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HANDBOOK

Social Marketing ROAD Map

A Practical Method for Mapping
a Social Media Strategy

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Social Marketing ROAD Map Handbook

A practical method for mapping a social media strategy

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Social Marketing ROAD Map Handbook

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TABLE OF CONTENTS

Table of Contents	ii
Director's Note.....	2
<i>On the ROAD to social marketing maturity</i>	<i>2</i>
Setting the Stage for Social Marketing	3
Three Questions to ask yourself before getting started	3
1. <i>Where are you now?.....</i>	<i>3</i>
Worksheet: Determining your organization's phase of social marketing maturity	3
How your organization stacks up against others	4
Chart: Organizations by phase of social marketing maturity	4
2. <i>Where do you want to be?</i>	<i>4</i>
Articulating a vision for social marketing success	4
3. <i>How will you get there from here?.....</i>	<i>5</i>
Understanding the challenges	5
Chart: "Very important" challenges to social marketing effectiveness, by primary market	5
A financial commitment to overcome challenges and achieve social marketing success	6
Chart: How organizations perceive social media marketing at budget time	6
The Social Marketing ROAD Map Defined	7
A method for mapping an effective social media strategy	7
<i>The Social Marketing ROAD Map is a continuous improvement process</i>	<i>8</i>
The Social Marketing ROAD Map Cycle	8
<i>As social marketers mature, their priorities change dramatically</i>	<i>9</i>
Chart: ROAD Map elements prioritized by phase of social marketing maturity	9
<i>Let's get started!</i>	<i>9</i>
Chapter 1: ROAD Map – Research	10
Gathering intelligence on target audiences and their social use	10
<i>Stop, look and listen – social media monitoring</i>	<i>10</i>
<i>What to monitor.....</i>	<i>10</i>
Checklist: Monitoring search phrases	10
Checklist: Monitoring social media factors	10
Chart: Types of social media monitoring tools and solutions used for marketing purposes	11
<i>List of social media monitoring tools and solutions</i>	<i>12</i>
Example: Monitoring mentions – analyzing selected MLB brands on all social media	15
Segmenting and profiling target audiences	16
Simple segmentation of target audiences by social media behavior and influence	16
Worksheet: Profiling target audiences by social influence, platform preferences and use	17
The human factor – resources for a social marketing team	18

Chart: Few organizations are outsourcing social marketing responsibilities	18
Worksheet: Finding candidates, defining roles and recruiting the social marketing team	19
Auditing existing content to identify digital assets	20
Worksheet: repurposing existing content for social marketing use	20
<i>Case study: Target audience survey “enables” Microsoft campaign</i>	<i>21</i>
Example: Microsoft’s I Am Enabled Microsite Homepage	21
<i>Case study: Researching target audience behavior while they research you</i>	<i>23</i>
Example: Caturano’s Rapid Assessment Offer	24
Example: Caturano’s Link Page	25
Example: Caturano’s Thought Leadership Post	26
<i>Chapter 1 notes</i>	<i>29</i>
Chapter 2: ROAD Map – Objectives	31
Aligning objectives with target audiences and metrics	31
Chart: Organizations targeting and measuring objectives, by social marketing maturity	31
<i>Defining targeted and measureable objectives for social marketing Purposes</i>	<i>32</i>
The difference between marketing communications goals and social marketing objectives	32
Example of social marketing objectives hierarchy by marketing communications goals	32
<i>Prioritize objectives by effectiveness or impact?</i>	<i>33</i>
Chart: Objectives social marketing programs achieve effectively	33
<i>How to align objectives with target audiences and metrics for success</i>	<i>34</i>
Aligning objectives with target audiences	34
Aligning objectives with success metrics	34
Checklist: Metrics that matter most in social marketing	34
Worksheet: Aligning social marketing objectives with target audiences and metrics	35
<i>Case study: The objectives of social marketing in a real estate recession</i>	<i>36</i>
Example: Creative Sample from Ines Hegedus-Garcia:	38
<i>Case study: When the objective of social marketing is a social cause</i>	<i>44</i>
Example: California State Parks Foundation Facebook Page	44
<i>Chapter 2 notes</i>	<i>46</i>
Chapter 3: ROAD Map – Actions	48
Creating a social marketing strategy with a tactical plan of action	48
<i>Tactical effectiveness versus “fast and easy” implementation</i>	<i>48</i>
Chart: Comparing the effectiveness, effort required and usage of social marketing tactics	48
Tactics for the effective use of social media platforms	50
<i>Guiding principles</i>	<i>50</i>
<i>Blogging</i>	<i>51</i>
Blogging tactics and best practices	51
Chart: Rating the tactical effectiveness of blogging	51
<i>Microblogging</i>	<i>52</i>
Microblogging tactics and best practices	52

