

# Expectations of Marketing Practices

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# Marketing Agencies

# Methodologies

## Health Benefits

If health benefits are referenced in marketing, then the Tea Tavern must be able to provide an easily accessible place to obtain the referenced research proving that the health benefits are *real* and *obtainable* with the consumption of the specified tea or type of tea in quantities that are at normal/average levels.

We can mention what people say and believe about tea, but if there is no evidence that we can reference proving a particular benefit, then the marketing piece must specify this in some way, such as by writing "Patrons tell us..." or "People believe that...".

# Overarching Marketing Playbook

## 1. BRAND IDENTITY

- Brand Story
- Mission/Vision: Clarify what your brand stands for and the long term goals
- Sustainability: if applicable highlight how your brand incorporates eco-friendliness or supports social causes
- Brand Aesthetic: Cohesive visual identity
  - Logo + brand colors (choose 3-5 colors, incorporate into backdrops, props and branding elements), font (must be consistent throughout all marketing materials)
  - Ensure consistent voice/tone and color palette across all channels
- Packaging

## 2. TARGET CUSTOMER + COMPETITOR ANALYSIS

- Targeting/Segmentation
  - Demographics (age, gender, income, education and occupation)
  - Psychographics (lifestyle, values, attitude and behaviors)
  - Geographic (regional or national)
  - Behavioral (purchasing habits, brand loyalty and product usage)
- Buyer Personas
  - Identify your ideal customers & create buyer personas with their preferences, challenges and motivations (**create 2-3 personas**)
- Cultural Trends Analyze how cultural shifts (e.g., health consciousness, minimalism) influence customer behaviors in your category
- Understand Your Market / Competitors
  - Analyze competitors for strengths, weaknesses, pricing and marketing strategies
  - identify market gaps, pain points and key motivators for purchasing

## 3. MARKETING CHANNELS + CONTENT STRATEGY/ONLINE PRESENCE

- Digital Marketing
  - Website: must have beautiful and consistent imagery, detailed product descriptions, "about me" page to share story/ethos, mobile friendly!!!
  - Social Media: create accounts on IG, FB and Pinterest: post a mix of educational, entertaining and promotional content

- **TikTok and Emerging Platforms:** Explore newer platforms with high engagement for your niche, especially for short-form video and trends
- **Video Content Beyond Instagram:** Consider platforms like YouTube for longer-form content, such as tutorials, behind-the-scenes looks, or brand stories.
- Email Marketing: use to create email database, build segments and send newsletters (campaigns for promotions, launches or loyalty rewards)
- Content Marketing
  - Instagram:
    - **IG Reels:** (short form video that is educational or entertaining), Recommend 15-30 seconds
    - **IG Stories:** short, engaging pieces of content that disappear after 24 hours, can connect with your audience in real time and to stay top of mind as stories appear at the top of the instagram app
    - **IG In Feed:** permanent post and contribute to profile's overall aesthetic
    - **BEST PRACTICES:** Use tools to plan posts in advance/preview your feed, alternate between product shots, lifestyle photos, and Reels to maintain variety, use consistent editing styles (same filter or editing preset), use a mix of close ups, flat lays and lifestyle shots
    - **Content Mix for Feed**
      - Product Images (30%-40% of Posts) : Use clean, minimal backgrounds or settings that reflect your brand's vibe
      - Lifestyle Shots (40%-50% of Posts) : show how product fits into people's daily lives
      - Educational/Entertaining Reels (20%-30% of Posts) : how to videos, benefits of product, fun trends
      - Seasonal or thematic content (10%-15% of Posts) : holidays, seasons or special occasions
    - Use tutorials and user generated content to build trust and show authentication
    - Photography: high quality images to be used for website, social media and ads
    - Social Content: lifestyle photos, product images, behind the scenes
    - Blog/SEO: write blog posts using key words to improve search ranking and attract organic traffic
  - Paid Advertising
    - FB ads, IG ads, google ads

## 5. LAUNCHING A MARKETING CAMPAIGN

- **Define Campaign Goals**
  - SMART (Specific, Measurable, Achievable, Relevant, Time-bound)
    - Measuring brand awareness, engagement, conversions, ROI
    - Tools to Use: google analytics (for web traffic and conversions), IG insights (for social engagement) and email platforms (to track open rates and click throughs)
- **Select Marketing Channels:** social, email, paid ads, influencer marketing, content marketing

