



Our Marketing Process

Everything to expect when you sign us - as your Strategic Marketing Partner.



When working with our team, you should expect clear visions, exciting strategies, and most importantly results! This is how we accomplish just that:



Step 1: First and foremost, we will work together to **Discover Your Needs**. By looking at where you are and where you aim to go, we can determine the most effective strategy for you. This starts with an “*Initial Marketing Strategy Consultation*” and our “*New Marketing Client Questionnaire*.”

Step 2: Next, we will work collaboratively to **Determine Your Budget**. In facilitating the process, we will analyze your recent financial activity (the most prior 3 months) and suggest a budget accordingly. While we recommend allocating anywhere from 8%-18% of your gross revenue, the exact number will depend on your growth eagerness, current margins & expenses, as well as the specific solutions that will best serve your organization.

Step 3: Once we establish the project scope and budget, we will jointly **Set our Expectations** for what success looks like. In our role as your strategic partner, Holistic Business Solutions acts as your Chief Marketing Officer. That means we will handle the implementation and execution of **your** marketing plan. To best accomplish this- we will put in place a 3-month retainer**- Equivalent to your determined budget. Your budget will then cover all applicable costs (Pay Per Click, SEO, Booth Rentals, Printing, placement costs, Website builds etc.) including the HBS management fee. Before any checks are written HBS will provide you with an expense and project proposal; upon your approval we accept your retainer and do all of the work to put the plan in motion.

**Retainer's can be paid in a lump sum or 3-Equal installments.

Step 4: Marketing is most successful when it is done deliberately, consistently and over time. For that reason, we ask you **Plan for A Long-Term Relationship**. At the end of the initial 3 months, we will reconvene to discuss what worked and what didn't. Additionally, we will determine new goals (or maintain current ones) and budget for the next 3 months- putting in place a new retainer. We will rinse and repeat using our S.I.M.P.L.E process.



Step 5: Our **S.I.M.P.L.E** approach and understanding **exactly** what you will get from us as your strategic marketing partner.

Exactly What You Want

- Campaign Implementation and Management
- Exclusivity agreement- We will not market the same or similar service in your zip code or any bordering zip codes.
- Quarterly Strategy Sessions
- Phone/Email Support
- Digital Solutions
- A dedicated team using a S.I.M.P.L.E. approach working as **YOUR** Chief Marketing Officer

Strategize- We will be an active part in determining the best strategies, tools, and tactics to achieve your goals.

Implement- Whether designing a brochure, placing an ad, or employing SEO it is our job to put handle the particulars.

Monitor- We will actively monitor the progress of each campaign to continuously align with your goals.

Pivot (as needed)- Some campaigns work perfectly right away others take time to get right. There is no perfect formula, but we can find the recipe that best suits you.

Listen (to feedback)- From sales reports to customer reviews we will listen to the data and respond accordingly.

Expand (upon what works)- As we find the sweet spot(s) we will increase our efforts in that/those directions.