Chart: Rating the tactical effectiveness of microblogging	52
Social networking.....	53
Social networking tactics and best practices	53
Chart: Rating the tactical effectiveness of social networking	53
Multimedia content sharing	54
Multimedia content sharing tactics and best practices.....	54
Chart: Rating the tactical effectiveness of multimedia content sharing.....	54
Social bookmarking and other platforms.....	55
Social bookmarking tactics and best practices	55
Engaging the vocal minority and pitching the social authority.....	56
Influencing the influencers – engaging the vocal minority.....	56
Blogger relations – pitching the social authority.....	56
Checklist: Blogger relations best practices	56
The importance of a social media policy and how to draft one.....	57
Social media policy template	57
List of sample social media policies.....	58
Social media's share of the online marketing budget.....	59
Special Report: Six lessons on developing your social marketing tactical plan.....	60
Case study: Six social marketing tactics to attract prospects.....	64
Case study: How to use Twitter to push your products.....	67
Example: Woot's Twitter Feed	68
Case study: Economic stimulus package lands 7,000 new customers	71
Example: Atlassian Promotion Sign-Up Page.....	71
Integrating social media with other tactics in the marketing mix	73
<i>The ease and importance of social integration.....</i>	73
Chart: Organizations that are integrating social media with other marketing tactics	73
Inbound marketing's powerful pair – search and social.....	74
<i>Who is using social media with SEO?.....</i>	74
Chart: Organizations integrating social media into search engine marketing campaigns	74
<i>Why are they doing it? Perceptions of search and social media's objectives</i>	75
Chart: The effectiveness of SEO objectives and social media objectives.....	75
<i>Social media's influence on search engine rankings.....</i>	76
Chart: Average target keyword rankings by social media use	76
<i>The hidden benefits of integrating social media with search practices.....</i>	77
Chart: Organic conversion rates by social media use.....	77
Chart: PPC conversion rates by social media use	78
Chart: PPC click through rates by social media use	79
Perception is not always reality. Social media's truly effective objectives.....	79
<i>Best practices in integrating social media with search campaigns.....</i>	80
<i>Special report: Part 1 – Five key trends in search and social integration.....</i>	82
<i>Special report: Part 2 – Seven tactics to build rankings using search and social.....</i>	86

