



**PROSPER**  
PORTLAND

# **DIGITAL MARKETING HANDBOOK**

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A roadmap for assessing your clients'  
digital marketing needs

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# AUDIT WORKSHEET

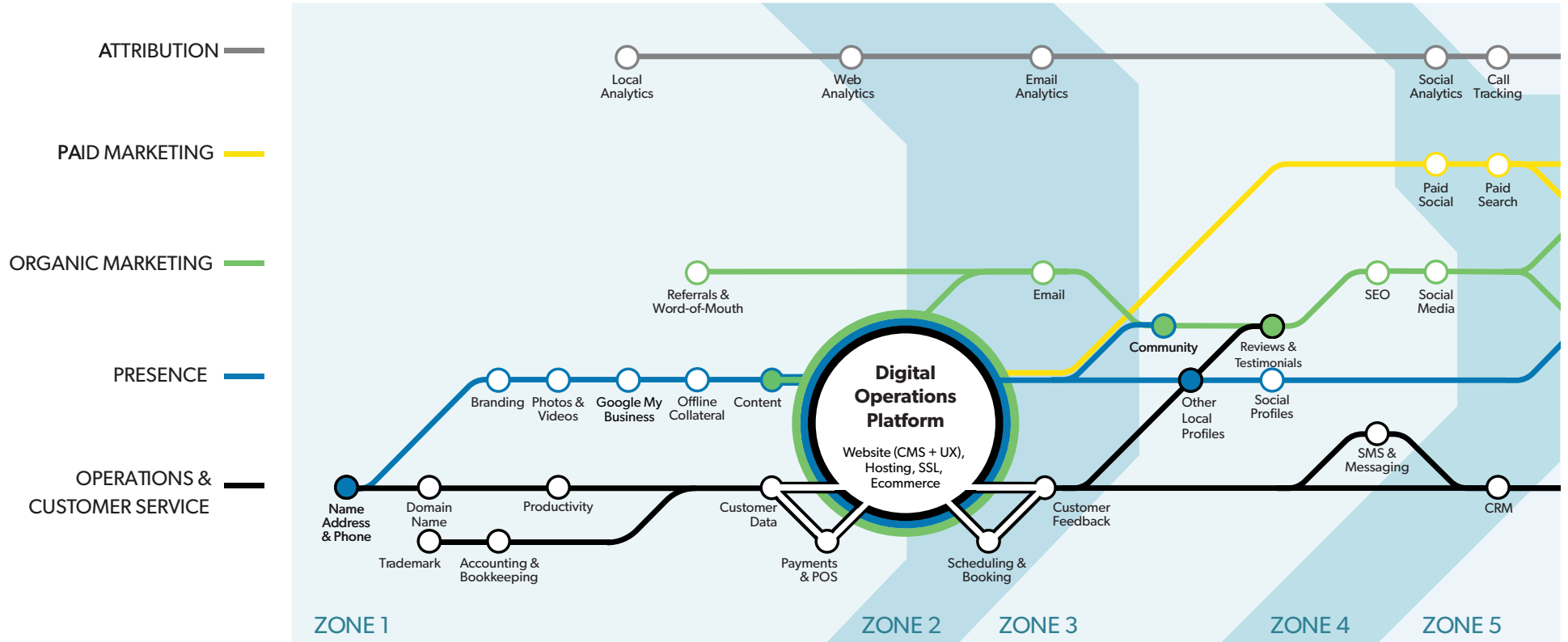
OK	Not OK	Page	Item	How to Audit	Vendor	Follow-up?
		6	Name Address Phone	Google Search for proposed name		
		10	Domain Name	Search <a href="https://domains.google">https://domains.google</a>	Domains.Google	Trademark
		13	Productivity	Enter website in <a href="https://mxtoolbox.com">https://mxtoolbox.com</a>	Google Workspace	
		17	Branding	Google Image search for [site:domainname.com brand name]	Tailor Brands	
		19	Photos & Videos	Google Image search for [site:domainname.com]	Mercatus Directory	
		21	Customer Data	(ask merchant)	Google Workspace, Digital Ops Platform	
		25	Offline Collateral	(ask merchant)	Canva	
		26	Referrals & W-O-M	(ask merchant)	Small Thanks w/ Google	
		27	Content	Use checklist provided in Roadmap		SEO
		29	Website/Digital Operations Platform	Enter website in <a href="https://whatcms.org">https://whatcms.org</a>	Squarespace, Shopify, Square	Payments & POS, Web Analytics, Email Marketing,
			(SSL Certificate)	Look for secure/lock icon in web browser	Let's Encrypt	
		37	Website UX	Enter website in <a href="https://search.google.com/test/mobile-friendly">https://search.google.com/test/mobile-friendly</a>	Squarespace, Shopify, Square	
		42	Web Analytics	Enter website in <a href="https://gachecker.com">https://gachecker.com</a>	Google Analytics	
		47	Customer Feedback	(ask merchant)		
		49	Email Marketing	Enter website in <a href="https://builtwith.com">https://builtwith.com</a>	Digital Ops, Mailchimp	
		53	Email Analytics	(free with Digital Operations Platform or Mailchimp)	Digital Ops, Mailchimp	
		55	Local Profiles	Google Search for full Name, Address, Phone	Google Business Profile, Yelp	Scheduling & Booking
		58	Local Analytics	(free with Google Business Profile)	Google Business Profile	
		59	Social Profiles	Search for profile name at <a href="https://namechk.com">https://namechk.com</a>	Facebook, Instagram, YouTube, LinkedIn, Pinterest, Twitter	
		61	Community	Brainstorm list, Google Search for [site:organization.org brand name]	NextDoor	
		63	Reviews & Testimonials	Google Search for full Name, Address, Phone	Whitespark Review Link Generator	
		65	SEO	Google Search for [site:domainname.com]	Google Trends, Digital Ops Platform	
		71	Social Media	Use chart provided in Roadmap	Buffer	

ZONE 1

ZONE 2

ZONE 3

# THE LOCAL MARKETING STACK (ZONES 1-3)



## HOW TO INTERPRET THIS GRAPHIC

Generally speaking, you should read the graphic from left-to-right and bottom-to-top. Points lower and to the left are more fundamental to the overall success of your business than points higher and to the right in the sequence.

Each of the most popular digital products, services, and tactics in the market today is called out by a circle. Some stops are particularly key integration points that contribute to the success of multiple marketing avenues.

We've also marked four major zones from left to right. For the most part, you should complete each stop that lies to the left of a given zone boundary (for example, Digital Operations and Web Analytics are inside of Zone 2) before moving onto stops in zones that are further out (such as SEO).

**This handbook focuses on marketing components in the first three zones.**

## Intended Audience

This guide is intended to help local business owners, and the marketers who serve them, put together a roadmap for making their marketing decisions.

It assumes a very basic understanding of digital marketing concepts, but is intended for a beginner-level audience.

Second Edition

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# NAME ADDRESS & PHONE

Your Name, Address and Phone are foundational to your identity as a business, and they're not something you should change frequently, if ever.

## WHAT IT AFFECTS

Almost everything. Branding, trademark potential, collateral, local profiles, social media, SEO: all are impacted by this decision.

## WHAT TO CONSIDER

- Is the name descriptive or meaningful?**  
If it describes your products or services in some way, that will help with SEO in the future. If it's meaningful to your customer base, or if it's an extension of your personal identity, it'll be more memorable.
- Does it sound like it reads, and vice versa?**  
If someone hears about your business from a friend, will they know how to spell it (and be able to look you up online)?
- How crowded is your namespace?**  
Are there any other companies with similar names?
- Is your address near a large portion of your customers?**  
Locate as close to your customer base as possible to give yourself a head start on SEO. The closer you are to where

your customers are searching, the higher you will rank.



### Choose a local, not 1-800, phone number

Research shows customers are more likely to buy from a local small business that uses a local number.

## HOW TO AUDIT

Perform a Google search for the name(s) you're considering. What websites show up?



