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WOMEN IN FAMILY BUSINESSES

Heritage Business Strategies for Sustainable Development

Work package 3

Training Programme For Leader Women in Europe Family Businesses

2022-1-SE01-KA220-ADU-000087596

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HERITAGE BUSINESS STRATEGIES

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MARKETING & SALES WITH A HEART: PROMOTING YOUR FAMILY BUSINESS

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1. Introduction

Women running a family business often encounter numerous difficulties in marketing and sales management, especially when they find themselves in scenarios such as being a first-time starter, suddenly taking over the business due to illness or bereavement, or caring duties, or issues related to gender discrimination, and/or migration and racism. In these circumstances, several challenges may arise, impacting their sales management efforts.

Throughout this section we will give you TIPs about strategies you can implement to overcome some of the challenges you may encounter when running a family business and when implementing Marketing and Sales management.

One common challenge is the limited marketing and sales experience that comes with being a first-time starter or abruptly taking over a business. Without prior knowledge or experience, navigating the marketing and sales process can be daunting. Developing effective strategies, understanding customer needs, and building a strong customer base become more challenging tasks.

Additionally, inexperienced entrepreneurs may find it challenging to build industry networks. Limited connections within the industry can hinder their access to potential customers, suppliers, or distribution channels. Building partnerships and establishing a robust network becomes more difficult, making it harder to expand their reach and tap into new opportunities.

Discrimination and bias add another layer of difficulty for some women entrepreneurs, particularly those who have migrated and who in addition may face racism. Discriminatory practices can impact their ability to secure sales opportunities, establish partnerships, or gain trust from customers or suppliers. Overcoming these biases becomes crucial to building a successful marketing and sales management approach.

Language and cultural barriers can also pose significant challenges for women who have migrated and are running a family business. Language barriers hinder effective communication with customers and understanding their needs. Cultural differences can impact marketing efforts and building relationships. New entrepreneurs may struggle to connect with their target audience, leading to missed opportunities for sales and growth.

Limited resources and funding can further exacerbate the challenges faced by those running a family business. Starting or taking over a family business often comes with financial constraints, limiting investments in marketing and sales activities. Insufficient resources make it difficult to reach and attract customers effectively, hindering sales growth.

Regulatory and permit challenges also pose significant obstacles, especially for migrants starting a small family business. Navigating complex bureaucratic procedures to obtain necessary permits and licences can be time-consuming and overwhelming. Additionally, encountering discriminatory practices within the regulatory environment further hampers progress, making it even more challenging to establish and operate the business effectively.

Balancing multiple responsibilities is an additional challenge that women in family businesses often face. Statistics show that many juggle their professional responsibilities with caring duties for children, elderly family members, or sick relatives. Managing these responsibilities alongside sales activities requires effective time management strategies and the ability to prioritise tasks effectively.

Addressing these difficulties requires a multi-faceted approach that includes support, resources, and tailored solutions. Initiatives focusing on providing training programs specifically designed for women entrepreneurs can enhance their marketing and sales skills and knowledge. Mentorship opportunities allow them to benefit from the guidance and expertise of experienced professionals in navigating the marketing and sales landscape. Networking events and communities create avenues for connecting with like-minded individuals, sharing experiences, and accessing valuable resources.

Efforts to address systemic barriers and biases are also essential. Creating an inclusive business environment that embraces diversity and fights against discrimination is crucial. Providing access to funding, grants, and resources specifically aimed at supporting women in family businesses can help alleviate the challenges posed by limited resources.

Overall, empowering **women, like you,** in family businesses to overcome these challenges in marketing and sales management requires a combination of targeted support, accessible resources, and initiatives aimed at breaking down barriers. This section will give an introduction to some of the main topics related to Marketing and sales, and suggest related activities, tools and free online templates, resources and further reading to get you started.

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2. Skills & Knowledge Table

The content in this module is linked to the BOSS Competences Framework (WP2) and will offer you introductory information and tools to develop the following skills and knowledge:

CONTENT	LEARNING OUTCOMES	
	SKILLS	KNOWLEDGE
Introduction to marketing:	Entrepreneurial skills, communication	Marketing, Digital literacy, Planning
Marketing Management: Marketing Strategy & Plan	Entrepreneurial skills	Marketing, Digital literacy, Planning
Marketing Management: A deeper understanding to the tools needed	Entrepreneurial skills	Marketing, Digital literacy, Planning
Understanding Consumption	Entrepreneurial skills, Communication & networking & negotiation	Marketing, Digital literacy, Planning
Sales Management	Entrepreneurial skills, Communication & networking & negotiation,	Time management & Planning, Digital literacy, Risk-taking
Supply Chain Management	Entrepreneurial skills, Communication & networking & Negotiation,	Time management & Planning, Digital literacy, Risk-taking
Networking & sustainability	Entrepreneurial skills, Communication & Networking & Negotiation Emotional intelligence, Persistence,	Time management & Planning, Digital literacy, Risk-taking
Brand Management: Branding	Entrepreneurial skills	Marketing, Brand management
Brand Management & Communication: Storytelling & brand communities	Entrepreneurial skills, Communication & Networking	Marketing, digital literacy
Social Media Management	Entrepreneurial skills, Communication, Networking	Marketing, Digital literacy, Planning
Legal Aspects Checklist (Advertising law, Ethics, Data Protection and Privacy,Copyright & Copyleft)	Entrepreneurial skills, Communication & Networking & Negotiation, Self-organisation	Digital literacy, Marketing, Risk-taking

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3. Marketing & Sales with a Heart: Promoting Your Family Business

3.1. Introduction to Marketing

Summary of the chapter:

This chapter is an introduction to marketing. We are discussing the difference between sales and marketing and we are focusing on the marketing principles which are the base to develop a marketing strategy (from 4Ps to 7Ps). Today, we are talking about marketing 3.0, human-centric marketing, and the transition to Marketing 4.0 which uses the new technologies of the digital world to better understand consumers' decisions. It may be stated that Marketing 4.0 represents the entry of companies into the digital era and that marketing initiatives are focused on the creation of suitable material for consumers and a seamless integration of online and offline engagement.

Tools or Keywords
Definition of marketing, 4Ps-7Ps marketing principles, Marketing Vs Selling, digital marketing, SEO, SEM.

3.1.1. Introduction to Marketing

Philip Kotler, also known as the father of Marketing, defined marketing as "the science and art of exploring, creating, and delivering value to satisfy the needs of a target market at a profit. Marketing identifies unfulfilled needs and desires. It defines, measures and qualifies the size of the identified market and the profit potential."

While the American Marketing Association (AMA) defines marketing as " the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. "

3.1.2 The principles of marketing

Principles of marketing, often known as marketing principles, are accepted marketing concepts that businesses utilise to create successful marketing strategies. We base our strategy for promoting products on these guiding ideas. We may effectively promote either products or services by using marketing principles.

The 4Ps of marketing: **Promotion, Product, Place**, and **Price**, play a major role in delivering the customers' needs at the right time and the right place. Philip Kotler says, "The most important thing is to predict where clients are going and stop right in front of them".

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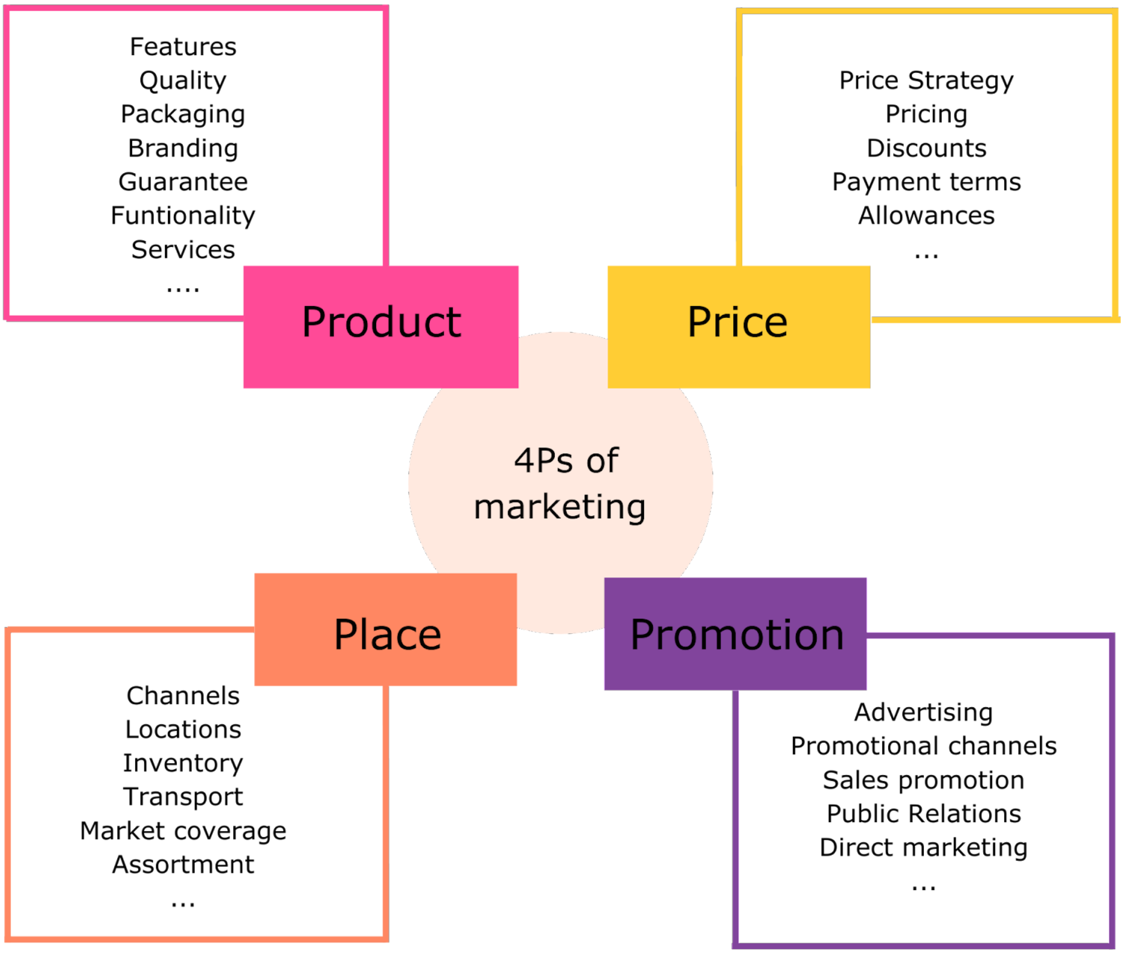

The 4Ps of Marketing, Marketing Mix

"The 4Ps were designed at a time where businesses were more likely to sell products, rather than services and the role of customer service in helping brand development wasn't so well known." However, the strategy changed along with marketing. The 7Ps of marketing are now complete with the addition of People, Process, and Physical Evidence.

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The 7Ps of Marketing

3.1.3 The connection with sales

SELLING vs. MARKETING

Although both sales and marketing focus on promoting interest in the product, marketing is a much **broader process** that includes market research, analysis of the needs of potential clients, the design of the product and settling on a price. By contrast, selling only focuses on the sale of the product, with goals in the short run like monthly sales volume goals whereas marketing mostly has objectives in the long run through campaigns for example.

Marketing also has a much **broader scope**, as it aims to promote a good image of the company/association in general, and foster growth. So it is mainly directed **towards customers**, whilst selling is more product-oriented in order to draw the attention of customers. All in all, selling can be considered as a specific part of marketing, which slightly differs in its intentions and strategies.

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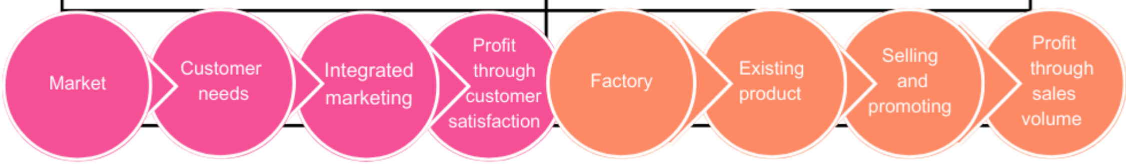
Marketing	Selling
Long-term	Short-term
Aims at directing goods towards customers' minds (outside-in perspective)	Aims at directing customers' minds towards goods (inside-out perspective)
Focuses on customer satisfaction	Focuses on products
Broader scope	Narrower scope



3.1.4 Marketing goes digital
Moving from traditional marketing to the digital era.

Marketing 4.0 is both more human and more digital after the product-centric (Marketing 1.0) and the customer-centric (Marketing 2.0) and human-centric (Marketing 3.0). By establishing content marketing to discuss mission, ecology, commitment, and CSR. It aims to centre values on the brand and it refers to a society that is dedicated, innovative, and constantly searching for meaning.

The essence of marketing 4.0 today is that it makes use of new digital technologies to gain a deeper understanding of consumer behaviour. It makes use of tools like CRM (customer relationship management), marketing automation, and big data (the processing of large amounts of data). Marketing 4.0 considers not only technological advancements but also changing consumer behaviour, which is becoming more complex and demanding.

In fact, customers today are more informed and demanding than previous consumers since they have access to more information than before. As a result, they are less likely to make an impulsive choice when selecting a service or good. They are more connected and socially conscious and they can promote a product on social media or criticise it as easily as to

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interact directly with brands on social networks and to post questions on blogs and forums. Consequently, the customer's decision-making process is becoming more complicated than it once was. New generation marketing suggests creative ways to connect with consumers in this situation. By utilising various digital tools including local referencing, content marketing, predictive algorithms, and e-reputation, it focuses on the customer experience by attracting, persuading, and anticipating their behaviour.

It may be stated that Marketing 4.0 represents the entry of companies into the digital era and that marketing initiatives are focused on the creation of suitable material for consumers and a seamless integration of online and offline engagement. Today, Marketing 4.0 plays a significant role in our daily lives. In the past few years, machine learning, artificial intelligence, and prediction algorithms have advanced significantly, making it simpler than ever to predict consumer expectations, buying patterns, and psychological difficulties. Marketing 4.0 is a useful tool for producing goods/services that are very near to what customers want in this way.

As a result, the term "Marketing 4.0" refers to a new style of communicating between businesses and their customers. Brands are now "humanising" themselves to forge an emotional bond with consumers, but more importantly, they are communicating with them on all fronts through a multi-channel strategy.

Digital Marketing:

The promotion of brands via the internet and other digital communication channels is known as digital marketing, sometimes known as online marketing. This consists of text and multimedia messages as well as email, social media, and web-based advertising as a marketing channel.

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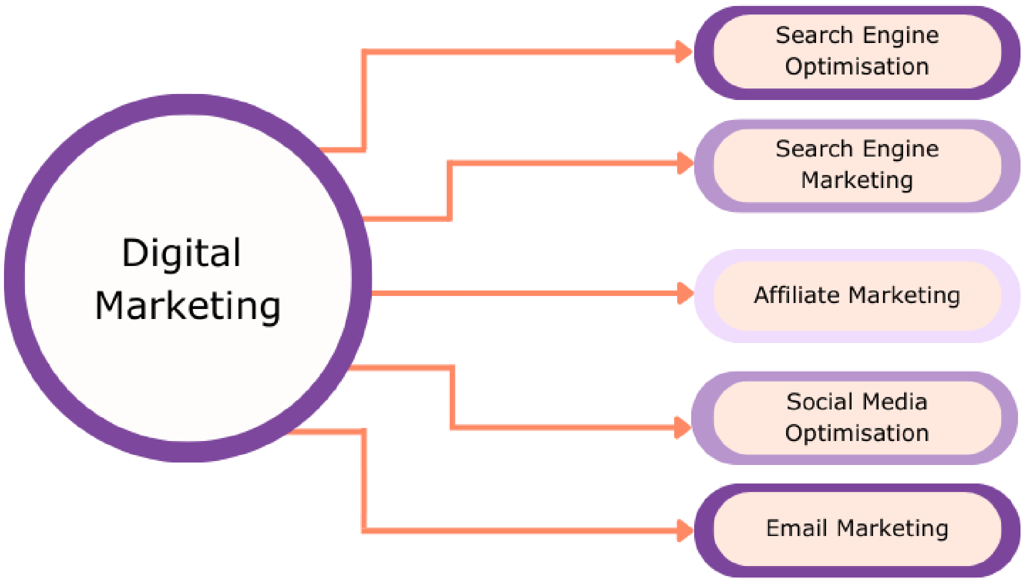

SEO vs SEM

So, let's clarify these terms that are usually being confused. Both SEO and SEM are strategies used in digital marketing to **increase the traffic and the ranking of your website**, but while SEO (Search Engine Optimisation) refers to how you can do so by modifying elements internal and external to your website for **free**, SEM (Search Engine Marketing) as opposed to organic research refers to a system where you have to **pay** the search engines for them to put your website in evidence. Let's go into a bit more detail.

SEO can be split into two main categories: **on-page** and **off-page**.

- On-page SEO is related to all the tactics the website owner can resort to when it comes to the website itself: modifying tags, improving the content quality, adapting the length of the articles…
- Off-page SEO, however, is about linking the website to other promising platforms for example by participating in online forums.

While SEO is free, it also provides long-term results. So it is often best to combine it with a SEM strategy, which brings immediate results but requires a bit more planning. The way you'll pay for the search engine platform is through a system called **PPC** (Pay Per Click), which is quite self-explanatory but needs some thinking for it to be efficient. You should indeed make sure that customers reach your advertisement for your website by choosing appropriate **keywords** and setting a determined **budget** for each of them (SEO works almost like an auction: the website that bid the most on a determinate keyword will be placed above all the others in the result page).

3.2. Marketing Management: Marketing Strategy & Plan

Summary of the chapter:

Although both concepts are often used to express the same idea, the marketing strategy comes before the marketing plan as it is meant to identify where the project should be headed**.** The marketing plan aims at setting precise steps and schedules to achieve the goals set by the marketing strategy. It is important for a company to conduct a strategy/plan which will be adapted and evaluated according to the company's goals and KPIs. Marketing strategy's components are presented in order for you to understand what it is needed to include in your strategy.

Tools or Keywords:
Marketing Strategy, Marketing plan, marketing strategy's components

3.2.1. Is a marketing strategy the same as a marketing plan?

Although both concepts are often used to express the same idea, the marketing strategy comes before the marketing plan as it is meant to identify where the project should be **headed**.

The marketing strategy includes; establishing the company's main goals and the value proposition, setting target groups and discerning their needs, identifying competitors and determining how the main message will be conveyed. This should all come down to a distinctive value proposition specific to the project and the company. Thus, the marketing strategies should ideally have a longer lifespan than the individual marketing plans but they should not be thought of as static but **in constant readjustment**, adaptation to the target group's needs, or the results of the strategy. It thus could be synthesised by the following loop.

