

Marketing Month 2025

*Week 4 - Crafting Your Marketing
Strategy: A Summer School Round-Up*



Paradigm

A Summer School Round-Up

And just like that, we've reached the end of our 2025 Marketing Month!

We hope you'll agree that this month, we've taken a real whirlwind tour of all things marketing. Our aim has been to equip you with the tools and knowledge to **grow your business** and give it the recognition it truly deserves. From managing **Financial Promotions** on social media to being mindful of **diversity, equity, and inclusion** when creating and sharing content, we truly believe we've helped you lay the foundations for building a comprehensive marketing strategy.

Back in Week 1, we asked you some big questions: Where do you ideally want your business to be in **one year**? How about in **five years**? How do you think marketing will help you achieve these goals? And does this all align with your current business strategy?

Now is the perfect time to **revisit those questions**. Have your answers changed since then? Remember what you're trying to get out of your marketing strategy, and double-check that you've done enough preparation before you dive in.

We genuinely hope our Summer School of Marketing has sparked some new ideas and shown you fresh ways to **catch your clients' attention**. We've tried to share practical tips and insights so you can see how to put them into practice. And if you do, we'd absolutely love to hear from you! Please do get in touch if you have any success stories you can share with us – it would be brilliant to hear what's worked for you!

What's the one key takeaway from our Summer School that you're most excited to implement in your business?



Creating Your Marketing Strategy: A SOSTAC Approach

As a starting point, your marketing strategy should always **align with the overall strategy of your business**. Think of it as "**a way to reach your destination**." For instance, if your business goal is to increase your client base, then a marketing strategy focused on **improving brand awareness** would be a sensible approach to generate more leads. On the other hand, if your business aims to retain more existing customers, you might focus on creating **informative content** that continuously demonstrates the value of your advice and services.

To help you create your marketing strategy, we'll be using the **SOSTAC model** as our template throughout this guide. If you haven't come across SOSTAC before, don't worry – it's incredibly straightforward to use and ensures your strategy develops in a **logical order**, allowing you to critically assess each step. A great benefit is that if one step doesn't quite work, you don't have to go right back to the drawing board; you can simply revisit the parts that don't connect or go back to the previous step.

Remember: **practice makes perfect!**

Here's a quick breakdown of what each part of SOSTAC stands for:

- **Situation Analysis:** Where are you now? This involves looking both externally (market trends, competitors) and internally (your current resources, strengths).
- **Objectives:** Where do you want to be? This is about setting clear, measurable goals, such as gaining more followers, achieving better engagement, or increasing likes.
- **Strategy:** How do you get there? This outlines the broad approach you'll take to achieve your objectives.
- **Tactics:** What specific methods are you going to use to get there? These are the detailed actions you'll implement.
- **Action:** Bringing the plan to life! What specific tasks need to be completed to execute your tactics?
- **Control:** How are you going to monitor the results? How will you know you've reached your goals and what measures will you put in place to track progress?

Do you already have a clear overall business strategy in mind that your marketing efforts can support?

Your Situational Analysis

As you've probably spotted on page 2, our quote for the guide really hones in on **preparation**, and there's a good reason for that! When it comes to crafting a winning marketing strategy, getting your groundwork right is absolutely essential.

We touched on this in our Week 1 guide, but it's worth a quick recap. To truly get a handle on your **situational analysis**, you need to build a clear picture of the current market and precisely where your business fits within it.

To help you do this, we highly recommend carrying out both an **external** and **internal analysis**. This will give you a crystal-clear view of your current position, highlight any factors that might impact you, and really pinpoint who you are and what you do best.

Diving Deeper: Your External Analysis

Now, here's a crucial part that often gets missed, yet it's arguably one of the most vital elements of any robust marketing strategy: your **external analysis**.

Why is it so important, you ask? Well, it's your window into the wider world, allowing you to pinpoint those all-important **opportunities** and potential **threats** that can genuinely impact your profitability, drive your growth, or even create a bit of volatility – factors that often lie beyond your direct control.

