Digital Marketing Strategy Best Practice Guide

A digital marketing strategy provides structure to your online activity and ensures that every action supports your wider business goals. For small and local businesses, this means using time and resources effectively to attract the right customers and encourage long-term loyalty.

In this guide created by Whitewall Marketing, we share helpful tips on how you can improve your digital marketing strategy.

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Setting Objectives, Goals and KPIs

Objectives

Objectives describe the overall direction you want your marketing to take. They are broad and long-term in nature, aligned to the growth of your business. Examples include increasing brand awareness in your local community, building an engaged online audience, or driving more enquiries through your website.

Goals

Goals are more specific, measurable targets that contribute to achieving your objectives. For example:

·   Increasing website traffic by 20% in six months
·   Growing your Instagram audience by 500 followers in three months
·   Securing ten customer reviews per quarter on Google Business Profile

Key Performance Indicators (KPIs)

KPIs measure whether your goals are being met. They are the metrics that demonstrate success. For example:

·   Website visits (tracked via Google Analytics)
·   Reach and impressions of social media posts
·   Engagement rate (likes, shares, comments, saves)
·   Click-through rate on email campaigns
·   Conversions (enquiries, bookings, sales)

How-To-Guide for Businesses

Effective digital marketing begins with clarity about who you serve and what success looks like. The following expanded guidance turns the five core steps you supplied into an actionable, workplace-ready plan. Each step explains why it matters, how to do it, practical templates or calculations, suggested tools and metrics, and examples you can adapt to your business.

Step 1: Define Your Audience

Identify your ideal customers by location, age, interests, and needs. For example, a local café may target students and professionals looking for workspace during the week, and families at weekends.

How to Do It in Practice:

- Collect quantitative signals
  - Obtain website data from Google Analytics or the analytics panel in your website builder. Look for geography, age ranges, device use and top pages.
  - Review social analytics in Meta Business Suite, Instagram Insights or TikTok Analytics to see who engages with your posts.
  - Use point of sale or booking system data to observe purchase frequency, peak times and popular products

- Gather qualitative insight
  - Ask customers short exit surveys at point of sale or via email. Two or three focused questions are better than long forms.
  - Run a handful of short phone or in-person interviews with regulars to surface motivations, objections and unmet needs.

- Segment by meaningful attributes
  - Location: Street, neighbourhood, postcode cluster or radius in miles or kilometres from your business location.
  - Demographics: Age bracket, household composition, employment status.
  - Behaviour: Visit frequency, average spend, time of day, preferred products.
  - Psychographics: Values, lifestyle, priorities. For example convenience seekers, value shoppers, socially conscious buyers.

- Create simple personas using a template you can share with the team
  - Persona name and short description.
  - Demographics.
  - Primary needs and pain points.
  - Typical customer journey and preferred channels.
  - Key message that will move them to act.

Practical Example for a Local Café

Persona 1: Student Sam
Age 18 to 24. Visits midweek afternoons. Needs low-cost seating and strong Wi Fi. Prefers Instagram and short-form video.

Persona 2: Remote-worker Rachel
 Age 25 to 40. Visits weekdays, needs reliable sockets and quiet tables. Responds to email offers and Google search when looking for workspace.

Persona 3: Family Fiona
Parents with children. Visits at weekends for breakfast. Responds to family-friendly images and Google Business Profile reviews.

Prioritise Segments Using Simple Value Estimates

- Estimate average order value, visit frequency and retention in years to produce a basic lifetime value calculation. Work through the arithmetic step by step to avoid errors. Example calculation for clarity:
    - Assume average order value is £6.00.
    - Assume average visits per week is 3. Multiply 3 by 52 weeks. Calculation: 3 times 52 equals 156.
    - Annual value equals 156 visits times £6.00. Calculate 156 times 6 equals 936. Annual value is £936.
    - If average customer remains for 3 years, lifetime value equals 936 times 3. Calculate 936 times 3 equals 2808. Lifetime value is £2,808.