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A marketing strategy should cover:

- Research
  - It is the analysis of your market, the target groups and the understanding of their needs, buying behaviour, your competition, etc
- Positioning
  - It refers to the differentiation in value promises, in how your product or service appears to the market, and the message you use to communicate it, etc.
- Promotion
  - Marketing through the use of connections, experiences, and content with the aim of influencing profitable consumer behaviour
- Measurement
  - Delivering value, learning from success and failure, and refining future efforts to achieve marketing objectives

On the other hand, the marketing plan aims at setting precise steps and schedules to **achieve** the goals set by the marketing strategy, for example, by branding the project, dividing responsibilities and resources between partners (with time schedules, GANTTs, or budget sheets) or identifying communication channels to reach the target group.

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3.2.2 Why is it important for companies to have a strategy or a plan?

Marketing strategies and plans allow the company to achieve greater coherence and clarity within its projects at different scales. First of all, **within the team**, strategies and plans improve communication between coworkers, encouraging fruitful teamwork and easily monitoring progress and difficulties.

Moreover, they foster cohesion **between the team and the company** by enabling the latter to distinguish and put forward the core values the employees relate to. These values also serve the purpose of **differentiating the company** from its potential rivals.

Lastly, by identifying the needs of the **target groups** and directing the advertisements and brandings towards that group, the team will reach higher efficiency, and acknowledgment leading them to be able to keep up to date with the current trends. An organisation that does not take the target groups into account is bound to fail, as its relevance depends on their desires, behaviours and lifestyles. The company that succeeds the best in this objective will gain a competitive advantage over other competitors in the same field.

3.2.3. What to include to impress (Marketing Strategy Components)

A marketing strategy should be consisting of the following components:

1) **Begin with a preliminary document** (4Ps of marketing)

It helps you decide broadly where the strategy should lead by defining the four Ps of marketing: Product (what will you sell?), Price (how much will you sell it for?), Place and Promotion (where will you sell and promote the product?). It is an essential step as it provides you with research and a global understanding of your product and the persons you are working with.

2) **Understand your market and target group** (STP, buyer persona)

Analysing the behaviours, lifestyles and needs of the persons you are going to sell your product to is crucial if you want to create relevant content and an appealing product. The effort of relating your product to the target audience is usually divided into several steps: Segmentation, Targeting and Positioning (STP).

The segmentation is a series of criteria that allow you to better understand the target group (see Chapter 5.3). Stemming from the segmentation; a buyer persona can be created to identify the target group to an imaginary individual summarising the data you've collected (see Chapter 6.3). The targeting aims at narrowing the target group to a restricted collective so that through the positioning of the product and company, the audience may relate to it as much as possible.

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3) **Competitor Analysis** (market trends, SWOT analysis)

The target group should feel if your specific product or your company is better suited for their needs and values than other proposals in the field. Thus, you should collect data on potential rivals and market trends that will allow you to differentiate your company from the antagonism of your branch. The SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) of your company may provide an insight into understanding how to take advantage of certain particularities (see Chapter 5.4).

4) **Budget & Objectives** (SMART goals)

Once you have determined where your product is landing to, and more importantly, to whom it may concern, you can start planning out more in detail your marketing tactics. This includes allocating resources to different tasks and setting SMART goals (Specified, Measurable, Attainable, Realistic and Time-bound) that will allow you to coordinate coworkers and partners, and monitor the progress. Among the numerous tools that can be used, GANTT charts are one of the most useful.

5) **Content**/message (brand, design, values)

Now, it’s time to put everything you have learned and reflected about in action: creating content includes choosing for each product/service a specific way to spread information, depending on each target group (theory, podcasts, activities, etc). Moreover, you should create a whole brand image (design, values… see more in Chapter 10) to put into practise the separation from other competitors.

6) **Identify Marketing Approaches and media** (marketing funnel, channels, tactics)

The marketing approach includes finding out how to best spark interest in a particular audience, through the several steps illustrated in the marketing funnel graph. The marketing channels and tactics should also appeal to each specific target group, their needs and their characteristics (for example, social media; channel- TIK TOK, tactic-video to reach a specific young audience, see Chapter 12).

7) **Evaluation** (KPIs)

KPIs (Key Performance Indicators) can help you assess your progress and your performance. The marketing team selects them depending on the dissemination channels chosen and on the product. It is important for your marketing strategy to include metrics and key performance indicators to track the effectiveness of your campaign and the underlined goals set by the marketing team or the business as a whole.

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3.3. Marketing management: A deeper understanding to the tools needed

Summary of the chapter:
To create a relevant marketing strategy, you first need to gain a broad understanding of the current situation of your market. In this chapter, we will focus on the tools that are needed in order for you to conduct a market research looking at your external environment such as PEST analysis, at your intermediate environment by focusing on the competitor analysis. Through a SWOT analysis you will define your product/service's strengths, weaknesses, opportunities and threats; and find your unique selling proposition that will differentiate you from the competition.

Tools:
PEST, Competitor analysis template, STP (Segmentation, Targeting, Positioning), SWOT analysis, Unique selling proposition (USP)

3.3.1. Knowing your market – identify trends

To create a relevant marketing strategy, you first need to gain a broad understanding of the current situation of your market, which is the external environment of your company. The tool commonly used to achieve this is the **PEST analysis**, research based on four main factors: Politics, Economics, Society and Technology. The responsible for this analysis, thus, needs to set some criteria or events that are likely to have an impact on the product/company in each field; for example, a company such as Starbucks might want to monitor trade agreements through which coffee beans are bought (political factor), the global state of the economy (economic factor) and the rising importance of both sustainability (social factor) and social media (technological factor) in customers' behaviours.

This kind of research can be made through online tools such as Google Trends or Buzzsumo to understand where customers direct their interest or through surveys, for instance. Finally, the marketing team should determine whether these criteria are having a positive or negative impact on the company.

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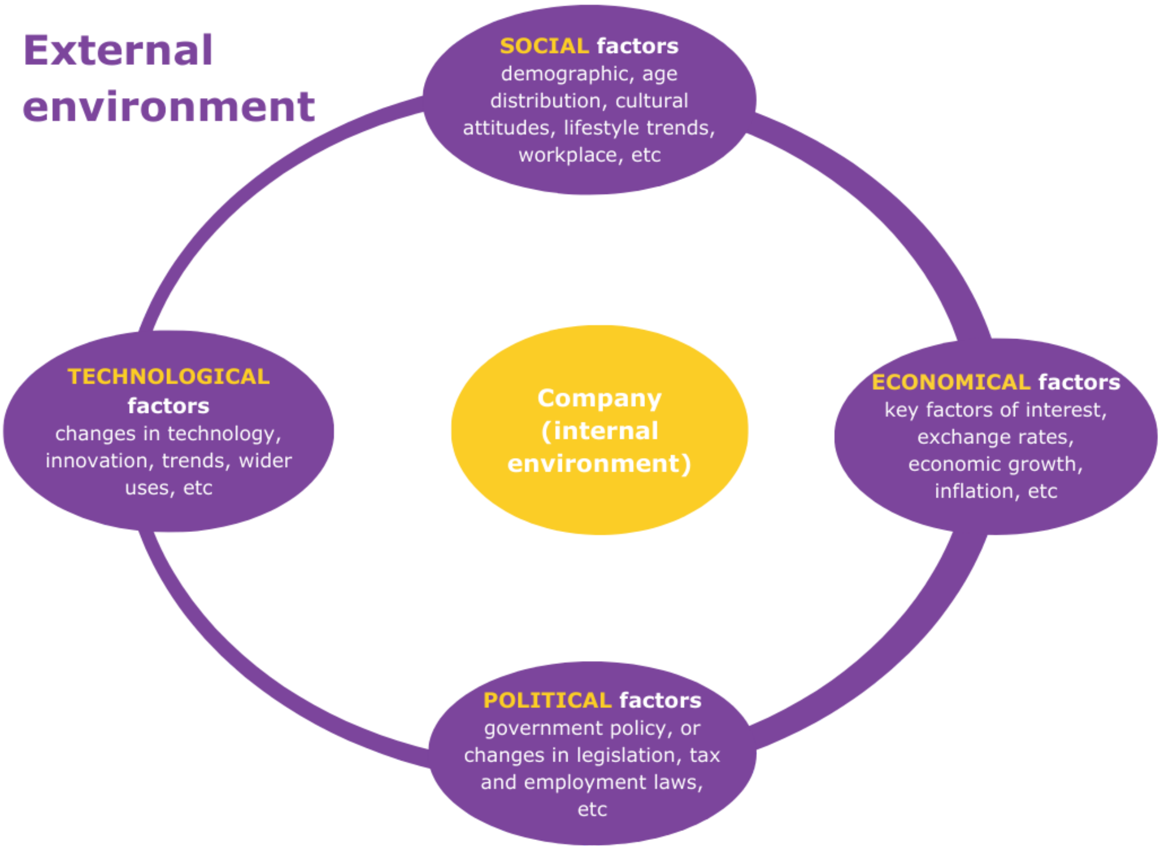

3.3.2. Knowing your competitors - Competitor analysis

Once you've gained knowledge of the external environment of your company (PEST analysis), it is time to focus on what can be called the "intermediate environment". The intermediate environment is narrower compared to the broad factors discussed in the PEST analysis (external environment), and it consists of five main actors that have a more concrete impact on your market and shape the competition within it. Those actors are the so-called **"five forces of Porter"**: competitors, new entrants (companies that are new to the specific market), substitutes (companies that provide alternative products), suppliers and buyers. Indeed, they have a direct influence especially on the fluctuation of prices (rivals or new entrants can drive prices up by proposing the same product but at a lower price, prices can fall if a company does not have plenty of buyers, etc.). It is thus crucial to understand how each of these forces behave in the market and what their strengths and weaknesses are to try and prevent any harm for the company.

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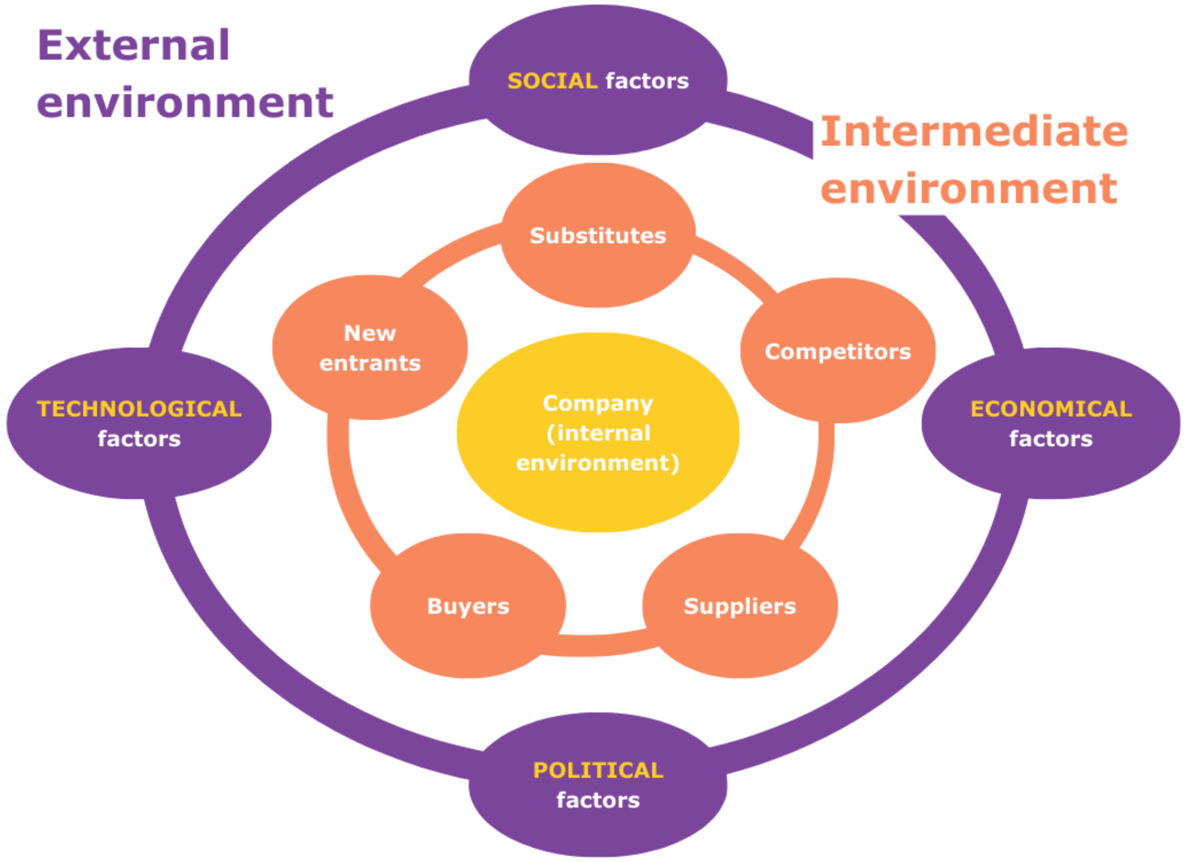

Let's focus on **competitors**.

To conduct a competitor analysis, you need to focus on rivals of every kind (new entrants, small firms) and their strengths as well as their weaknesses. You should compare their communication, branding, proposition, strategy, content and dissemination channels with yours through organised research outlined by key questions such as "How do they communicate with their audience? Is their email and content marketing tailored to each specific customer journey? Do they have a good presence in search engines?"(McGruer. D, 2020, pg 16,chapter 3, Dynamic Digital Marketing). To help you in this analysis online tools are available: SpyFu to collect data on online research about your competitors or Rival IQ to know how well your social media platform is doing compared to others in the industry. All in all, you should compare their strategy and tactics with their results in social media or search engines presence. To help you gather information on all those different types of data, many competitor analysis templates are available, like this one from the book *Dynamic Digital Marketing* by Dawn McCruer, chapter 3.

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Marketing competitive analysis

Communication

How are they engaging their audiences and getting interactivity? Are they using groups, pages, forums?

Branding

What is their tag line, brand look, and feel, messaging, tone?

Proposition

What are they offering to solve their customers' pain or problem?

Strategy

What is their strategy/business model? What is their key objective? What tactics are they using?

Content

How are they using content to attract, nurture, convert, and get repeat customers? Video, blogs, whitepapers, case studies, posts, articles,etc.

Channels

Where are they promoting their business? Where are they generating leads from?

USP

What is their "unique selling point"?

Advertising

Where are they advertising and what is their traffic and spend for this channel?

Social

What networks are they using and how big is their reach and engagement?

Email

How are they marketing to their customers through different stages of the sales-cyrcle?

Search

How do they rank for keywords? Where are they driving traffic to... blogs, web or landing pages?

Campaigns

Who are they targeting, what is their key message and call to action?

Events

What events are they hosting, sponsoring, or exhibiting at? Events or conferences - online or in-person events or both?

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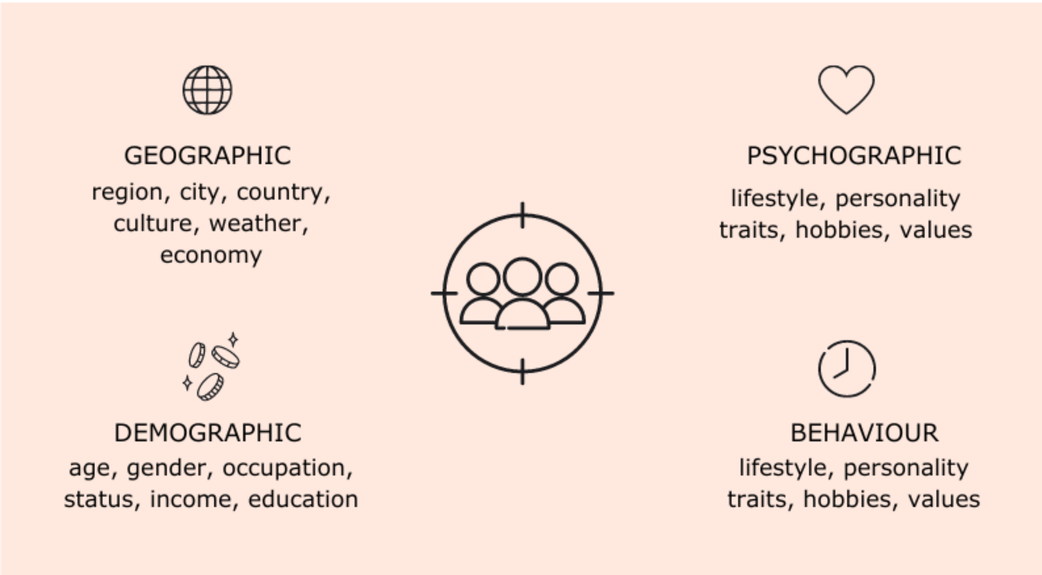
Competitor analysis template, book Dynamic Digital Marketing by Dawn McCruer, chapter 3.

3.3.3. Defining your target audience

The effort of relating your product to the target audience is usually divided into several steps: **Segmentation, Targeting and Positioning (STP)**. The segmentation is a series of criteria that allow you to better understand the target audience and their problems: demographics (age range, gender, education, etc.), psychographics (personality, beliefs, values, etc.), lifestyle (hobbies), behaviour (favourite brands, shopping habits).



Stemming from the segmentation, a buyer persona can be created to identify the target group as an imaginary individual embodying the data you've collected (see Chapter 4c). The targeting aims at narrowing the target audience to the group of individuals that need your product the most so that you can relate to them as much as possible and provide a relevant solution to their problems. This also helps you create a unique proposal and stand out from your competitors.

Lastly, positioning the company according to the first two steps is essential to convey the desired message; it ensures after a competitor analysis that you won't propose the same product as other companies, thus, making your product easier to find on the market.