Case study: <i>Eight steps to create a team-authored blog and reap SEO gains</i>	90
Example: Acoustics By Design Blog	94
Social sharing extends the reach of email campaigns and more	95
<i>Formulating a strategy for social sharing</i>	95
Chart: Plans to integrate social media with email campaigns this year	95
<i>Social sharing effectiveness</i>	96
Chart: The effectiveness of social sharing at achieving email marketing objectives	96
<i>Why email needs social media</i>	97
Chart: Social sharing leads year-over-year change in email list growth tactics	97
...and why social media needs email.....	97
Chart: Email is the most acceptable channel for permission-based messaging	97
<i>Best practices for designing and optimizing email campaigns for social sharing</i>	98
Case study: <i>How social sharing buttons increased email interaction by 25%</i>	99
Example: SmartBrief Newsletter	102
Case study: <i>Eight essentials for using social media and email to prospect</i>	104
Example: BreakingPoint employee linkedin template	108
Case study: <i>Five email and social integration strategies to grow audiences</i>	110
Example: Wilton's Newsletter with Social Media Promotion	112
Example: Sample Wilton Tweets Pre-Launch.....	113
Example: Wilton's Yearbook Email Blast.....	114
Example: Wilton's Halloween Tweets	115
Example: Wilton's Halloween Newsletter.....	116
Managing social marketing tactics and resources	117
Worksheet: Quarterly social marketing tactical plan	117
Chapter 3 notes	118
Chapter 4: ROAD Map – Devices	120
Selecting platforms by tactical effectiveness and architectural fit.....	120
Chart: Social Media Technology Platforms Used for Marketing Purposes.....	120
<i>Social media brands</i>	121
Worksheet: Analyzing the strengths and weaknesses of Leading social media brands	121
Social marketing architecture	122
<i>Lack of architecture results in random acts of social marketing</i>	122
Example: What social marketing looks like without a plan or purpose.....	122
<i>Dissecting a successful social marketing architecture</i>	123
Example: The hub and spoke architecture for Cisco's Collaboration solutions.....	123
Social marketing architecture hub sites	124
<i>Website is the hub of the marketing strategy</i>	124
Example: Cisco Collaboration website for content and conversion	124
<i>Blog is the hub of the social marketing strategy</i>	125
Example: Cisco Collaboration blog for SEO friendly content	125

Social marketing architecture spoke sites	126
<i>Social network for building a community of fans on Facebook.....</i>	126
Example: Facebook fan page for Cisco Collaboration	126
<i>Microblog for engaging followers in 140 characters or less on Twitter.....</i>	127
Example: Twitter microblog for Cisco Collaboration	127
<i>Discussion forum for building a community of technology-oriented members</i>	128
Example: Branded technology community for Cisco Collaboration	128
<i>Multimedia sharing for driving traffic to platforms from YouTube and Flickr.....</i>	129
Example: YouTube video sharing for Cisco Collaboration	129
Example: Flickr photo stream for Cisco	130
<i>Other platforms for supporting the hub and spoke sites.....</i>	131
Example: RSS feed from Cisco Collaboration blog.....	131
<i>Sourcing and repurposing content from existing digital assets</i>	132
Example: Sourcing content from Cisco Collaboration blog	132
<i>Constructing your social marketing architecture</i>	133
Worksheet: Defining the purpose of platforms and brands selected and roll-out sequence	133
Worksheet: Assembling the pieces of your social marketing architecture	134
<i>Case study: Exploring alternatives to Facebook with a branded social network</i>	135
<i>Chapter 4 notes</i>	138
Appendix	140
Social media marketing glossary	140
MarketingSherpa Resource Library	151

DIRECTOR'S NOTE

ON THE ROAD TO SOCIAL MARKETING MATURITY

Social media has created an exciting and challenging world of new possibilities for marketers. Until recently, a vast majority of marketers were exploring this unfamiliar terrain without a compass – or strategy – to guide them. Captivated by the hype and the ease of implementing social sites, many ignored proven marketing principles. They launched their social initiatives by creating blogs, Twitter and Facebook accounts without a plan or a purpose.

But a momentous change in the use of social media for marketing purposes is taking place. Social marketing is maturing to the point where the mainstream is now in transition from the trial-and-error phase of the learning curve to the strategic phase. Marketers are learning to begin their social initiatives by researching the medium and monitoring target audiences to determine realistic objectives. Then and only then do they formulate tactical plans and roll-out the social platforms required by the plan. To help marketers ascend this steep learning curve, they need a practical method for mapping their social media strategy. They need to develop a coherent process for achieving objectives that can be easily and routinely performed. MarketingSherpa's Social Marketing ROAD Map methodology was created to fulfill this need.

Based on the ROAD Map methodology, this handbook is a step-by-step guide to mapping your social marketing strategy. It is loaded with research-based insights on proven practices, hands-on worksheets and checklists, and social marketing case studies featuring the real life successes of marketers like you. It is intentionally "social media brand agnostic," meaning that familiar brands like Twitter, Facebook, LinkedIn, etc., are used only when necessary as tactical examples. The purpose of this approach is to help you develop a strategy that will outlive technology brands that are often here today and gone tomorrow.