### No "Fortune 500" companies.

You'll have a hard time outranking Amazon, Etsy, or other big brands anytime soon, and you don't want to lose customers to them.



### No local companies in a similar line of business.

You don't want to lose customers to a possible competitor or invite a potential trademark battle.

## EXAMPLES

The image shows a Google search for "jen's jewelry". The search results list several entries, including "Jen's Jewelry Box - Home | Facebook" with a 5.0 rating and "Jen's Jewels - 118 Photos - Jewelry/Watches - Facebook" with a 5.0 rating. A large grey 'X' is overlaid on the search results. To the right, a map shows the location of "Jen's Jewels" in Redding, California, with a 5.0 rating and 2 Google reviews. The address is 1555 Yuba St, Redding, CA 96001. The hours are Open from 10:00 AM to 4:00 PM. There are buttons for Website, Directions, Save, and Add phone number.

*Jen's Jewelry* is **not** a good choice due to high similarity with another local business.

Google search for "designer jewelry" results:

- Delicate Designer Jewelry at Neiman Marcus - NeimanMarcus.com**  
www.neimanmarcus.com/ | 4.7 rating  
Get Inspired by classic styles from the finest designers at Neiman Marcus. Free Shipping. New Arrivals. Designer Trends. Free Returns. Highlights: We Provide Customer Service, We Offer Gift Cards, Mobile App Available. Men's - Women's Dresses
- David Yurman® Women's Jewelry | Official Site | DavidYurman.com**  
www.davidyurman.com/ | 4.8 rating  
Shop The Iconic Women's Collection, Exclusively From David Yurman. Expertly Crafted. Exclusive Designs. Complimentary Shipping. Book an Appointment. Live Chat. Types: Bracelets, Rings, Necklaces, Earrings, Watches, Accessories, Engagement Rings, Wedding Bands, Wedding Jewelry. Women's Jewelry - New Designs - Find a Store - Men's Jewelry
- Harry Winston® Official Site | Exquisite Fine Jewelry**  
www.harrywinston.com/ | (800) 988-4110  
Discover Our Tradition of Creativity, Rarity, and Quality Without Compromise.
- Designer Fine Jewelry | Blue Nile - BlueNile.com**  
www.bluenile.com/ | 4.8 rating  
4.8 - 4,993 reviews - On-time delivery: 95%+  
Pay 20-40% Less Than Traditional Jewelers. Free Shipping and Free Returns. Free 30-Day Returns.

See designer jewelry

 BVLGARI B.zero1 Necklace in Rosé... <b>\$2,800.00</b> BVLGARI Free shipping	 David Yurman Women's... <b>\$395.00</b> David Yurman Free shipping	 BVLGARI Save The Children... <b>\$620.00</b> BVLGARI Free shipping
 Cartier - Love bracelet ... <b>\$1,630.00</b> Cartier Official Free shipping	 LANA JEWELRY Prettis Chain... <b>\$255.00</b> Shoppop Free shipping	 David Yurman Men's Bracelets... <b>\$215.00</b> David Yurman Free shipping

*Designer Jewelry* is **not** a good choice due to high competition with major brand names.

Google search for "native blossom studios" results:

- Blossom Studio**  
www.blossomstudiobeads.com/ | 4.8 rating  
Glass by Sihaya Hopkins, beads & jewelry inspired by nature. Hollow drops in a rainbow of colors, birds, butterflies & botanicals.  
Missing: native | Must include: native
- Wild Blossoms Studio - Custom Floral Designs for Events in Northern ...**  
https://wildblossomsstudio.com/ | 4.9 rating  
Dec 14, 2018 - At Wild Blossoms Studio we love to tap into our creativity to make exciting and ... As a Fort Collins native she is devoted to catering to the local ...  
Portfolio - Testimonials - Resources - Blog
- Blossom Studios - Home | Facebook**  
https://www.facebook.com | Places › Christchurch, New Zealand › Dance Studio  
Gym/Physical Fitness Center in Christchurch, New Zealand. ... Bring out your inner Beyonce and get that heart rate going with 45mins of non-stop grooving. ... Bring our your inner Beyonce and get that great rate going with 45 mins of non-stop grooving.  
Missing: native | Must include: native

Annotations:

- Blue checkmark icon next to the first result.
- Blue box around "blossomstudiobeads.com/" with a line pointing to the text "Google has a hard time finding any businesses that include all three of these terms."
- Blue box around "great rate going with 45 mins of non-stop grooving." with a line pointing to the text "Google has a hard time finding any businesses that include all three of these terms."

Google has a hard time finding any businesses that include all three of these terms.

*Native Blossom Studios* is a good choice due to uniqueness and low competition.



---

## USEFUL TOOLS

### **Google.com**

There's no substitute for searching the world's dominant search engine to check out your namespace.

### **Namechk.com**

This tool is actually for looking up domain names (also an important consideration when choosing a name). If many popular domain extensions (such as .com and .net) are taken, it can provide an extra indication of how crowded your namespace is.

**Also See:** Trademark (Appendix).



# DOMAIN NAME

Your domain name is your business's address on the web, and it's fundamental to the permanent identity of your business.

## WHAT IT AFFECTS

A lot. Your website, email address, and SEO are among the marketing factors affected by this decision.

## WHAT TO CONSIDER

Many of the best domain names have either been reserved by other businesses or are cost-prohibitive, so it might require a little creativity to find a great one.

- Get the .com if you can.**  
It's still the most reputable extension and many customers will simply default to typing it into their browser. If the .com you want is already in use by someone else, you may lose customers to them.
- Consider acquiring the .org and .net versions as well.**  
It'll only cost you a few extra dollars per year, and you'll want to make sure that a spammer doesn't acquire them for nefarious purposes.
- Say your domain name out loud.**  
You're going to want to tell people offline where they can find you online. If you choose a name like "Portland dash oregon dash florist dot com" just because it's available... think about the impression that conveys to your custom-

ers and how memorable it is for them. Maybe “Northwest floral dot com” is a better option once you say it.



### Consider acquiring and redirecting misspellings.

If your domain name isn't obvious to spell, consider buying domain names that match common misspellings. Once you've purchased them you can redirect them automatically to the domain name you actually plan to use.

## HOW TO AUDIT

Go to <https://domains.google> to see if your domain is available.

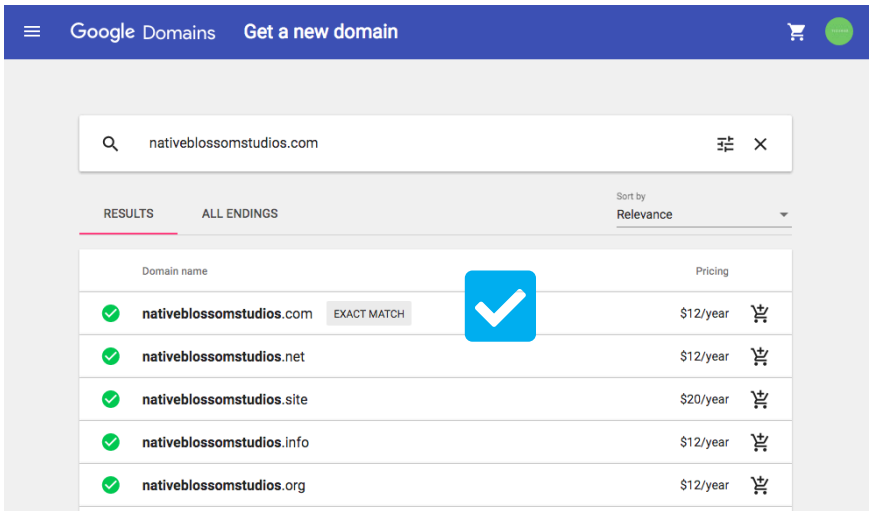
There are a number of less reputable domain lookup companies that may be vulnerable to spammers or domain hijackers.

