) given your goals.

This might mean reaching out to specific entrepreneurs, companies or bloggers to create relationships, partnerships, or opportunities, or to make a specific request (share an article or guest post, co-create a webinar, request an interview, etc.). It might also mean creating a specific campaign or Facebook ad that leads to a specific landing page for conversions, or even creating a webinar or free video series, or even a specific blog series that is part of a lead-up to a product launch.

Here are some examples of tactics that I've seen work well:

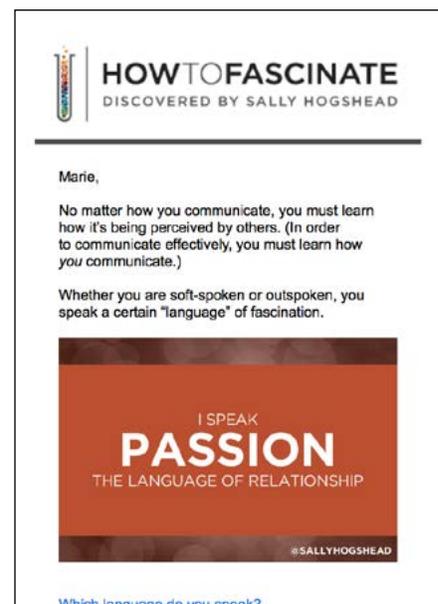
□ CREATE CUSTOM LEAD MAGNETS

Produce supplementary content that attracts your ideal customers. These can include: ebooks, whitepapers, downloadable kits, webinars, podcasts, videos, an email educational series, a video series, etc (and to a lesser extent, your blog posts). Your lead magnets are content that speaks directly to a curiosity or need/problem that your most valuable customer has. No need to create every type of lead magnet: start with one, and tie it into your newsletter opt-in. An easy first lead magnet to produce is an ebook, downloadable resource or checklist, or even an infographic.

□ USE CUSTOM FUNNELS AND EMAIL AUTO-RESPONDERS

Create different autoresponder sequences that are better targeted at each of your ideal customer stages. *(Sally Hogshead does an amazing job with this - 46 unique funnels based on fascination advantage!)*

This way you can avoid sending emails that promote a product your customer has already purchased, and tailor more relevant content to your audience.



□ **ADD CONTENT UPGRADES TO BLOG POSTS**

At the bottom of your most popular (or recent) blog posts offer a “content upgrade.” If you think of your blog post as the “what,” think of your content upgrade as the “how.” This could be in the form of an additional checklist, resource, ebook, etc. (“Sign up to get the checklist”, “sign up for the full interview”, etc.).

□ **ADD A CALL TO ACTION TO BLOG POSTS**

Do you have a product or service that you’ve recently launched? At the bottom of your blog posts, insert a visual call to action that leads the reader to your related product/service.

□ **BUILD AUTHORITY THROUGH STRATEGIC PARTNERSHIPS**

Whether it’s guest posting, getting interviewed, doing joint webinars, or being featured on other blogs, you can really begin to elevate your brand by partnering up with industry leaders and influencers. Create and pitch blog posts as well as podcast, video, radio, or print-based interviews.

□ **DEVELOP A SOCIAL MEDIA STRATEGY**

It’s pretty rare that a social media presence isn’t a huge benefit to online businesses. Pick and choose a few key platforms that make sense for how you best reach your audience, and how they want to be reached. It’s better to use a few very effectively than to spread your time and energy across every single one. How do you know which ones make the most sense for you?

Experiment, measure and track followers, engagement and conversions.

Make friends on your social networks, get to know other bloggers, and observe what others in your field are doing. Make “friends” with everyone, even your competitors (who may become future collaborators).

Twitter: Follow (and engage with): potential clients, potential joint venture partners, people that will help spread your message, and followers of your rivals. Run twitter profile searches of people who might be interested in your website and offering.

Facebook: may be an opportunity for you to reach and interact with your potential clients via Facebook groups. Status updates with questions have been shown to increase engagement. Tap into their pain points, and find out what they’re struggling with. It’s a great platform for *social listening*.

- Run a few Facebook Ads to target your target audience. Test different types of campaigns: promoted posts, sidebar ads, etc.
- Post relevant, educational, or inspirational content related to your industry.

Quora: Look for questions related to your industry and help with answers (In depth detailed answers are usually more effective.)

- If relevant include a link back to your pre-launch page (do not abuse this!)
- Build up a following of people who look to you for advice and expertise.