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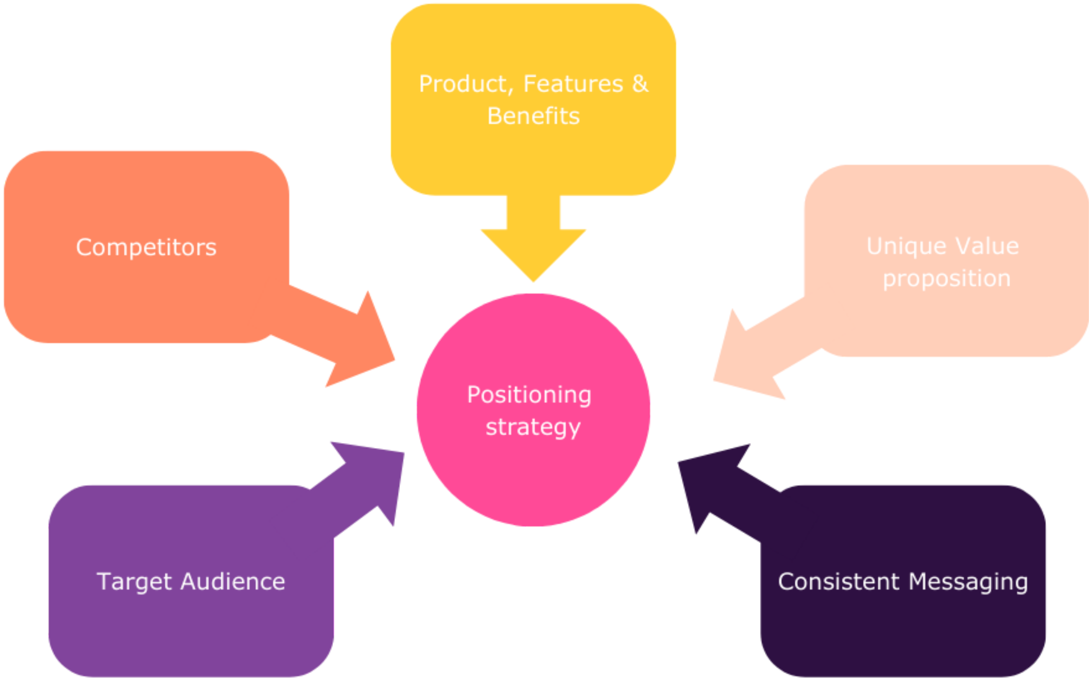

3.3.4. SWOT analysis

After the analysis of the external and intermediate environments of the company, it is time to look into its internal environment through a tool called the **SWOT analysis**. The SWOT analysis, which stands for Strengths, Weaknesses, Opportunities and Threats, allows a realistic evaluation of the company's situation by focusing on internal (strengths and weaknesses) and external (opportunities and threats) factors **(see also Chapter X)** .

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	Positive	Negative
Internal	Strength	Weakness
External	Opportunity	Threat

*What are the company's **strengths**?*
The strengths are the internal and positive factors of your company, the particularities that give it an advantage against competitors. It is a broad idea that includes conceptual (e.g. a specific branding) as well as tangible assets (a particular project, the skills of the staff…).

*What are the company's **weaknesses**?*
By contrast, the weaknesses are the internal and negative factors of your company, the burdens that hinder growth and prevent you from achieving your goals. To determine them, you should ask yourself what could be improved, from the image your company gives off to the budget, staff, or technological problems.

*What are the company's **opportunities**?*
The opportunities are the external and positive factors of your company, tactics that you have not identified or implemented yet, and that could give you a tremendous advantage over the competition. To capitalise on opportunities, you must find new ideas that have not been explored yet by your rivals (competitors analysis), or sectors with a great deal of potential that have been disregarded until now.

*What are the company's **threats**?*
The threats are in stark contrast to the opportunities. They are negative and external factors to your company that may potentially hinder your growth, objectives and strategy. They

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could be a diminishing interest of the audience in your product, an emerging new competitor, or a hefty dependence on a supplier/product.

All in all, the main factors to look at are those linked to your **company** (team, availability, company culture, etc.), how you appear in the **customers' eyes** (online presence & reputation, customer feedback & fidelity, etc.), and how your company is situated in the **broader market** (market share, competition, etc.). This is why the previous tools detailed above (PEST, competitor analysis) can and should be used in the SWOT analysis.

After a SWOT analysis, you can combine the four different factors (strengths/opportunities, strengths/threats, weaknesses/opportunities, weaknesses/threats) to come up with different and creative **strategies** for your company. This can be completed with a SWOT analysis made on rivals.

To learn more, you can watch the example of a PEST and SWOT analysis made on Starbucks: https://www.youtube.com/watch?v=6pqwGoiFGUo&t=108s.

3.3.5. Unique selling proposition

***Why** is it important to create a USP (Unique Selling Proposition)?*

Creating a USP will not only allow you to **stand out** from **competition** but also to establish a strong and **loyal customer base**. Indeed, focusing on a more defined, specific task and target group will allow the customers in question to identify more with your product and will let you be **more efficien**t while working on an easier and more restricted field.

***How** can you create an effective USP?*

An effective USP should be a memorable, short, and **catchy message**. It must target a **specific need;** for a specific customer that can be identified through an STP (Chapter 3c) or a user persona (Chapter 4c), and put forward a particularity that makes you **stand out in your market**. This can be achieved through a SWOT analysis to gain knowledge about your company's strengths and competitor analysis to understand what you are doing differently.

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You do not need to find an entirely new product or idea to stand out in the market. You can also determine one particularity that makes your company special like Canva did by stressing the fact that its website is really easy to use.

3.4. Understanding Consumption

Summary of the chapter:
As we have already established above, having a good understanding of your customers is essential, especially, if you want to create a relevant and appealing product: your content must be aligned with the users' demands. It is thus crucial to determine what kind of users you are directing your product towards after choosing a USP that narrows its scope and focuses your attention. Understanding consumption requires having some knowledge of the theoretical patterns that consumers follow during their buying process. Consumer buying behaviour is the behaviour of customers when purchasing goods, and how you can understand the AIDA model and incorporate it in your business. The same model will help you in creating a customer journey, a tool with great benefits for you.

Tools or keywords:
Consumer Buying Behaviour model, AIDA model, user persona, customer journey map

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3.4.1. Knowing your customers

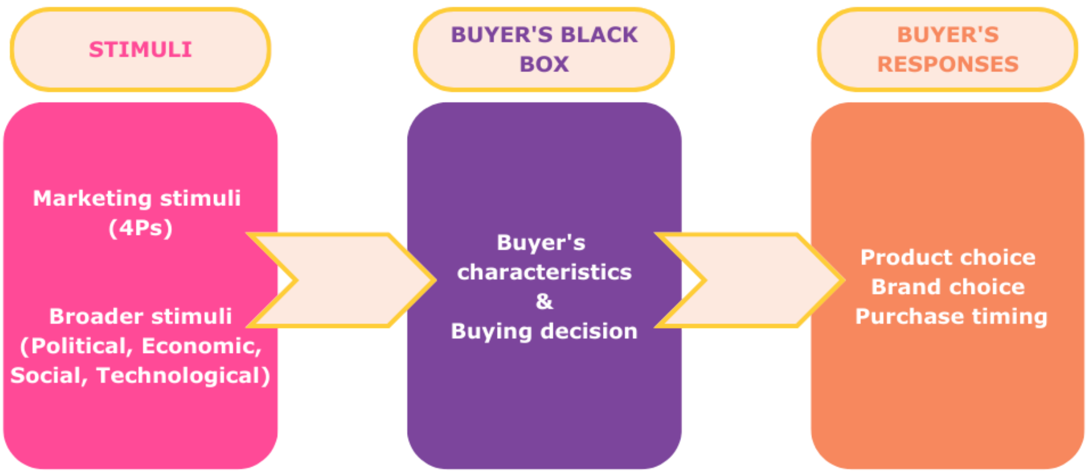
As we have already established above, having a good understanding of your customers is essential if you want to create a relevant and appealing product: your content must be aligned with the users' demands. It is thus crucial to determine what kind of users you are directing your product towards after choosing a USP that narrows its scope and focuses your attention. What are their lifestyles, problems, and needs you can address? How can you set up channels to reach them as well as possible?

In the book *Dynamic digital marketing*, in Chapter 1, a few steps are outlined to achieve that goal: analysing the customers' general behaviour, creating a "user persona" (a fictive profile of the ideal customer) to better identify the customer's needs and habits, and mapping the customer journey.

To get started on this objective to know your customer better, you can analyse your current customer base and conduct surveys, interviews or research interests online.

3.4.2. Consumer buying behaviour and the AIDA model

Understanding consumption requires having some knowledge of the theoretical patterns that consumers follow during their buying process. To ensure an optimal response to the marketing strategy of your company, the marketing stimuli chosen to encourage consumption must take into account accurately the behaviours of customers. The process can be summarised in three big steps with one unknown factor: the buyer's response to the marketing strategy.



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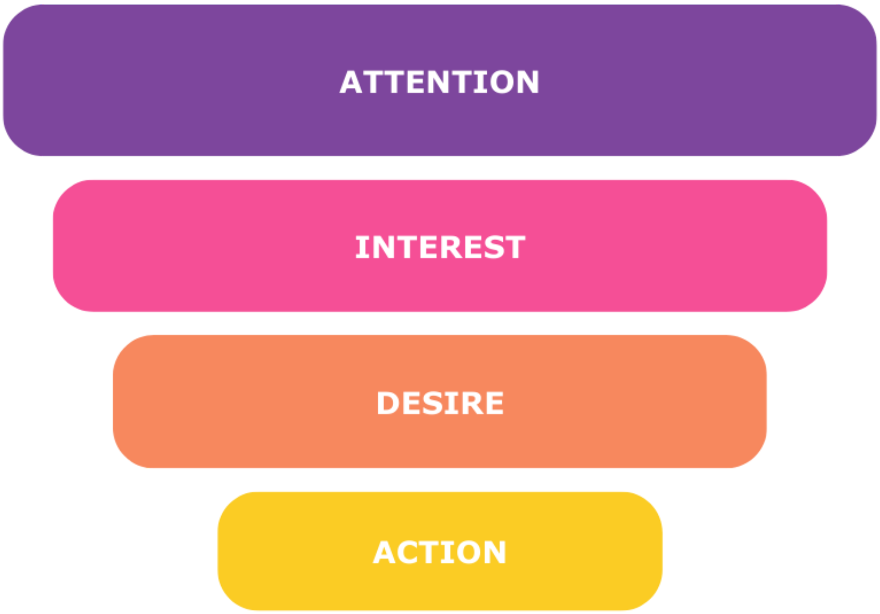
Model of Buyer Behaviour

The whole strategy of encouraging consumption, thus, revolves around getting a grasp of what goes on in the buyer's black box and influencing the buying decision. Once general information on the Target Group (TG) has been gathered (STP analysis), a buyer persona should be created (Chapter 6.3). Then, it is time to analyse the buying process.

While a great deal of simulations have been imagined, the most common one is the AIDA model: Attention, Interest, Desire, Action. The four parts are the steps customers usually go through before buying a product, and the marketing strategy implements tactics to try and direct the potential buyers toward the final transaction. The AIDA model can be illustrated by a funnel-shaped graph, as the numbers of interested customers usually decrease throughout the steps.



AIDA model

*What can you do in the **"Attention"** stage?*
It is the largest part of the AIDA funnel with the largest scope. In this stage, you have to attract the consumer's attention and make them aware of your product. This can be achieved through several tactics, like organic (long-term) or paid (short-term) advertisements, blogs/articles related to your product and using highly popular keywords.

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If you'd like to understand more in detail how to conduct such a strategy, you can visit this article which uses the company Casper as an example:
https://www.semrush.com/blog/marketing-funnel/

*What can you do in the **"Interest" and "Desire"** stage?*
In this part of the funnel, you have to keep the customers interested in your product and provide them with information about your brand, values, benefits of using your product, and your USP. By repeatedly showing the customers how well their needs fit with your proposal, and by positioning yourself as worthy of trust, you will eventually spark not only interest but also desire for your product.

*What can you do in the **"Action"** stage?*
The last thing you want to do is make the purchasing process as transparent, clear, and detailed as possible for the customers: high-quality photos of the product but also straightforward information on prices should help them make the final decision.

*What are the **limits** of the AIDA model?*
The AIDA model is a simplified version of the buying process; thus, it does not take into account all the subtleties you might encounter in your career. Indeed, some customers never go through the first two phases of AIDA and want to buy a product from the start. This is why a cautious marketing strategy should not only focus on a linear buyer's journey but adapt to different situations. However, AIDA remains a useful tool to conceptualise and simplify the buyer's journey.

3.4.3. User persona

***What** is a user persona and **why** should I use it?*
A user persona is a fictional profile of your ideal customer that helps you understand which problems you should tackle with your product. It allows you to relate your product to the target group and keeps you and your team on the right track for the marketing strategy. By humanising the customers, you will feel more deeply about what their struggles and goals are; and you will be able to **adapt your product** to their needs. The specificity of the persona also helps you be more **efficient and targeted** in your work since you will have less data to analyse and fewer problems to address.

***How** can I create my own user persona?*
There are three main steps in creating a user persona: gathering **information**, **putting it together** and designing the **final product**.

To gather information, you should ask yourself who your ideal customer is, or if you have already started a business, what are the current behaviour patterns/characteristics of your users?

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You can collect **quantitative data** through surveys and polls and learn more about demographics, shopping habits, and locations. To gather **qualitative data,** you should make direct or indirect contact with your target audience through interviews, open questions, testing or for example, by answering questions such as: What websites do they visit? What are their interests? What are their goals/challenges? Who are their influencers? Who do they want to please? Who are they responsible for? Who might they let down or fail? What worries them? (*Dynamic digital marketing*, chapter 1).

Once you have collected enough information, you should organise it. Often a **visual representation** helps: you can use spreadsheets to generate charts easily or affinity diagrams, for instance. Although you should create as little personas as possible, if you have more than one you can use Venn diagrams to compare their needs and find the overlapping interest.

Finally, you can start creating the **final product**. The pieces of information that should appear are personality, biography, motivations, goals/pains, behaviour, influences as well as a fictive name and photo that reflect the persona's age, occupation and personality traits. The design should be simple and refined yet interesting and catchy. Here are some examples:

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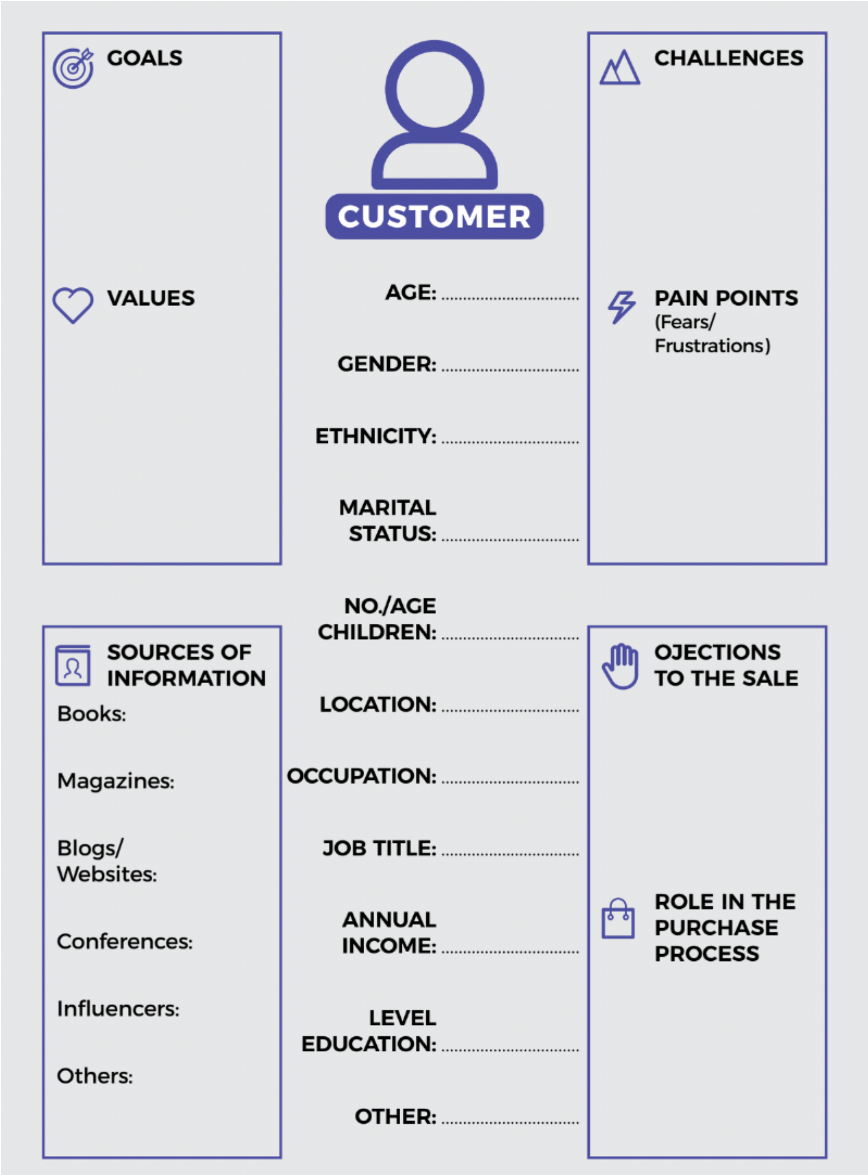

Dynamic Digital marketing, McCruel, Ch 1, Persona template

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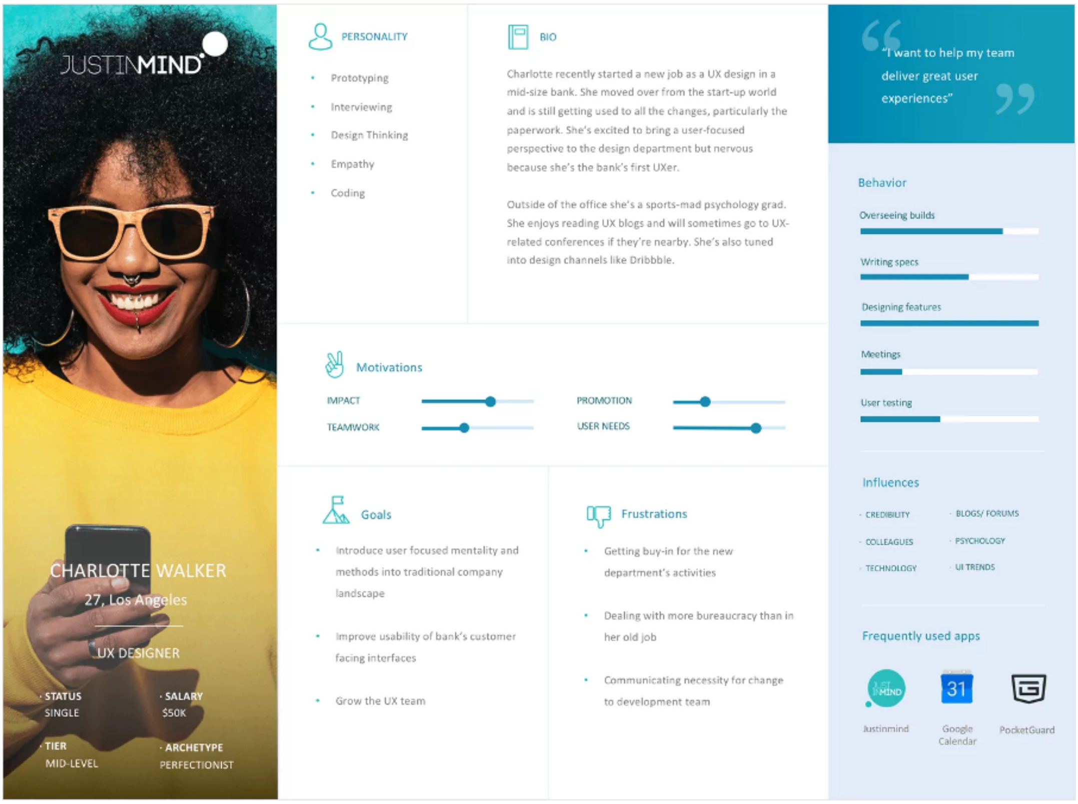