- **Set a Budget and Timeline** (budget allocation to paid ads, influencer collabs, content creation, tools, etc.)
- Pre Launch:
  - Teasers: "coming soon", early access and sneak peeks, teasers on social
- Product Launch: Go live with a coordinated push across all chosen channels, i.e. e-blast, social posts, sms
- Launch Activities:
  - launch event, limited time promotions (giveaways), implement paid advertising
- Post Launch: Outline how to sustain momentum after the launch (i.e., follow-up campaigns, new collaborations, or additional content)
- Types of Campaigns: Seasonal campaigns, loyalty programs, referral programs, co-branding, product launch, sales or discount

## 6. INFLUENCER MARKETING AND PARTNERSHIPS

- Partner with micro influencers
  - (1K-50K) that relate to your specific niche (to create product reviews, unboxing, how they integrate the product into their daily lives)
  - often have highly engaged audiences, which lead to better conversions
  - Provide free product to said influencers in exchange for content
  - **KPIs for Influencer Campaigns:** Specify metrics like engagement rates, clicks, sales, or follower growth to evaluate success
  - **Content Repurposing:** Plan to reuse influencer-generated content for ads, email campaigns, or social media to maximize its value.
- Affiliate programs
  - you pay influencers only when they drive sales (low risk investment)
  - ideal for small business with limited marketing budgets
  - unique affiliate codes or links make it easy to track sales
  - **Reputable Affiliate Platforms: Rakuten, Awin, ShareASale**
- Brand Partnerships
  - Collaborate with brands in complementary niches for cross promotion that have overlapping target audiences
- Tips: influencer and brand partnerships provide a scalable way to market your product without the high costs of traditional advertising

## 7. CUSTOMER/COMMUNITY ENGAGEMENT + RETENTION

- Social Media Engagement: consistently respond to comments, DM's and mentions
- Discounts: first time buyers, bundle opportunities
- Loyalty Program: Reward repeat customers with points to use toward free product
- User Generated Content: Encourage customers to share photos of your product and to tag you on IG so that you can repost their content
- Polls and Q and A's? : Use IG stories to engage with followers
- Interactive Events: Host virtual educational sessions or live chats about benefits of product

- Customer Onboarding: Develop a welcome series for new customers to help them learn about your brand and products.
- Post-Purchase Engagement: Create campaigns to re-engage customers with cross-sells, usage tips, or customer appreciation initiatives.

## 8. EVENT MARKETING

- Host product launches, pop ups
  - Collaborative Events: Partner with complementary brands to co-host events, increasing reach and shared marketing responsibilities.
  - Virtual Pop-Ups or Experiences: Offer online-exclusive events for customers who can't attend in person.
- **What Do I need to Bring to A Physical Event?**
  - Branding Materials
    - business cards
    - banner or table top sign (use acrylic stand) with logo and business name
    - price lists, product info, educational signage
  - Product
    - product range, product add ons or enhancements, samples, exclusive items (if applicable)
    - relevant decor, tablecloth, product display stands
    - payment (point of sale system), bags to carry product
  - Misc. Marketing
    - special offers, sign up sheet (to collect email addresses), social media qr code
- **Social Strategy**
  - Pre Event: post story reminders or countdown for event (include time, location, activities)
  - tag partners if applicable
  - Content Ideas at Event: share bts clips, product showcasing, interactive demos, customer interactions, testimonials, ambiance shots (location, signage, decor)
  - Post Event: reel or carousel on feed featuring highlights from event (end with a CTA), share UGC from customers

## 9. STRATEGIC GROWTH

- Expand into new distribution channels (retail, subscription boxes)
- Co branding/large scale partnerships
- Leverage PR to gain media coverage and industry recognition

## 10. MEASURE YOUR RESULTS

- Website Traffic: How many people visit your site and where they come from
- Social Media Engagement: Likes, comments, shares, and clicks
- Sales and Conversion Rates: How well your marketing efforts are turning leads into customers
- Customer Feedback: Reviews and surveys to gauge satisfaction