For this deep dive, we wholeheartedly recommend carrying out a **PEST analysis**. As you'll see in the image provided, we've even given you a few cracking examples to get you started!



OLITICAL

- Cost of Living



CONOMIC

- Recession
- Inflation



OCIAL

- Mortgage commitments
- Social Media



ECHNOLOGY

- New system and sourcing
- New Social Media platforms

Getting Under the Bonnet: Your Internal Analysis

Right, once you've had a good look at the outside world, it's time to turn the spotlight inwards! Your **internal analysis** is where we really get to grips with three key things: your organisation's **competencies**, your **resources**, and your unique **competitive advantage**.

For this, we highly recommend getting stuck into a **SWOT analysis**. It's brilliant for pinpointing those fantastic **USPs (Unique Selling Points)** you can really shout about, and unearthing exciting **opportunities** just waiting to be explored. What's more, a SWOT analysis also helps you identify any potential **threats** or **weaknesses** that you can then focus on improving.

Now, a quick word of caution: while your competitors might technically be a 'threat', don't let them become your *sole* focus or, worse still, start just copying their every move. Remember, you do what you do well, and your customers will definitely remember that!

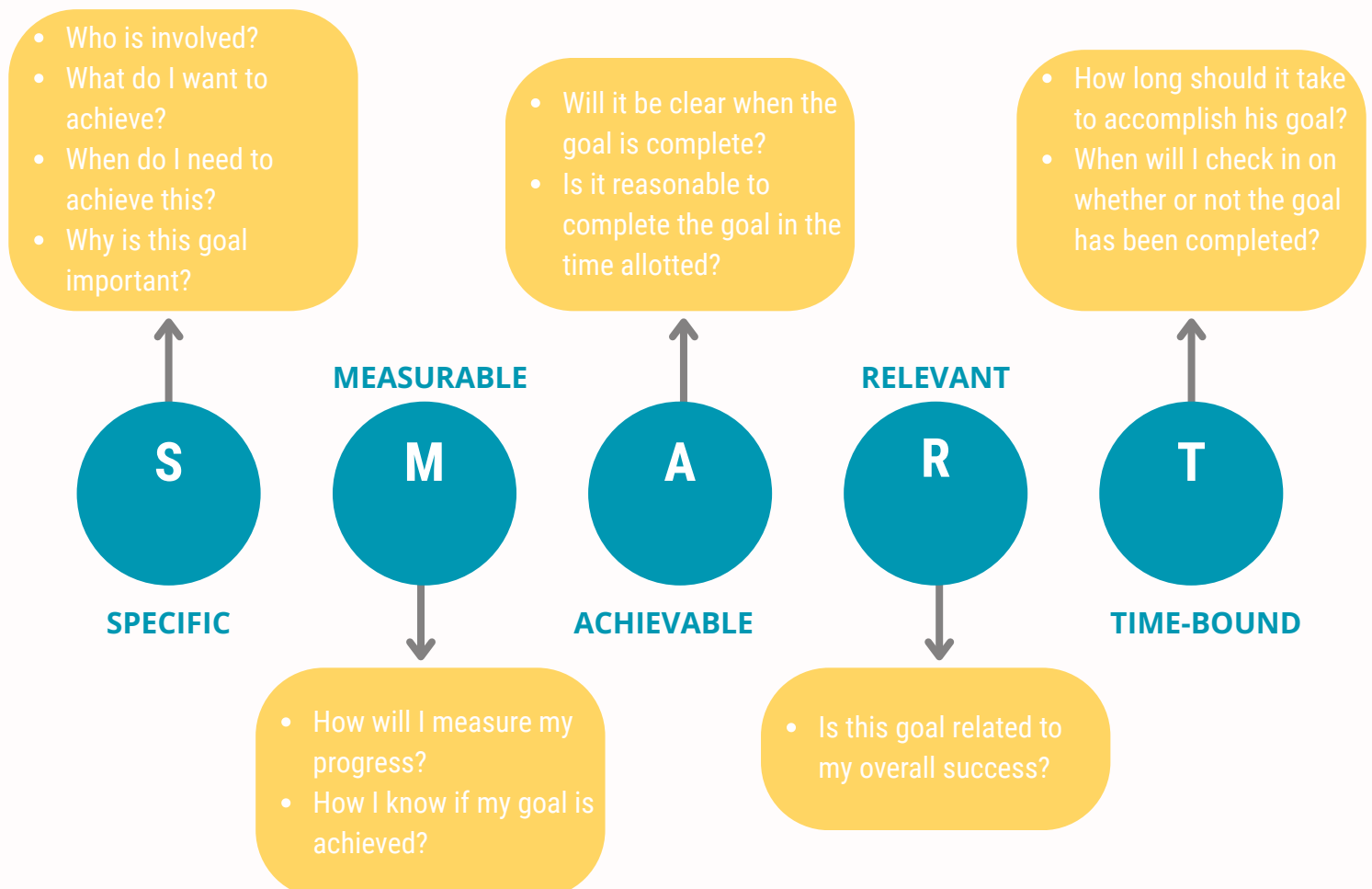


Setting Your Sights: Objectives

Alright, now that we've got a really clear picture of where you're currently standing, it's time to start thinking about **where you want to be!**

Take a moment to truly ponder this... Are you aiming to boost the number of likes on your social posts? Perhaps you're hoping for better lead generation, or maybe even sky-high customer engagement? Could it be improved customer retention that's top of your list?