- Rank segments by their likely lifetime value and by how easily you can reach them from owned channels. Focus first on the highest value or most reachable segments.

Deliverable Checklist for Step 1

- Two to four written personas.
- A customer journey map per persona showing awareness, consideration, booking or purchase, and retention triggers.
- A one page prioritisation matrix showing potential revenue and ease of reach.

Suggested Quick Tools For This Step

- Google Analytics for audience data.
- Meta Business Suite for social demographics.
- A simple spreadsheet for persona and LTV calculations.
- Typeform or short paper surveys for customer interviews.

Step 2: Align Objectives with Business Needs

Ask yourself what the business most needs in the next six to twelve months. Is it awareness, more sales, repeat customers, or a new audience?

How to Translate Needs into Objectives

- Determine the business need for the next six to twelve months. Common needs include: increase awareness, grow footfall, improve average transaction value, increase repeat purchases, or enter a new customer segment.
- Choose a primary marketing objective and one or two secondary objectives. Keep the number small to preserve focus. For example, the primary objective may be repeat visits while a secondary objective is to attract new lunchtime customers.
- Tie each objective to a measurable outcome. Replace vague aims with statements such as increase monthly footfall by X percent or increase average order value by £Y.

Example Objective Framing with KPIs for a Café

- Primary objective: Increase weekday footfall among remote workers. KPI: number of unique weekday customers per week measured via till or booking system. Baseline: 120 weekday customers. Target: 150 weekday customers within six months.
- Secondary objective: Improve average order value by encouraging add-ons. KPI: average transaction value measured in till. Baseline: £6.00. Target: £6.60 within three months.

Resource Allocation and Practical Approach

- Decide how to allocate marketing effort and budget based on chosen objectives. Consider a simple split of effort rather than precise percentages: focus time on channels that directly help the objective, reserve a small percentage of time for testing new channels.
- Make responsibilities clear. Assign one person to be accountable for each objective and list required actions, frequency and reporting cadence.

Deliverable Checklist for Step 2

- One primary objective statement for the next six to twelve months with baseline and target.
- One or two secondary objectives with KPIs and timelines.
- A short resource plan saying who will do what and the expected weekly time investment.

Suggested Quick Tools for this Step

- Google Sheets or Excel for tracking objectives, baselines and progress.
- A simple project board in Trello or Asana to assign responsibilities and deadlines.

Step 3: Choose the Right Channels

Not every platform or tool will suit your business. Select two or three core channels where your customers are most active (for example, Meta for local community engagement or Google for search-driven leads). The wrong channel wastes money and time. The right channel reaches your priority audience in the right context with the right creative.

How to Select and Map Channels

- Start with persona-channel mapping. For each persona, list the channels they use and the content formats they prefer.
- Assess channel characteristics
- Intent driven channels such as Google and local SEO are effective when customers are actively searching.
- Social channels such as Instagram or Facebook are effective for discovery and community.
- Email is strong for owned audience retention and repeat visits.
- Review platforms such as Google Business Profile and TripAdvisor influence new customers and local SEO.
- Use a channel-effort-impact matrix. Score each channel for effort required and likely impact on your primary objective. Prioritise channels with high impact and moderate or low effort.
- Commit to two or three core channels initially. Use the fourth channel only for testing.

What to Do On Each Common Channel

- Google Business Profile
  - Keep NAP information consistent. NAP means name, address, phone number.
  - Upload current high quality photos.
  - Publish short posts for offers and events.
  - Encourage and respond promptly to reviews.

- Search and local SEO
  - Optimise page titles and meta descriptions for local intent such as "café near [neighbourhood]".
  - Add local schema markup if your website template supports it.
  - Ensure pages load quickly and are mobile friendly.

- Meta platforms including Instagram and Facebook
  - Use a mix of content types: short video, behind the scenes, menu highlights and time-limited offers.
  - Use stories for daily promotions and reels for discovery.
  - Use location tags and relevant hashtags for discoverability.