## EXAMPLES

The screenshot shows the Google Domains search interface. The search bar contains "nativeblossom.com". Below the search bar, there are two tabs: "RESULTS" (selected) and "ALL ENDINGS". A "Sort by" dropdown menu is set to "Relevance". A table lists the search results:

Domain name	Pricing
nativeblossom.com	Unavailable
nativeblossom.net	\$12/year
nativeblossom.biz	\$15/year
nativeblossom.site	\$20/year
nativeblossom.org	\$12/year

*NativeBlossom.com* is **not** available. Choosing .net or .biz isn't as credible and you'll be confused with the owner of the .com.



*NativeBlossomStudios.com* is available. Also consider purchasing the .net and the .org to protect your business from spammers.

## USEFUL TOOLS

### Domains.Google

Really the only tool you need here. If your chosen .com is not available, Google will suggest alternatives. Using domains.google also makes future steps of the roadmap much easier -- such as setting up G Suite for Productivity.

**Also See:** Trademark (Appendix)



# PRODUCTIVITY

Productivity is such a 90's word. It's an umbrella term for "digital things your business will probably need," such as email addresses at your domain name, a work calendar, and basic software like documents, spreadsheets, and presentations.

## WHAT IT AFFECTS

First and foremost, your professionalism. Research shows that customers are 9x more likely to choose a business with a professional email address (@yourbusinessname.com instead of @gmail.com or @yahoo.com, for example).

Your productivity suite can also affect the ease of storing and importing or exporting customer data, booking and scheduling services, and more.

## WHAT TO CONSIDER



**There are really only two choices: Google Workspace or Office365.**

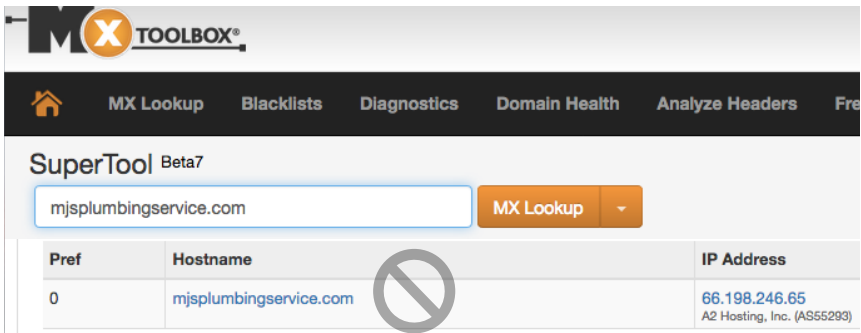
Both solutions offer email, calendar, and cloud storage for documents along with an office suite for word processing, presentations and spreadsheets - all essential tools for running a business of any size.

# HOW TO AUDIT

Enter your domain name at <https://mxttoolbox.com> to see if the MX hostname points to Google.com.

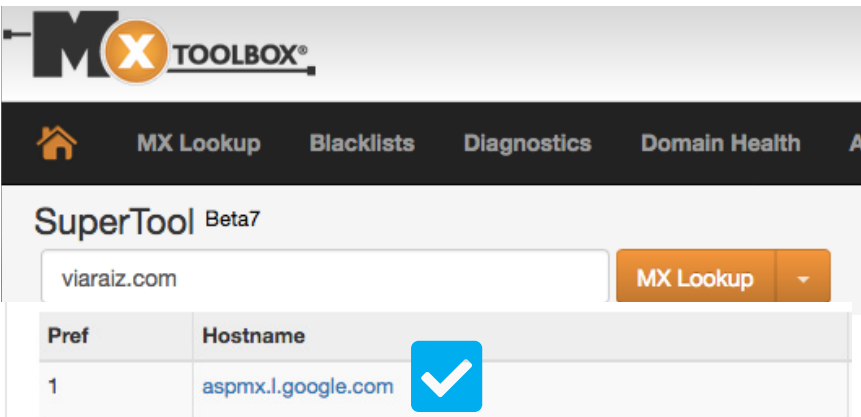
Basically, an MX hostname is an “address lookup” for an email account. In this case, we are showing how to check that the address is Google.com.

# EXAMPLES



The screenshot shows the MX Toolbox interface. The search bar contains 'mjsplumbingservice.com' and the 'MX Lookup' button is pressed. The results table shows a preference of 0 and a hostname of 'mjsplumbingservice.com'. A large grey 'no' symbol (a circle with a diagonal line) is overlaid on the table, indicating a failed lookup. The IP address listed is 66.198.246.65, belonging to A2 Hosting, Inc. (AS55293).

Pref	Hostname	IP Address
0	mjsplumbingservice.com	66.198.246.65 A2 Hosting, Inc. (AS55293)



The screenshot shows the MX Toolbox interface. The search bar contains 'viaraiz.com' and the 'MX Lookup' button is pressed. The results table shows a preference of 1 and a hostname of 'aspmx.l.google.com'. A large blue checkmark icon is overlaid on the table, indicating a successful lookup.

Pref	Hostname
1	aspmx.l.google.com

# USEFUL TOOLS

## MXToolbox.com

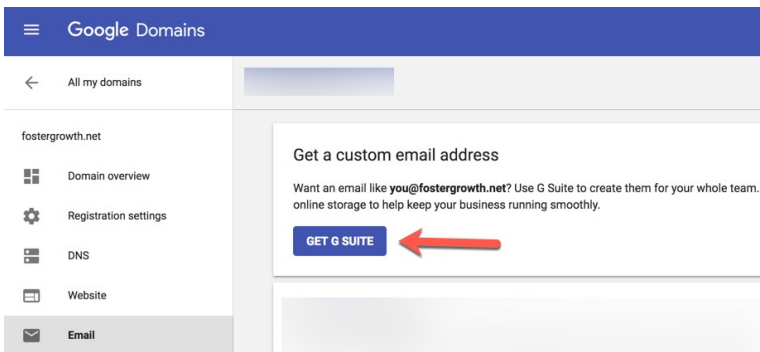
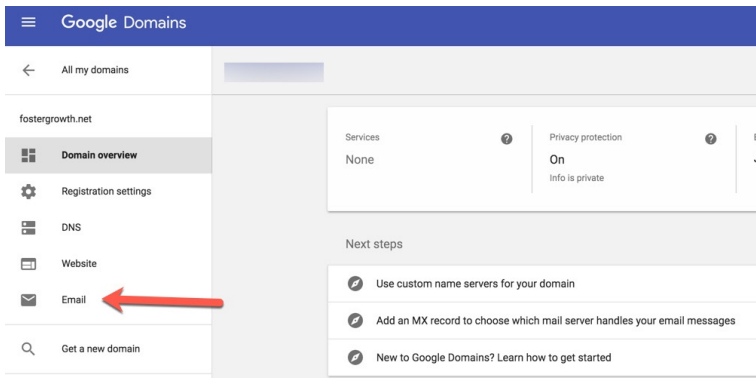
The simplest way to check if a domain name is using G Suite.

## G Suite

<https://workspace.google.com/business/signup/welcome>

If you haven't yet reserved your domain name, simply sign up for G Suite as you go through the buying process on domains.google.

Within Google Domains click "Email," then click "Get G Suite" and it will walk you through the purchase process and set it up to work with the domain you purchased through Google Domains.



If you already have a domain name, you'll probably need to change a setting with your domain registrar. Google provides step-by-step instructions for how to connect G Suite for most major domain registrars here:

<https://support.google.com/a/topic/1409901>

## Does your business have a domain?

You'll need a domain, like *example.com*, to set up email and a G Suite account for your business. [?](#)

- I have a domain**  
Use a domain you own to set up your G Suite account. Your domain and website won't be affected during G Suite signup.
- I'd like to buy a domain**  
Purchase a custom domain to set up your G Suite account.
- I'd like a free .page domain**  
Get started quickly with a .page domain like *yourcompany.page*, free for a year.

NEXT





# BRANDING

While the old advertising adage is true that in the end, your customers define your brand, you can certainly influence that definition with a professional image.

## WHAT IT AFFECTS

Offline Collateral, Website User Experience, Email Marketing, Local Profiles, Social Profiles.