The options really are endless, but here's a friendly piece of advice: try not to bite off more than you can chew too quickly! For this stage, we'd absolutely recommend diving into **SMART objectives** to help you focus.



So we've nailed down that your objectives need to be super **clear and concise**, following that brilliant **SMART** template. Now, it's time to really dig in and think about not just where you want to be, but precisely *how* you're going to get there.

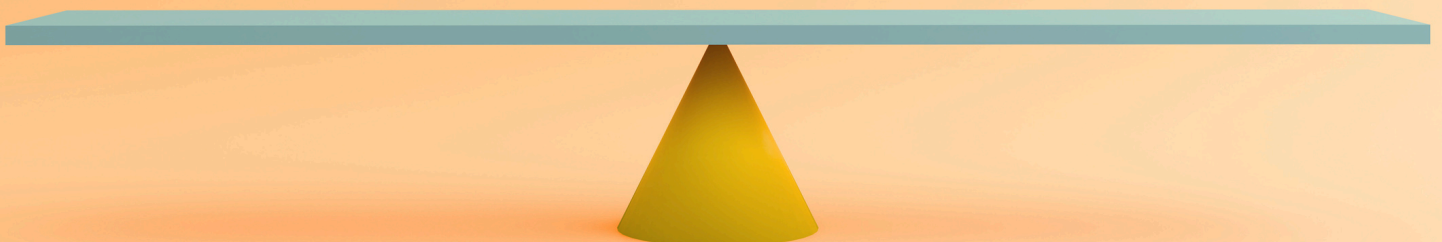
Instead of a broad statement like "I want more customers," let's get specific! How about: **"increasing first-time buyer customers by 10% by January 2026"**? See the difference? This gives you a truly **tangible objective** that's **relevant, measurable, specific, and time-bound**.

As we said right at the start of this guide, every business is unique, and what 'improvement' looks like will vary wildly. Increasing by 10% could mean 7 new customers for one business, but a whopping 70 for another! So, please, **never compare your progress with others**. Instead, really take the time to think about what you want to achieve, rather than just something that looks like a visual improvement.

Now, for Section 2 of your worksheet, we'd like you to jot down three objectives that perfectly align with your overall strategy. To get you started, we've popped a few examples below:

- **Objective 1:** Increase the amount of first-time buyer clients by 10% by July 2026.
- **Objective 2:** Increase LinkedIn following by 5% by February 2026.
- **Objective 3:** Boost positive reviews left on Google from 110 to 150 by January 2026.