# Instagram Growth Strategy

- **Define Target Audience**
  - Demographics (age, gender, location)
  - Interests and Values
  - Pain Points
- **Brand Identity**
  - Brand Story (share why you started the business and what makes your product unique)
  - Visual Aesthetic (develop a cohesive feed with specific brand colors, fonts and imagery)
  - Consistent Brand Voice and Messaging
- **Content Strategy**
  - **Visuals:** Product photos (use natural lighting and clear backgrounds) vs. lifestyle shots (showing your product in real life settings)
  - **Posting Plan** (educational content, entertainment, inspiration, product highlights, lifestyle content, behind the scenes (how product is made or sourced), engaging posts (quizzes, polls))
  - **Frequency:** **5-7 posts per week with a mix of 3 static and 2 reels, post stories daily**
    - **Best Posting Time - Morning (7-9am), Afternoon (12-2pm), Evening (6-8pm)**
  - Use hashtags relevant to niche
- **Influencer Marketing**
  - Micro influencers: partner with influencers in specific niche (their engaged audiences are likely to trust them)
    - offer free product in exchange for content
  - Affiliate Programs: provide influencers with unique discount codes or commission opportunities for sales they generate
- **Engage Your Community**
  - Comments and DM's (respond promptly)
  - UGC (stands for user generated content, encourage customers to post and tag your product so you can report)
  - Run Contests (to increase engagement and visibility)
  - Comment on Popular Posts
  - Follow Similar Accounts
- **Strategic Partnerships**
  - collab with complementary businesses for cross-promotions or joint events, host joint virtual giveaways
- **Drive Traffic**
  - SEO optimization (use keywords in IG bio)
  - Collaborations (host IG lives with experts)

- Paid Ads (run targeted ads showcasing product to audiences based on interest)
- **Paid Growth Strategies**
  - great way to increase reach and attract new followers
  - Run Targeted Ads (Ad Types)
    - Photos Ads: high quality static images
    - Video Ads: short, engaging clips
    - Carousel Ads: multiple images or videos highlighting product benefits or bundles
    - Story Ads: immersive ads appearing between user stories
  - Key Strategies: retargeting ads, lookalike audiences, geo-targeting
    - **Budget Tips: start with a small daily budget (\$5-\$15/day) to test audience response**
    - Metrics: click-through rates (CTR), cost per click (CPC) and return on ad spend (ROAS)
  - Boost High Performing Organic Posts (high likes, comments or share)
    - click "boost post" and set targeting criteria based on: interests, demographics, behaviors
- **Leverage IG Shopping Feature** (Focus on this when you are more established with imagery/content)
  - allows users to browse and purchase products directly through the app
  - convert profile to a business account, create product catalog, enable product tagging (tag products in stories, posts and reels)
  - Tap to shop option on feed, product stickers to be used on stories to make actionable and influencers can share shoppable posts that tag products
  - Benefits: reduces clicks, simplifying the buying process, encourages impulse purchases, increases product discoverability
- **Tracking Performance**
  - Key Metrics
    - Engagement metrics: likes, comments, shares, saves
    - Reach: the number of unique users who see your content and Impressions: total views of your content (can include repeat views)
    - Website Traffic and Conversions: use the "link clicks" metric to see how many people are visiting your site
      - Integrate UTM tracking codes for better data on versions
    - Follower Growth: track how audience size evolves, look for spikes after campaigns or collabs
    - Story Metrics: tap forward rate (users skipping ahead), drop off rate (users exiting stories), engagement (polls, questions and swipe ups)
  - **BEST PRACTICES**
    - low engagement? experiment with different content formats
    - Low Reach? use hash tags, collab with influencers or boost posts
    - High Drop off on Stories? shorten the length or add interactive elements

## KEY FEATURES OF INSTAGRAM

1. **Posts (In-Feed)**: permanent content that appears on your profile

- Best for showcasing brand identity and products, announce launches
2. **Stories:** temporary content that disappears after 24 hours
    - best for behind the scenes or interactive content
  3. **Reels:** short, engaging videos idea for storytelling, tutorials or trends
    - reels help increase visibility as IG promotes these to wider audiences
    - similar color palette and tone as photos, use overlays or consistent fonts, ensure the reel's cover aligns with your overall feed
  4. **Highlights:** Saved stories organized into categories on your profile
    - Great for FAQ's, about us section, product tutorials, customer testimonials, highlighting events, partnerships or press features