This ***Social Marketing ROAD Map Handbook*** is designed as a teaching tool – not only for advancing the careers of the self taught but also for those attending MarketingSherpa's Social Marketing ROAD Map Workshops. These workshops are conducted in small classroom settings by social marketing experts using this handbook as a curriculum guide.

Whether you have obtained this handbook separately, packaged with the *2010 Social Media Marketing Benchmark Report* or included with the Social Marketing ROAD Map Workshop, it will help accelerate your progress through the phases of social marketing maturity to achieve optimal results.

As always, we welcome your comments and look forward to hearing from you.

Regards,



Sergio Balegno, Research Director, MarketingSherpa

[Twitter.com/SergioBalegno](https://twitter.com/SergioBalegno)

SETTING THE STAGE FOR SOCIAL MARKETING

THREE QUESTIONS TO ASK YOURSELF BEFORE GETTING STARTED

1. WHERE ARE YOU NOW?

You are about to begin a journey that requires navigating through uncharted territory. To find the fastest and safest route, you need to know two things: where you are now and where you want to be. The same is true for mapping an effective social marketing strategy. Before getting started, you need to know where you are in terms of the social marketing maturity lifecycle. The following worksheet will help you determine this by analyzing your progress in four process-related factors critical to social marketing success.

To complete the worksheet, circle one number in each row that corresponds with the column heading that *best describes* the process you use for each tactic. For example, if your organization has a formal, documented process that it routinely performs for gathering intelligence on target audiences, their use of social media and your competition in the space, circle 5 in the first row. If your organization has not begun to formulate a process for this tactic, circle 1. After circling one number in each row, sub-total each column and combine columns for your total score. Matching this score to the phase shown in the bottom row will determine where your organization is now in the social marketing maturity lifecycle.

WORKSHEET: DETERMINING YOUR ORGANIZATION'S PHASE OF SOCIAL MARKETING MATURITY

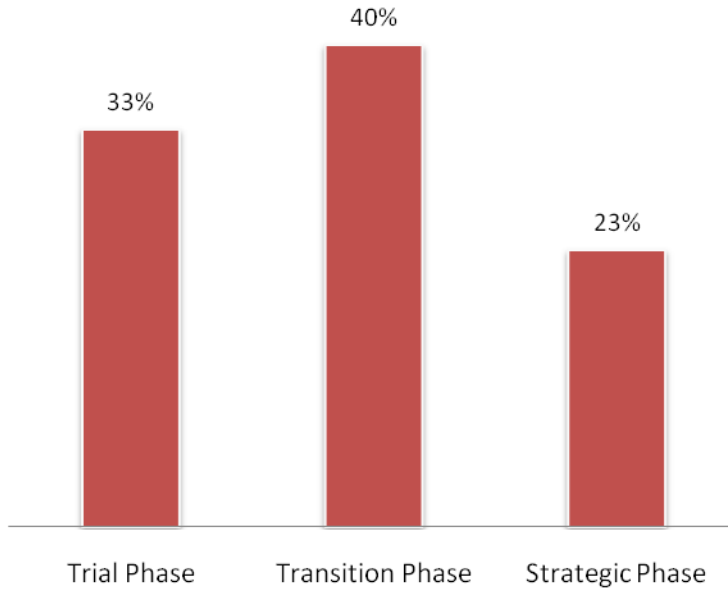
Social Marketing Maturity Process Benchmark	No Process	Informal Process, Randomly Performed	Formal Process, Routinely Performed
Gather intelligence on target audiences, social media use and competition	1	3	5
Define objectives aligned with target audiences and social metrics	1	3	5
Create a social marketing strategy with a tactical plan of action	1	3	5
Select platforms that fit social marketing architecture and tactics.	1	3	5
Sub-Totals			
Total			
Social Marketing Maturity	Trial Phase: 4-6	Transition Phase: 8-16	Strategic Phase: 18-20

Note: If necessary, skip ahead to "The Social Marketing ROAD Map Defined" for a more detailed description of the four factors critical to social marketing success.