- Email marketing
  - Build a welcome sequence that includes a clear incentive and sets expectations for frequency.

- Segment the list by behaviour: new subscriber, regular customer, lapsed customer.
    - Use automated campaigns to re-engage lapsed customers with specific offers.

- Partnerships and local PR
    - Collaborate with neighbouring businesses for cross-promotions.
    - Offer local press a special tasting or event to secure editorial coverage.

Channel Selection Criteria Summary

- Customer presence - Is the audience there now?
- Measurability - Can you track outcomes and attribute results?
- Cost and time to manage - Are you able to produce content at the required frequency?
- Competitive advantage - Can you do the channel better than local competitors?

Deliverable Checklist for Step 3

- Channel map that links personas to channels and content types.
- A quarterly content plan for your two core channels.
- A small testing plan for one additional channel.

Suggested Quick Tools for this Step

- Google Business Profile for local presence.
- Canva for quick social creative.
- Meta Business Suite for scheduling and insights.
- Mailchimp or a similar email provider for list building and automation.

Step 4: Set SMART Goals

SMART goals are Specific, Measurable, Achievable, Relevant, and Time-bound. For example, "Increase email newsletter subscribers by 100 in the next three months by offering a discount code on sign-up."

SMART Explained and Examples

- Specific - Define exactly what will change.
- Measurable - Pick the metric you will use.
- Achievable - Make sure the team and budget can reasonably hit the target.
- Relevant -The goal should move the business toward your primary objective.
- Time Bound - Give a clear deadline.

Templates and Sample SMART Goals

- Awareness example - Increase organic search impressions for service pages by 25 percent within six months by publishing two localised blog posts per month and optimising on-page SEO.
- Acquisition example - Increase new customer enquiries from Google organic by 15 percent in four months by improving local landing pages and collecting customer reviews.
- Retention example - Increase returning customer rate from 20 percent to 26 percent in three months by launching a two-email retention flow and a loyalty punch card.

How to Set Realistic and Stretch Targets

- Start from a baseline. Use your last three months of data to set a realistic improvement range.
- Use small, staged targets. For example, aim for a 5 to 10 percent uplift in the first three months, then reassess.
- Create a stretch target that is ambitious but tied to a plan of action and additional resources if required.

Practical Example Showing Conversions and Traffic Math

- Baseline scenario - Website receives 2,000 visitors per month and converts at 2 percent. To calculate current conversions:
  - Convert 2 percent to a decimal by dividing 2 by 100 which equals 0.02.
  - Multiply 2,000 visitors by 0.02. Calculation: 2,000 times 0.02 equals 40 conversions.

- Target scenario - Increase conversion rate to 3 percent with the same traffic:
  - Convert 3 percent to a decimal by dividing 3 by 100 which equals 0.03.
  - Multiply 2,000 visitors by 0.03. Calculation: 2,000 times 0.03 equals 60 conversions.

- Alternate route - Keep conversion at 2 percent but increase visitors to reach 60 conversions:
  - Desired conversions 60 divided by conversion rate 0.02 equals required visitors. Calculation: 60 divided by 0.02 equals 3,000 visitors.

- Use these calculations to decide whether to prioritise conversion optimisation or traffic growth.

Breaking Goals Down into Monthly Tasks

- Convert each goal into a list of monthly actions, for example content calendar items, paid ad experiments, or email campaigns.
- Assign owner, deadline and expected outcome for each action so monthly reviews are straightforward.

Deliverable Checklist for Step 4

- SMART goal document with baseline, target and timeline.
- Monthly action plan that maps tasks to owners.
- A short modelling sheet showing how traffic, conversion and value link to revenue.

Suggested Quick Tools for this Step

- Google Sheets for modelling and goal tracking.
- Google Analytics and Meta Insights for baseline measurement.
- A simple CRM or POS reporting for revenue attribution.

Step 5: Monitor and Adjust

Digital channels and customer behaviour change. Regular monitoring ensures you spot problems early and invest more in what works. It also provides the evidence needed to adapt rather than guess.