Example of user persona templates: https://www.justinmind.com/blog/user-persona-templates/

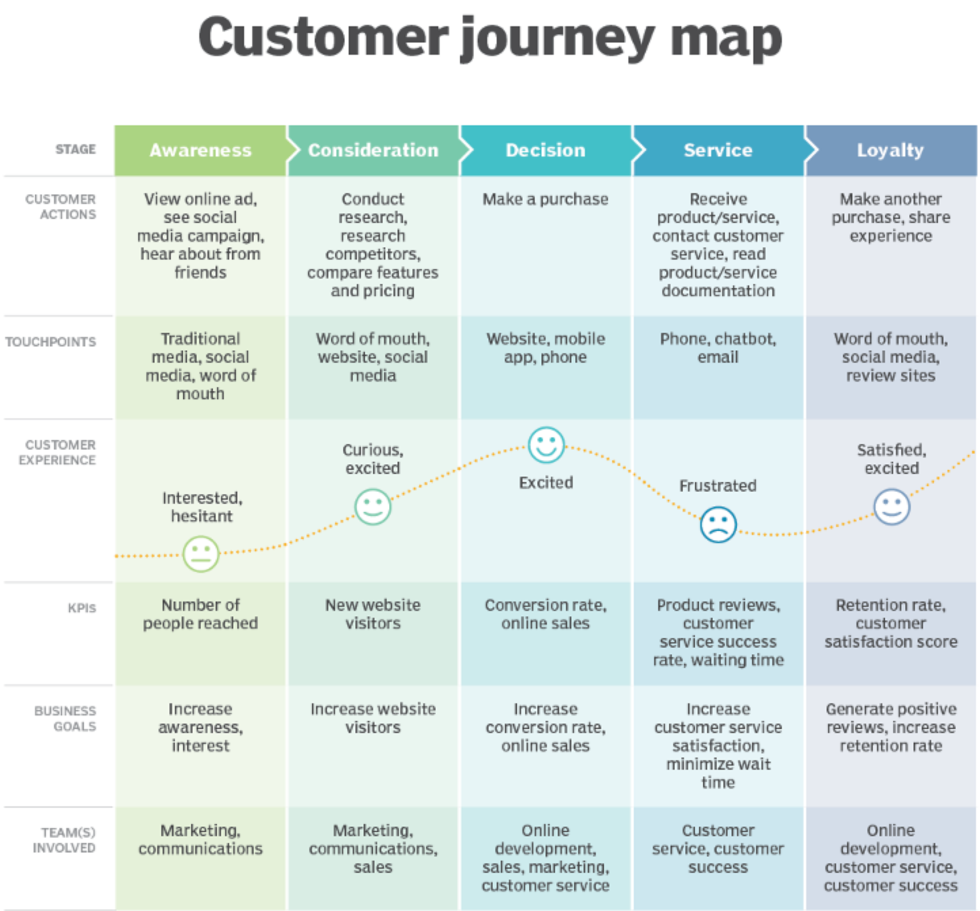
3.4.4. Map your Customer Journey

***What** is a customer journey map?*

A customer journey map is a graphic that represents the different stages a customer goes through before and after buying a product. Mapping the buyer's journey gives you better insight on what their preoccupations, feelings, and experiences linked to your product are; as we have said before with the AIDA model, which is one way to map the customer's journey, knowing the buyer better is the key to a relevant and appealing product. Moreover, mapping the journey will help you reach the customer better and keep him/her interested in the product throughout the different stages by understanding which channels s/he navigates through.

What are the different parts of a customer journey map?

First of all, you need to identify the **different stages** the buyer goes through, for example, through a model such as AIDA. Then, you should try to **predict their behaviour** with the help of a user persona (Chapter 6.3) and influence it through customer **touchpoints**, which are the tools the customer may use to get in touch with the company (phone calls, chatbox, social media). Finally, the map should include a prediction of the **customer's feelings** throughout the process.



Example of customer journey map

3.5. Introduction to Sales Management

Summary of the chapter:

Sales Management in a family business, like in any business, refers to the strategic planning, organisation, and supervision of sales activities within the family-owned enterprise. It involves developing sales strategies specific to the business's unique dynamics, managing the sales team composed of family members and non-family employees, and ensuring the achievement of sales goals.

You will find after each topic some **self-guided tools, activities, and methodologies**, along with **suggested templates** to be found online, for sales management for first-time beginners. Remember, while these templates provide a starting point, it's important to adapt them to align with your family business's unique requirements and goals.

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3.5.1.Understanding the sales process

Understanding the sales process in a family business entails comprehending the systematic steps involved in identifying, engaging, and converting potential customers into loyal patrons. Recognizing the sales process's significance is crucial for sustaining revenue generation, fostering customer relationships, and driving business growth while upholding the family's values and legacy. Basic steps include:

1. Lead Generation:
This initial stage involves identifying potential leads or individuals who have expressed interest in the products or services offered by the family business. Lead generation can be achieved through various channels such as marketing campaigns, referrals, networking events, or online platforms. It plays a crucial role in building a pipeline of potential customers for further engagement.

2. Prospecting:
Prospecting is the process of researching and analysing qualified leads to gain insights into their needs, pain points, and preferences. It helps businesses identify specific targets within the larger pool of leads who are most likely to benefit from the offerings. By understanding the prospects better, the family business can tailor their approach and messaging to engage with them more effectively.

3. Qualifying:
In this stage, businesses engage with prospects to assess their level of interest, budget, decision-making authority, and timeframe. Qualifying leads helps determine if they meet the criteria to become potential customers. This stage is crucial in ensuring that time and resources are focused on prospects who have the highest potential for conversion.

4. Presenting:
Presenting involves developing and delivering compelling presentations or proposals that showcase the unique value proposition of the family business's products or services. It highlights how the offerings address the specific needs and challenges of the prospects. Presentations are tailored to emphasise the benefits, features, and competitive advantages of the offerings to differentiate them from competitors.

5. Overcoming Objections:
During this stage, businesses address any concerns or objections raised by prospects. Effective communication and negotiation skills are utilised to overcome objections and build trust. Businesses provide additional information, clarify misconceptions, and alleviate concerns to help prospects make informed decisions.

6. Closing the sale:

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Closing refers to the stage where businesses seek commitment from the prospects to move forward with the purchase decision. Pricing, terms, and conditions of the sale are finalised, and agreements or contracts are secured to formalise the customer's commitment. Closing requires effective negotiation and persuasive skills to reach mutually beneficial agreements.

7. Follow-up:

The follow-up stage involves maintaining regular and consistent communication with customers. It aims to nurture the relationship and provide post-sales support. By engaging with customers, businesses can address any questions, concerns, or issues that may arise. Continuous follow-up helps identify opportunities for upselling, cross-selling, and generating referrals.

TIP: Seek Mentorship and Guidance: Connect with experienced professionals or join mentorship programs specifically designed for women entrepreneurs. Mentors can provide valuable insights, guidance, and support in navigating the sales landscape, overcoming obstacles, and building networks.

Throughout the sales process, the family business should focus on building relationships, understanding customer needs, and aligning their offerings with customer expectations. Effective communication, personalised interactions, and exceptional customer service play pivotal roles in nurturing the customer journey and driving successful sales outcomes.

It is worth mentioning here **the sales funnel,** a marketing term used to capture and describe the journey that potential customers go through, from prospecting to purchase. A sales funnel consists of several steps, the actual number of which varies with each company's sales model. The sales funnel represents the process through which potential customers move from initial awareness of a product or service to making a purchase decision. It consists of multiple stages that align with the customer's progression in their buying journey. Here is a visual representation and description of the stages of the sales funnel (for more in depth information see also the related topic "Consumer buying behaviour and the AIDA model" in the Marketing section of this course). (image source: Freepik.com)

1. Awareness:

The first step is creating awareness among potential customers about the family business's products or services. This is achieved through targeted marketing efforts, advertising, social

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media presence, and word-of-mouth referrals. The goal is to ensure that the target audience becomes aware of the offerings and develops an initial interest.

2. Interest:

Once awareness is established, the focus shifts to generating interest among potential customers. This is done by showcasing the unique value proposition, highlighting benefits and features, and addressing pain points. Engaging content, demonstrations, and testimonials can be effective in capturing and sustaining the interest of potential customers.

3. Consideration:

In the consideration stage, potential customers evaluate the offerings in more depth. They compare features, pricing, and reviews, seeking assurance that the family business's products or services align with their needs and expectations. Providing comprehensive information, personalised consultations, and interactive demonstrations can help potential customers make informed decisions.

4. Intent:

At this stage, potential customers express a clear intent to proceed with the purchase. They may request a quote, ask specific questions, or indicate a desire to move forward. The family business must respond promptly, address any remaining concerns, and provide the necessary details to facilitate the next steps.

5. Evaluation:

After expressing intent, potential customers enter the evaluation stage. Here, they carefully assess the family business's offerings, comparing features, pricing, and reviews. The family business should provide comprehensive information, address any remaining concerns, and offer personalised consultations to support potential customers in making informed decisions.

6. Purchase:

The final stage of the sales process is the purchase stage. Potential customers, having evaluated their options, make the decision to proceed with the purchase. The family business should ensure a seamless and customer-centric experience, facilitating a smooth transaction process. Clear communication, reliable customer support, and transparent pricing contribute to building trust and facilitating successful purchases.

The sales process in a family business context is crucial as it provides a structured approach to guide the sales efforts while upholding the family's values and legacy. It enables businesses to effectively identify potential customers, engage with them, address objections, and convert them into loyal patrons. By understanding and implementing the sales process, family businesses can establish strong customer relationships, drive revenue growth, and ensure the long-term success of the business.

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3.5.2. Developing a sales strategy and sales plan

Developing a sales strategy and sales plan involves crafting a comprehensive framework to achieve sales objectives in a family business. This includes defining target markets, identifying competitive advantages, setting sales goals, designing effective sales tactics, allocating resources, and outlining specific actions to maximise sales performance and ensure long-term business success. **Creating a sales strategy in five easy steps:**

1. Set Clear Objectives:
Define specific and measurable sales objectives aligned with the overall business goals. These objectives can include revenue targets, market expansion, customer acquisition, or product penetration.

2. Identify Target Market and Customers:
Conduct thorough market research to identify your target market and understand the needs, preferences, and pain points of potential customers. This enables the customization of the sales strategy to effectively engage and address the target audience.

TIP: Adapt Sales Strategies to Cultural Contexts: If facing cultural barriers or even racism, consider tailoring sales strategies to the specific cultural context. Research cultural norms, preferences, and business practices in the target market and incorporate them into sales approaches. Building cultural intelligence can help bridge gaps and establish meaningful connections.

3. Develop Value Proposition and Differentiation:
Define a compelling value proposition that highlights the unique benefits and advantages of your products or services. Identify ways to differentiate from competitors and articulate the added value the business brings to customers. This helps position the business as the preferred choice in the market.

4. Determine Sales Tactics and Activities:
Based on the objectives, target market, and value proposition, develop specific tactics and activities to achieve sales success. This includes prospecting methods, lead generation strategies, sales techniques, pricing strategies, promotional campaigns, and sales channel optimization. Align the tactics with the target market and objectives.

5. Monitor and Measure:
Continuously monitor and measure the performance of the sales strategy against the defined objectives. Track key performance indicators (KPIs) such as revenue, conversion rates, customer acquisition costs, and satisfaction. Regularly analyse the results and make necessary adjustments to the strategy to optimise performance and drive sales growth.

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With these five steps, your businesses can create an effective sales strategy that guides sales efforts, maximises revenue generation, and achieves its desired business outcomes.

TIP: Invest time in Sales Training and Skill Development: Enhance sales skills and knowledge through training programs, workshops, or (free) online courses. Focus on areas such as sales techniques, negotiation skills, communication, and relationship building. This helps build confidence and competence in sales management.

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3.5.3. Sales forecasting and sales analysis

Sales forecasting and sales analysis involve predicting future sales performance and evaluating current sales data in a family business. By analysing historical sales patterns, market trends, and customer behaviour, businesses can make informed decisions, set realistic targets, and adjust strategies to optimise sales outcomes and drive profitability.

Sales forecasting:

1.Predicts future sales performance based on historical data and market trends: sales forecasting involves analysing past sales data and current market trends to make informed predictions about future sales. It helps businesses estimate the demand for their products or services.

2. Informs decisions on inventory, production, and marketing strategies: With accurate sales forecasts, companies can make better decisions about how much inventory to keep, how much to produce, and how to allocate marketing resources to meet the anticipated demand.

3. Can vary in complexity, using statistical methods or advanced machine learning algorithms: sales forecasting methods can range from simple statistical techniques like moving averages to more sophisticated machine learning algorithms that take into account multiple variables and factors.

4. Enables efficient resource allocation and growth planning: by having a clear understanding of future sales expectations, businesses can optimise their resource allocation, ensuring they have enough staff, materials, and budget to meet customer demand and achieve growth targets.

5. Identifies potential challenges and opportunities for strategic adaptation: sales forecasting helps businesses spot potential obstacles in achieving their sales goals and seize opportunities to adapt their strategies accordingly. It allows them to be proactive in responding to market changes.

6. Valuable tool for both small businesses and large corporations: sales forecasting is beneficial for businesses of all sizes. Small businesses can use it to plan their operations and manage resources effectively, while large corporations rely on forecasting to make informed decisions across various departments and locations.

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Sales analysis:

Sales analysis is a crucial tool for businesses to optimise their sales efforts, improve profitability, and enhance customer satisfaction.

1.Evaluation of Sales Performance: Sales analysis involves the systematic evaluation of a company's sales performance over a specific period, typically monthly, quarterly, or annually.

2.Identification of Trends and Patterns: By analysing sales data, businesses can identify trends, patterns, and fluctuations in sales figures, helping them understand the factors that impact sales.

2.Insights into Product Performance: Sales analysis provides insights into the performance of different products or services, highlighting the best-selling items and those that may require improvement or marketing focus.

3.Understanding Customer Behaviour: The analysis helps businesses gain a deeper understanding of customer behaviour, preferences, and buying habits, enabling targeted marketing and sales strategies.

4.Assessment of Sales Strategies: By comparing actual sales results against sales targets and goals, sales analysis allows businesses to evaluate the effectiveness of their sales strategies and make necessary adjustments.

5.Decision-Making Support: Sales analysis provides valuable data-driven insights that support decision-making processes, such as setting sales targets, allocating resources, and designing marketing campaigns for improved business performance.

TIP: Be persistent and recognize that challenges are part of the entrepreneurial journey. Cultivate resilience, perseverance, and a growth mindset to overcome obstacles and setbacks. Seek support from family, friends, or business communities during challenging times.

3.5.4. Sales team management

Sales team management and motivation in a family business involve overseeing and inspiring the sales team members to achieve their full potential. However, you may not have a team of people working on sales, you may rely mainly on yourself, in which case you probably need to be even more inspired and motivated. In any case, it will help setting clear performance expectations, seeking training and support, fostering a positive work

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environment, implementing incentive programs, and recognizing and rewarding achievements, ultimately driving sales "team" productivity and success.

TIP: Advocate for Diversity and Inclusion: Actively promote diversity and inclusion within your industry and your community. Participate in forums, events, or initiatives that champion women entrepreneurs and challenge discriminatory practices. This helps create a more supportive and inclusive environment for women in business.

(image source: vector4stock in freepik)

Let's consider sales team management in the context of a familiar little business, for example a local bakery.

In this scenario, you are the owner of a small bakery, and you have a small team of sales staff responsible for selling baked goods and managing customer interactions. Here's how sales team management principles would apply in this context:

1.Recruitment and Training: You hire sales staff who are friendly, customer-oriented, and have a passion for baked goods. You provide them with training on the various products offered, customer service best practices, and effective selling techniques.

2. Goal Setting: You set specific sales targets for the team, such as daily, weekly, or monthly sales goals. The team understands the importance of meeting these targets to ensure the bakery's profitability and growth.

3. Motivation and Incentives: You create a positive work environment, offering praise and recognition for excellent sales performance. You might also implement incentives, such as commission-based bonuses or free baked goods, to motivate the team to upsell and increase sales.

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4. Performance Monitoring and Evaluation: You regularly review individual and team sales performance. By analysing sales data, you can identify peak sales periods, popular products, and areas where the team can improve.

5. Coaching and Development: You provide ongoing coaching and feedback to help your sales team improve their selling skills and customer interactions. This might include role-playing scenarios, sharing customer feedback, and suggesting improvements.

6. Sales Strategies and Planning: You work with the team to develop sales strategies. For example, you might plan special promotions for holidays or collaborate with nearby businesses for cross-promotion.

7. Communication and Collaboration: You encourage open communication among the team members, enabling them to share successful sales approaches or challenges they encounter. Regular meetings allow you to provide updates and align everyone with bakery goals.

8. Problem Solving: When facing obstacles, such as slow sales during certain times, you brainstorm solutions together with the team. This might involve adjusting operating hours, introducing new products, or targeting different customer segments.

9. Technology and Tools: While a small bakery might not require sophisticated technology, you might use a simple point-of-sale system to track sales, gather customer information, and monitor inventory.

Through effective sales team management, your bakery team can develop strong customer relationships, maximise sales opportunities, and contribute to the success and growth of your little business. A well-managed sales team helps create a positive reputation for the bakery and fosters customer loyalty, which is crucial for the long-term success of any small business.