## WHAT TO CONSIDER

- Do you have a digital version of your logo?**  
Ideally this is available in .EPS format for maximum flexibility in terms of where you can use it.
- Do you use a consistent primary/secondary color?**  
Consistency makes your business more memorable and professional.
- Do you have a high-resolution photo of yourself?**  
In most cases for businesses just starting out, you are the brand!

## HOW TO AUDIT

Search for your business's domain name and brand name on Google Image Search (<https://images.google.com>), like so:

**site:yourdomain.com your brand name**



site:tidings.com tidings

All News **Images** Books Shopping More

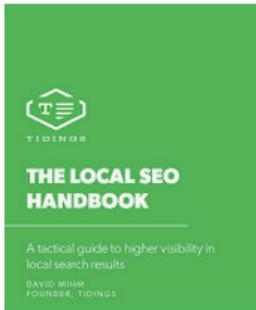
Your business's logo and color scheme should be obvious, and the images returned should not look pixelated.



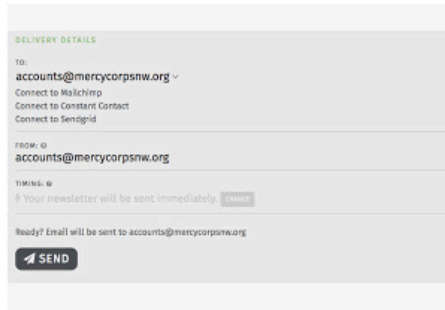
Who's Behind Tidings? Meet t...  
tidings.com



Email Newsletter from Your Instagram ...  
tidings.com



Small Business Digital Stra...  
tidings.com



A Closer Look at Delivery Details - Tidings  
tidings.com

## USEFUL TOOLS

### Tailor Brands

<https://tailorbrands.com>

Tailor Brands offers an affordable do-it-yourself logo builder and branding kit.



# PHOTOS AND VIDEOS

Regardless of the platform on which consumers see your business, they want photos and videos! And good ones! One of the most important investments you can make as you're starting your business is in compelling photography and videography—assets that can be used in both online and offline marketing, and even in-store.

## WHAT IT AFFECTS

Offline Collateral, Website User Experience, Content, Email Marketing, Local Profiles, Social Profiles, Social Media.

## WHAT TO CONSIDER

**Do you maintain a collection of all business-related photo and video assets in the cloud?**

Your Google Drive account is a great place to upload these (see “Productivity.”)

**Are there brands you follow on social media to which your business aspires?**

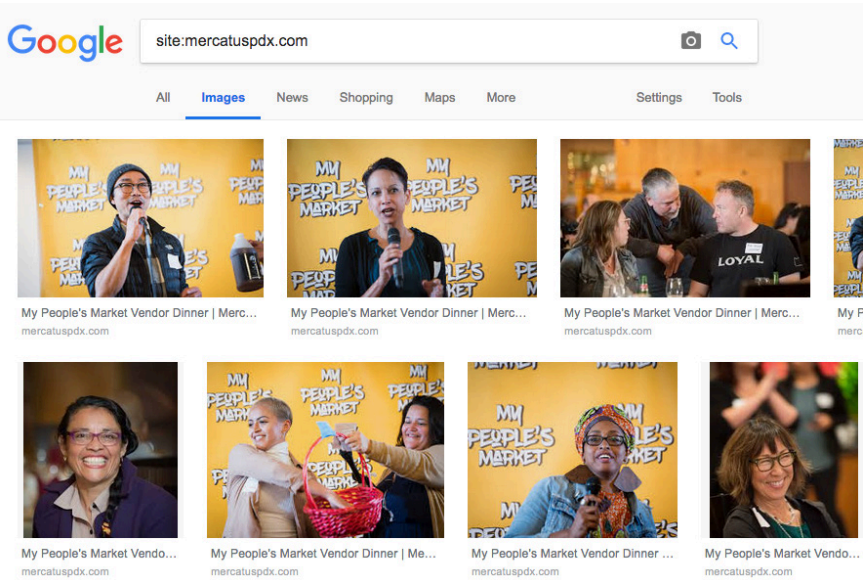
If photos or videos of your products (or of you delivering services) wouldn't look out of place in their feeds, you are doing a great job!

## HOW TO AUDIT

Image and video quality is a subjective criterion. But, if you have a website, to get a sense for how you appear to customers, search for your business's domain name on Google Image Search:

On <https://images.google.com>, type `site:yourdomain.com`

Do these images represent your business well?



The screenshot shows a Google Images search interface. The search bar contains the text "site:mercatuspdx.com". Below the search bar are tabs for "All", "Images", "News", "Shopping", "Maps", "More", "Settings", and "Tools". The "Images" tab is selected. The search results display a grid of images from the website "mercatuspdx.com". The images show various people at a "My People's Market Vendor Dinner" event. The background of the photos features a yellow banner with the text "MM PEOPLE'S MARKET". The photos include a man speaking into a microphone, a woman speaking into a microphone, a man and woman talking, a woman smiling, a woman holding a basket, a woman with a headscarf, and a woman smiling.

## USEFUL TOOLS

### Mercatus Directory

<https://mercatuspdx.com/directory/>

There are a number of professional photographers in the Mercatus program!

### Snappr.co

<https://www.snappr.co>

Snappr is sort of like Uber or Lyft for professional photographers and videographers.

---

# CUSTOMER DATA

Every business should collect an email address from every customer (and prospect, if appropriate), and maintain a spreadsheet or database of each customer's purchase history.

## WHAT IT AFFECTS

Email marketing, customer feedback, reviews and testimonials, SEO, paid online advertising.

## WHAT TO CONSIDER

Even if you never have the time to look at this data, software products are springing up left and right that can ingest this data, augment it with data from third-party sources, and analyze it for you with a keystroke. Over time, you'll be able to make smarter decisions about how and where to spend your marketing budget, have software execute campaigns automatically based on your customer list, and increase the return on those campaigns.

- Is your email contact list organized or tagged?**  
For most businesses, this is the simplest way to start.
- Can you export email addresses from your accounting software?**  
If you're using accounting software such as Quickbooks, your customer list should be exportable.
- Can you export email addresses from your point-of-sale?**  
If you're using a modern point-of-sale system like Shopify or Square, your customer list should be exportable.

**Do you maintain a spreadsheet of your customers?**  
Even if it's not up-to-date, it's a great starting point, and can be augmented by all other sources (e.g., email, signup sheets, etc.).

**Do you have a signup sheet or business card fishbowl at in-person events where customers can leave their contact information?**  
This information can be digitized later, although it's generally a best practice to follow-up with contacts soon after the event for memorability.

## HOW TO AUDIT

There isn't an online tool to help audit your customer data practices; you're either collecting customer information or you're not.

## USEFUL TOOLS

### Google Workspace Contacts

<https://contacts.google.com>

Manually reviewing (and labeling) your existing contacts can be a great place to start building your customer list.

If you're diligent about labeling your contacts as customers in Workspace, that's really all you need as a starting point. If that sounds unrealistic (true for most business owners), read on.

### Google Sheets (Part of Google Workspace)

<https://workspace.google.com/products/sheets/>

Google provides a simple spreadsheet program with Workspace that can be used to keep track of your customers from multiple sources, including Google Workspace.

## IFTTT (Free)

<https://ifttt.com>

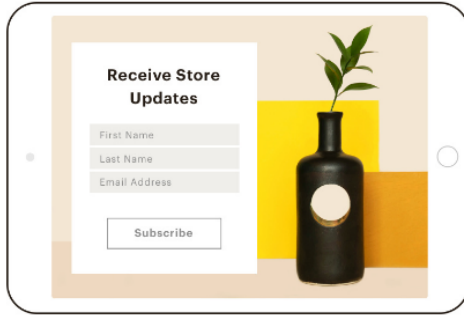
IF This Then That helps you automate the process of consolidating customer accounts into one place. Connect your Google Workspace email account to a Google Spreadsheet in just a couple of clicks.