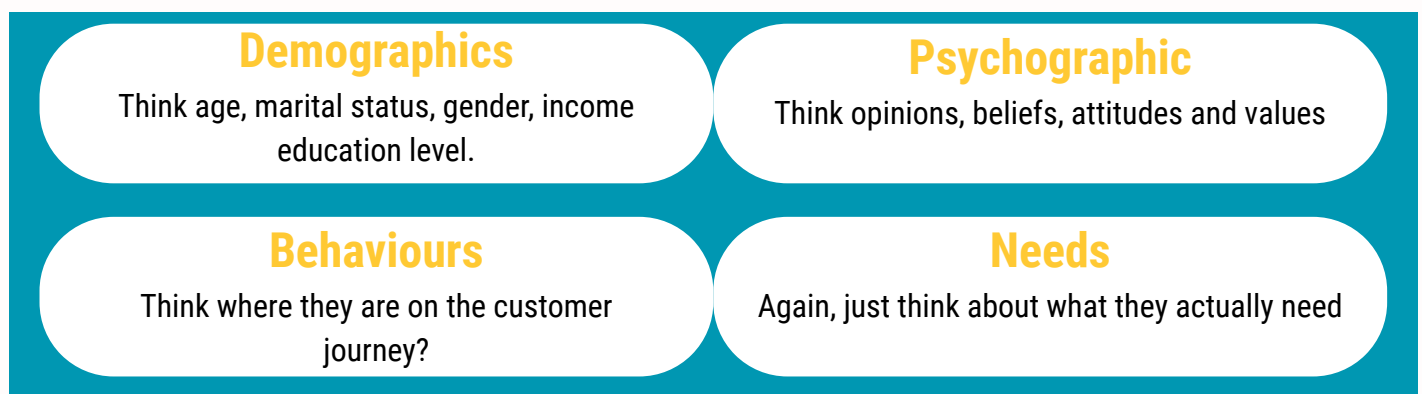
You'll notice these objectives are all quite different, but each one is designed to help your business grow and thrive!



Your Game Plan: Strategy & Tactics

Alright, so we've got those super clear **SMART objectives** locked in. Now comes the exciting bit: figuring out **how we're actually going to achieve them!** This means identifying *who* we're aiming to reach (our customer segments), deciding *which channels* we'll use, and basically, mapping out the full implementation.

With your objectives in hand, it's crucial to really understand **who you're trying to reach**. We've already sketched out your broad target market, but now we need to slice and dice it into smaller, more focused groups. These are the specific folks you'll be marketing to. So, let's ask: Who are they? What are their burning needs? What hurdles do they face? And most importantly, what truly motivates them?



We can break down your broad target market into four helpful categories: **Demographics, Psychographics, Behaviours, and Needs.**

Think about it: from your objectives, who are you going to market to? Let's take **Objective 1** as an example: "Increase the number of first-time buyer customers by 10% by the end of July 2025." If we segment first-time buyers using those four categories, it allows us to pinpoint a very specific individual and create a detailed **target customer persona**. This will be different from the 'ideal' customer persona we built in Week 1, as we need to push ourselves out of our comfort zone a bit!

For instance, a 'typical' first-time buyer might be under 35, single, perhaps quite eco-conscious, very active on social media, and in desperate need of sound financial advice on buying their first home. For this objective, we've now got a wonderfully clear, segmented group to target!

What's Your Playbook?

So, what tactics are you going to use to reach them? What will make them choose you over a competitor? And crucially, **where are they on their customer journey with you?** Knowing this helps us hit them with the right message at the right time.