HOW YOUR ORGANIZATION STACKS UP AGAINST OTHERS

Once you have completed the worksheet, you will know where you are in the social marketing maturity lifecycle. But it is also important to understand how your organization stacks up against others. Are you lagging behind or taking the lead? The following chart shows the average percentage of organizations in each phase of social marketing maturity based on a survey of more than 2,300 marketers.

CHART: ORGANIZATIONS BY PHASE OF SOCIAL MARKETING MATURITY



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

2. WHERE DO YOU WANT TO BE?

ARTICULATING A VISION FOR SOCIAL MARKETING SUCCESS

Leading a successful initiative starts with a vision – in this case, a vision for social media marketing success.

A vision for an initiative is an inspirational description of what a leader would like his team to accomplish, not in terms of specific objectives but a mental image that summarizes what success could or should look like. It's the end game. It can give a team direction and insight – steering current and future objectives, strategies and courses of action.

The challenge is to articulate a clear and concise vision the team will accept and understand. Clarity will allow a team to make decisions based on your vision. And a ring of drama will inspire the team to give the initiative a higher priority.

Sometimes a vision for an initiative is difficult to articulate but you intuitively know that there is one and, with a little brainstorming, it can be described.

For example, the vision for an online publisher's social marketing initiative might look something like this:

Example: A Vision for Social Marketing Success

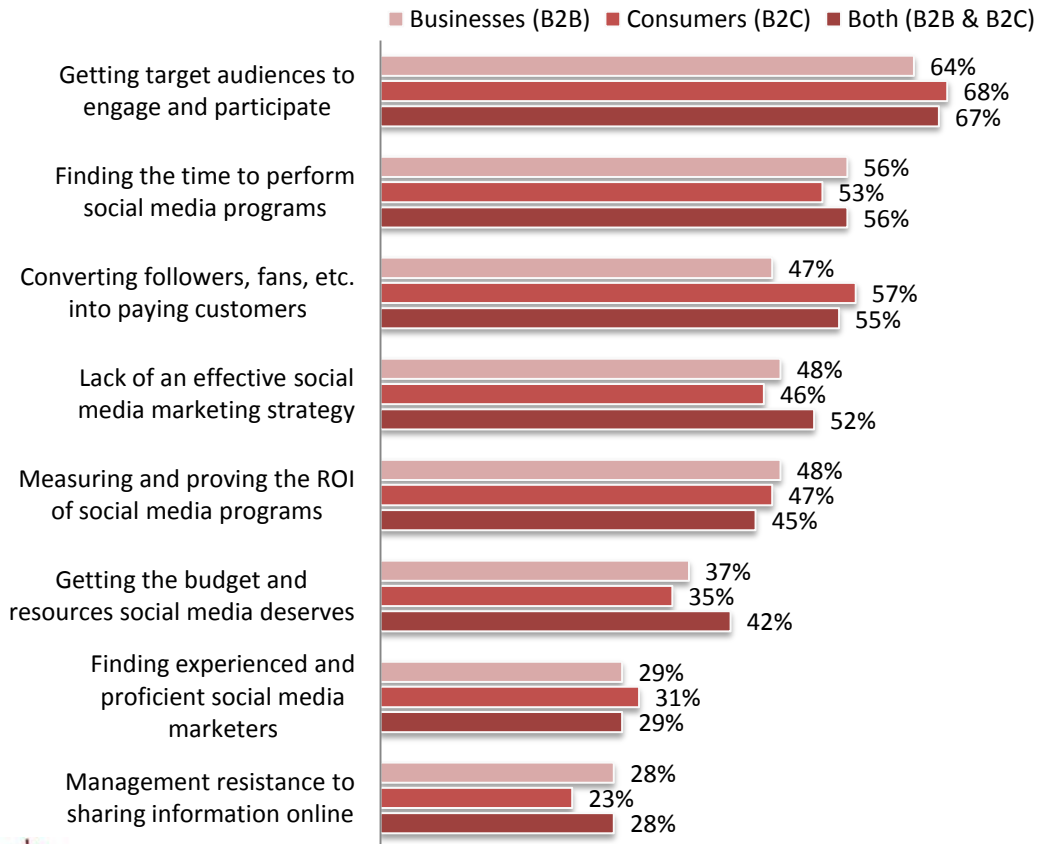
Social media enables us to form and engage communities with common professional interests and challenges. We will develop a compelling social marketing strategy for delivering the insights and know-how members of these communities need. And we will create a compelling persona for interacting with members of these communities with a single, trustworthy voice. As a result, we will be recognized not only as thought-leaders but as innovators in our segment of the online publishing space.

