# Implementing SAM6®

Gain **competence** in marketing terms

Fill in **code** sheets

Select **channels**

Schedule **calendar**

Develop **control** template

Engage **creative** team


## A Strategically Aimed Marketing companion manual

By Robin Kocina


# How to implement SAM 6®

Please allow me to introduce myself. I'm Robin Kocina and Lonny is my husband. We have been married and working together at Media Relations Agency for longer than I care to admit. I'm both proud and shocked that Lonny wrote "The CEO's Guide to Marketing." *Proud* because it's a great book. *Shocked* because it's a book about process and he's the least process-driven person I've ever met.

Lonny and I work great as a team primarily because we have such opposite strengths. Lonny is all about the future. His strengths are strategy, ideation, creativity, etc. Not me. I'm a process-driven person. In my world, I like to get things done. All the trains run on time. In a nutshell, Lonny thinks things up and I implement them.

Lonny has told me that for this book to be successful, people will need to integrate the SAM 6 process into their organization. He has asked me to manage supplying a brief manual to help you make integrating the SAM 6 process easier.

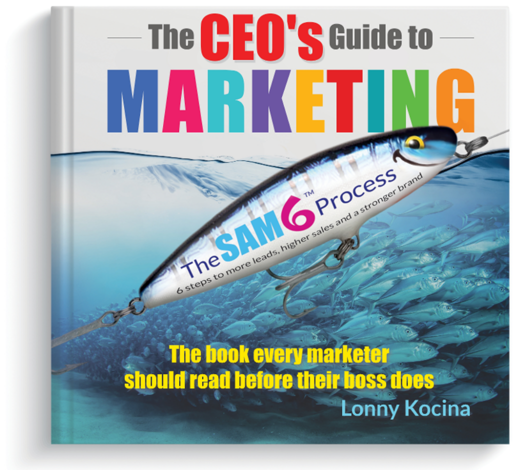
Think of this manual as a CliffsNotes version of the book that focuses less on explanation and more on implementation. While this manual is short and to the point, you need to be realistic. Process implementation requires a commitment. You will need to set aside sufficient time to do the initial work. Your team will need to stay focused. And you will also need mechanisms in place to hold people accountable. The good news is, once you get this process in place and people are using it correctly, you will only need to review it periodically to ensure it stays on course.

Don't expect everyone on your team to buy into this right away. They may be resistant to change at first but they will love you for it in the long run.

My take on projects like this is they end up being wonderful team-building experiences.

You can use this [quick team assessment sheet] at any time to gauge your teams level of integration of the SAM 6 process.

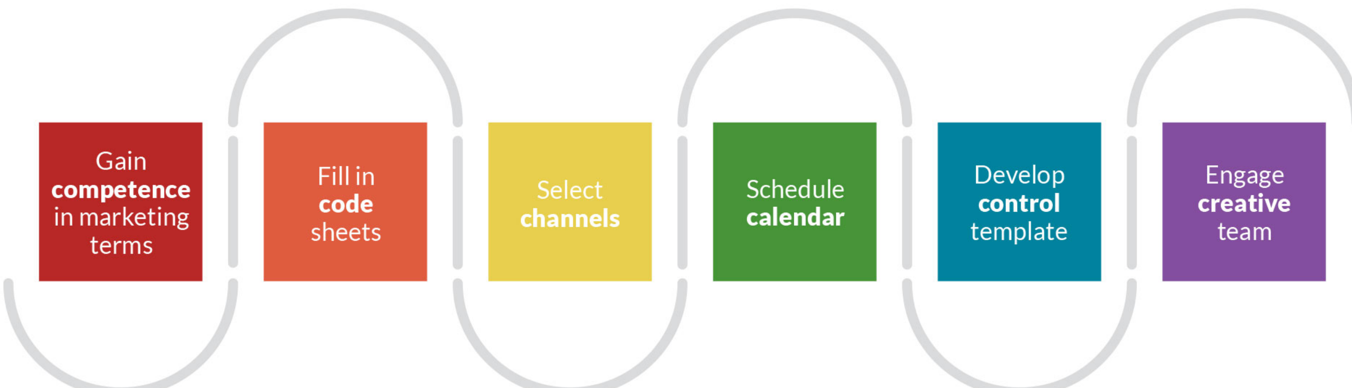
# Before you get started:




Everyone on your team should have a copy of the book. There are a couple reasons for this: First they should learn SAM 6; second, they will use the book as a resource as they implement the steps.

Think of the process like this: Steps 1 and 6 are like bookends. Step 1 is a simple overall explanation of marketing and step 6 acknowledges the connection to your creative staff. Steps 2, 3, 4 and 5 are the real workhorses. Even though there are technically 6 steps, the actual process — and that's what I'm all about — is only 4.

When steps 2 thru 4 are completed, we call the result our Brand Playbook. I'm not a big football fan but I get the concept of going on the field with a plan. I'm the type of person who likes things thought out step-by-step so when it's time to execute projects they run smoothly with no surprises.



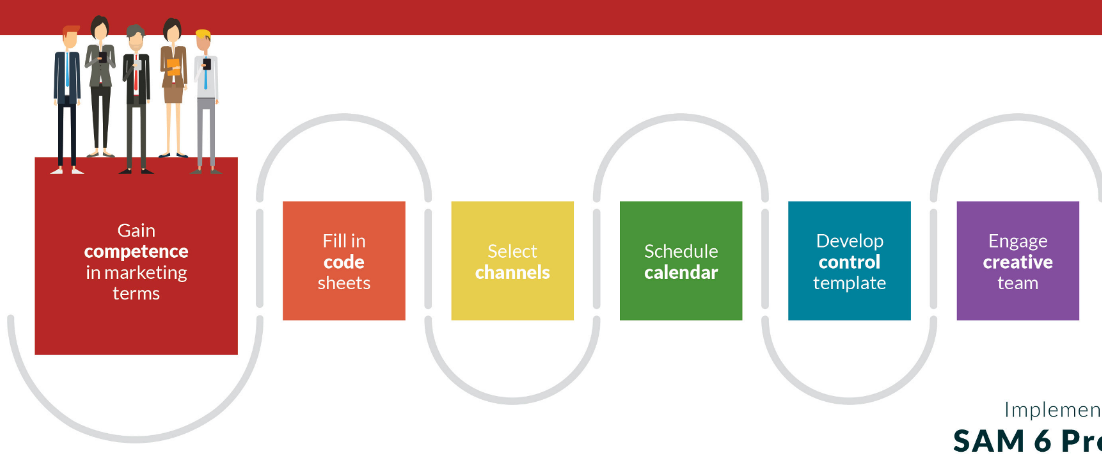
## STEP 1

# COMPETENCE

Who needs to know these terms and how can we teach them?