Monitoring Cadence and What to Review

- Daily checks
  - Review paid campaign spend and key metrics such as cost per click and conversions. Pause campaigns showing waste.

- Weekly checks
  - Review social engagement and top performing posts. Identify one post to replicate or scale.
  - Check email open rates and early indicators for new campaigns

- Monthly review
  - Assess SMART goals and KPI progress. Produce a short one page report showing baseline, current performance, variance and recommended actions.

- Quarterly Review
  - Reassess objectives, reallocate budget and choose new experiments. Update personas if you have new customer insight.

A Simple Reporting Template for Monthly Reviews

- Objective - The business objective being measured.
- KPI - The single metric tied to the objective.
- Baseline - The starting number at the beginning of the period.
- Current value - Where you are now.
- Change - Absolute and percentage change.
- Actions taken this month - Short list.
- Recommended next steps - Clear owner and deadline.

How to Interpret Results and Act

- If a metric is underperforming ask three questions in order: Is the offer relevant? Is the creative or copy clear? Is the audience correctly targeted? Triage and test one change at a time.
- For underperforming paid campaigns test creative first, then landing page relevance, then audience targeting.
- For high cost per acquisition test messaging and landing page friction. Consider offering a smaller conversion (newsletter sign-up) as a stepping stone.

Experimentation and Optimisation Approach

- Use structured testing - Define a clear hypothesis such as "If we change the call to action from Book Now to Reserve Table we will increase bookings by 10 percent." Run a controlled A/B test.
- Keep tests simple and isolate variables -Test one element at a time: subject line, creative image, call to action or headline.
- Set minimum sample rules before deciding - Avoid jumping to conclusions from small sample sizes.

Knowledge Management and Iteration

- Document learnings from each test into a shared folder or document. Record what was tested, results and recommended next steps.
- Convert recurring successful approaches into standard operating procedures so future campaigns can be deployed faster.

Deliverable Checklist for Step 5

- A one page monthly performance report template.
- A one page action log listing recommendations, owners and deadlines.
- An experiments register capturing hypotheses, dates, and outcomes.

Suggested Quick Tools for this Step

- Google Analytics and Google Data Studio for cross-channel reports.
- Meta Business Suite for post performance and ad reporting.
- Mailchimp or equivalent for email metrics.
- A shared Google Sheet or Trello board for action logs and experiment tracking.

What to Avoid

- Avoid setting vague objectives such as "get more customers" without a measurable outcome.
- Do not try to use every platform at once. Focus on the channels that align with your audience.
- Avoid measuring success based only on vanity metrics such as likes. Instead, prioritise conversions and engagement.
- Do not set unrealistic goals that are not achievable with your resources. Start small and scale gradually.
- Avoid ignoring results. Failing to monitor performance means missed opportunities for improvement.

Free Tools and Platforms to Support Strategy

- **Google Analytics** - tracks website traffic, user behaviour, and conversions, providing clear insight into how visitors find and use your website.

- **Google Business Profile** -free business listing that helps your company appear in local search results and Google Maps, increasing visibility within your community.

- **Meta Business Suite** - allows scheduling and tracking of Facebook and Instagram activity, including detailed performance metrics.

- **Canva** - free design tool that helps create branded visuals for campaigns, ensuring consistent presentation across platforms.

- **Mailchimp** - a free-to-use email marketing platform (up to a certain number of contacts) that enables newsletters, customer updates, and automated campaigns.

- **Ubersuggest** - Provides keyword research, competitor analysis, and SEO insights to help businesses optimise their content strategy.

- **Trello** - a free project management tool for organising marketing campaigns and scheduling content calendars.

- **Bitly** - URL shortener that tracks click-through rates on links, helping measure the effectiveness of campaigns.

Further Support

If you require further support with your digital marketing strategy, please contact your dedicated adviser directly, or email invest@westlothian.gov.uk .