To seamlessly begin compiling a list of customers, simply label incoming emails from them with something like “business.” You can then use this IFTTT applet:

<https://ifttt.com/applets/101636p-log-emails-with-label-in-google-drive-sheet>

to automatically store the email addresses from any sender in your “business” label.

The image shows a Gmail inbox interface. At the top, the search bar contains "label:business". Below the search bar, there are several email entries, including one from "IFTTT" with the subject "Your email has been changed - Hi davidmihm, The email for your IFTTT". A blue overlay box on the left contains the text: "If New email in inbox labeled business, then Add row to David Mihm's Google Drive spreadsheet". To the right, the IFTTT logo is displayed above a large black arrow pointing down to a row in a spreadsheet. The spreadsheet row shows the date "February 16, 2019" and the email address "welcome@ifttt.". The spreadsheet has columns labeled "1" and "B".



## Mailchimp Subscribe App

<https://mailchimp.com/features/mailchimp-subscribe/>

The Mailchimp Subscribe App is a great option for businesses that do a lot of in-person events. It's a great way to eliminate the dreaded pen and paper sign up sheet. All you need is a MailChimp account and a tablet. It allows you to host a subscription form on your tablet, and even if the event doesn't have wi-fi, any customers who signed up for your list will sync to your account once your tablet has an internet connection.



# OFFLINE COLLATERAL

Even in the digital age, it's still important to present a good offline impression with items like business cards, menus, posters, and presentations.

## WHAT TO CONSIDER

- Do you frequently participate as a vendor at events?**  
See “Marketing Event Checklist” in the Appendix.

## HOW TO AUDIT

It's very hard to audit offline collateral—either you have it or you don't. At a minimum, you should have:

- business cards
- menus if you're in the food/beverage business
- product labels if you sell products
- a large-format sign or table stands for an event booth

## USEFUL TOOLS

### **Mercatus Directory**

<https://mercatuspdx.com/directory/>

There are a few printing companies in the Mercatus program.

### **Canva (Free)**

<https://www.canva.com>

Canva can help you put together impressive-looking visuals even if you don't have the budget for a graphic designer.



# REFERRALS & WORD OF MOUTH

The word-of-mouth referral is still the most effective marketing, according to most small business owners.

## WHAT TO CONSIDER

- Are you encouraging referrals with offline collateral?**  
Business cards and other collateral help seed referrals.
- Are you networking with business-owner peers or community leaders?**  
Your peers frequently provide the best source of referrals.
- Are you sending an email newsletter?**  
A regular email to your customers is the best way to keep your business top of mind digitally.

## HOW TO AUDIT

It's not really possible to "audit" word-of-mouth. But it's a good idea to remind colleagues and customers how important referrals are on a regular basis to keep your business top of mind digitally.

## USEFUL TOOLS

### **Small Thanks with Google (Free)**

*<https://smallthanks.withgoogle.com>*

If you have a Google Business Profile, this free tool helps you spread word-of-mouth with offline collateral.



# CONTENT

Your content should be authentic, informative, and focused on your customers.

## WHAT IT AFFECTS

Website User Experience, Email Marketing, SEO, Social Media, Conversion Rate Optimization.

## WHAT TO CONSIDER

- Why should customers choose you?**  
Clearly convey your value to your customers (and if appropriate, how that differs from your competition).
- What are the most common questions that customers call, email, or ask you about in person?**  
Answering the questions that people are already asking can not only help you rank for those same questions when prospects type them into a search engine, but also convert them once they land on your website or see them answered on social media.
- Can your customers provide content for you?**  
Customer testimonials and reviews are some of your most powerful content.

## HOW TO AUDIT

Each business is different, but here are some common pieces of content that each small business website should contain:

- Founder story / About the founder.**  
Increase the connection customers feel with your business by telling your story--and for bonus points, tell your story in a video alongside a text version.
- One page per product or service.**  
Make sure there's a unique page dedicated to every product you offer -- or at least your best-sellers.
- Press, media, or awards.**  
Have you been featured in a local publication? Add the logo of the publisher and link to the story. Consider adding a full page if you've been featured multiple places.
- Where to buy.**  
If you don't have a retail presence yourself, are your products distributed in any local shops? Let customers know where they can purchase in person.
- Upcoming events.**  
Let customers know where and when to find you.
- For wholesalers.**  
Want broader distribution of your products? Create a page with any information relevant to wholesalers.
- Testimonials.**  
Show off comments from your happy customers to encourage more happy customers.
- Contact information.**  
Make it easy for customers to get in touch with you.



# WEBSITE / DIGITAL OPERATIONS PLATFORM

The choice of the platform on which your website is built is far more consequential and has far longer-lasting consequences than does the initial look-and-feel you choose for your website. In fact, numerous website platforms have evolved beyond just Content Management Systems to full-blown Digital Operations Platforms.

On a good website platform, it's fairly trivial to update or customize the look-and-feel as preferences change. But the same cannot be said for poorly-integrated or poorly-optimized website builders as your business grows more complex. Choosing a substandard website platform increases headaches exponentially as your business grows.

## WHAT IT AFFECTS

Customer Data, SSL, Hosting, Ecommerce, SEO, Email Marketing, Paid Advertising, Scheduling and Booking, Customer Feedback, Payments and POS.

## WHAT TO CONSIDER

Too many small businesses are lured by slick radio ads or ridiculous marketing promises and don't take a step back to think critically about the strengths and weaknesses of the platform they're about to select.

Here are the most important considerations:

**How well does the platform integrate with other marketing products?**

If you sell both online and offline, can you manage all your products from the same place? Are there widgets that collect email addresses for an email marketing campaign? Can you easily publish customer reviews as testimonials? Can you pull in a feed of your Instagram photos? These are just a few of the basic integrations that your website platform should offer.

**How well-supported is it?**

How easy is it to find someone who can fix your site?

**How easy is it for you to update content?**

Can you do it yourself or can a friend help you? Or do you need to be a digital expert in order to use your own website?

**How search-engine-friendly is it?**


Squarespace, Shopify, Wordpress, and Square are the only CMS platforms that are truly search-engine-friendly “out of the box.”

**Does website platform provide an SSL certificate by default?**

An SSL Certificate ensures that all information that customers enter into your site (such as their email address or credit card information) is encrypted and more difficult to hack or scrape. Shopify, Square, and Squarespace are all SSL-enabled by default; less-reliable platforms are

not. Check for SSL-enablement by looking for a small lock icon when you load a website in a browser.

SSL-enabled  <https://mercatuspdx.com>

No SSL Cert.  Not Secure | [www.tegna.com](http://www.tegna.com)

## **FOR BUSINESSES THAT WANT TO SELL ONLINE**

Deciding to sell online is a big step, and the complexities of sales tax in other jurisdictions, drop-shipping, and inventory management mean it's not a decision to take lightly.

The additional post-pandemic visibility afforded by Google Merchant Center mean that a simple integration with Google Shopping should now be one of the main criteria for selecting a Digital Operations platform for businesses focused *primarily* on Ecommerce.

## **FOR SERVICE-ORIENTED BUSINESSES**

Even service-oriented businesses can “sell online” by offering online booking. Like Ecommerce, this requires a secure website for entering sensitive information, and platforms that integrate with your Google Business Profile can increase the number of customers who book with you after an online search by raising the visibility of your online booking option. (Square Appointments are integrated with Google; as of this edition of the Handbook, Squarespace's scheduling is not.)

# CHOOSING A DIGITAL OPERATIONS PLATFORM

Many factors play a role, including your general familiarity with online software, what percentage of your business you hope will come from online sales, and whether you are already running a Point-of-Sale in your store.

**Are you a relatively new business, or do you plan to sell just a handful of products offline?** **Squarespace** is the best simple Ecommerce solution for businesses just starting out, or for service-oriented businesses that don't need or want to offer direct online booking.

**Is your business primarily retail-oriented?** **Square** is best for single-location retail-oriented businesses or service businesses that won't be producing much website content.