## BEST PRACTICES

- **Optimize Bio**
  - who you are, what you offer and strong CTA (call to action)
  - Use keywords specific to niche
  - link to website
- **Use Strategic Hashtags** (use a mix of high volume and low volume to reach a broader audience)
- Create content that specific niche will be looking for
- **Community Engagement**
  - like and comment on posts from similar accounts to get noticed by their audiences
  - follow and engage with bloggers or enthusiasts for specific niche
  - join and engage with FB groups or Reddit community
  - Attend events related to specific product (tag event and engage with attendees)
  - Host giveaways (require participants to follow account, like the post and tag friends)
- **Plan Posts in Advance;** check out **Later, Planoly, or Hootsuite** (to preview feed layout before posting)

# Important Marketing Acronyms + Terms

## General Marketing Acronyms + Terms

- Customer Journey: the process a customer goes through from learn about your product to making a purchase
  - stages: awareness -> consideration -> purchase -> retention
- Buyer Persona: a detailed description of your ideal customer
- B2B: Business to Business
  - marketing between 2 companies
- B2C: Business to Consumer
  - Marketing directly to customers
- KPI: Key Performance Indicator
  - metrics used to measure the success of a campaign (i.e. website visits, sales, engagement, follower growth)

## Digital Marketing Acronyms + Terms

- Content Marketing: creating valuable content (blogs, videos) to attract and engage audience
- SEO: Search Engine Optimization
  - strategy to improve a websites visibility in search engines
- SEM: Search Engine Marketing
  - paid strategies to increase search visibility (i.e. google ads)
- CTR: Click Through Rate
  - % of people who click on your link after seeing it
  - Formula:  $\text{clicks} / \text{impressions} \times 100$
- CPC: Cost Per Click
  - the cost you pay for each click in a paid ad campaign
- PPC: Pay Per Click
  - advertising model when you pay only when someone clicks on your ad
- CPA: Cost Per Acquisition
  - cost of acquiring a new customer through an ad or campaign
- ROI: Return on Investment
  - measures profitability

- Formula:  $\text{net profit/cost of investment} \times 100$
- ROAS: Return on Ad Spend
  - how much revenue you earn for every dollar spent on ads

## **Social Media Acronyms + Terms**

- Engagement Rate: the % of people who interact with your social content
- Impressions: the number of times your content is displayed to users, regardless of if they interact with it
- UGC: User Generated Content
  - content created by customers or followers
- SMM: Social Media Marketing
  - using platforms like IG, TikTok and FB to promote brand
- DM: Direct Message
  - private communication between users on social platforms
- CTA: Call to Action
  - encourages users to take a specific action (i.e. shop now)

## **Email Marketing Acronyms + Terms**

- Open Rate: % of recipients who open your email
- Drip Campaign: a series of automated emails sent based on user behavior or time
  - (i.e. sending a welcome email series to new subscribers)
- Segmentation: dividing your email list into smaller groups based on interests or behaviors
- Bounce Rate: the % of emails that could not be delivered
- CRM: Customer Relationship Management
  - tools to manage customer interactions (i.e. Salesforce, HubSpot)
- CTR: Click Through Rate
  - % of recipients who click on a link in your email
- CTO: Click to Open Rate
  - % of recipients who open the email and click on link
- ESP: Email Service Provider
  - platforms for email marketing (i.e. Mailchimp, Klaviyo)
- CMS: Content Management System
  - platforms to create and manage digital content (i.e. Wordpress, Shopify)

## **Analytics Acronyms + Terms**

- Bounce Rate: the % of visitors who leave your site after viewing only 1 page
- Funnel: the steps a customer takes from learning about your product to purchasing it
- GA: Google Analytics
  - a free tool to track web traffic, user behavior and conversions
- LTV: Lifetime Value
  - the total revenue you can expect from a customer over their relationship with your brand
- CAC: Customer Acquisition Cost

- the cost to acquire 1 customer
- formula: total marketing costs/number of new customers
- AOV: Average Order Value
  - average amount spent per order
  - formula: total revenue/number of orders

## **E-Commerce Acronyms + Terms**

- Conversion Rate: the % of users who complete a desired action, such as purchasing
- Cart Abandonment Rate: % of users who add product to their cart, but don't complete the purchase
- Upselling: encouraging customers to buy a higher priced product or add ons
- Cross Selling: promoting related products to customers
- SKU: Stock Keeping Unit
  - unique identifier for inventory management
- POS: Point of Sale
  - system for processing in store or online transactions
- CLV: Customer Lifetime Value
  - emphasizes long term customer profitability