LinkedIn: Join LinkedIn groups related to your industry. They usually have like minded professionals and discussions closely related to your niche

Participate in LinkedIn Answers. Similar to Quora you can contribute your expert opinion to help answer other people's questions. Create a company page to establish your businesses presence.

Pinterest: One of the fastest-growing websites (over 10 million unique visitors currently), Pinterest is an excellent platform to take advantage of because it actually converts browsers into buyers. You can drive a lot of inbound traffic back to your website, you can easily integrate it into your website and other social channels, and you can discover new trends.

Instagram: This is a great tool for demonstrating your “company culture,” lifestyle, beliefs, etc. It is such a great platform to connect with people more deeply by showing them behind the scenes of your life and business.

Periscope: Periscope is a great platform for connecting with people via live video streaming. If you're comfortable on camera, Periscope can be a great way to give value to your viewers, and show people how you work and what you're up to. It's a great channel for engagement and connection.

TAKE ACTION:

Decide on 3-5 tactics that support your strategies.

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MEASUREMENT

How will we measure performance and results?

How do you determine if your new (or current) website design is a success?

How do you decide which metrics to track? There are:

- Measuring Key Performance Indicators (KPI's)
- Tracking and monitoring social media engagement
- Tracking and monitoring website traffic
- Perform usability testing
- Analytics and insights: Google, Pinterest, Facebook Insights, etc.
- 30, 60, 90-day planning

Measurement, tracking and testing are how we determine whether or not our business goals are being met and helps us gain insight into customer behavior. Now before you get hung up on all the metrics and data (are your eyes glazing over yet?), I will say this: *the key to measurement is people and behavior.*

Data is meaningless without context.

Start small and iterate. Some tracking is better than none; you don't have to measure and track everything, but having some benchmarks to start off with will be very helpful.

- Google Analytics and Webmaster tools are the best and easiest places to start, both of which are free! Ideally your client is already tracking their current traffic with Google Analytics. If they aren't, make sure to get that installed ASAP! Even minimal analytics are better than none.
- Most social platforms also have built-in analytics and insights, so you should be able to gather insights from your various social platforms (Twitter Analytics, Facebook Insights, Pinterest Analytics, etc.).
- Identify what stage of the customer journey needs focus. Are you trying to increase awareness and build an audience? Or are you optimizing for conversions? Depending on both the businesses goals and the stage of buyer awareness, you'll want to track different metrics.

The only way to know if your marketing and related efforts are effective is to measure, track and observe changes over time. Is there increased engagement with certain types of posts (Facebook, Blog, Instagram, etc.)? Has there been more traffic and conversions since running a specific marketing campaign? Have you noticed increased mentions or engagement of your brand since outlining your social media strategy? Have we increased organic search results with our SEO and content strategy efforts?

There are many different metrics to track; sometimes this can be as simple as tracking followers monthly in a spreadsheet, and creating insights based on

specific posts, mentions etc., while other tracking can be much more complex. Start with what you know!

TAKE ACTION:

- Decide on 3-5 things you can start tracking today to help you measure your success.*

SUMMARY

It's a process.

Beyond the strategies, metrics and tactics, running a successful online business really comes down to *how you leave your prospects and clients feeling at each touchpoint.*

EMPATHY

You must understand your users/customers/visitors, and more importantly, be able to get inside their heads. Do you know what makes them attracted to you? Do you know their pain points inside and out? Begin seeing *everything* from the lens of your ideal customer/client, and ask yourself “*why should they care?*”

SIMPLICITY

Keep things simple, and make sure that it's painfully obvious: what you do, how they can work with you (or purchase from you), or learn more about what you can do for them. Focus on one key call to action per page.

VALUE

Earn your customer's trust by providing tremendous value. Whether through blog posts, newsletters, or free resources, empower your customers through education and generosity. Help them reach their goals and you'll earn their trust.

EXPERIENCE

Create an unforgettable client or customer experience. From first contact, to purchase, to repeat customer, to raving fan, make sure you've created an experience that takes into account each stage of a customer's journey.

From your website to your customer experience to your products and services, crafting a digital strategy can help you assess your needs, get clear on your goals, and create an actionable plan to get measureable results.

ABOUT THE AUTHOR

[Marie Poulin](#) is a designer and digital strategist who loves helping people grow online businesses. With a love for online programs and courses, she co-founded [Oki Doki](#) with her partner Ben, where they help people ideate, create, beta-test, launch and market online programs with their platform, [Doki](#).

She founded [Digital Strategy School](#) to help designers transition into strategists, so they can become more valuable assets to their clients (while increasing their own bottom line).

She's on a mission to make strategy more approachable to everyday people, without all the jargon.