**Is your business somewhat established, or do you plan to sell primarily online?** **Shopify** is the best Ecommerce solution for slightly more advanced small businesses just starting to sell online, or a strong upgrade option from Squarespace. For businesses expecting to build a significant retail operation, Shopify also offers a Point of Sale to keep your online and offline inventory in sync.

**Shopify Lite** offers businesses already running Wordpress a relatively easy way to add buy buttons to an existing website (and social media profiles).

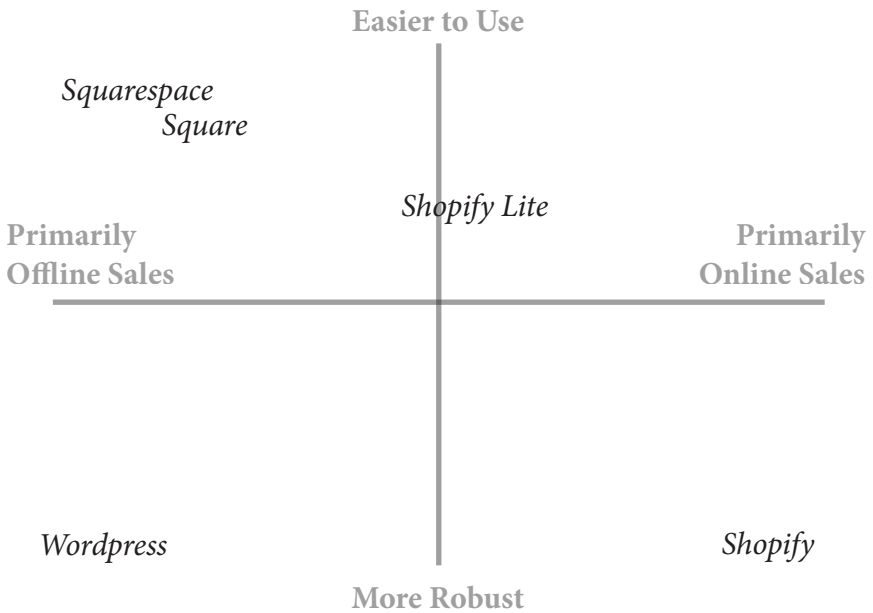
*The previous edition of this Handbook recommended Wordpress,*



*which remains a fine option for businesses who are already using it.*

However, the steep Wordpress learning curve and improvements to each CMS above mean Wordpress isn't the best choice for new businesses. The **WooCommerce** suite of plugins is also an option for advanced businesses already familiar with Wordpress.

The chart below is intended to help you make this important decision.

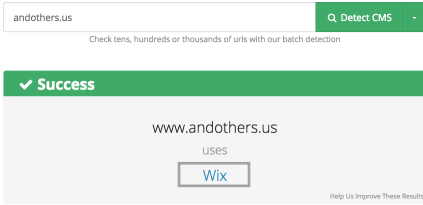


# HOW TO AUDIT / USEFUL TOOLS

## WhatCMS

<https://whatcms.org>

Easily detect the Content Management System of any website.



andothers.us Q Detect CMS

Check tens, hundreds or thousands of urls with our batch detection

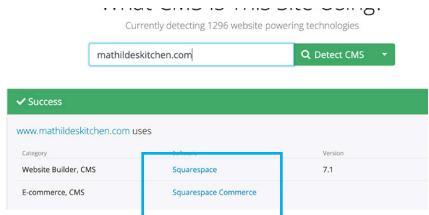
✓ Success

www.andothers.us

uses

Wix

Help Us Improve These Results



mathildeskitchen.com Q Detect CMS

Currently detecting 1296 website powering technologies

✓ Success

www.mathildeskitchen.com uses

Category	Technology	Version
Website Builder, CMS	Squarespace	7.1
Ecommerce, CMS	Squarespace Commerce	



## Really Simple SSL Plugin for Wordpress (Free)

<https://wordpress.org/plugins/really-simple-ssl/>

If you're running Wordpress, this plugin can help you configure your website to be secure in just a couple of clicks.



# WEBSITE USER EXPERIENCE

60% of consumers are less likely to buy from a small business that offers a poor website experience. Your website should look good AND be designed to convert visitors into customers.

## WHAT IT AFFECTS

SEO, Conversion Rate Optimization.

## WHAT TO CONSIDER

- No splash page.**  
If you have a page that says “Enter Here” or “Skip Intro,” delete it. Visitors hate them and they’re terrible for SEO.
- Mobile-friendly.**  
Loads quickly on a phone with no pinching or scrolling.
- Clear navigation.**  
Easy for customers to find the key pages they’re looking for (see “Content”).
- Strong calls-to-action.**  
Each page should direct the visitor to take an action -- call you, order a product, email for more information, etc.

## HOW TO AUDIT

Enter your website address in the Google Mobile-Friendly Tool:  
<https://search.google.com/test/mobile-friendly>

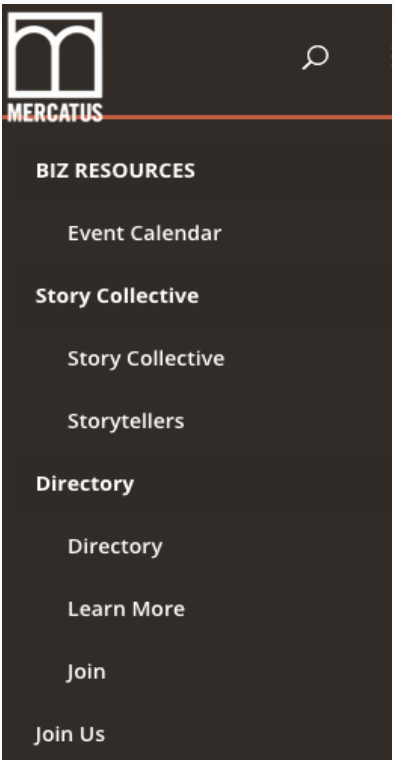
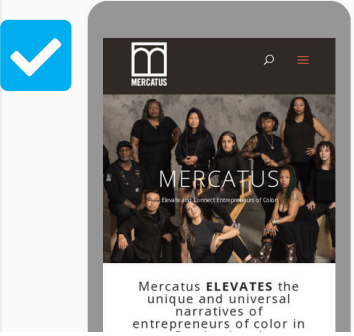
Test results


Page loading issues VIEW DETAILS

Tested on: Feb 18, 2019 at 9:50 AM  
**Page is mobile friendly**  
This page is easy to use on a mobile device

- Additional resources
- Open site-wide mobile usability report
  - Learn more about mobile-friendly pages
  - Post comments or questions to our discussion group

Rendered page HTML SCREENSHOT



Check the navigation (usually a  menu on mobile). Is each important page listed?

---

## **USEFUL TOOLS**

### **Google Mobile Friendly Test**

*<https://search.google.com/test/mobile-friendly>*

Google's easy, automated test.

### **Usability Hub**

*<https://usabilityhub.com/examples>*

Inspiring questions to ask about your website's usability.

### **Squarespace Templates**

*<https://www.squarespace.com/templates>*

Many Squarespace experts consider this the most flexible template to work with for a variety of businesses.

### **Best Themes for Small Inventories (Shopify)**

*<https://themes.shopify.com/collections/small-inventory>*

Shopify's curated list of best themes for businesses like yours.



# WEB ANALYTICS

The goal of web analytics is to help you understand how consumers are finding and interacting with your website.

## WHAT IT AFFECTS

SEO, Paid Advertising

## WHAT TO CONSIDER



**Google Analytics is the most widely-used analytics.**

It's complicated, but it integrates with loads of other marketing programs, and should you hire a marketing professional at any point in the future, s/he will thank you for installing Google Analytics early on.

Google Analytics tracks behavior on, and sources of traffic to, your website via a tiny snippet of code.

## HOW TO AUDIT

GAchecker.com will show you which pages of your website, if any, have the Google Analytics tracking code installed.