Wouldn't it be great if we all spoke the same marketing language?

Let's develop some tests so we can benchmark our knowledge.



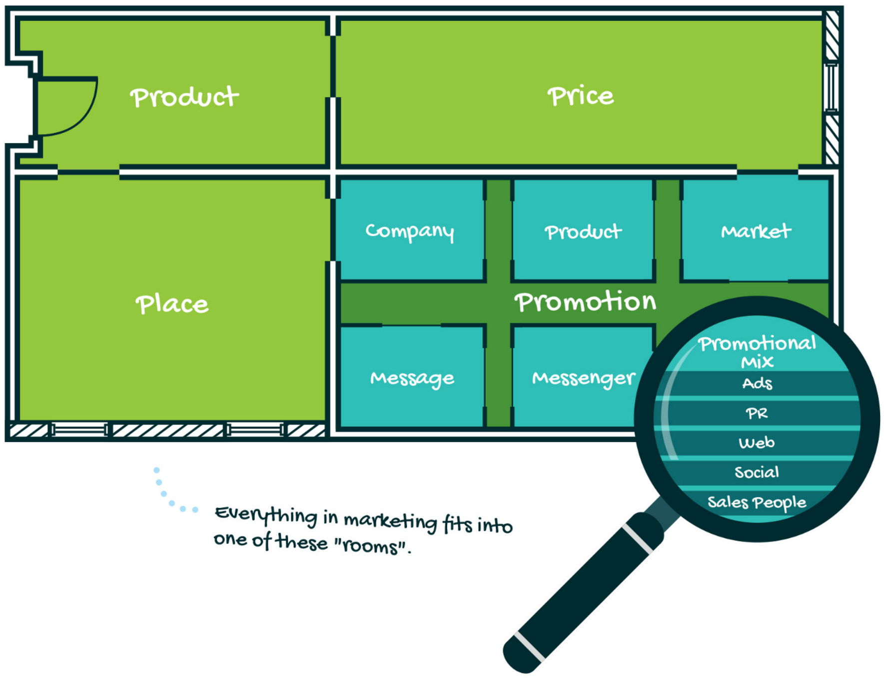

Implementing the
**SAM 6 Process**

## Step 1: Gain competence in marketing

The SAM 6 process will be easier to implement if your team understands the foundation and reasoning on which it is built. That's what step one is about. It's simply bringing everyone up to speed on the scope of marketing and the terms that will enable your team to speak a common marketing language.

A good place to start integrating the SAM 6 process is by reviewing the scope of marketing with your team. I've found the floor plan diagram pictured on page 15 to be very helpful. You can access a printable copy on Publicity.com under SAM 6 Tools. What you want to point out is that on a macro level, the scope of marketing is actually pretty simple to comprehend. You also want to show them that most of what you will be working on falls under the category of promotions. One nice benefit of a process is its ability to reduce stress. Each little advancement you make toward implementing the SAM 6 process will help your team gain confidence.

Use the *floorplan graphic* to facilitate teaching and discussion about the scope of marketing. I've found that it works best to get people involved in discussions. Not only does that require them to know the subject but it allows me to listen and see if they understand the topic.




Once you've had a chance to review marketing at a macro level, it's time to make sure your team is speaking a common marketing language by brushing up on marketing terms and concepts. Repetition is the key. It's going to take more time than you think before your staff knows the terms and concepts so well they become second nature.

We use a variety of tactics to teach our staff the *terms and concepts* of marketing. Since most people won't use each concept on a daily basis, we've developed different ways to keep them in front of our team.

Our goal is not to have them parrot the definitions back to us. We want them using the concepts and principles to influence their work on a daily basis. There is a big difference between repeating the definition and demonstrating practically application. I'm going for the latter.

1. **Discuss the concepts every day.** What worked well for me was to create little desk-friendly flip charts with terms on them. The terms are numbered 1 thru 31 — one for each day of the month. We have one of these on everyone's desk and in all of our meeting spaces. We begin every meeting, every day, with a brief discussion of the term of the day. We call on someone to give us the definition and an example of how they have used it recently or how they could use it in the near future. This practice does a few things: It assures everyone knows the terms, it makes them think about their application, it gets new hires up to speed quickly, and in effect, everyone becomes a teacher of the terms.

