

**A GUIDE TO  
WORKING WITH A  
DIGITAL MARKETING  
AGENCY**



# WHAT YOU NEED TO SUCCEED

## Established Brand

Having an established brand image and messaging or being open to a marketing agency helping you get there will aid in your company standing out against competing options. Remember:

**K.I.S.S.** - Keep it Simple... Seriously

**K.I.M.** - Keep it Memorable

## WHY-based, not WHAT-based

### LOGO

Simple, unique

Legible fonts

Simple Name

Colors match WHY

Versatile - Digital, print, embroidery

Icon reflective of WHY over WHAT

### MESSAGING

Simple, unique

Purpose-Driven

Purpose-Driven

Versatile - Digital, print, embroidery

### IMAGES

Simple, unique

Real Caregivers w/ your logo

Real clients or unique models

Positive/Outcome-based

# WHAT YOU NEED TO SUCCEED

## Right-Fit Audience

Even if working with a marketing agency that has extensive industry experience, knowing your right-fit client and what sets you apart in serving them will help optimize for key words and conversions.

### Core Compass - Right-Fit Client

- In Need
- Elderly/Enhanced Opportunity
- Long-Term Care
- Disabled/Dementia
- Available Resources

**I.D.E.A.L.**

### Demographics

- Client receiving services
- Adult children influencing decisions

### Messaging

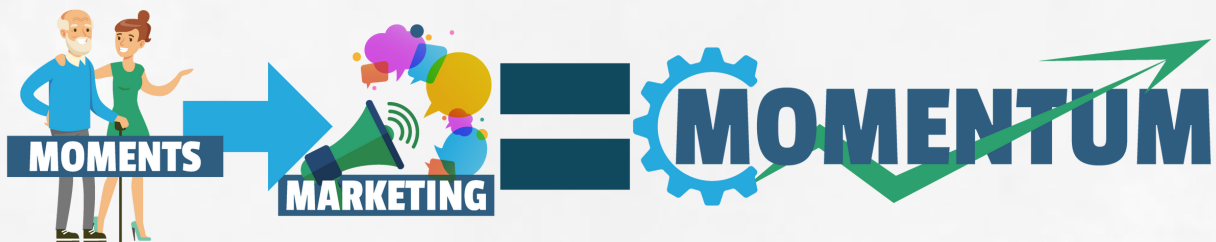
- What do clients need to hear/understand?
- What do adult children need to hear/understand?

“Fingers don't walk anymore...  
... they Tap, Click, and Scroll!”  
- Kevin Hansen

# WHAT YOU NEED TO SUCCEED

## Moments to Build From

Document moments of success with clients/caregivers that can be shared online. Use a combination of written testimonials, images, and video to cover the various forms of media that consumers use to find solutions.



## Context in Content

- Not definitions of WHAT
- Connect with their intent

- Google Trends - <https://trends.google.com/trends>
- Answer the Public - <https://answerthepublic.com>
- Uber Suggest - <https://neilpatel.com/ubersuggest>
- Feedback from clients/referral sources/caregivers

## Document

- Testimonials / Reviews
- Google business / Facebook business
- Case Studies - Text / Video
- Community Engagement

“**To be a great storyteller...**  
**... you must first become great collectors of stories.**”  
*- Vinh Giang*

# WHAT YOU NEED TO SUCCEED

## List of Names/Emails

Beyond the purpose of tracking results, having names/emails from prospects and existing clients can be used to help paid marketing campaigns build target audiences similar to those you already work with. And, you can better nurture leads through their journey from interest to conversion.

### Capture Names

- Name/Email/Phone/Location
- Phone Calls
- Website Forms
- Social Media Forms

### Categorize Names

- Services Needed
- Contact Type

### Nurture Names

- Targeted Emails Texts
- Targeted Ads

### Capitalize Names

- Convert to Assessments
- Convert to Clients

# WHAT YOU NEED TO SUCCEED

## An Established Budget

Plan an appropriate budget based on your current ability and your desired revenue outcomes. Be prepared to invest for a few months before beginning to see meaningful results.

- 3-5% - Position-Holding
- 5-7% - Slightly Competitive
- 7-10% - Competitive
- 10-13% - Aggressive

*NOTE: This is a total marketing budget that includes all lead-gen activities, not only digital.*

“Setting realistic goals and expectations is not settling. It's establishing Quick Wins!”