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3.5.5. Customer Relationship Management

Customer Relationship Management (CRM) is a strategic approach in a family business that focuses on managing and nurturing customer interactions throughout their lifecycle. It involves implementing tools, processes, and strategies to enhance customer satisfaction, loyalty, and retention, leading to long-term relationships and increased profitability for the business.

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TIP: Make use of Technology and Automation: Utilise sales management tools, customer relationship management (CRM) systems, and automation software to streamline sales processes, track leads, and manage customer relationships more efficiently. Technology can help save time, improve productivity, and provide valuable data insights.

1.Centralized Customer Data: CRM systems enable businesses to gather, store, and organise comprehensive information about their customers. This includes contact details, purchase history, communication preferences, and other relevant data, all in a centralised database.

2.Enhanced Communication: CRM facilitates improved communication between businesses and their customers. It enables personalised interactions by allowing companies to send targeted messages, offers, and notifications based on customer preferences, behaviours, and needs.

3.Sales and Lead Management: CRM systems help streamline sales processes by tracking leads, opportunities, and customer interactions throughout the sales cycle. This assists sales teams in prioritising leads, managing tasks, and nurturing relationships, ultimately increasing sales efficiency and effectiveness.

4.Customer Service and Support: CRM tools aid in providing excellent customer service by offering support teams quick access to customer information. This enables them to resolve

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issues faster and provide personalised assistance, resulting in higher customer satisfaction and loyalty.

5.Analytics and Insights: CRM systems provide valuable insights through data analytics and reporting. Businesses can analyse trends, customer behaviours, and purchasing patterns, helping them make informed decisions about marketing strategies, product development, and customer engagement.

CRM can be tailored to suit the needs and scale of a small family startup. It's important to choose a CRM system that aligns with the requirements and resources of your family startup, ensuring that it provides the necessary functionality without unnecessary complexity. Two easy and free CRM options for small businesses are:

HubSpot CRM is a popular choice due to its user-friendly interface. It offers contact management, email tracking, task management, and basic sales reporting. The free version provides unlimited users and up to 1 million contacts, suitable for small businesses.

Zoho CRM is another option for small businesses. It offers a free plan with features like lead management, contact management, sales pipeline tracking, and basic reporting. Zoho CRM provides a simple and intuitive interface, making it easy to set up and use.

3.5.6. Digital Sales

Digital Sales refers to the process of selling products or services online using digital platforms and technologies. It involves using digital marketing channels, such as websites, social media, email marketing, and online marketplaces, to reach and engage customers, driving sales and revenue in the digital realm.

Digital marketing offers cost-effective ways to promote products or services, engage with customers, and build brand awareness.

Key components of digital sales include:

1. Online Store or Website: This is the foundation of digital sales. An online store or website serves as your virtual storefront, allowing customers to browse your products or services, learn about your brand, and make purchases directly over the internet. It should be well-designed, easy to navigate, and provide all the necessary information for customers to make informed decisions.

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2. Product or Service Listings: Detailed and engaging product or service listings are essential. High-quality images, comprehensive descriptions, pricing information, and any relevant specifications help potential customers understand what you offer and why they should choose your products or services.

3. E-commerce Platforms: E-commerce platforms provide the infrastructure to manage your online store. They offer features such as inventory management, payment processing, order tracking, and customizable templates. Choosing the right platform is crucial to ensure smooth operations and a positive customer experience.

4. Digital Marketing Strategies: Digital sales heavily rely on effective marketing strategies to drive traffic to your online store. This includes various techniques such as:

- Search Engine Optimization (SEO): Optimising your website to rank higher in search engine results, increasing your visibility to potential customers.
- Social Media Marketing: Utilising platforms like Facebook, Instagram, and Twitter to engage with your audience, share content, and promote products.
- Email Marketing: Sending targeted emails to subscribers with offers, updates, and information about your products or services.
- Pay-Per-Click (PPC) Advertising: Running targeted ads on search engines or social media platforms to attract potential customers.
- Content Marketing: Creating valuable content (blogs, videos, guides) that not only educates your audience but also showcases your expertise and products.

5. Payment Gateways: These secure systems enable customers to make online payments. Integrating reliable payment gateways ensures that customers can complete transactions using various methods, such as credit cards, digital wallets, and other electronic payment options, while keeping their financial information safe.

6. Customer Experience and Support: Providing an exceptional customer experience is crucial for building trust and loyalty. This includes:

- User Experience (UX): Ensuring your website is user-friendly, loads quickly, and works well on mobile devices.
- Checkout Process: Simplifying the checkout process to minimise friction and abandoned carts.

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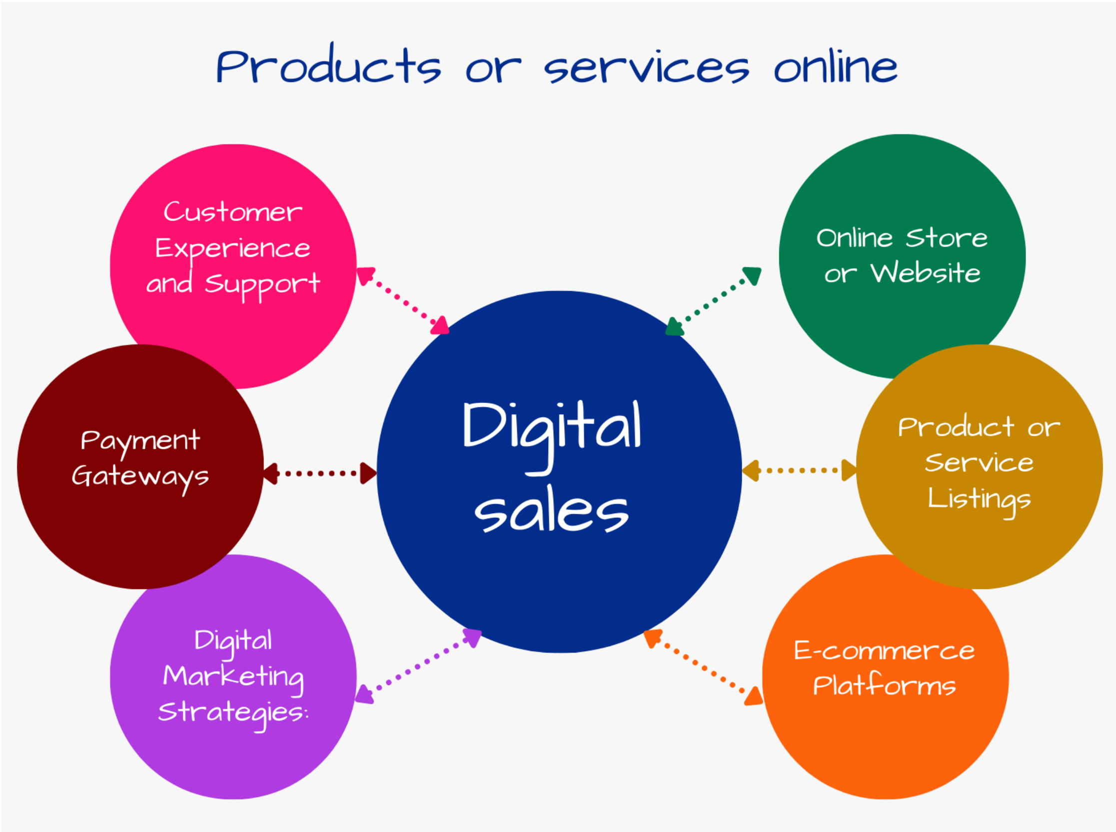

Check out the “social media management” section in this course/tool kit for more info and ideas.

TIP: Have fun whilst using Digital Sales & Marketing channels, such as social media. Create funny videos, engaging challenges, short quizzes and competitions, to engage your audiences and get instant feedback of what they like.

3.6. Supply chains and Supply Chain Management

This topic is aimed at providing participants with the necessary competences to understand:

3.6.1. The concept of Supply chains and supply chain management

A supply chain refers to the network of organisations, people, activities, resources, and technologies involved in producing, distributing, and delivering products or services to

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consumers. It encompasses all the steps required to bring a product from its raw materials stage to the hands of the end user.

The Sourcing and Procurement involve selecting suppliers, negotiating contracts, and purchasing raw materials or components needed for production. The general key concepts are:

1. Production: This stage involves transforming raw materials into finished products through manufacturing processes.

2. Distribution: Once products are manufactured, they need to be transported to distribution centres or directly to retailers or customers.

3. Logistics: This includes managing transportation, warehousing, inventory, and the movement of goods throughout the supply chain.

4. Inventory Management: Balancing the amount of inventory on hand to meet customer demand while minimising excess inventory costs.

5. Demand Forecasting: Predicting future customer demand for products, which helps in planning production and inventory levels.

6. Information Flow: Accurate and timely sharing of information among various supply chain partners to enable efficient decision-making.

7. Collaboration: Cooperation and coordination among different entities in the supply chain to optimise processes and outcomes.

8. Risk Management: Identifying and mitigating potential disruptions that could impact the supply chain, such as natural disasters, geopolitical events, or supply shortages.

9. Sustainability: Considering environmental, social, and ethical factors in supply chain decisions to minimise negative impacts.

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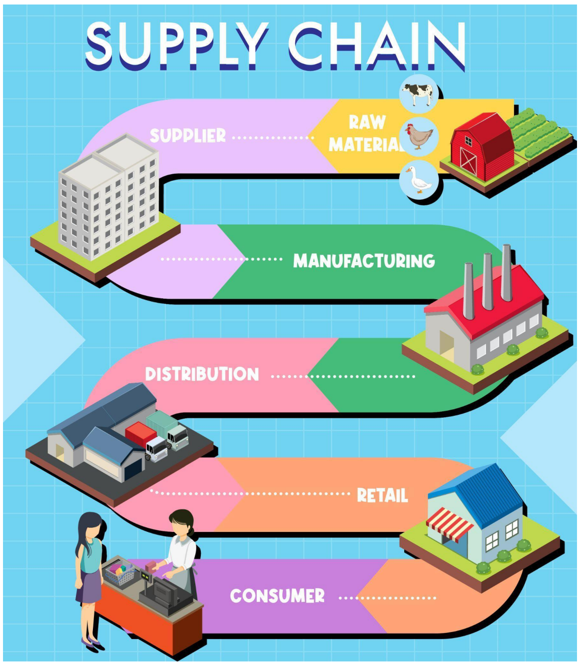
Supply Chain Management (SCM) is the process of strategically planning, coordinating, and optimising the various activities within a supply chain to ensure the efficient flow of goods, information, and finances from the point of origin to the point of consumption. The primary goal of supply chain management is to enhance the overall effectiveness and competitiveness of the supply chain.

Think of Supply Chain Management (SCM) as the conductor of a symphony that brings different instruments together to create beautiful music. The main goal of SCM is to ensure this movement happens seamlessly and efficiently, enhancing the overall performance and competitiveness of the entire supply chain.

3.6.2. The stakeholders within supply chains



Stakeholders within supply chains refer to the individuals, groups, or entities that have a vested interest in the processes, operations, and outcomes of a supply chain. They play crucial roles in influencing and being influenced by the activities that occur within the supply chain. Understanding and managing these stakeholders is vital for the effective functioning of the supply chain and the achievement of its objectives. Here are some of the key stakeholders within supply chains:

1. Suppliers: These are the entities that provide the raw materials, components, or services necessary for the production of goods or services. Suppliers are crucial to the success of a supply chain as the quality, reliability, and cost-effectiveness of their offerings directly impact the final products.

2. Manufacturers/Producers: This category includes companies or entities that transform raw materials and components into finished products. They are responsible for coordinating production processes, maintaining quality standards, and ensuring timely delivery of goods.

3. Distributors/Wholesalers: These entities facilitate the movement of products from manufacturers to retailers. They often manage warehousing, transportation, and distribution networks to ensure products are available to retailers and, ultimately, consumers.

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4. Retailers: Retailers sell products directly to consumers through various channels such as brick-and-mortar stores, online platforms, or other sales outlets. They play a significant role in reaching the end consumer and influencing purchasing decisions.

5. Customers/Consumers: The end consumers of products or services are critical stakeholders. Their preferences, demands, and feedback influence the entire supply chain, from product design to marketing strategies.

6. Logistics and Transportation Companies: These stakeholders are responsible for moving goods from suppliers to manufacturers, manufacturers to distributors, and distributors to retailers. Efficient logistics management is crucial for timely deliveries and cost-effective operations.

7. Regulatory Authorities/Government: Government agencies set regulations and standards that affect various aspects of the supply chain, such as safety, labelling, environmental impact, and import/export procedures.

8. Financial Institutions: Banks, lenders, and financial institutions provide funding and financial services that support the operations of different supply chain entities, such as working capital loans, trade finance, and investment.

9. Employees and Labor Unions: The workforce involved in supply chain activities, from manufacturing to distribution, forms an essential stakeholder group. Their working conditions, wages, and labour agreements impact the overall efficiency and ethical considerations of the supply chain.

10. Investors/Shareholders: Individuals or organisations that invest in companies within the supply chain have a financial interest in their success. They may influence decisions through ownership rights and expectations for returns on investment.

11. Non-Governmental Organisations (NGOs): Organisations that focus on social, environmental, or ethical concerns often monitor and advocate for responsible supply chain practices.

12. Competitors: Other companies within the same industry or supply chain may also be considered stakeholders, as their actions can influence market dynamics and competition.

Each stakeholder has its own set of interests, objectives, and concerns. Effective supply chain management involves understanding and balancing these interests to create a cooperative and efficient network that benefits all parties involved.

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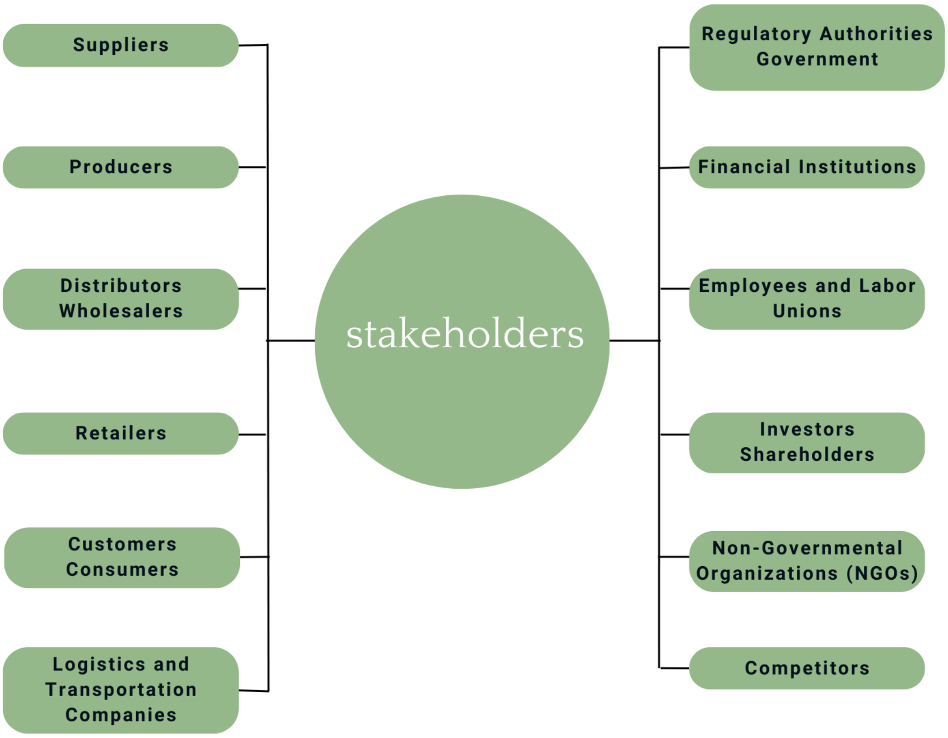

3.6.3. Supply chain sustainability and responsibility

Supply chain financial sustainability and responsibility refer to the ethical and financially responsible management of the financial aspects within a company's supply chain operations. These concepts emphasise maintaining financial viability while also considering ethical considerations and social responsibility throughout the supply chain.

Supply Chain Financial Sustainability:
Financial sustainability within the supply chain focuses on ensuring the long-term financial health of the business while minimising negative impacts on stakeholders, the environment, and society. Key components include:

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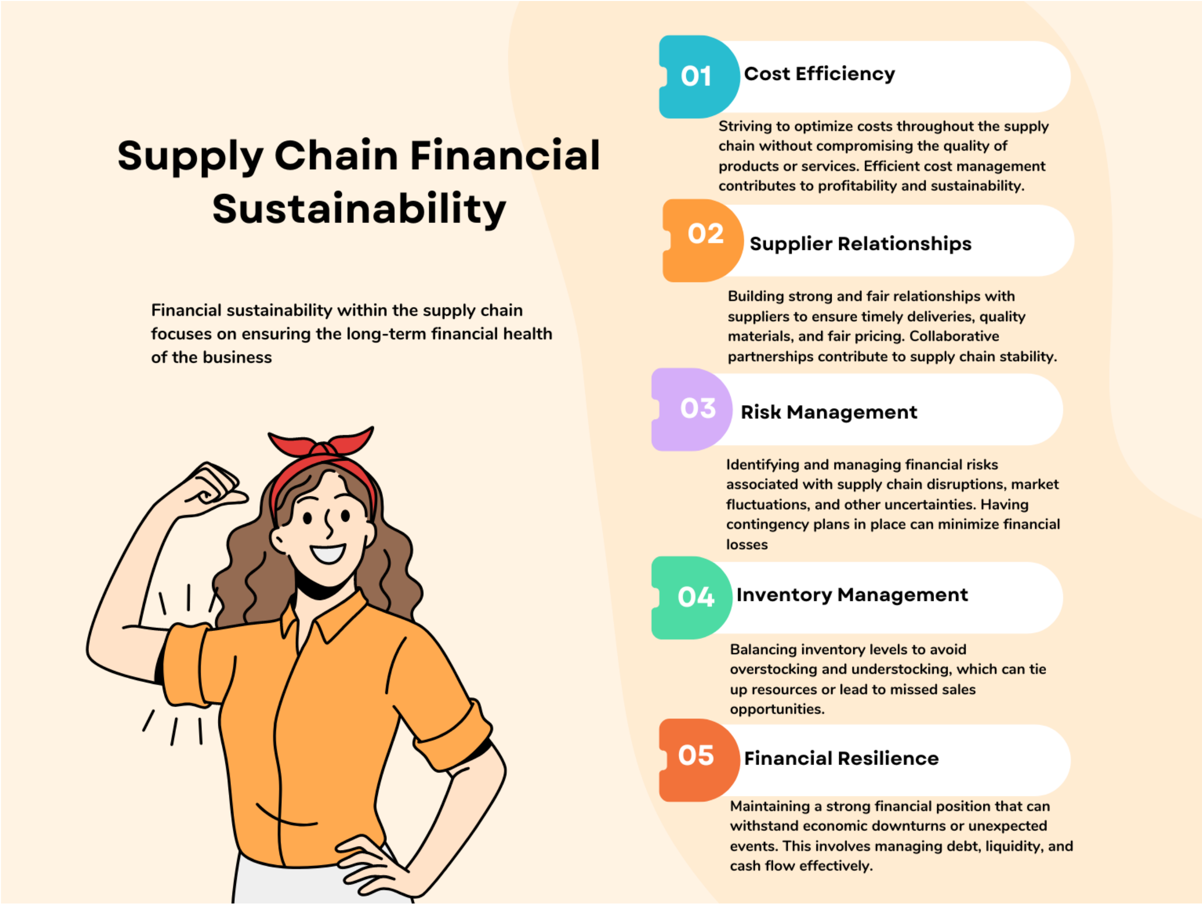

Supply Chain Responsibility:

Financial responsibility in the supply chain extends beyond profit generation to encompass ethical practices and social responsibility. This involves considering the impact of financial decisions on various stakeholders and society as a whole.