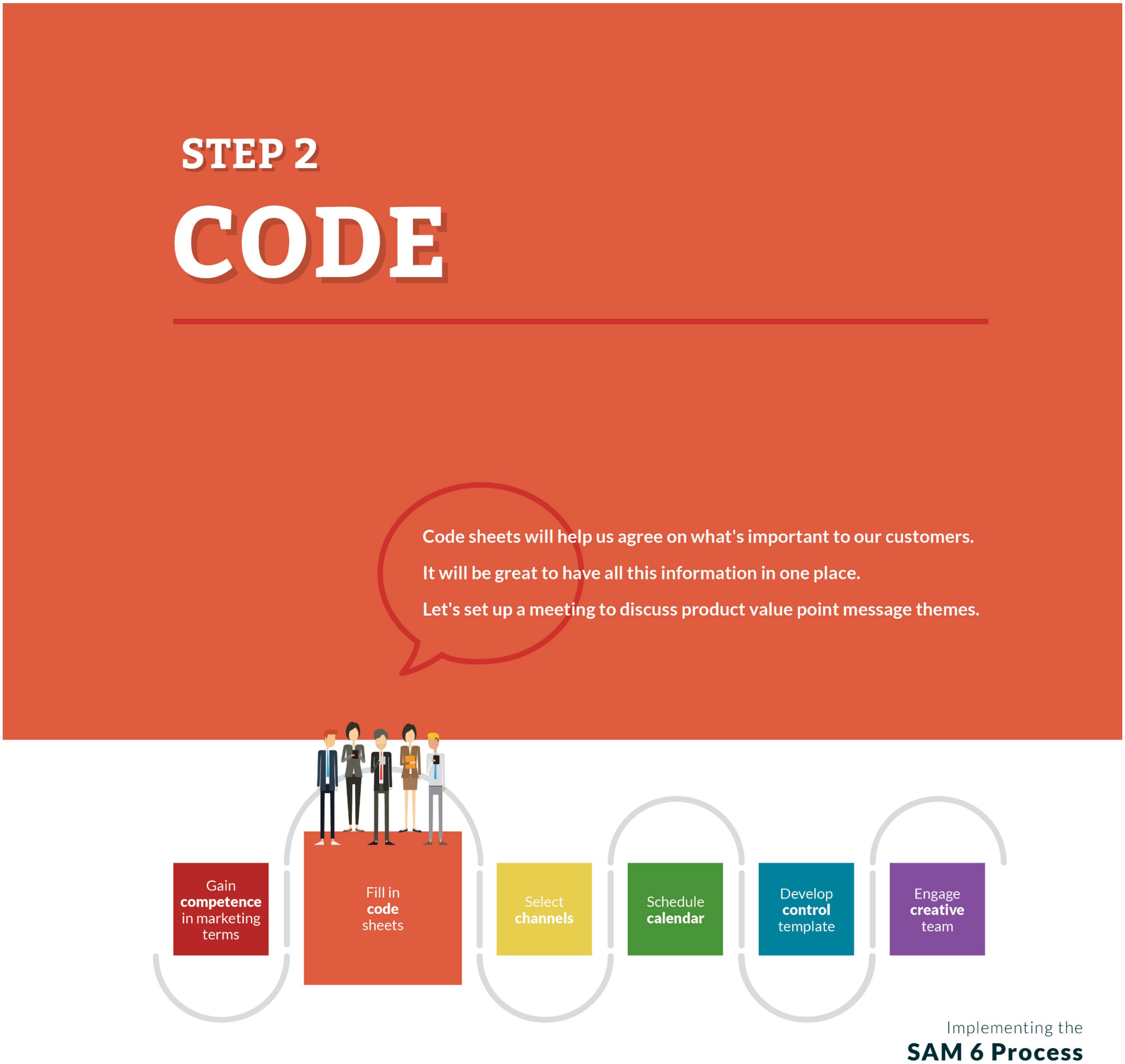
My first version of these flip charts were made by hand—nothing fancy but they worked just fine. Now we have professionally printed cards on wooden holders that look a little nicer (pictured in the book on page 192). If you'd like us to make some for you, we can do that for a small fee. Just call us at 952 697-5200.

2. **Send daily reminders.** In addition to our little flip charts, I have an automated daily email that goes out with the term of the day. It's another easy way to keep the terms in front of everyone. Not everyone is in the office every day or has a meeting every day, so this is a good reminder for them. You can sign up to receive these daily emails by going to SAM 6 Tools on publicity.com (https://bit.ly/2PBW4n2).

3. **Flash Cards.** Using flashcards or an app is an additional way to help your team study the marketing terms. At Media Relations we created these using https://www.flashcardmachine.com

4. **Pop quizzes.** We can provide you with a quiz to give your staff after you've done some the training. I suggest repeating the quiz every 90 days. If you would like to use the quiz we have developed, you can access it under SAM 6 Tools on publicity.com (https://bit.ly/2Cf68ip).

5. **One last tip.** Remember this: If at any time you quit bringing up the term of the day at your meetings, your staff will quit bringing them up too. The speed of the leader determines the speed of the pack.




## Step 2: Code Sheets

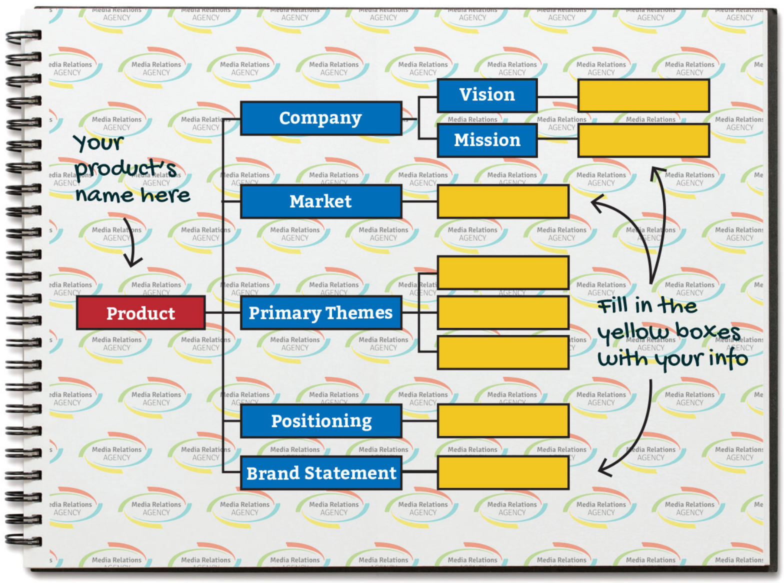
I consider creating our company's code sheets to be the most important step in the SAM 6 process. This is where we get our messaging on point so it can be carried through all our marketing efforts.

For most of you, developing your code sheets will be done in a series of collaborative management meetings. You should bring any customer information, surveys or data that you have about the buyers of your products to the meetings.

During these meetings, you will develop one code sheet for your company, and one or more for each of your products. You will have multiple code sheets for one product if it is sold to different market segments.

The time it takes to develop these code sheets will depend on how quickly meeting participants come to an agreement on each point, and how much clarity you already have on each variable. This is where your data comes in handy.

You can find a blank code sheet on [Publicity.com under SAM 6 Tools](https://bit.ly/2PzZ7fv) (https://bit.ly/2PzZ7fv). Make lots of copies for your meetings, to be used as worksheets.




Start by creating a code sheet for the company in general and then move on to creating one for each of your products or services.

1. **The first section is easy to complete if you've already created your Vision and Mission statements.** Enter your Vision and Mission on each code sheet you are developing. This keeps Vision and Mission top of mind as you develop messaging to your clients. A Vision states where you are going. A Mission states is who you are today. As Lonny says in the book, a Mission states how you are going to get to your Vision. The Vision and Mission stay the same on all code sheets unless you change them at some point in the future.

   Many times, Vision and Mission statements are much too long for the purpose of code sheets. It they are too long, no one will repeatedly read them. They need to be short, punchy, easy to view at a glance and easy to remember.

2. **Before you start creating the messages, you need to determine who you are talking to.** Perhaps you know your market well. This is where your surveys and research will be helpful. Some products have many markets. If this is the case, you will be developing a code sheet for each market.

   We suggest building out a Marketing Profile and giving it a name. Please see the book for a full discussion on Market Profiles.

   Remember, don't segment your market unless you have to. Segmenting creates more work and more complexity.

You want to allow people time to discuss market segmentation. And don't let one person dominate the conversation. Take time to ask the quiet person what they think as well.

3. **Next create your Primary Message Themes.** Start by listing all the reasons a person would buy your product. This list may be quite extensive. Then your team should come to an agreement on which are the top two, three or four main reasons most people purchase your product. On the code sheets we refer to these as primary message themes. They should be listed in priority order. As Lonny discusses in the book, the Primary Message Themes (also called primary value points) are like the starring actors in a movie and the secondary value points are the supporting actors. Enter your primary message themes on your code sheet. Note that at least one of the value points should be different if you are segmenting a product's markets. If the primary value points are the same for two submarkets, there is no need to segment them.

4. **Next work on Positioning.** This is defined as how your product is positioned in the mind of the consumer compared to your competition. In other words, why should they buy from you rather than the competition. Factors that can be part of positioning include price, quality, speed of delivery, convenience, taste etc. Create a statement boldly expressing why your product is better than the competition.

   Enter this statement in the code sheet.

5. **The final entry on the Code Sheet is the Brand Statement.** You will use your primary message themes and positioning to write this. The brand statement is what you would like to hear if you overheard a customer talking about your company or product and they got it just right. The definition you create in your market's mind will contain the essence of your message themes and positioning but it won't be bullet points. The brand statement is written in the voice of the customer and consists of your Primary Messages and your Positioning.

   Write your Brand Statement in plain language just as someone might actually say it. Use casual and conversational phrases. Writing a Brand Statement for code sheets this way helps the people who are tasked with creating and delivering your message see the bridge from your code to the actual definition or brand they are trying to shape in the mind of the prospective customer.

While these meetings require time and effort, you will feel good about having completed them and they will serve you, your staff and the company well. As you begin to use them, you many realize you need to make a few changes. That's ok. It's not always easy to get these exactly right the first time.

You should also set a time for your management team to periodically review your code sheets because things change. Depending on your circumstances, it could be quarterly, every six months or yearly. I like to review ours every six months. We usually have gained some insight or something has changed in the overall market that makes adjustments worthwhile.

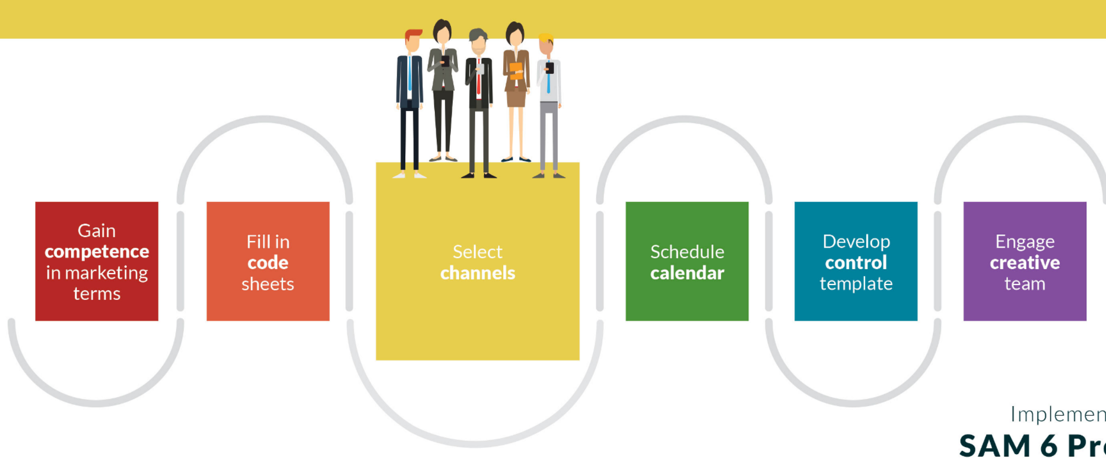
STEP 3

# CHANNELS

Let's decide which promotional mix channels will give us the best return.

I wonder which channels reach our market the best?

We need to use channels that give us enough space to tell a persuasive story.




Implementing the
**SAM 6 Process**

## Implementing Step 3
## Channel Selection

There is an awful lot of strategy in the SAM 6 process that has nothing to do with creativity. As a business owner, my overriding concern is ROI. Creative people like Lonny often don't have the mindset, or even an interest in the bottom line. But I do. And someone better be paying attention to it or the company won't be around very long.

Defining the promotional mix is easy compared to figuring out which combination of channels will give the best ROI for your organization. You'll need to ask questions like, what is this market doing during the day? Do they spend time online? Do they read the paper? Watch TV? Attend trade shows?

Consider which is the best channel to meet the market where they are looking to buy or open to hearing about your product. Also, which is the most cost effective? Does the channel reach mass audiences or can you pinpoint your unique market? Does the channel enable you to tell a story (long message) or do you have to communicate your messaging in a few seconds or words? These variables will help you evaluate which channels are best for your market, your budgets and your team's abilities.

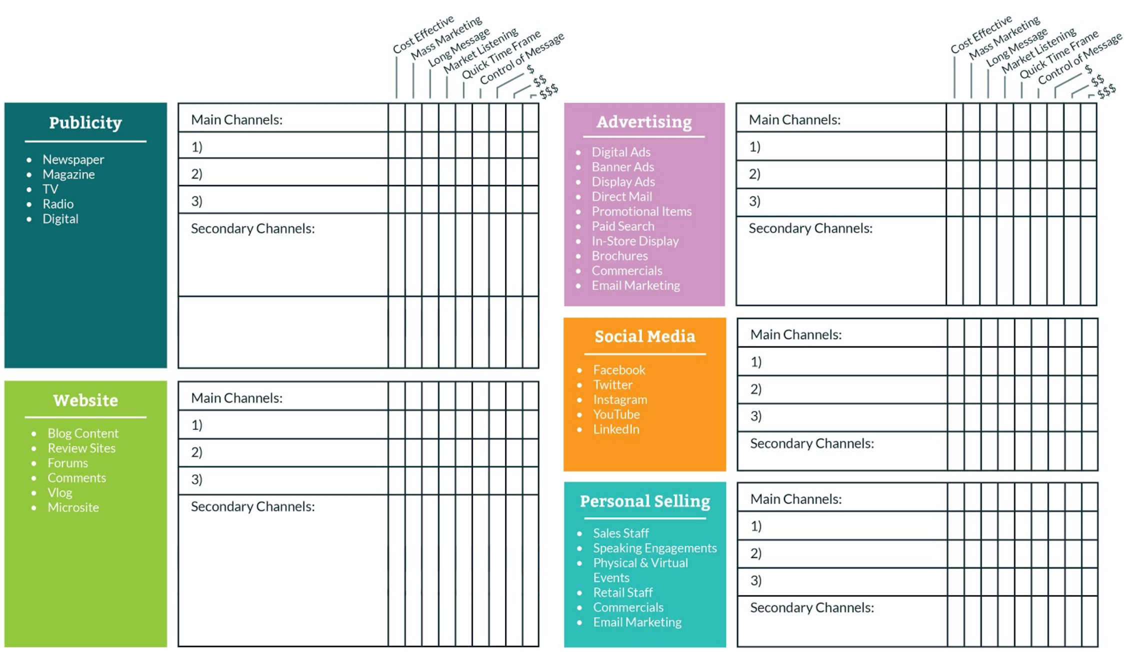
Once you have established the channels you want to use, these choices need to be constantly tested and reviewed. There are many tools to evaluate how your promotional mix channels are working for you. As of this writing, we use Google Analytics to learn about our website visitors. This tool enables us to see where they're coming from and what they're looking at on our website. This helps us determine what type of content we want to continue producing to keep our audience engaged. We can also track whether people are led to a blog on our website from a link within a social post or an email we sent about that same blog. Or maybe people are organically searching and found our website on Google.

We also track the reach and engagement of our social posts on such platforms as Facebook and Twitter. We can learn which social messages our audience engages in and the number of people our messages organically reach. We use this information to help determine what to include in our digital ads.

We closely track email open rate and clicks in MailChimp. This information helps us determine the type of email subject lines that are prompting our email audience to open the email. We can also learn what they're clicking on. If an email has a great open rate with a high number of clicks, we are likely to produce a similar email in the future. We can also send that same email a second time to people who did not open it the first time.

You can see there are many nuanced variables we watch but on a macro level I'm always considering what impact the channel choice is having on our messages.

We've developed a table to help you determine which channels might work best for your company and your market. You can find this graphic on pages 129 and 130 or you can get a printable copy on Publicity.com under [SAM 6 Tools](SAM 6 Tools).



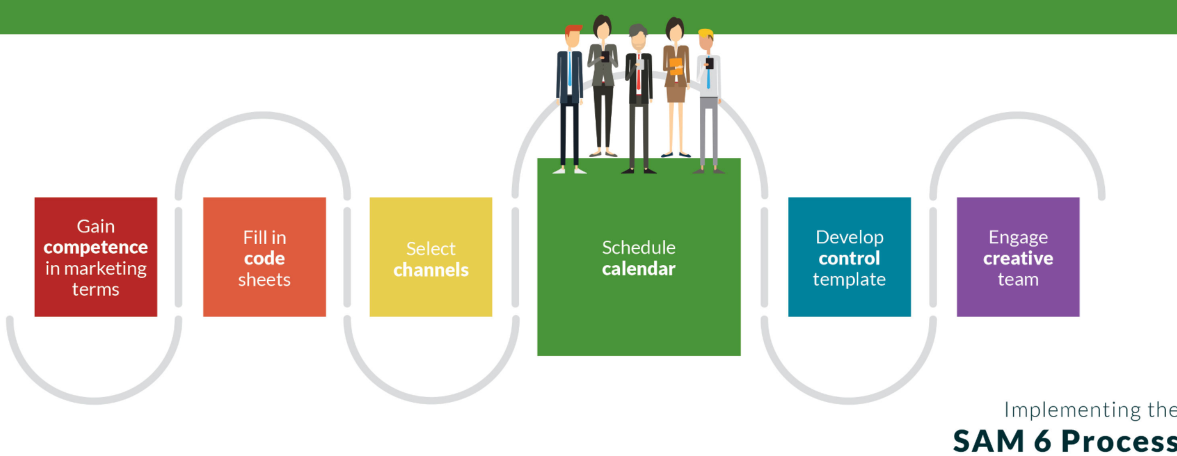
STEP 4

# CALENDAR

We need to figure out which products should get the most attention.

Scheduling will keep our promotions organized and also help with budgeting.

Having a carefully thought out calendar of promotions will give us a peace of mind.




## Implementing Step 4
## Calendar

I use two phases to building out the calendar, to help cycle through products and message themes. Phase one is creating a top-level plan which establishes which products get the most attention and how much we are going to spend. The second phase is filling out a very detailed scheduling calendar.

To prepare, you will need your code sheets for all your products in front of you.

Build out your top-level plan by considering each of the following:

1. **How much attention (money and manpower) you will give to each product**
2. **How much attention you will give to each product's submarkets**
3. **How much attention you will give to your general company promotions**
4. **How much attention you will give to each primary message.** (Some are more important than others.)
5. **How much attention will you give to positioning**
6. **How much money and staff time you are willing to commit**
7. **How frequently your promotions will go out**
8. **Which promotional channels will be used. Factors include how best to reach your market within your budget and resources**

As you can see, there are many variables to consider. It may seem a bit overwhelming at first but it's actually not that difficult if you just take it product by product.

Here is an example of how our thinking goes in relation to using the above points to guide our top-line plan. I won't try to cover everything because it would take too long. But it should give you the feel for how this exercise goes. In this example, I'll pay special attention to our best-selling product, which at this time is the the media coverage we arrange for clients. We price media coverage per story we secure and call it Pay Per Interview Publicity®.

1. **Which products will you promote.** Most companies promote all of their products and that's what we do.

2. **How much attention (money and manpower) you will give to each product.** We rank our products by sales volume. Our top-selling products get promoted the most. If we are launching a new product, we temporarily allocate more resources to that product during the launch period. For this example, media coverage is our best-selling product, so that product will get the most promotions. Consequently, it will always get the most budget dollars and manpower; at least until something else outsells it.

3. **How much attention you will give to each product's submarkets.** Our media coverage product has two submarkets we feel are about equal in importance so they get an equal amount of promotions.

4. **How much attention you will give to your general company promotions.** We spend some money on institutional promotion such as sponsoring events, but not much. Our strategy at this point is to focus the bulk of our resources on selling specific products.

5. **How much attention you will give to each primary message theme.** Some primary message themes are more important than others. For instance, we know that making a product *famous* is a more important value point than *credibility*. So *product fame* gets more attention.

6. **How much attention you will give to positioning.** In the case of our media coverage product, positioning—Pay Per Interview Publicity®—is always an important message we want to teach the market. We know people shop around so it's important that prospective customers know what we offer that our competition doesn't. We always promote Pay Per Interview Publicity® in conjunction with whatever primary value point we are promoting. Whether we are promoting fame or credibility, we are always mentioning Pay Per Interview Publicity®.

7. **How much money and staff time you are willing to commit.** Out of all the products we sell, we allocate about 40% of our budget to promoting Pay Per Interview Publicity®. The balance is split among our other products in proportion to the revenue they bring in.

8. **How frequently your promotions will go out.** We have learned our database will tolerate about 3 emails per week from us. Two will be about publicity and the third rotates through our other products. There is more frequency for advertising than we could ever have the budget for. We take our own medicine and use media stories to promote our products, and we take as many as we can get. We also post on our website blog and social channels every time we promote anything. You will read more about that in a minute.

9. **Which promotional channels will be used. Factors include how best to reach your market within your budget and resources.** It's a bit ironic that we sell our clients' media stories but have a tough time getting media coverage for ourselves. Here's why. We tell clients that it's cheaper to buy the content from us than to buy ads from the media. As you can imagine the media isn't in a big hurry to share that story. But with a full staff of publicists, we get our fair share of media coverage for our other products. The database of prospects we've built up over 30 years works well for us too. Our website is also a real workhorse (publicity.com). Social channels produce less for us but the cost is low. Digital ads are ok but you can't say much in them and our products are somewhat complex.

The results of our top-line plan look something like this. It's not our actual top-line plan because that of course is confidential.

Marketing Letters: 2-3/week. Topics/month 4 publicity, 2 web, 2 other, 4 book

Blog Posts: At least once a week on MRI

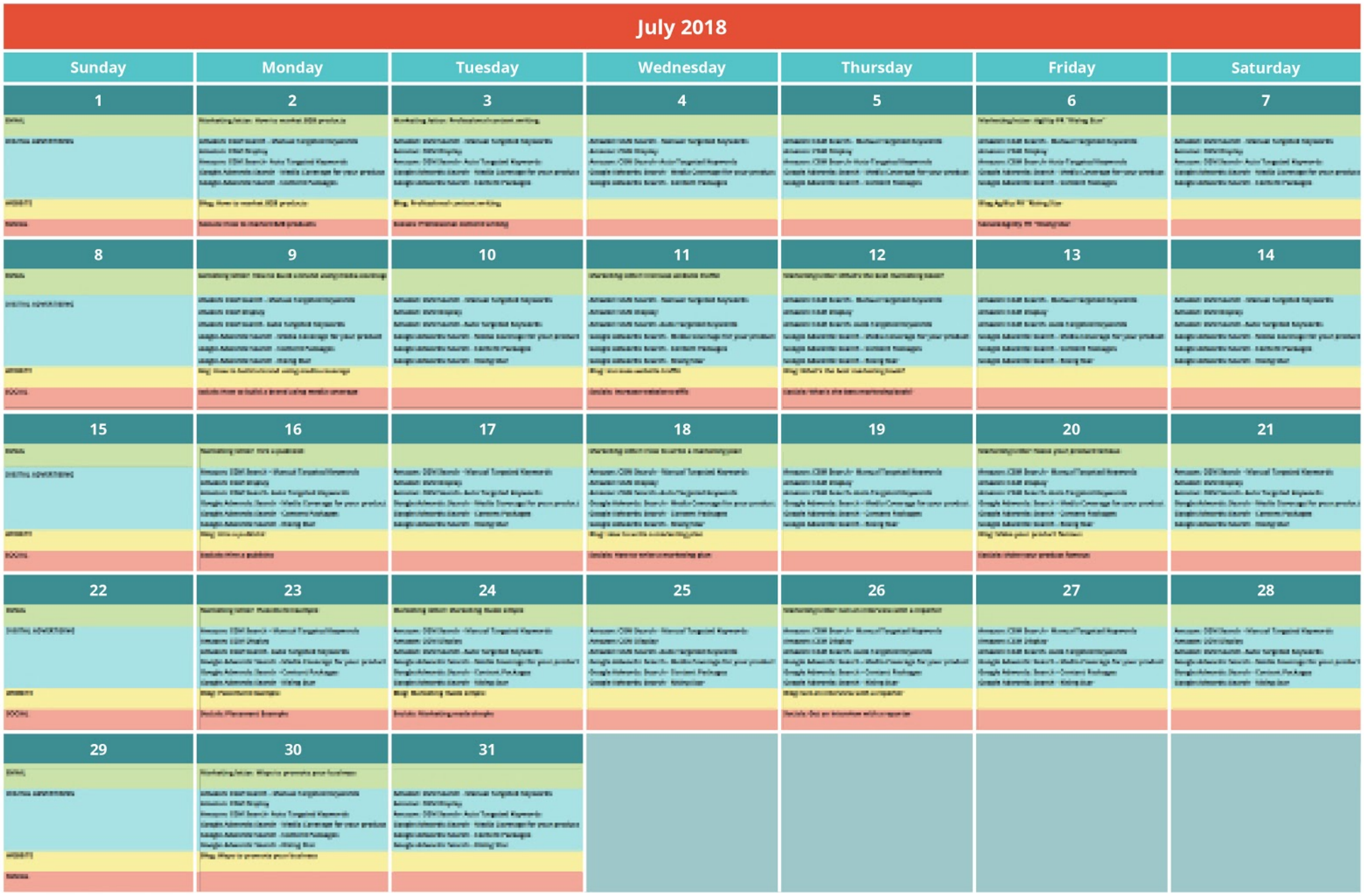
Social: LinkedIn twice a week; Facebook daily; Twitter, 3X/day