## **A/B Test**

- Method of comparing 2 versions of marketing assets to see which one performs better
- How it Works
  - create two variants: version A (original) and version B (modified version with 1 key change)
  - split the audience: divide audience into 2 groups randomly and evenly
  - run the test simultaneously: ensure the test runs at the same time to avoid external factors (i.e. time of day)
  - Measure performance: track a specific KPI
- Examples of Elements to Test
  - E-Blast: subject line, sender name, CTA text or placement, email layout
  - Website: headline, button colors or placement, product images, page layout
  - Ads: visuals, ad copy, target audience segmentation, ad placement (stories vs feed)
  - Social: caption style (short vs detailed), image types (lifestyle vs product focused), hashtag usage

# Pinterest Strategy

## 1. Set Up a Business Account

- gives you access to analytics, ads
- special tools like **Rich Pins** (automatically pull extra details from your website (like price, availability, and descriptions) and display them on your Pinterest pins, keeping the information updated in real time) and a **Shop tab** (a storefront on your Pinterest profile where users can browse and shop your product catalog directly, with links leading to your website for easy purchases)
- **Optimize Your Profile:** Use your logo as your profile picture, write a compelling bio with relevant keywords, and include a link to your website

## 2. Develop a Pin Strategy

- Pin consistently: **Aim to pin regularly (10-20 pins per day)**, mixing your original content with repins of related, high-quality pins
  - You can use a scheduling tool such as Tailwind
- Use high quality images: visuals with consistent branding, incorporating your logo, product shots, and brand colors
- Vertical pins: **Use vertical images (2:3 aspect ratio)** for better visibility.  
**Pinterest recommends 1000 x 1500 pixels**
- Rich pins: Enable Rich Pins to automatically sync information like pricing, availability, and product descriptions from your website

## 3. Create Engaging Boards

- Organize Boards Strategically: Group pins into themed boards (e.g., "Product Ideas," "DIY with [Product Name]," "Gift Ideas," "Seasonal Favorites").
- **Incorporate Keywords in Board Titles and Descriptions:** This improves search visibility
- Include User-Generated Content (UGC): Create a board to showcase how customers use your products

## 4. Focus On Content that Drives Engagement/Sales

- **Lifestyle Pins:** how your product fits into everyday life or how it solves a problem for customers
- **How-To and Tutorials:** Share practical uses for your products through step-by-step guides
- **Seasonal and Trending Content:** Create pins that tie into holidays, seasons, or trending topics to stay relevant

- **Infographics:** Summarize key product benefits or ideas in a visually appealing infographic
- **Bundle Suggestions:** Showcase complementary products in styled photos to encourage upselling

## 5. Leverage SEO

- Use Keywords Strategically: Include relevant keywords in your pin titles, descriptions, and board names to make your content discoverable
- Hashtags: Use a few relevant hashtags to enhance discoverability, but don't overuse them
- Alt Text for Pins: Add descriptive alt text to images to improve SEO and accessibility.

## 6. Link Back to Your Website

- Clickable Pins: Ensure every pin links to a relevant product page or blog post on your website
- Landing Pages: Create Pinterest-friendly landing pages optimized for conversions with clear calls-to-action (i.e., "Buy Now," "Learn More")

## 7. Utilize Pinterest Analytics

- Track Performance: Use Pinterest Analytics to monitor which pins and boards drive the most engagement and traffic
- Refine Strategy: Focus on creating more of the content that performs well and experiment with new approaches based on insights

## 8. Use Pinterest Ads for Amplification

- Promoted Pins: Boost your most popular pins to reach a larger audience
- Targeting: Use Pinterest's ad targeting to reach specific demographics, interests, and behaviors
- Shopping Ads: Showcase your products directly to users with high purchase intent

## 9. Engage with Your Audience

- Collaborative Boards: Create boards where users can pin their own ideas or photos featuring your products
- Comment and Save: Engage with other users by commenting on and saving their pins to build relationships
- Respond to Followers: Reply to any comments or questions on your pins to foster community

## 10. General Marketing Strategies

- Integration: promote pins on social, include links to boards in email campaigns and add pinterest widgets to your site

- Influencer Collabs: pin partnerships (influencers showcasing your product), sponsored content (have influencers create tutorials or reviews)
- UGC (User Generated Content): create a branded hash tag and encourage customers to use it, pin reviews and testimonials