Key components include:

1. Ethical Supplier Practices: Ensuring that suppliers uphold ethical labour practices and fair wages for their employees. Responsible sourcing avoids supporting exploitative labor conditions.

2. Fair Payment Terms: Offering fair payment terms to suppliers, particularly smaller ones, to ensure their financial stability and prevent undue pressure on their operations.

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3. Transparency: Maintaining transparency in financial dealings and disclosing relevant financial information to stakeholders. Transparency builds trust and demonstrates accountability.

4. Sustainable Procurement: Prioritising the procurement of sustainable and responsibly sourced materials. This might involve avoiding materials associated with unethical practices or environmental harm.

5. Supplier Diversity: Supporting diversity and inclusion by working with a diverse range of suppliers. This promotes economic growth in various communities and industries.

6. Community Support: Investing in the communities where the supply chain operates through responsible financial practices, job creation, and contributions to local development.

Balancing financial sustainability and responsibility in the supply chain requires strategic planning, collaboration, and a long-term perspective. Businesses that prioritise both financial viability and ethical considerations are more likely to build strong relationships with suppliers, maintain a positive reputation, and contribute positively to the broader community and society.

3.6.4. Supply chain risk management

Supply chain risk management is just as important for small businesses as it is for larger enterprises, even though the resources and scale might be different. Small businesses often have limited budgets and fewer personnel, which means that they need to be strategic in how they approach risk management in their supply chains. Here's how small businesses can effectively manage supply chain risks:

1. Risk Assessment and Prioritization: Identify the potential risks that could disrupt your supply chain. These could include supplier disruptions, demand fluctuations, transportation issues, and more. Prioritise these risks based on their potential impact and likelihood of occurrence.

2. Supplier Relationships: Cultivate strong relationships with key suppliers. Open communication and collaboration can help you better understand their capabilities, potential risks, and their own risk management strategies.

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3. Diversification: Where possible, work to diversify your supplier base. Relying on a single supplier for critical components or materials can be risky. Having backup suppliers can help you mitigate the impact of disruptions from a single source.

4. Local Sourcing: Consider sourcing from local suppliers when feasible. This can reduce the impact of global disruptions, such as transportation delays and geopolitical conflicts.

5. Inventory Management: Keep a balanced inventory level. While carrying excess inventory can tie up capital, having some buffer stock can help you navigate disruptions by providing a cushion against sudden supply chain interruptions.

6. Lean Operations with Resilience: While efficiency is important, small businesses should also build in some level of resilience. This might mean having alternative suppliers or backup plans ready in case of disruptions.

7. Collaboration and Networking: Join industry associations or networks where you can share information and learn about best practices from other small businesses. Collaborative efforts can provide insights into supply chain risk management strategies.

8. Technology Utilisation: Leverage technology to aid your risk management efforts. Even simple tools like spreadsheets can help you track suppliers, inventory, and potential risks. More advanced tools and software can provide data insights and predictive analytics.

9. Scenario Planning: Create scenarios of potential disruptions and their impacts on your supply chain. This can help you prepare and respond effectively when such disruptions actually occur.

10. Crisis Management Plan: Develop a clear crisis management plan that outlines the steps to be taken in case of supply chain disruptions. Assign roles and responsibilities to ensure a coordinated response.

11.Continuous Learning and Adaptation: Keep up with industry trends, global events, and technological advancements that might impact your supply chain. Being adaptable and willing to adjust your strategies is crucial for effective risk management.

12. Insurance and Contracts: Explore options for insurance that can help mitigate financial losses from supply chain disruptions. Additionally, ensure that your supplier contracts include clauses that address how disruptions will be handled.

13. Employee Training: Educate your employees about supply chain risks and their role in managing them. Encourage a culture of vigilance and early reporting of potential risks.

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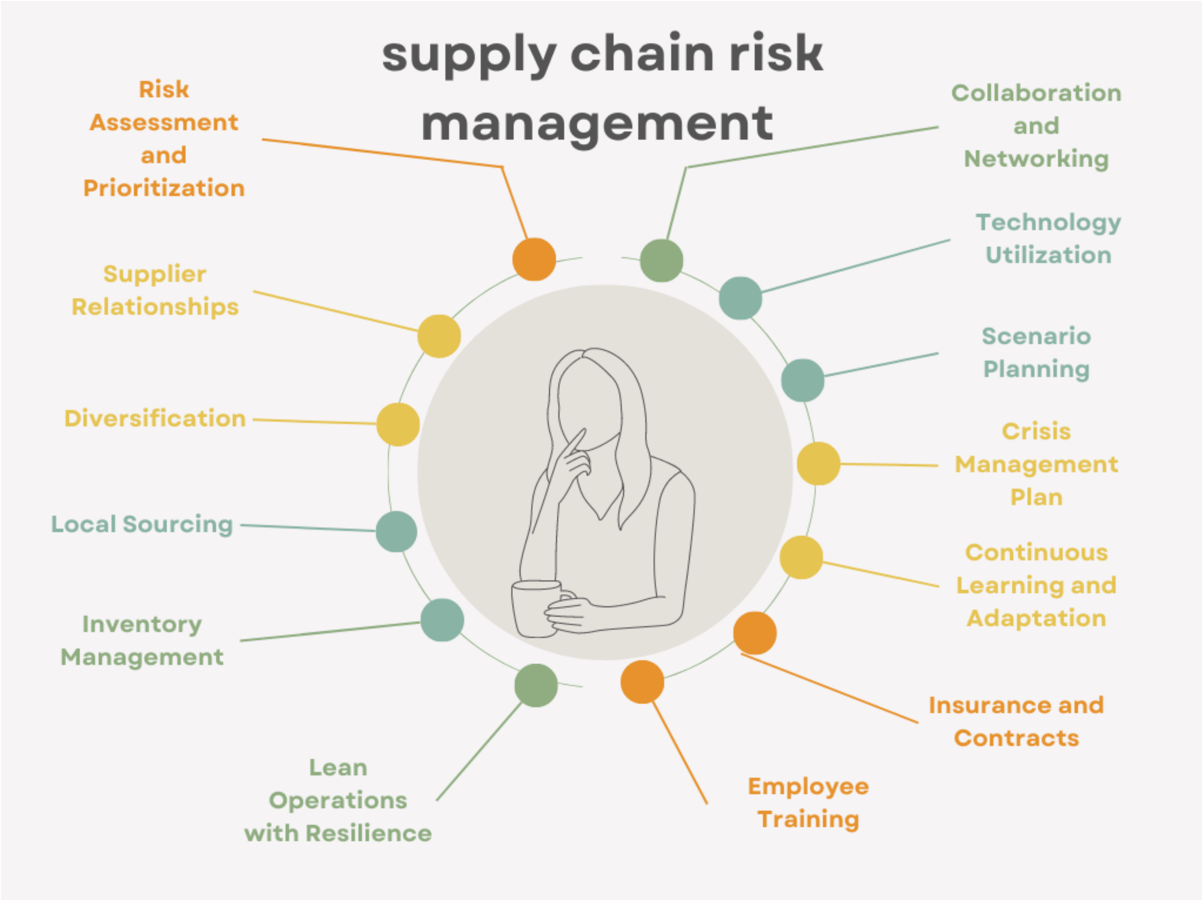

In summary, while the scale might be different, the principles of supply chain risk management apply to small businesses just as they do to larger enterprises. It's about being proactive, building resilience, and taking steps to ensure the continuity of your business operations in the face of disruptions.

3.7. Be inspired by networking and sustainable practices

This topic is aimed at providing participants with the necessary competences to understand: **The role of sales and networking in promoting sustainable practices**

3.7.1 Building sustainable relationships with clients and customers

Building sustainable relationships with clients and customers refers to the process of establishing and nurturing long-lasting, mutually beneficial connections with individuals or entities that use or are interested in a company's products or services. The term "sustainable" emphasises the idea of creating relationships that can endure and evolve over time, rather than being short-lived or transactional.

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Key aspects of building sustainable relationships with clients and customers include:

Trust and Communication: Trust is the foundation of any strong relationship. Open and transparent communication is essential to foster trust between the business and its clients/customers. Regularly updating clients/customers about products, services, and any changes helps maintain a healthy level of understanding and trust.

Customer-Centric Approach: Understanding the needs, preferences, and pain points of clients/customers is crucial. A customer-centric approach involves tailoring products, services, and interactions to meet these needs effectively. This can involve personalised solutions and exceptional customer service.

Consistency and Reliability: Consistently delivering high-quality products and services builds reliability and credibility. Clients/customers should feel confident that they will receive the same level of quality each time they interact with the business.

Value Addition: Going beyond basic transactions by offering additional value can help strengthen relationships. This might involve providing educational resources, expert advice, or additional services that enhance the client/customer experience.

Listening and Feedback: Actively seeking feedback from clients/customers and using it to improve products, services, and processes demonstrates a commitment to their satisfaction. Listening to their concerns and suggestions helps adapt and evolve the business to better suit their needs.

Long-Term Perspective: Building sustainable relationships requires a long-term perspective rather than a focus solely on immediate sales or profits. The goal is to foster ongoing engagement and loyalty, resulting in repeat business and referrals.

Adaptability: Markets and customer preferences change over time. A business that can adapt its offerings and strategies to these changes demonstrates flexibility and a willingness to meet evolving needs.

Conflict Resolution: Inevitably, there will be challenges and conflicts in any business relationship. The ability to address these issues promptly and satisfactorily is essential to maintaining trust and loyalty.

Appreciation and Recognition: Acknowledging and appreciating clients/customers for their loyalty and support can go a long way in solidifying the relationship. This could be through loyalty programs, special offers, or simply expressing gratitude.

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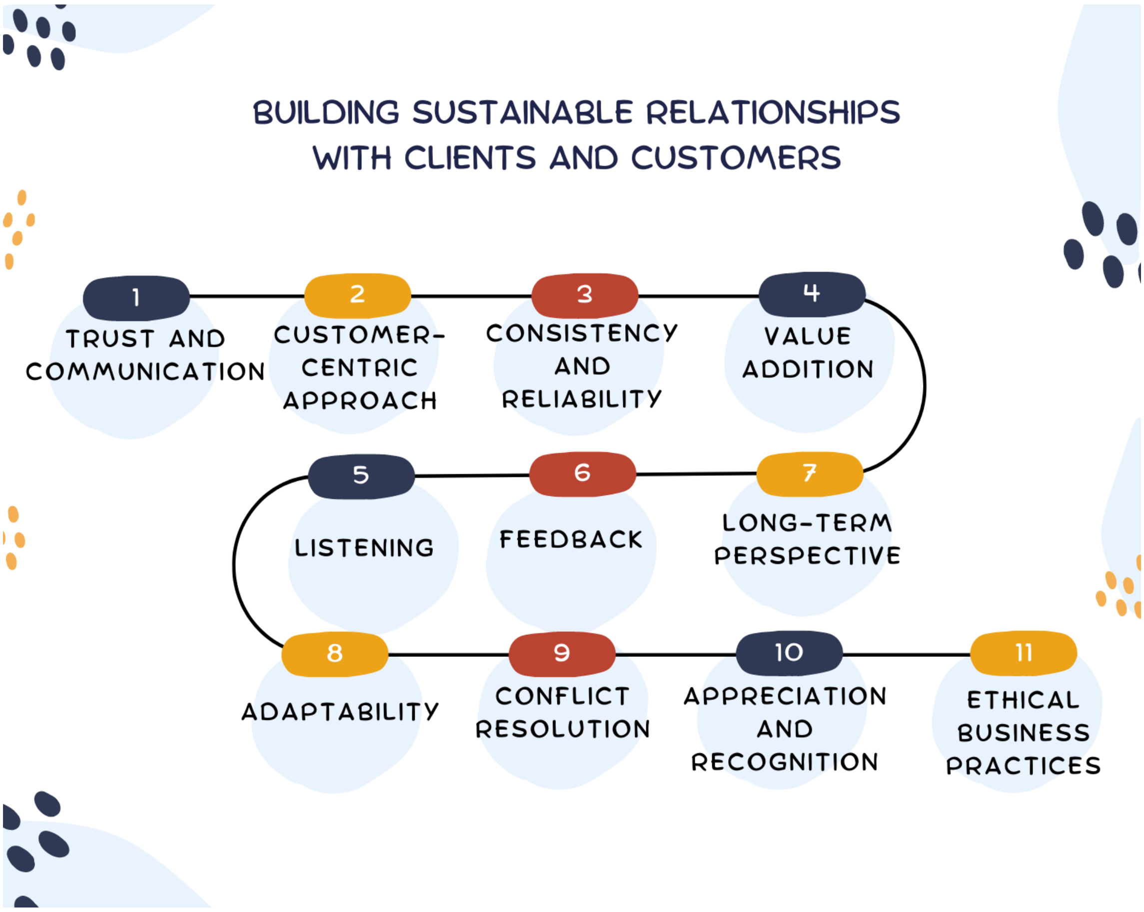
Ethical Business Practices: Operating with integrity and ethical values is vital for establishing and maintaining trust. A business that is perceived as honest and ethical is more likely to build sustainable relationships.



Overall, building sustainable relationships with clients and customers is about fostering connections that benefit both parties over the long term. It requires genuine care, effort, and a commitment to understanding and fulfilling the needs and expectations of those the business serves.

3.7.2 Networking with sustainable businesses and organisations

Networking with sustainable businesses and organisations involves establishing and nurturing connections with other entities that share a commitment to environmental, social, and economic sustainability. This type of networking goes beyond traditional business relationships and focuses on

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collaborating with partners who prioritise ethical practices, environmental stewardship, and social responsibility.

Key points to consider when networking with sustainable businesses and organisations include:

Shared Values: Networking with sustainable entities begins with aligning values. Both parties should have a genuine commitment to sustainability, whether it's in terms of reducing environmental impact, promoting social equity, or supporting ethical business practices.

Mutual Benefits: Networking should provide mutual benefits for all parties involved. This could involve sharing resources, knowledge, expertise, or access to new markets. Sustainable partnerships should contribute to the growth and success of both organisations.

Collaborative Initiatives: Consider joint projects, initiatives, or campaigns that promote sustainability. Collaborations can amplify efforts and reach a wider audience. For example, sustainable businesses could partner on environmental conservation projects or organise events that raise awareness about social issues.

Information Sharing: Sharing information about best practices, innovative technologies, and successful strategies can be valuable for both partners. This kind of knowledge exchange helps both organisations improve their sustainability efforts.

Supply Chain Alignment: If applicable, ensure that the values and practices of your partners align with your supply chain. Collaborating with sustainable suppliers and distributors can enhance the overall sustainability of your business operations.

Events and Conferences: Attend industry-specific events, conferences, and workshops related to sustainability. These gatherings offer opportunities to meet like-minded businesses, learn from experts, and explore potential collaboration avenues.

Online Communities: Participate in online forums, social media groups, and platforms dedicated to sustainability. Engaging in these communities can help you connect with businesses that share your values.

Local Engagement: Engage with sustainable businesses and organisations in your local community. Collaborating on community projects or sustainability initiatives can help strengthen your network and make a positive impact on your surroundings.

Innovation and Research: Collaborate on research and development projects that aim to address sustainability challenges. This could involve developing new technologies, products, or services that contribute to a more sustainable future.

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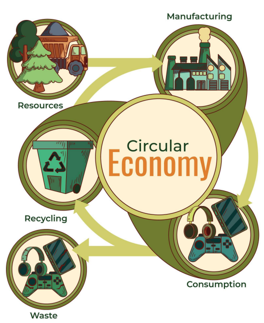
Long-Term Relationships: Just like building relationships with clients and customers, sustainable business networking is about fostering long-term connections. Focus on trust, communication, and shared goals to create lasting partnerships.

Visibility and Brand Enhancement: Collaborating with reputable sustainable organisations can enhance your brand's reputation. Being associated with other ethical and sustainable businesses can attract customers who value these principles.

Transparency and Accountability: Maintain transparency in your networking relationships. Hold each other accountable for sustainable practices and ensure that both parties are adhering to agreed-upon values and objectives.

By networking with sustainable businesses and organisations, you can amplify the positive impact of your efforts, drive innovation, and contribute to the advancement of sustainable practices in your industry and beyond.

3.7.3 Developing partnerships with sustainable suppliers and vendors



Developing partnerships with sustainable suppliers and vendors for a small business involves forming mutually beneficial relationships with other companies that prioritise ethical, environmental, and social responsibility in their operations. These partnerships can be particularly impactful for small businesses looking to align their values with their supply chain and make a positive impact on their community and the environment.

Here's a breakdown of the key considerations for small businesses when developing partnerships with sustainable suppliers and vendors:

Shared Values: Seek out suppliers and vendors that share your commitment to sustainability. Look for partners who align with your small business's values regarding ethical practices, environmental conservation, and social responsibility.

Start Locally: Consider sourcing from local suppliers and vendors who prioritise sustainability. Local partnerships not only support your community but also reduce the carbon footprint associated with transportation.

Supplier Screening: Even for small businesses, careful vetting of potential partners is crucial. Evaluate their sustainability practices, certifications, and track record to ensure they meet your criteria.

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Transparency: Opt for suppliers and vendors that are transparent about their sourcing practices, production methods, and any potential environmental or social impacts associated with their products or services.

Collaborative Growth: Developing partnerships doesn't have to be complex. Small businesses can work closely with suppliers to establish shared sustainability goals and collaborate on strategies for improvement.