3. HOW WILL YOU GET THERE FROM HERE?

UNDERSTANDING THE CHALLENGES

Forewarned is fore-armed, so be prepared to address these challenges as you proceed through the social marketing planning process. As this chart shows, the challenges to social marketing effectiveness are ranked similarly by marketers in every channel.

CHART: "VERY IMPORTANT" CHALLENGES TO SOCIAL MARKETING EFFECTIVENESS, BY PRIMARY MARKET

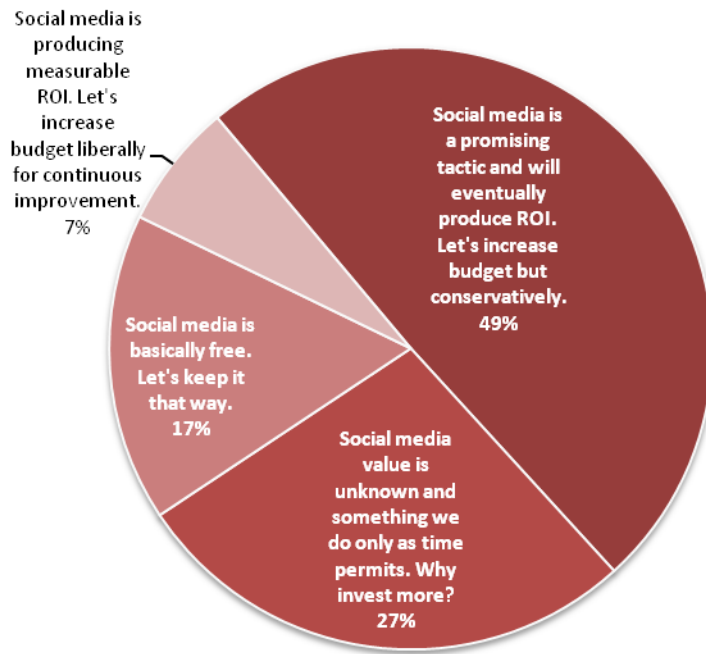


Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

A FINANCIAL COMMITMENT TO OVERCOME CHALLENGES AND ACHIEVE SOCIAL MARKETING SUCCESS

Depending on the size and type of your organization, this may simply require a “thumbs up” from your boss or demand a full-scale lobbying campaign to win over skeptics and gain the support of an executive committee. But winning financial support for social marketing is no different than winning support for any other business initiative – you have to prove its value to the organization.

CHART: HOW ORGANIZATIONS PERCEIVE SOCIAL MEDIA MARKETING AT BUDGET TIME



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

Considering that social marketing is at a very early stage in its lifecycle, it's outstanding that it received a 7% confidence rating indicating it produces measurable ROI and should be funded liberally.

Conservative budget increases by half of all organizations at budget time, based on the promise that social media will eventually produce ROI, demonstrate another vote of confidence in the tactic for the longer term.

The 17% of organizations who still believe social media marketing is basically free – and should stay that way – are destined to get what they pay for.