**GA Checker**

prosperportland.us

**Check Your Site**

#	URL	Global Site Tag	Universal Analytics	Analytics Classic	Analytics Remarketing
55	https://prosperportland.us/category/news-releases/page/3/	✗	✗	✗	✗
54	https://prosperportland.us/board-approves-dumbbell-project/	✗	✓	✗	✗
53	https://prosperportland.us/urban-land-institute-working-with-mayor-hales-on-central-eastside-strategy/	✗	✓	✗	✗
52	https://prosperportland.us/virtual-reality-offers-advance-look-at-alberta-commons/	✗	✓	✗	✗
51	https://prosperportland.us/category/central-eastside/page/3/	✗	✓	✗	✗
50	https://prosperportland.us/holiday-pop-up-shops-now-open-through-dec-24/	✗	✓	✗	✗
49	https://prosperportland.us/diverse-business-showcase-november-9/	✗	✓	✗	✗
48	https://prosperportland.us/ao-annual-event-offers-pitch-contest-new-industry-report/	✗	✓	✗	✗
47	https://prosperportland.us/my-peoples-market-on-nov-9-to-celebrate-and-connect-entrepreneurs-of-color/	✗	✓	✗	✗



# SET UP GOOGLE ANALYTICS

First, sign up for an account at <https://analytics.google.com>.

Once you've created your account, you'll see a tracking ID starting with "UA-###...." Highlight this tracking ID and copy it. (Note, if you use Shopify, copy the full <script> code provided by Google).

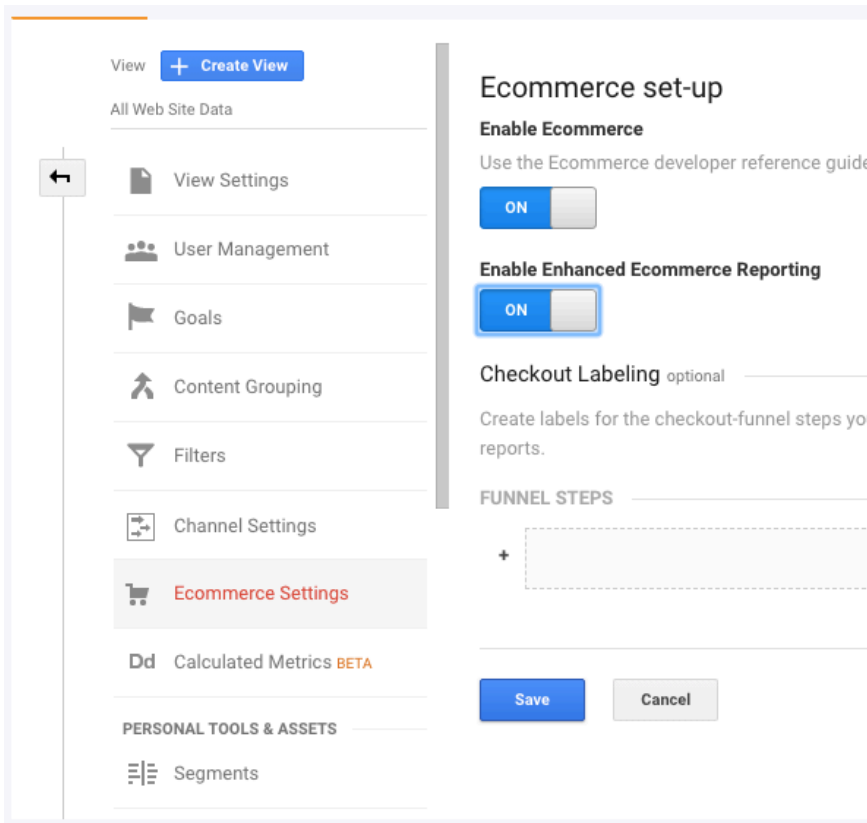
**Tracking ID**  
UA-134820923-1

## If you sell via Ecommerce

Once you've created your account, select Admin from the lower-lefthand navigation.

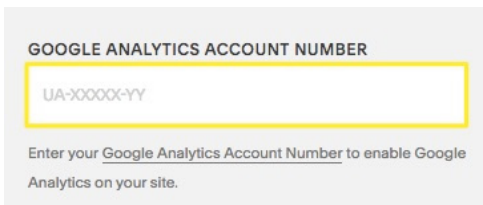
Look for the  Ecommerce Settings icon.

Turn both toggles to "On" and click "Save."



## Add Google Analytics to Squarespace

In the Home Menu, click “Settings,” and then click “Advanced.” Click “External API Keys.”



Paste your Google Analytics tracking ID in this box. Click “Save.”

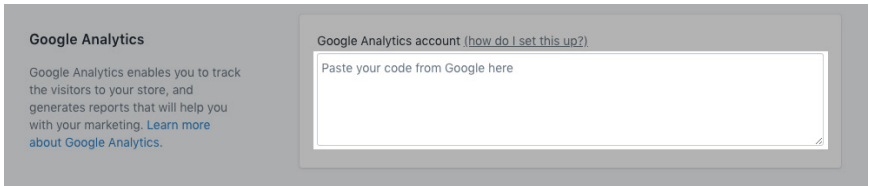
Click “Save.”



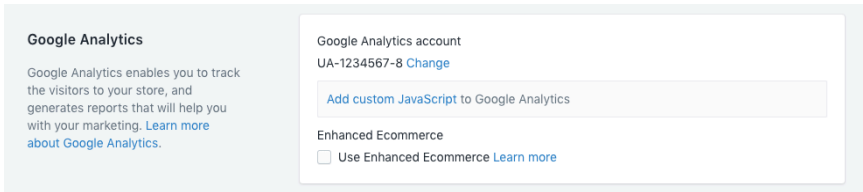
# Add Google Analytics to Shopify

Open your Shopify admin and go to Online store > Preferences.

In the Google Analytics section, paste your global site tag in the Google Analytics account field:



You'll know that Google Analytics is enabled on your online store when you see a code beginning with UA- under the Google Analytics account heading, like this:

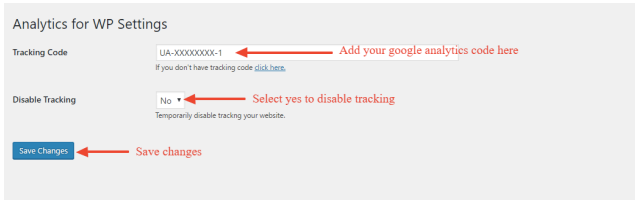


# Add Google Analytics to Wordpress

Install the Google Analytics for Wordpress plugin:

<https://wordpress.org/plugins/analytics-for-wp/>

Once installed, click “Google Analytics” in the lower lefthand navigation. Paste your UA tracking code and click “Save Changes.”



---

## **USEFUL TOOLS**

### **GA Checker (Free)**

*<https://gachecker.com>*

See which of your pages have Google Analytics installed.

### **Google Analytics (Free)**

*<https://analytics.google.com>*

Track behavior on, and sources of traffic to, your website.

### **Google Analytics for Wordpress (Free)**

*<https://wordpress.org/plugins/analytics-for-wp/>*

Connect Google Analytics to your Wordpress website. Note: there are many similarly-named (and more complicated) plugins.

---

# CUSTOMER FEEDBACK

Many small business owners are unnecessarily fearful of asking their customers for feedback on their product or service. But beyond the obvious marketing value of positive reviews and testimonials, customer feedback helps you run a better business!

## WHAT IT AFFECTS

Reviews and Testimonials, SEO.

## WHAT TO CONSIDER

- Are you already capturing customer email addresses?**  
(See “Customer Data.”)
  
- Is there a natural place in your transaction to ask for feedback?**  
Could you ask for feedback at the bottom of your receipts? Or as part of a routine follow-up a certain number of days after completing a project?
  
- Can you automate the process?**  
Can you auto-generate an email request to customers based on the date of their purchase?
  
- Is there an offline place to ask for feedback?**  
Can you place an index card near your point of sale that encourages customers to leave their feedback with you?