Economies of Scale: By pooling resources with sustainable partners, small businesses can sometimes achieve cost savings and efficiencies that might otherwise be difficult to achieve individually.

Local Networking: Engage in local sustainability networks or associations to discover potential partners and learn from other businesses' experiences with sustainable sourcing.

Adaptability: Smaller businesses can be more agile in adapting their supply chain practices. This flexibility allows them to incorporate sustainable changes more swiftly.

Community Impact: Small businesses often have a strong local presence. Partnering with sustainable suppliers and vendors reinforces your commitment to the community and resonates positively with local customers.

Marketing Advantage: Collaborate with your partners on marketing efforts to showcase your shared commitment to sustainability. Highlighting these partnerships can attract like-minded consumers who value ethical and eco-conscious practices.

Long-Term Relationships: Cultivate enduring relationships built on trust, open communication, and a mutual understanding of each other's values and goals.

Education and Empowerment: Small businesses can use their partnerships as an opportunity to educate both their customers and suppliers about the importance of sustainability, fostering a wider culture of responsibility.

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In summary, developing partnerships with sustainable suppliers and vendors offers small businesses the chance to create meaningful connections, drive positive change, and align their operations with ethical and environmental considerations. These partnerships not only enhance a business's reputation but also contribute to the larger goal of promoting sustainable practices across the business landscape.

3.7.4. Build sustainability and networking into the family business plan

Working into the family business plan for a small business involves weaving environmental and social responsibility into your operations while leveraging strategic connections.
Here's how you can achieve Sustainability Integration:

a. Environmental Impact: Identify areas where your business can reduce its environmental footprint. This could involve adopting energy-efficient practices, minimising waste, and sourcing eco-friendly materials.

b. Social Responsibility: Develop initiatives that positively impact your local community. Consider supporting local charities, creating job opportunities, or implementing fair labour practices.

c. Ethical Sourcing: Prioritise suppliers and vendors who share your commitment to sustainability and ethical business practices. Opt for partners that align with your values.

d. Long-Term Vision: Integrate sustainability into your business's long-term vision. Outline specific goals, such as achieving certain carbon emissions reductions or community impact milestones.

Networking Strategy:

a. Local Engagement: Attend local business events, workshops, and community gatherings. Networking within your locality can help you connect with other small businesses, potential partners, and customers who value sustainability.

b. Industry Associations: Join industry associations or groups related to sustainability. These platforms provide opportunities to share insights, learn from others, and collaborate on common goals.

c. Online Presence: Leverage social media platforms to showcase your family business's commitment to sustainability. Engage with online communities, share success stories, and connect with like-minded businesses.

d. Collaborative Initiatives: Form partnerships with other small businesses that align with your sustainability values. Collaborate on projects, events, or marketing campaigns to amplify your collective impact.

e. Supplier Relationships: Network with sustainable suppliers to build strong relationships. These connections can ensure a steady supply of eco-friendly materials and products for your business.

f. Customer Engagement: Engage with your customers through various channels to communicate your sustainability efforts. Transparently share your progress, goals, and the positive impact you're making.

Business Plan Integration:

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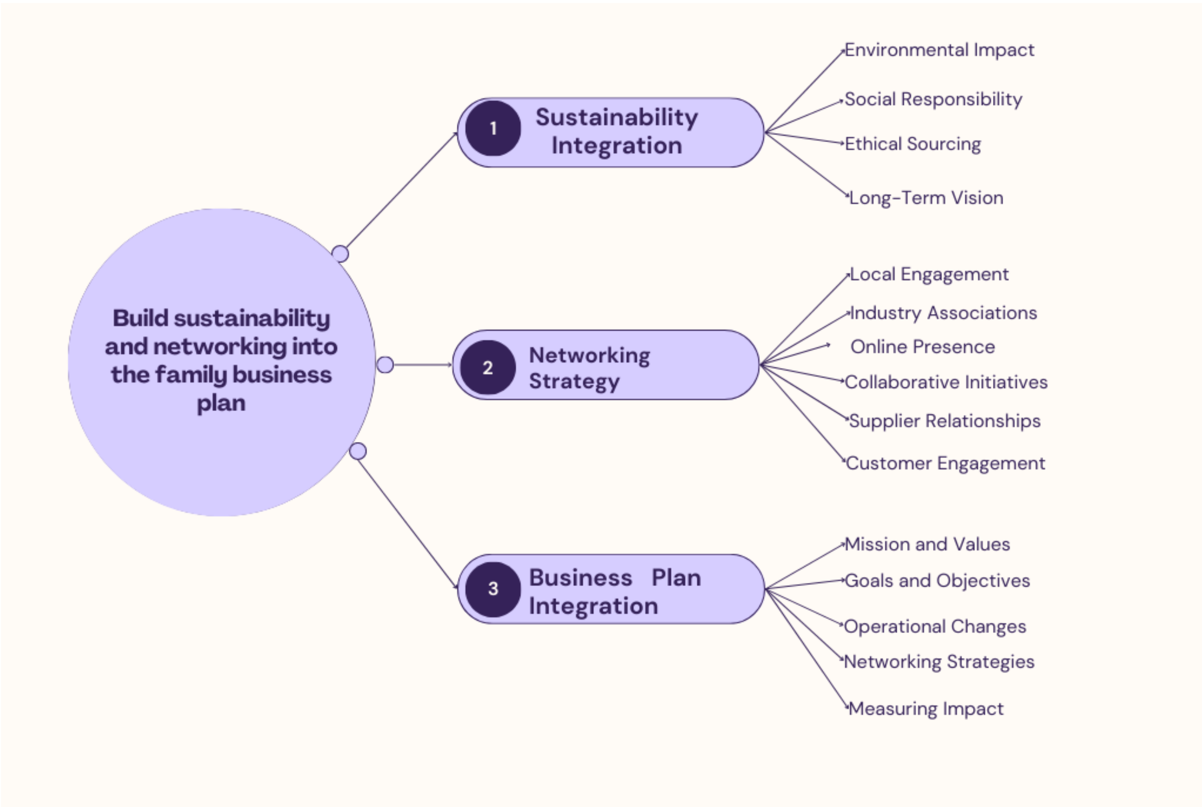
a. Mission and Values: Clearly state your family business's sustainability mission and values in your business plan. This demonstrates your commitment to prospective partners, investors, and stakeholders.

b. Goals and Objectives: Outline specific sustainability goals and targets in your business plan. This adds a strategic dimension to your commitment and provides a roadmap for implementation.

c. Operational Changes: Detail how you'll integrate sustainability into your day-to-day operations. This could involve processes like waste reduction, energy efficiency, and employee training.

d. Networking Strategies: Explain how you intend to build and nurture your network of sustainable partners, suppliers, and like-minded businesses to create a supportive ecosystem.

e. Measuring Impact: Include a section on how you'll measure the impact of your sustainability efforts. This can involve tracking metrics related to energy consumption, waste reduction, community engagement, etc.



By effectively integrating sustainability and networking into your family business plan, you're not only setting your business on a path towards responsible growth but also contributing to a positive change in your community and industry. This holistic approach can enhance your

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business's reputation, attract conscious consumers, and position your family business for long-term success

TIP: Build a Supportive Network: Actively participate in industry associations, networking events, or online communities that focus on supporting women entrepreneurs. Networking provides opportunities to connect with like-minded individuals, exchange experiences, share resources, and gain valuable contacts.

TIP: Collaborate and Form Partnerships: Seek opportunities for collaboration and partnerships with other businesses, both within and outside the family business realm. Partnerships can help expand customer reach, tap into new markets, and leverage complementary strengths for mutual growth.

3.8.Brand Management: Branding

Summary of the chapter:
A brand is how your company appears in people's eyes: it is an image, a name, or an idea associated with a product or a company and that distinguishes it from other brands. A brand is a name with the power to influence, and this definition captures the essence. Brand equity, on the other hand, is the value of a brand, determined by the consumer's perception of its quality and desirability. It is based on factors such as the brand's recognition, customer loyalty, and customer satisfaction. Lastly, the Brand Identity Prism, a well-known marketing model also referred to as Kapferer's Brand Identity Prism, has for purpose brands recognising the parts of their identity and making them work together to tell the brand's story.

Tools and keywords:
Brand triangle, Brand Equity, Brand Identity Prism

3.8.1. What is branding

A brand is how your company appears in people's eyes: it is an image, a name, or an idea associated with a product or a company and that distinguishes it from other brands. To make your product appealing, the brand's name or logo is linked with an idea (USP) and more importantly with an experience. The customers should identify with your brand, forge a link of trust and commitment. This is why a brand is more complex than just a name or a logo; it is a system of three fluctuating elements that can be represented by a triangle, representing the brand system.

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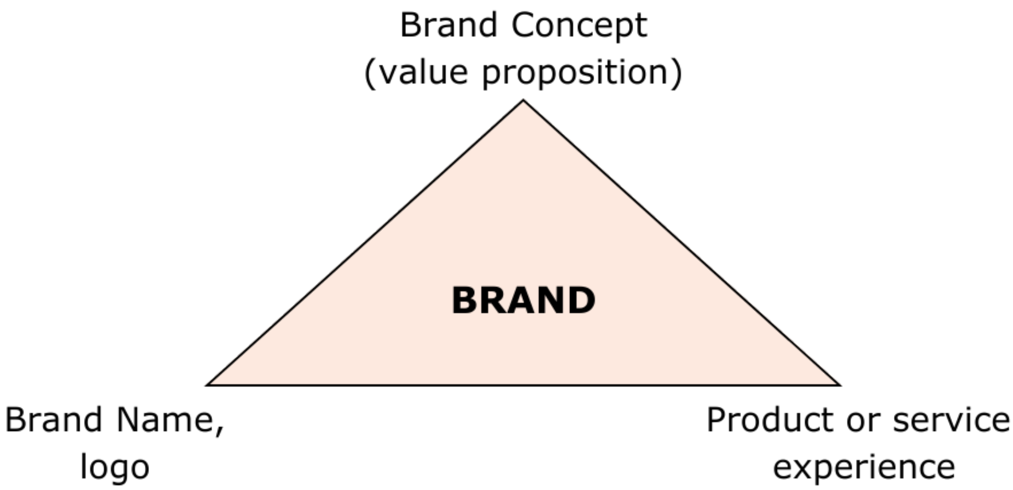

The brand system, Ch1, pg 10, The new strategic Brand Management by Jean-Noël Kapferer

The company first and foremost sells an experience of the product, different from other rival products or companies. This experience is associated in the customer’s mind with a name or a logo, and both the experience and the logo come from a unique selling proposition (USP), value proposition, which is the concept at the core of the brand. To put it in a nutshell, a brand exists when it has gained the power to build a community, to exercise influence over a market, and the goal of brand management is precisely to increase that influence by making the experience and trust in the brand more widely shared.

The fact that the three different poles of brand management can evolve over time raises some questions: should the concept/product/logo change according to time and space? What should help customers recognise the product? Only a name, a name and a logo, just a logo? This is why the question of brand identity is very important.

3.8.2. Brand equity

What *is brand equity?*

Brand equity is the worth of a brand, measured by several factors that express the opinion consumers have of its quality (qualitative assessment). The higher the brand equity is, the higher the profit of the company will be. The six factors identified by most marketing teams are brand **image** (how the customers see the brand), brand **identity** (how the brand wants to be seen), brand **awareness** (how much the brand is known), brand **loyalty**, brand **association** (to what the brand is usually associated with) and customer **perception** (the general experience of customers). But they can also be split between brand **assets** and brand **strengths**, as the opinion customers have of the brand usually stems from both the influence the brand has on the market and from its results.

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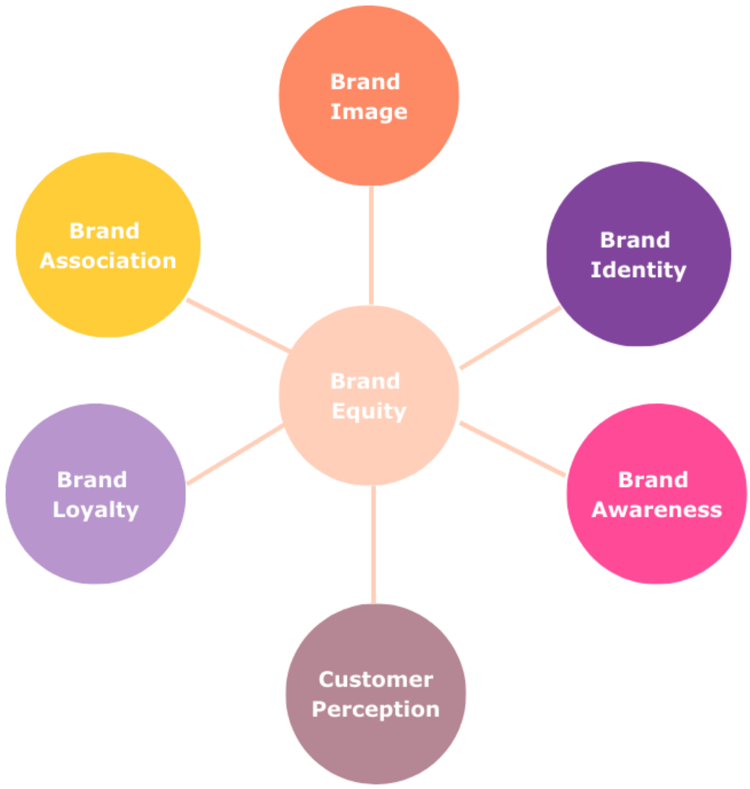

How can brand equity be ***measured****?*

Although brand equity is a qualitative assessment, there is some quantitative data related to it that can be measured. For instance, consumer reviews & behaviour; financial data like profits, and strength metrics such as brand awareness or loyalty. This can be achieved through surveys, for example.

3.8.3.. Brand identity

What is the Brand Identity Prism?

The Brand Identity Prism, also known as Kapferer's Brand Identity Prism, is a marketing model that represents the six key elements of brand identity and their interactions. It is a

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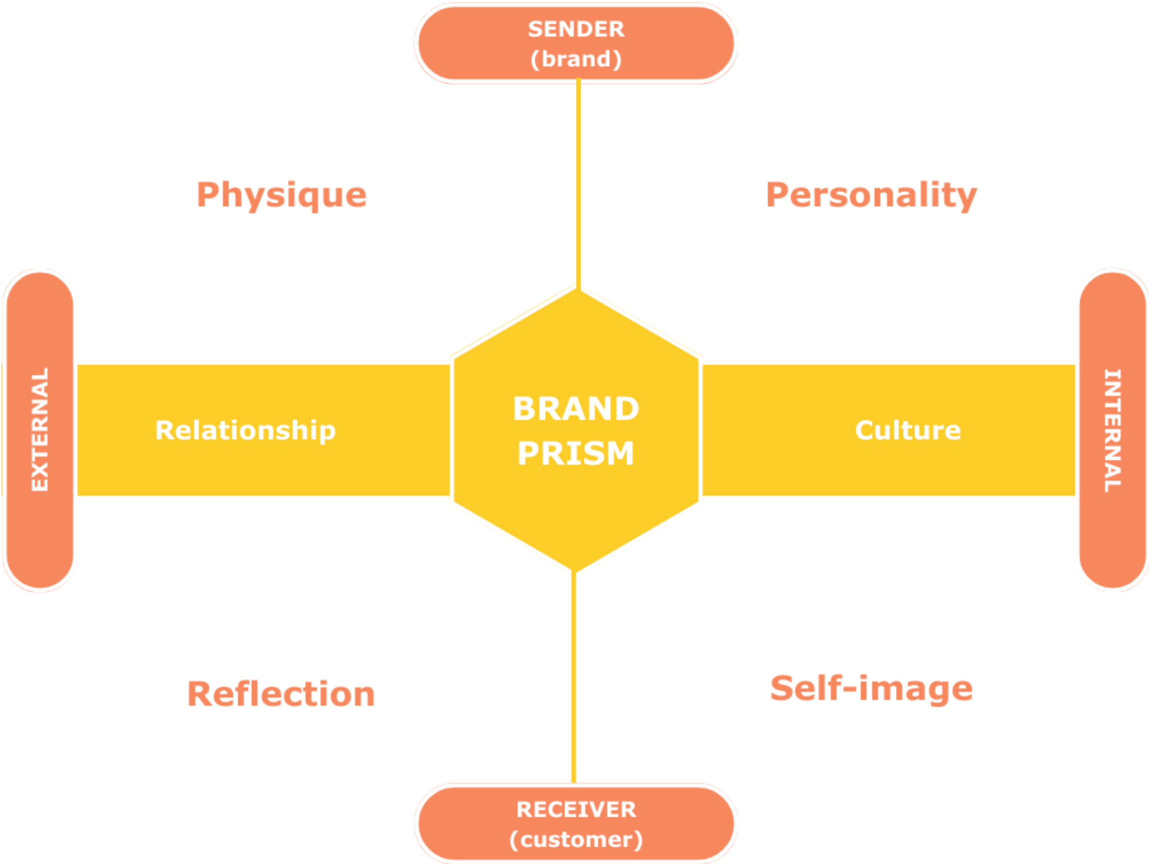
very useful tool to understand how brand identity works and how to communicate it to the customers.



Brand Identity Prism by Jean-Noël Kapferer

The prism is divided into four categories: sender (brand) & receiver (customer), internal & external. The four sections in the corners are categories of how both the customers and the brand appear, while the two stripes illustrate the links between them. Let's break the prism down.

*What the "**Physique**" section is:*
The "physique" section refers to the external characteristics of the sender, which is the brand. It contains all the visible attributes of the brand: name, logo, style, colours… Those attributes create the physique of the brand, an appealing visual representation of it.

*What the "**Personality**" section is:*
The "Personality" section is related to how the brand conveys its message, and what it says about the internal identity of the brand. It is similar to human personalities: it expresses the character traits of the brand. For instance, Nike seeks to display a fearless, competitive and risk-taking personality brand.

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*What the "**Reflection**" section is:*
The "Reflection" section refers to the external characteristics of the receiver, namely the customer. It is about which customer the brand wishes to reach.

*What the "**Self-image**" section is:*
The self-image section is about how the customers see themselves, what ideal they aspire to, which problems they have to overcome in order to reach it.

Physique + Reflection
The **relationship** between the brand and customers is essential to keep the target group (reflection) interested in the external product (physique), and could build loyalty, for example, through good customer service.

Personality + Self-image
The **culture** section is about how the brand shows its commitment to solving the customer's problems (self-image) through its origin story and by displaying its personality. Culture refers to the purpose of your brand.