*- Kevin Hansen*

## **BONUS** - Optimizable Website

Not all website platforms are created the same. The following are critical for a website to be successful:

- SEO-Friendly
- Mobile-Friendly
- Page Descriptions
- Alt-Title Images
- SEO-Friendly image file names
- UX Branded/Optimized

# WHAT TO LOOK FOR WHEN HIRING AN AGENCY

## Client Reviews

Do your research about what the marketing agency's clients are saying.

## Transparency / Reporting

Depending on your budget, you should at least be seeing monthly reports on key indicators of success. Ask the agency what they focus on in their reporting based on the plan for your marketing.

## Collaborative Approach

Ensure the agency you choose plans to collaborate with you. This ensures ongoing communication on content, goals, and strategies. Find a real partner in working toward success in your marketing efforts.

## Custom Pricing (not turnkey)

You'll likely spend more with an agency that does custom pricing, but you'll also end up with a team working to achieve your goals - as opposed to paying for tactics that don't lead to results. What makes marketing expensive isn't what you spend each month, rather a lack of results.

## Industry Experience

The marketing agency doesn't have to be home care exclusive, but having one with experience will make the first few months far more effective.

*continued...*

# WHAT TO LOOK FOR WHEN HIRING AN AGENCY

*continued...*

## **Realistic Expectations**

Just as you should have realistic expectations for the agency, they should be honest with what to expect from them.

## **Strengths vs Needs Analysis**

How do the strengths of what the marketing agency can do best align with what your home care agency needs? Get multiple opinions and factor in what each says you need and see who is best suited to perform best in those areas of digital marketing.

## **Innovator vs Trend Follower**

Ask the agency how they determine what changes in strategy might be needed. Ask them what new technology they're using to ensure your company has an advantage over other agencies.



# IDEAL DIVISION OF RESPONSIBILITIES

## Home Care Agency.

- Ad Costs paid to Google, Meta, etc
- Brand Messaging/ Imagery/Tone
- Organic Social Media
- Drafted pages/blog content
- Conversion of Leads
- Client/Caregiver Satisfaction

## Marketing Agency.

- Ad Campaign Management
- Brand Messaging/ Imagery/Tone Variations
- Paid Social - Boosting
- SEO/Conversion Optimization of content
- Qualified Lead Capture
- Assisting with review generation strategies

# FROM THE MINDS OF DIGITAL MARKETING EXPERTS

The following are statements from digital marketing experts of what they wish businesses understood better when choosing and working with them:



Qualified leads are more important than search results rankings.



Lasting, effective marketing strategies take 3-6 months before experiencing meaningful results.



Be open to conversion optimization changes to your wording, images, etc. that help speak better to your differentiators and your right-fit client/caregiver.



There are no Magic Bullets, Magic Solutions, or Secret Sauces to digital marketing.



Digital marketing is a marathon - not a sprint.



It's critical to communicate changes to services you offer and goals - even other than digital - you've set.



When the revenue you've earned is equal to what you've spent in marketing, you still haven't broken even. Aim for 3-5 times revenue over what you've spent on marketing - depending on your margins.



Avoid Design Paralysis / Content Paralysis. Your website is never done, but over-analyzing it will prevent progress.



Trust the experience of the marketing agency that you hired - both in home care and in online strategies. You had enough confidence in them to hire them. Unless they fail to deliver realistic results, trust the process.



Expect agility in marketing. Digital is constantly changing, so there is no "set it and forget it" option. What worked 3, 6, or 12 months ago may no longer deliver the same results.



Campaign development is a team effort. Even if the marketing agency understands home care, setup of an effective marketing plan requires time and energy from you and the marketing team for the greatest potential of success.



Be prepared for greater transparency than other forms of marketing. PPC, Social, Organic, etc. marketing are all incredibly measurable.

When done correctly, they work wonderfully. If not, it's obvious. With that, coming short isn't always failing. It often means something has changed, and the marketing team has to adjust strategy.



Having a process in place - calling prospects, completing assessments, onboarding clients - to take on all the leads being generated is critical.



Do you have access to your website or is there a third-party controlling access? We can work with it either way, but it's helpful to know the answer.



Be an open book.

In order to make the most of your experience with us, show us your website and marketing material so we can meet you where you are and collaborate on next steps to reach your goals.