---

## HOW TO AUDIT

There's not really a way to audit this component besides asking yourself the questions above.

## USEFUL TOOLS

### Square Feedback

*<https://squareup.com/customer-engagement/feedback>*

When this feature is enabled in your Square account, your customers will automatically receive a “How’d we do?” message in their digital receipts with a :) and a :( as options.

If you're not a Square user, consider how you might replicate this feature within your own Marketing Stack.



# EMAIL MARKETING

Newsletters and promotional emails get many-times-greater visibility than unpaid posts on social media.

## WHAT IT AFFECTS

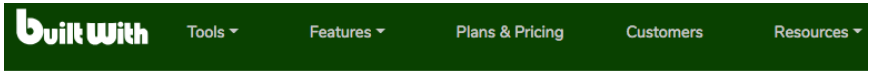
Word of Mouth, Reviews & Testimonials, Paid Advertising.

## WHAT TO CONSIDER

- Use an Email Service Provider, like Mailchimp, or the one provided by your Digital Operations platform.**  
Using your personal email account to send marketing campaigns to your customers is not compliant with spam regulations and may get your email address blacklisted. Set your full name and business email as the sender.
- Include a sign-up form on your website and at events.**  
Capture customer email addresses any way you can--and get permission from customers to email them.
- Set expectations and stick with them.**  
Let customers know when they sign up for your mailing list how often you'll email them and what those emails will contain. This makes them more likely to open your emails and keeps them loyal.
- Make sure your emails look good on mobile devices.**  
Almost 50% of emails are opened on mobile, so keep the same considerations in mind as for your website.

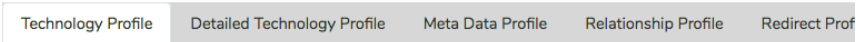
# HOW TO AUDIT

BuiltWith.com can detect what Email Service Provider you're using--if you have an email signup form on your website.




Home / mercatuspdx.com Technology Profile

## MERCATUSPDX.COM

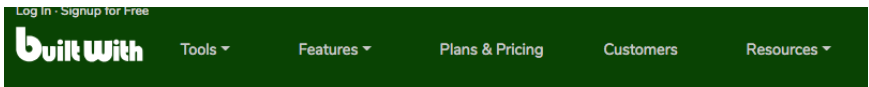



Widgets View Global Trends

 **MailChimp**

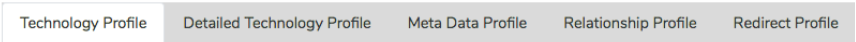
[MailChimp Usage Statistics](#) · [Download List of All Websites using MailChimp](#)

MailChimp is a widely used Mailing List delivery and support service.  
Feedback Forms and Surveys




Home / aceshowbiz.com Technology Profile

## ACESHOWBIZ.COM




Widgets View Global Trends

 **Constant Contact**

[Constant Contact Usage Statistics](#) · [Download List of All Websites using Constant Contact](#)

Email marketing solution software, provides email and survey solutions.  
Feedback Forms and Surveys



# USEFUL TOOLS

## Mailchimp

<https://mailchimp.com>

The easiest Email Service Provider to get started with. Integrates with thousands of other software programs, including every major Content Management System. Includes spam compliance features, email analytics, list management, and more.

## Mailchimp Subscribe App

<https://mailchimp.com/features/mailchimp-subscribe/>

As discussed in “Customer Data,” the Mailchimp Subscribe App allows you to host a subscription form on your tablet at in-person events.

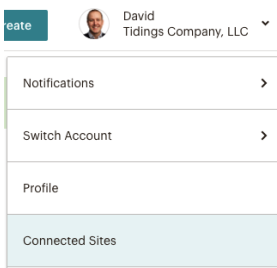
## Connect Mailchimp to Squarespace

<https://support.squarespace.com/hc/en-us/articles/205815508-Using-MailChimp-with-Squarespace>

Connecting Mailchimp to Squarespace is done on a per-form or per-block basis. See the steps in the article above to connect your accounts once you're logged in to Squarespace. Although Squarespace has a built-in email marketing service, MailChimp is more robust and the preferred solution.

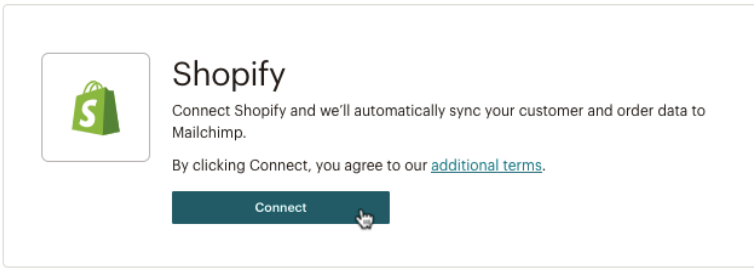
## Connect Mailchimp to Shopify

<https://mailchimp.com/help/use-mailchimp-for-shopify/>



Log in to your Mailchimp account, click your profile name, and choose “Connected Sites.”

Click “Shopify” in the list of logos and click “Connect.”



On the Shopify installation screen, click “Add app.”

Enter the domain name for your Shopify store, and click “Log in.” Enter your Shopify login credentials, then click “Log in” again.

Click “Connect existing account.” Choose a Mailchimp list to connect to your store, and click “Connect List.”

## Connect Mailchimp to Wordpress

*<https://wordpress.org/plugins/mailchimp-for-wp/>*

Install the Mailchimp for Wordpress Plugin from Ibericode. Once you’ve installed it, go to MailChimp for WP > Forms. Select at least one list to subscribe people to.

Embed a sign-up form in pages or posts using the [mc4wp\_form] shortcode, or show a sign-up form in your widget areas using the “MailChimp Sign-Up Form” widget.

## Privy

*<https://privy.com> (<https://apps.shopify.com/privy>)*

Privy helps you capture the email addresses of potential customers when they land on or leave your site. To add the app to Shopify, simply click “Add App” on the page listed above. (Wordpress installation is more advanced.)





# EMAIL ANALYTICS

One of the many advantages to using an Email Service Provider for your email marketing (as opposed to just sending them from your personal email account) is the analytics that ESP's provide you as part of your subscription.

## WHAT IT AFFECTS

Email Marketing

## WHAT TO CONSIDER

- Open rate (average: 20-25%).**  
How many people opened your email? Tracking this metric over time can help you identify the best days and times to send your emails, as well as the most compelling keywords or calls-to-action to use in your subject lines.
  
- Click rate (average: 2-4%).**  
Once they opened, how many subscribers (and which subscribers) clicked through to the content you were promoting? Analyzing this information can help you segment your audience by content type and optimize the content you deliver to each segment.
  
- Unsubscribes/complaints.**  
If you find yourself getting lots of unsubscribes, consider whether you're living up to the expectations you set in terms of sending frequency when your subscribers signed up, and whether the content you're sending is compelling.

---

## HOW TO AUDIT

Basic Analytics are provided by every reputable Email Service Provider. To determine whether you're using an Email Service Provider, see BuiltWith in the "Email Marketing" section of this manual.

## USEFUL TOOLS

### Mailchimp Industry Benchmarks

*<https://mailchimp.com/resources/email-marketing-benchmarks/>*

See how your metrics compare to other companies' in your industry.

---

# LOCAL PROFILES

Local Profiles (in particular Google Business and Yelp) are fundamental to any local business's search engine presence. In many cases, these profiles will outrank your website, especially for new businesses. (Yelp also powers listings on Apple Maps.)

## WHAT IT AFFECTS

Reviews and Testimonials, SEO.

## WHAT TO CONSIDER

- Do you have a storefront presence--even a shared or temporary one?**  
If not, you're ineligible for a Yelp listing, since Yelp requires you to show your address. (You can hide your address in your Google Business Profile.)
- Fill out these profiles as completely as possible, and be consistent with your Name, Address, & Phone on each.**  
It's the easiest SEO you will ever do.
- Submit great photos.**  
Photos are very prominent on mobile devices and good ones will likely lead to more sales.
- