Take the time to review your marketing plan to see what you need to change. You may have customers or markets that are no longer viable or new possibilities to promote your business.

#### 1. Develop new targets

If your existing customer base has changed substantially, who can you now re-position your offering to?

#### Profile three new customer types as precisely as possible:

If you sell to consumers, try to define the typical age bracket, gender, income bracket, and location. What are their preferences? If you sell to businesses or organizations, define the type and size of business or organization, number of employees, and an ideal contact at each business.

•	New target description 1
•	New target description 2
•	New target description 3



### 2. Identify positive trends

Outline why you believe these new target customers are worthwhile.

•	Trends affecting Type I customers
	The man amedian 8 in the management
•	Trends affecting Type 2 customers
	Trends affecting Type 3 customers



#### 3. Link promotions to targets

Identify how you intend to approach or get the attention of these three new customer types (the media your target markets watch, listen to, or read). Use the **Notes** column to define specifics, such as the social media channel you intend to use. With the current crisis how can you develop goodwill to help with word of mouth?

<b>▶</b> Media	Tick	What specifically will you do?	Notes
Videos			
Radio			
Email campaigns			
Strategic alliances or partnering			
Content marketing			
Media coverage			
Blogs			
Social media			
Direct selling			
Webinars and education			
Other			



### 4. Build your online presence

Outline how you intend to drive leads and traffic to your website.

<b>▶</b> Website features	Tick	What specifically will you do?
Marketing automation software e.g. HubSpot		
Updated special deals and news features on your homepage		
A newsletter with exclusive articles to capture customer email		
addresses for lead nurture		
Online shopping capability		
Curbside pick up option		
Home delivery option		
Useful tools, tips and resources section		
Links to other/complementary websites		
Develop relevant articles and resources		
Password access page for key customers (premium content or		
special deals for loyal customers)		
Password access pages for suppliers (inventory level details)		
Direct marketing with target lists		
Other		



### 5. Build credibility

Now is the time to build your credibility in the eyes of potential new customers. The more trustworthy you appear, the easier it is to gain new customers.

Credibility tactic	Tick	What specifically will you do?			
In all promotional material and the website					
Offer a personal guarantee					
Include customer testimonials in promotional material/websites					
Emphasize training, awards and quality certification					
Emphasize employee industry experience, achievements					
Other					
Personal action as owner					
Publish articles on industry websites and LinkedIn					
Run webinars for the industry/customers					
Use social media to blog and gain awareness					
Offer online demos of your product or service					
Other					
Community involvement					
Join a local business support network					
Join your industry or professional association					
Join Chamber of Commerce					
Work with or sponsor a charity					
Other					



#### 6. Partnerships and alliances

Create a wish list below of companies or organizations you would like to work with to increase your credibility and your marketing reach. Every business is under stress and often banding together may help everyone. In addition, are there any businesses or organizations that are crisis proof that you could work with?

Ideal partnership candidate	What specifically will you do?

This workbook is intended as general information only and is not to be relied upon as constituting legal, financial or other professional advice. A professional advisor should be consulted regarding your specific situation. Information presented is believed to be factual and up-to-date but we do not guarantee its accuracy and it should not be regarded as a complete analysis of the subjects discussed. All expressions of opinion reflect the judgment of the authors as of the date of publication and are subject to change. No endorsement of any third parties or their advice, opinions, information, products or services is expressly given or implied by Bank of Montreal or any of its affiliates. Bank of Montreal does not warrant the accuracy, completeness, quality, adequacy or content of any information in this workbook nor does it make any warranty as to the results that may be obtained from the use of this workbook.