How can I use the Brand Identity Prism?
The Brand Identity Prism allows the brand to have a clearer and more coherent brand concept and story, to communicate more efficiently with your target audience and to leave a lasting impression on customers. It acts as a governing principle for your brand concept and image. You should personalise the prism and come back regularly to it to ensure the relevance of further decisions.

3.9. Brand Management: Communication

Summary of the chapter

Storytelling has been, for centuries, the most effective way of moving people. Indeed, in rhetoric, persuading by triggering emotion in the audience is often more successful than convincing people with logical arguments. That is because stories can allow the audience to identify with the message that is being conveyed; it makes the person delivering the story relatable, and it fosters the development of trust between sender and receiver. A brand community, on the other hand, is working similarly as the storytelling element at the brand management. It is a community of loyal, devoted customers gathered around a brand. Especially with the use of social media and the growing importance of mass consumption and its criticisms alike, customers are brought together by shared lifestyles, values, and traditions.

Tools and keywords
Storytelling, Story brand, brand communities

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3.9.1. The power of storytelling

Why *is storytelling of great importance for branding?*
Storytelling has been, for centuries, the most effective way of moving people, whether it may be through today's politician's speeches or the great Latin orators during Antiquity (especially Cicero). Indeed, in rhetoric, persuading by triggering emotion in the audience is often more successful than convincing people with logical arguments. That is because stories can allow the audience to **identify** with the message that is being conveyed; it makes the person delivering the story **relatable**, and it fosters the development of **trust** between sender and receiver. And as we have seen in the previous part, it is a big part of what successful branding should be like.

How *can I structure my storytelling?*
First of all, you should, in general, focus on telling stories the target group may relate to authentically. Including figures might be a good idea, but it shouldn't take up too much space in your message. However, what should take an important place in your message is emotion, as it fosters deeper connection and understanding with your clients-to-be, as the example of Patagonia has shown us.

The few steps you can follow in storytelling are creating a **brand story** (Chapter 6b), putting your **customers' problems** at the heart of your narrative, establishing your **disseminating channel**, following the nature of the content (if it is long content, it might be best to use websites or videos whereas if it is short content, it would be better to post on social media, for example). Lastly, ensure that the content is **visual** and pleasant to go through.

3.9.2. Building a brand story

A brand story is your company's **origin and success story**, but in which your brand is not the hero. Indeed, your brand should be based on the customers' needs and problems to be seen as a reliable solution to their problems.
Your brand story can be illustrated as follows:

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Building a story brand by Donald Miller

Here are the different step your brand story should follow:

- **Defining a main character**: this step is about identifying a customer and their needs (human basic needs: accumulating resources, building relationships, reaching self-accomplishment…)
- **Identifying their problem**: the problem should be a cause and not a result, singular and not plural to make it more relatable, and lastly it should be real. It is also important to consider internal (the character's feelings, abilities) as well as external problems
- **Positioning the brand/company as a guide**: the brand should display empathy (by understanding and relating to the character's problem) and competence through previous experience
- **Establishing a clear plan**: should be made of a process plan (clear steps such as making an appointment, creating a plan tailored to the problem and assessing the results) and an agreement (of things you can guarantee to your customer).
- **Calling the character to action**: you should send direct (obvious signs) and indirect (educational content) calls to action for the character to make up his mind and start acting according to the plan
- **Helping the character avoid failure**: this step is about reminding the character (customer) of the stakes at play on buying the product without insisting too much on it and generating anxiety
- **And help them reach success**: show the customer how your brand/product can improve their life and solve their problem (achieve power/wealth, develop strong relationships, reach self-accomplishment…)

3.9.3. Brand communities

***What** is a brand community?*

A brand community is a community of loyal, devoted customers gathered around a brand. Whereas communities were traditionally close-knit groups living in a restricted and often

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rural geographical area, in opposition to individualistic urban societies, the rise of mass media allowed communities to form indifferently to geographical barriers. Especially with the use of social media and the growing importance of mass consumption and its criticisms alike, customers are brought together by shared lifestyles, values, and traditions.

***Why** are brand communities important?*
Unlike a segment, a marketing concept referring to a group of shared characteristics and profiles, a community is an active group exchanging information and thoughts about your brand. So, it is a major asset for your brand, which can help you get valuable feedback and advice but, most importantly, spread awareness about your brand and recommend it to others.

***How** can I expand and nurture my brand community?*
The first step is to identify the community that already exists. You might already have consumers following you on social media, for example, and it is in your interest to reach out to them. But to truly develop your community, you first need to improve and clarify your brand image and intention. Ask yourself; "*What is my brand's mission? What do I want it to be known for?"*. Then, you should establish your objectives and the ways you'll measure them. Finally, you should choose an online platform and communicate regularly with your community: if you are looking for a platform that can gather a large community, you might need to create a forum, if you want to interact with a more individualised community you can use social media like Instagram for example, and if you want to have a direct conversation with the community Facebook or Linkedin are more convenient. You can also create your own app or website.

3.10. Social Media Management

Summary of the chapter
Social media management or Social Media Optimisation (SMO) is a part of digital marketing that focuses on increasing the performance of the company's website through social media. It is a crucial tool for modern marketing because of its ability to reach customers all over the world, but more importantly because of its ability to bring people together in brand communities.

Tools and keywords
Social media management, Social media optimisation (SMO)

3.10.1. What is social media management?

Social media management or Social Media Optimisation (SMO) is a part of digital marketing that focuses on increasing the performance of the company's website through social media.

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It is a crucial tool for modern marketing because of its ability to **reach customers all over the world** (about half of the world population uses social media, which is also a great way to improve customer service) but more importantly as we saw in Chapter 11.3, because of its ability to **bring people together in brand communities**. Indeed, one of the peaks of the use of social media in marketing is that the brand can not only reach customers but interact with them, creating a meaningful connection and thus fostering customers' engagement. Another major asset of social media management is that it does not necessarily require any budget, leading to a **good ROI** (Return On Investment). Lastly, as we saw in Chapter 3.4, SMO is only one part of digital marketing but has a **positive impact on other categories like SEO** (Search Engine Optimisation), as it leads to more traffic on the content.

3.10.2. How can I optimise my social media strategies?

Social media management is a perfect example of how marketing can be applied at different scales. Here you can use the same steps we detailed in Chapter 2c: setting **SMART goals**, defining the **target audience (STP)**, doing a **competitor analysis**, choosing the **dissemination channels** according to the target group (targeting retirees on Tik Tok or teenagers on LinkedIn is unlikely to produce any results, for instance) and defining **KPIs** (Key Performance Indicators) to monitor results. However, there are some specificities if you go into detail.

Let's first talk about dissemination channels. It is essential to grasp what audience they draw to them and what their main characteristics are: while Facebook is perfect to reach a vast TG and directly sell products, Instagram attracts a younger audience and is a visual social media. Focus on posting high-quality designs appealing to Millenials and the Gen Z. LinkedIn is a more professional platform: educational content about your brand may be better suited.

The other specific steps you should take, now that you have decided where to post and who to post for, are **optimising your profile** and **planning out your content** (social media calendar). Regarding your profile, make sure all the important information about your business is easy to find and at the top of the page (business name, contact information) and use words frequently used in search with the help of a keyword research tool (**TagCrowd or Keysearch,** for example). Lastly, make sure that your branding is coherent throughout the promotion (see Chapters 5 and 6 for more). Regarding planning, you should first decide what kind of content you wish to promote depending on your TG and dissemination channels (educational, informative, entertaining content) and then set up a social media calendar to plan out exactly when and where to post content. Keep in mind that for algorithms, regularity is key, and adapt content in accordance with specific periods of the year (Halloween/Christmas content).
For more information, you can follow this link:
https://www.searchenginejournal.com/how-to-create-a-social-media-content-plan/472463/#close

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3.11. Short Checklist about Legal Aspects in Sales and Marketing

It is beyond the scope of this introductory course and toolkit to provide detailed information about "Legal aspects in Sales & Marketing", because of the complexity and extensive scope of the subject matter. Legal aspects in sales and marketing encompass a broad range of laws, regulations, and compliance requirements specific to different countries and jurisdictions within the EU. This complexity makes it difficult to adequately cover the topic within the limited scope of a basic online course and toolkit. Additionally, the extensive scope would require in-depth knowledge and expertise in EU law, which is beyond the introductory level.

Jurisdictional differences further complicate the inclusion of legal aspects in a basic online course. Each EU member state has its own legal framework and specific regulations regarding sales and marketing practices. To provide accurate and comprehensive information, it would be necessary to address the unique requirements of each jurisdiction. Resources without such localization may result in incomplete or inaccurate information, leading to confusion or legal risks.

Another crucial factor is the evolving nature of laws and regulations governing sales and marketing practices. EU regulations, such as data protection laws (e.g., GDPR), consumer protection laws, and advertising regulations, are subject to regular changes, updates, and amendments. Attempting to cover legal aspects in a basic online course may lead to outdated information, potentially causing legal risks. Addressing legal aspects always require specialised legal expertise to ensure compliance and mitigate risks.

Sales and marketing activities have legal implications, and non-compliance can result in severe consequences, including financial penalties, reputational damage, and legal disputes. It is crucial for businesses to prioritise legal compliance and risk management in their sales and marketing practices. Businesses must consult legal professionals who possess in-depth knowledge and experience.

Considering these factors, it is recommended that legal aspects in sales and marketing be addressed separately through specialised courses, legal consultations, or engagement of legal professionals with expertise. These avenues can provide the necessary depth, up-to-date information, and jurisdiction-specific guidance to ensure compliance and mitigate legal risks effectively.

By way of support we offer here a short, no exhaustive checklist of a few topics with legal implications that all businesses should take into consideration with their sales and marketing strategy:

3.11.1. Advertising law

Advertising law refers to the legal regulations and guidelines that govern the creation, dissemination, and content of advertisements. It encompasses various legal principles and requirements related to advertising practices, including truthfulness, accuracy, disclosure of material information, fair competition, and compliance with consumer protection laws. It is relevant to consider in a family business sales strategy as it ensures compliance with legal regulations and guidelines governing advertising practices. Adhering to advertising laws helps protect the business from legal risks, builds trust with customers, fosters transparency, and ensures fair competition, contributing to the success and reputation of the family business.

3.11.2. The Consumer Rights Directive

The Consumer Rights Directive is an EU legislation that establishes a set of consumer rights and harmonises consumer protection rules across member states. It covers aspects such as information requirements, right of withdrawal, remedies for faulty products, and unfair contract terms, aiming to ensure fair treatment and transparency in consumer transactions.
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3.11.3. Common sense code of Ethics for Marketing and Sales

Sales ethics refers to the principles and behaviours that prioritise treating leads, prospects, and customers with respect, fairness, honesty, and integrity. It emphasises putting the customer first, building trust, and focusing on long-term relationships rather than short-term gains. Adopting sales ethics leads to customer loyalty, engaged employees, and sustainable business growth.
Recommended reading: https://www.pipedrive.com/en/blog/sales-ethics

3.11.4. Data protection and Privacy

Data protection and privacy in sales refers to the legal and ethical practices implemented to safeguard personal information collected from customers and prospects during sales activities. It involves ensuring compliance with data protection laws, obtaining consent, securely storing and processing data, and respecting individuals' privacy rights, thereby fostering trust and protecting sensitive information. Two relevant EU directives are:

General Data Protection Regulation (GDPR):

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It is the primary legislation governing data protection and privacy in the European Union. It establishes strict rules on how personal data should be processed, stored, transferred, and protected by businesses operating within the EU or handling EU residents' data.
+info

ePrivacy Directive:
It focuses on the protection of privacy and confidentiality in electronic communications. It covers aspects such as consent requirements for cookies and similar tracking technologies, direct marketing regulations, and confidentiality of communications.
+info

3.11.5. Copyright & Copyleft

Copyright in sales refers to the legal protection granted to original creative works, such as written content, images, music, and videos. It gives the creator exclusive rights to reproduce, distribute, and display their work. In sales, respecting copyright means obtaining proper licences or permissions when using copyrighted material and avoiding unauthorised use or infringement.
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Copyleft in sales refers to a licensing approach that allows the distribution and modification of creative works while ensuring the same freedoms are passed on to subsequent users. It grants individuals the right to use, copy, modify, and distribute the work, promoting open collaboration and sharing within the sales context while maintaining certain requirements and conditions. There are several different copyleft licence available, each with its own specific conditions and requirements.

While copyleft licences are commonly associated with software and digital works, they can also be applied to non-digital product sales. One notable copyleft licence easily used for digital and non-digital products is the Creative Commons licence. This free of cost licence allows individuals or organisations to specify how they wish their product to be used. It promotes open collaboration and sharing, fostering a culture of innovation and community participation.
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4. Videos

1. PEST & SWOT analysis

The following video is using Starbucks as an example in order to showcase PEST and SWOT analysis. https://www.youtube.com/watch?v=6pqwGoiFGUo&t=108s

2. Building a story brand, Donald Miller, 2017 published by HarperCollins Leadership

The following video is an animated summary based on the book: Building a Story Brand, by Donald Miller. An overview of the storybrand formula is presented with examples which allow you to understand how the use of storytelling can deliver a direct message to your customers.
https://www.youtube.com/watch?v=FkCMhhJaSSk

3. Motivational Videos:

How to achieve anything in life by learning how to sell. | Rana Kordahi | TEDxCQU (17min)
Great Leadership Is a Network, Not a Hierarchy TEDtalk, by Gitte Frederiksen (12min)

4. Videos about CRM:

Tutorial For Beginners "How To Use A Free CRM Software" (8 min) by Teach express

5. Videos about Supply Chain Management:

What is Supply Chain Management? Definition, Introduction, Process & Examples by AIMS UK (12min)
Supply Chain Management In 6 Minutes: What Is Supply Chain Management? Apple study case, by Simplilearn (6min)
5 STEPS to a Sustainable Supply Chain with examples by Join Jessie Frahm from Planet One Point Five (6min)

More videos

5 STEPS to a Sustainable Supply Chain with examples by Join Jessie Frahm from Planet One Point Five

Basics about SWOT analysis: MY PERSONAL SWOT ANALYSIS by student Chua Sin Hui

Climate Action's Hidden Opportunities for Women" by Zineb Sqalli

Cómo construir relaciones con tus clientes, by Ética comercial with Marta de Francisco

Como convertirse en un un líder de ventas, Ética comercial with Marta de Francisco

Cómo montar una empresa rentable, ética y feliz by Txell Costa

Etsy and Women Entrepreneurs in the Digital Economy.

Forecasting in Excel Made SIMPLE (include seasonality & make predictions) by Leila Gharani

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Great Leadership Is a Network, Not a Hierarchy by Gitte Frederiksen

How supply chain bottlenecks are creating environmental issues by Live CBSN

How to achieve anything in life by learning how to sell. | Rana Kordahi | TEDxCQU

How to do a SWOT analysis for a product launch by Torrance Hart

How to Use SWOT Analysis by OnStrategy I Virtual Strategist

Instituto Human Delta "Conoce a tus stakeholders. ?Quiénes son? ?Qué tipo existen?

Laina Raveendran Greene How women are the key to economic well-being

Modelo de cálculo de previsión de ventas por familia | | UPV Universitat Politècnica de València, publicado 2021

Stakeholders o Partes interesadas

Supply chain Africa News - Women in supply chain leadership.

Supply Chain Management In 6 Minutes: What Is Supply Chain Management? Apple study case, by Simplilearn

Sustainable development goals fund, "The Road to Peace - Why the SDGs are Good for Business conference"

Taller de empresa - Miquel Pino Mentor de empresarios explains a real study case

TEDx talk: Imagine customers become friends, by Steven Van Belleghem

TEDx Windsor Networking for Success by Theresa Reaume

TEDxWolverhampton Reworking Networking by Eleanor Turner

The PM channel - Risk management basics: What exactly is it? and "What risk identification techniques are available and which is the best one?" by Dr David Hillson

Tutorial Como crear un CRM HubSpot en Español - Curso desde cero paso a paso (1.12 hora) by Roger Gómez

Tutorial For Beginners "How To Use A Free CRM Software" (8 min) by Teach express

Video book review: Excel Sales Forecasting for Dummies, VBA Review, 2021

What is Supply Chain Management? Definition, Introduction, Process & Examples by AIMS UK

EN online free courses:
Open.edu Supply chain sustainability
WeCan Project in 6 languages: Communication, networking and soft skills improvement

ecodesign4eu project : Sustainable goals and business vision
Free Online Supply Chain Management Courses with Certificates by Oxford Home Study Center

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5. Conclusion

In this basic course module on "Marketing & Sales with a Heart: Promoting Our Family Business", we have covered a comprehensive range of topics to equip you as a beginner with essential knowledge in marketing and sales. We have gained insights into the foundations of marketing, including marketing management, marketing strategy, and planning. Additionally, we have explored the tools required for effective marketing management and gained a deeper understanding of consumption patterns.

On the sales side, we have learned about sales management, including the sales process, forecasting, and team motivation. Supply chain management has been introduced to help us grasp the importance of efficient resource allocation.

Networking and sustainability have been emphasised, showcasing the significance of building industry connections while promoting ethical practices. We have explored brand management, branding, and the art of storytelling to create brand communities that resonate with customers.

To navigate the digital landscape, we have delved into social media management, understanding its role in engaging audiences and building brand presence. Furthermore, we have been introduced to legal aspects, including advertising law, ethics, data protection, privacy, copyright, and copyleft, ensuring we are aware of the legal frameworks that govern marketing and sales.

In summary, this module has aimed to empower you, women entrepreneurs in a family business, to become proficient and ethical sales leaders. Armed with **new skills** in relation to entrepreneurship, communication, networking, negotiation, and self-organisation, and **new knowledge** about marketing, brand management, time management and planning, digital literacy, risk-taking. You are now better equipped to promote your family business with heart.

This basic course module has laid a solid foundation for our journey as marketers and sales professionals. As we progress, we will build on this knowledge, learning practical implementation and refining our skills to promote our family businesses successfully and ethically.

This will help you foster customer loyalty, and drive sustainable growth. By adopting customer-centric approaches and embracing diversity and inclusivity, you are poised to make a meaningful impact in the business world, creating a successful venture that reflects your values and family legacy.

With this basic knowledge, you, as a woman entrepreneur can confidently embark on your personalised sales and marketing journey. You are now equipped to make well-informed

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decisions on how to approach sales and marketing, whether to take a more advanced course on a specific topic, or handle certain tasks yourself, or outsource tasks to experts based on your specific business needs, time and resources. Enjoy the ride!

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