— Social includes mix of fresh blogs, evergreen content, offers, curated content, work examples and personality posts — specific calendar on CoSchedule but events listed on this calendar

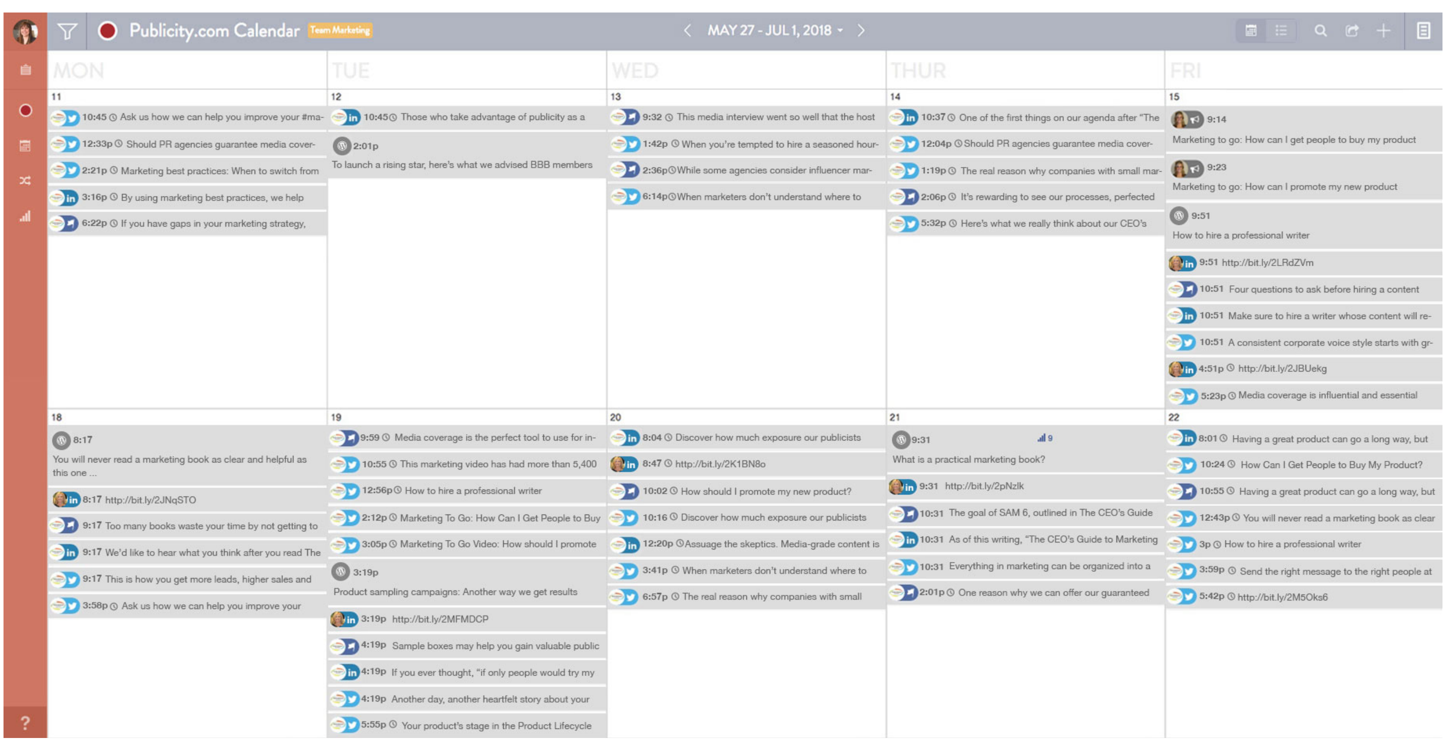
Digital Advertising: Publicity, Content alternating with Digital products, Newsies

Once you've determined what products, messages and markets you want to speak to, it's time to create your first monthly scheduling calendar. We typically use Google Calendars. In this calendar, we take all of our best thinking from above and put it into actionable tasks. At the beginning of each month, we bold content items as they are scheduled. It's a simple, visual way to stay organized and quickly see where we are. For example, each Monday our content manager can quickly double check that all blogs, marketing letters and social messages have been scheduled for the upcoming week by confirming that everything for that week is **bold**. (note that our big-picture plan appears below the calendar)

Example of our Google Calendar:




We also create a more in-depth social calendar using CoSchedule. This enables us to schedule our social posts with a date and time, then CoSchedule posts them for us. While this is our preferred tool, there are others that may work best for you.



The most critical step is to hold ongoing calendar meetings to review our results and evaluate our plan. We do this on a monthly basis. Before we fill in the next month's schedule, we evaluate what is going on within our company and with our products. Should we be focusing on a new promotional concept? Do we have a new product or service to introduce?

We also look at what happened in the past 30 days. What were our open rates for the emails we sent? How many leads came in from our website? How many leads were generated from our marketing letters, digital advertising and social media? When you trace your leads like this, you know what's working. And if it's working, continue with it! If there was no response, move on.

Only after we've determined what's needed and what's working do we get to work on the next monthly calendar.

Once the calendar is created, we assign tasks to our creative team for any promotional content needed. For example, we may need our writers to work on marketing letters, blogs and social media posts, and our digital marketing team to collaborate with our graphic designers to work on ads and infographics.

Eventually your monthly calendar meetings will become automatic. It's fun to see this happen. My experience is people really get engaged in these meetings. You can see the wheels turning as everyone evaluates how promotions are working or not working, how they fit together or don't. It's good collaborative team-building meeting.

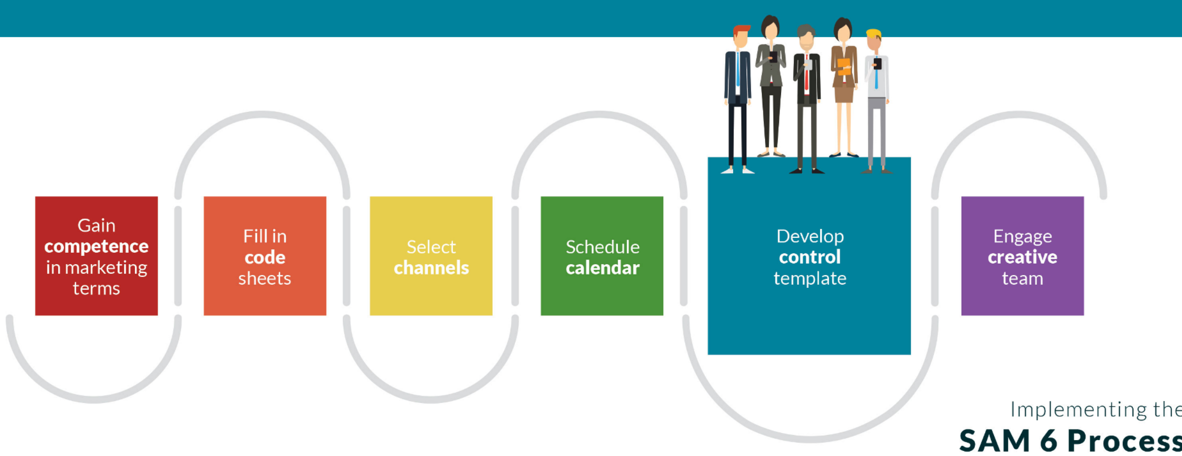
STEP 5

# CONTROL

Our creative team is going to love the clear direction!

Using a control template will ensure us a consistent brand message.

This step will make everyone's job a lot easier.




## Implementing Step 5
## Code Template

The control template helps your creative team bring your scheduling to life. It enables these imaginative professionals to create attention-getting content without losing sight of the marketing/branding necessities.

Initially it may be a challenge for creative professionals to embrace using a template, especially if they've worked years, or even decades, without such a tool. But soon they'll find it useful for producing quality, attention-getting and focused promotions.

The book clearly explains how to fill out the control template so I'm not going to repeat it here.

A good way for you to impress upon your creative staff that they need to work within the template is by using the template for giving them feedback. Remember that creative folks are emotional. Yes, you will use the template to make corrections but just as important, it gives you an opportunity to praise them. And there's no need to be phony or patronizing. Much of what these people create is truly amazing.

You can find a blank control template on Publicity.com under [SAM 6 Tools](SAM 6 Tools).

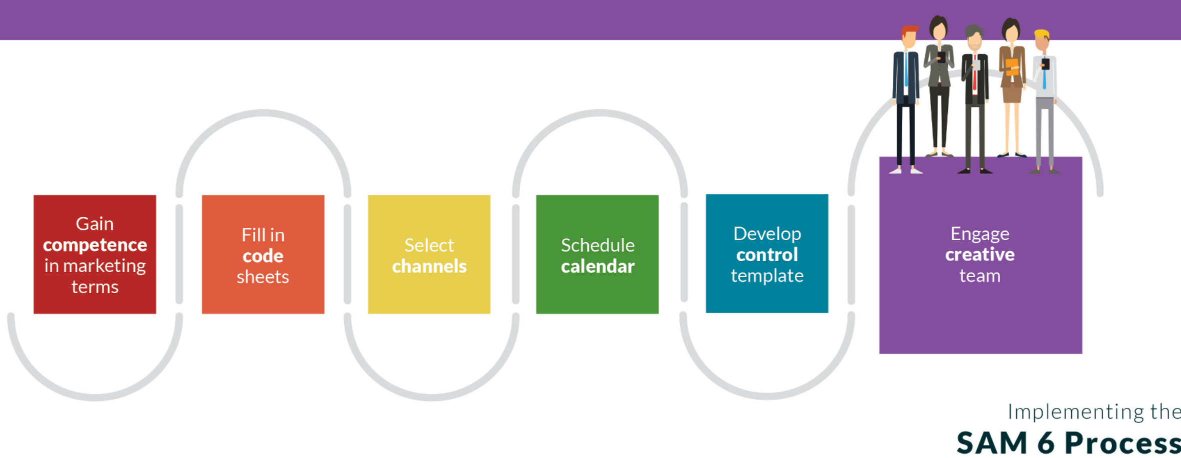
STEP 6

# CREATIVE

Marketing sure takes a lot of different talent today.

We're going to have the right talent on our team.

We should use Media Relations Agency. I hear they are the best!




## Implementing Step 6
## Creative Team

At the beginning of this book I mentioned that steps 1 and 6 are like bookends. I'd like to use step 6 as an opportunity to plug our company and you will find it less self-serving than you think.

Let's start with your internal staff.

It's nice to have inside talent that has corporate history and knows how you operate. But don't expect your internal person to be an expert at everything. This sets them and you up for failure. Use your internal person as your point person, and supplement with external experts. There's just too much for any one person to be an expert at everything today.

By using the experts like the ones we employ at Media Relations Agency, you skip the training time and only pay for their services as they are needed. Experts in the their field know how to get up and running right away and know what it takes to get it done. For example, our Publicists talk with producers and editors every day. They know who to call, what the media will typically require and how to prepare materials for the greatest chance of convincing the media to run the story.

Hiring content writers can be challenging. There are thousands of freelance writers out there. Many are just out of college. Some have never written for the media and others have never written marketing-specific content. Because your content represents your business and your reputation, be selective. You don't want an inexperienced writer to replace lack of knowledge with fluff. When hiring writers for our agency, we've had the most success by emphasizing writing skills, depth of experience in multiple industries as well as well-rounded life experience.

As with just about any technology area, the tools and methodologies of web design are constantly changing. Security … SERP algorithms … performance … scalability are just a few of the concerns. If your website isn't performing as well as your competition's, that's lost revenue. When choosing someone to design or update your website, make sure to confirm that the platform will do everything you need it to do. Is it browser-based? How well does it handle content management? Can it integrate easily with your social media channels? We build all of our clients' sites on WordPress because it is extremely functional and user friendly.

Two other areas that evolve continuously are digital marketing and graphic design. Digital marketing can get quickly get complex, especially when evaluating how to dominate specific channels and platforms with clicks and conversions. Should you link to a landing page or video? How much should you segment if your goal is to maximize shares? Our clients give us positive feedback about our digital marketing experts. We're fortunate to have found people who have a strong drive to learn what's new in this area.

Likewise, graphic design trends can influence how your company is perceived. Also, different design approaches will appeal to different market segments. But you still want to remain true to your company's persona. Because we have a diverse international client base, and therefore a demand for a breadth of design styles, our graphic designers are skilled in the nuances that make their results unique and appropriate to the specific project.

> "Marketing is not about fun. It just happens to be fun. Marketing is about the shortest, fastest, least expensive and most direct route to a lead, a sale and a brand."
>
> - Lonny Kocina