THE SOCIAL MARKETING ROAD MAP DEFINED

A METHOD FOR MAPPING AN EFFECTIVE SOCIAL MEDIA STRATEGY

Developing an effective strategy for integrating social media into the mix is a significant obstacle to the successful adoption of social marketing. Seeing the need for a practical method to overcome this obstacle, MarketingSherpa created the Social Marketing ROAD Map. Using this methodology to develop a strategy gives marketers the ability to make winning decisions. "ROAD" is an acronym for the following four elements:

Social Marketing ROAD Map

- Research**

Gather intelligence on target audiences, social use and competition.
Stop, look and listen – it's the first step to an effective social marketing strategy. Profile your target audiences and their social characteristics. Monitor their dialog and how preferred platforms are used. Benchmark brand popularity, share of voice and other qualitative and quantitative social metrics for your company and competitors. This is also an opportunity to assess your organization's existing resources, communities and digital assets that may add value to your strategy.
- Objectives**

Define objectives aligned with target audiences and social metrics.
Forget about soft objectives like "increasing awareness." Achieving hard, measurable and targeted objectives is the only way to win over social marketing skeptics who control the budgets at your organization. Segment, select and prioritize target audiences by social status. When possible, align objectives with metrics traceable to financials like ROI, cost-per-lead and sales conversions rather than qualitative measures such as sentiment. There are a variety of free tools (Google Analytics, Social Mention, etc.) and commercial analytical solutions for providing the quantitative tracking data required.
- Actions**

Create a social marketing strategy with a tactical plan of action.
Once you have established targeted and measurable objectives, you will need to plot a course of action toward achieving the desired outcomes. This section will specify the social marketing tactics, implementation timetables, campaigns and best practices, roles and responsibilities, policies and procedures, and budgets your strategy will require. It will also define your social marketing architecture – the pathways for connecting target audiences and conversations to content hubs, landing pages and conversion points.
- Devices**

Select platforms by their tactical effectiveness and architectural fit.
An effective strategy is expected to outlive the brief lifespan of today's popular social platforms. Therefore, your ROAD Map to this point has been technology brand-agnostic. But now is the time to identify, assess and select the appropriate social platforms (Devices) that effectively fit into your current social marketing architecture. If a social network is appropriate, will it be Facebook or LinkedIn? Do you need to build a private customer service forum or will a Twitter account be a better solution? These are the final questions your strategy will answer.

THE SOCIAL MARKETING ROAD MAP IS A CONTINUOUS IMPROVEMENT PROCESS

The Social Marketing ROAD Map is a four-step process for creating an effective strategy. The process is not linear, but circular. It is a continuous process for improvement that grows more powerful with each cycle. The Japanese coined the term “Kaizen” for the continuous improvement process, or the never-ending effort to improve products, services and processes. In this case, we use Kaizen as a never-ending effort to improve the results of your social marketing strategy.

THE SOCIAL MARKETING ROAD MAP CYCLE

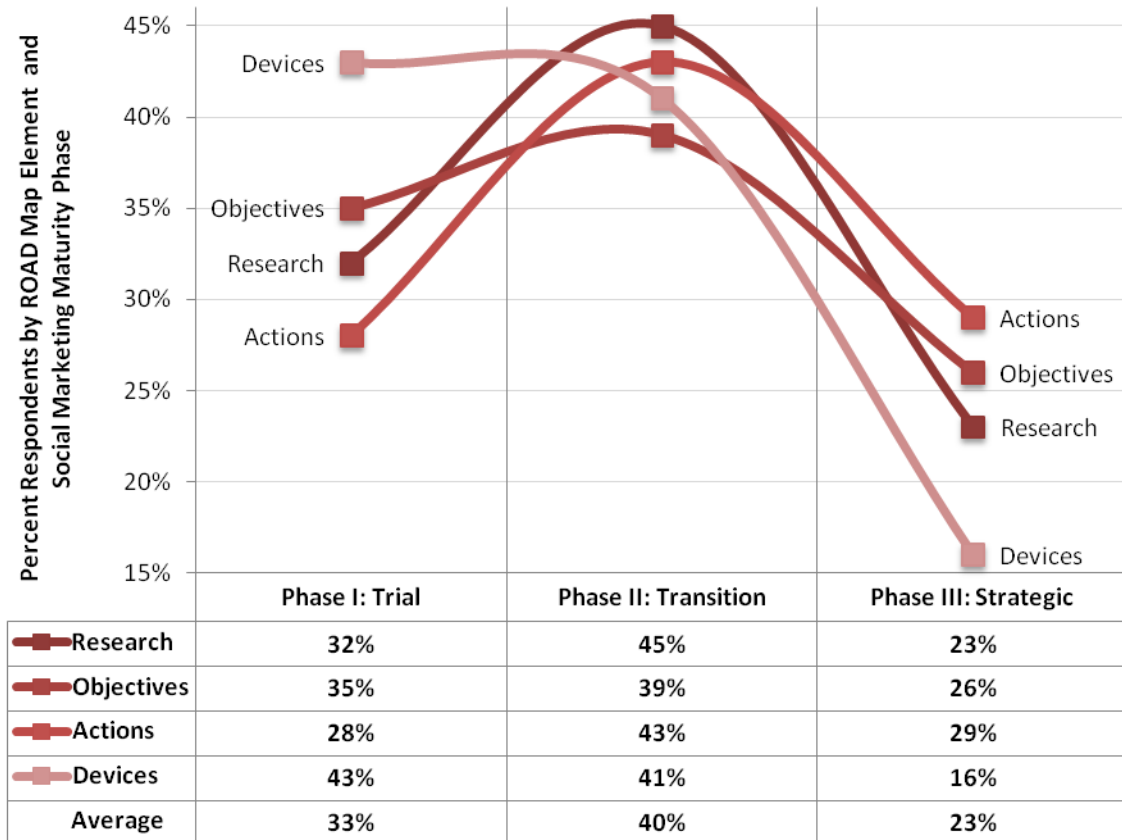


The Social Marketing ROAD Map cycle begins with Research, or gathering intelligence on your social marketing situation prior to developing your strategy. Once the initial cycle is complete, it begins again at the research step by gathering intelligence, not only on the current social marketing situation but also on what worked – and what didn’t – during the previous cycle.

AS SOCIAL MARKETERS MATURE, THEIR PRIORITIES CHANGE DRAMATICALLY

Earlier in this handbook, you determined the phase of social marketing maturity in which you currently reside and how you stacked up against other organizations. This chart provides a break-out for each of those critical factors to social marketing success (ROAD Map elements) by phase of social marketing maturity.

CHART: ROAD MAP ELEMENTS PRIORITIZED BY PHASE OF SOCIAL MARKETING MATURITY



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

For organizations in the Trial Phase, we see most are focused on Devices (social media platforms). We see the focus shifting to Research in the Transition Phase and to Actions in the Strategic Phase. The key takeaway here is that emphasis on Devices drops from the top line to the bottom as an organization's social marketing maturity evolves.

LET'S GET STARTED!

The stage is set and you're ready to get started. The following four chapters of this handbook are designed to provide a step-by-step methodology for mapping your social marketing strategy. This strategy will be the compass that guides you through the unfamiliar terrain that lies on your path to social marketing success. Good luck!

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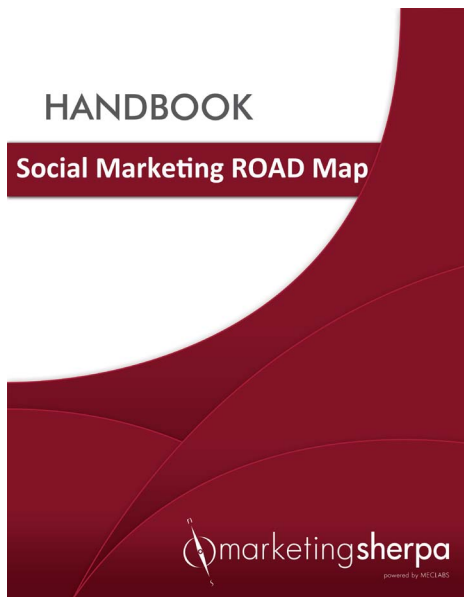
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