Here are a few ideas to get your tactical gears turning:

- **Content Creation:** You could look at crafting insightful **blogs or videos** packed with practical advice for first-time buyers. We don't want to give *everything* away, of course, but even breaking down the complex steps can gently guide a potential customer further down the funnel towards interest or desire (that's **owned marketing** for you!).
- **Social Media Buzz:** Let's crank up those posts across your existing social platforms, maybe focusing on environmentally-friendly ways to buy a home (that's clever **earned marketing**!).
- **Search Engine Optimisation (SEO):** Think about boosting your visibility on Google! By cleverly using keywords, we can make sure you rank higher for searches related to first-time buyers. You could even consider Google Ads for those keywords (just remember, **Google Ads** are paid marketing, but great SEO is absolutely free!).



The Grand Finale: Action & Control!

Right, this is it – the **final countdown!** We're almost ready to start bringing your brilliant strategy to life, but first, let's just fine-tune those last few crucial details. When are we kicking things off? Do we need to whip up some fantastic content beforehand? And, most importantly, how will we know when we've hit our objectives out of the park?

You've done an incredible job laying the groundwork for your marketing strategy. You understand your business's strengths and weaknesses, you've got clear objectives and goals, you know precisely who you're targeting, and how you plan to reach them. Now, it's time to **take action!** To iron out those final details and ensure a smooth launch, we can use the trusty **5Ws**:

- **WHO:** Who's going to be the driving force behind implementing this strategy? Who's responsible for creating that captivating content, or boosting your SEO ranking? Make sure someone's clearly "in charge" to keep everything ticking along nicely.
- **WHAT:** So, what exactly are we doing? For example, we might decide to ramp up posts across your existing social media platforms, focusing on environmentally-friendly ways to purchase a home (that's smart **earned marketing!**).
- **WHERE:** Where will you be rolling out all these fantastic tactics you've decided on? And here's a tip: can anything be **re-used**? A brilliant blog post, for instance, can easily be repurposed for your website, social media, and even your newsletters!
- **WHEN:** When are you actually going to hit 'go' on this strategy? If content is a big part of your plan, it might be worth creating a "bank" of content. This way, you'll have plenty of material ready to go, taking some of the pressure off!
- **WHY:** Always, always remember **why** you're doing this – what objective are you striving to achieve? Keep that end goal firmly in mind with every message you send out. It should always be your North Star!

Keeping a Watchful Eye: Control

Now, how are we going to keep this whole strategy under control and ensure it's working its magic? If tracking and analytics are new territory for you, we've got a handy **Hints & Tips guide on Google Analytics** over on our Summer School of Marketing page that's worth a peek!

Take a moment to idea storm how you can track the strategy's effectiveness. We highly recommend setting up **weekly or monthly check-ins** to make sure everything's on track. And definitely pop in a reminder for a **halfway-stage review** – this is crucial to see if anything needs a tweak or an update.

For our SEO tactic, where we're aiming to improve rankings for first-time buyer searches, we might look at **fortnightly check-ins** on our ranking position and regularly dive into **Google Analytics** to see how many views your site is getting for related queries. If, at the halfway mark, you're not seeing the results you hoped for despite all your hard work, don't fret! Simply **reassess your strategy** and consider other options or avenues to achieve those fantastic results.

This is precisely why having those **SMART objectives** is so vital – they ensure your goals are achievable... and we're absolutely certain they will be!



A man with a beard and sunglasses, wearing a yellow jacket, is shouting into a white megaphone with a yellow base. The background is a solid yellow color.

... week 4 over and out

We've reached the end of our Marketing Month for 2025!

As FCA-regulated firms, you know how crucial it is to keep customer communications and financial promotions clear and compliant. That's where we come in. Paradigm helps you highlight your services and attract clients, all while staying within regulatory guidelines.

Our experienced Technical Helpdesk, established in 2007, can streamline your financial promotion processes and help you create impactful, compliant materials for your target audience. We routinely review:

- Your website
- Marketing brochures and flyers
- Business stationery
- Blog content
- Social media posts

Ready to learn more? Call us at **03300 536061** or request a **callback**.

We're eager to hear your feedback and answer any questions about our Summer School sessions. Let us know what you think!

Best regards,

The Paradigm Marketing Team



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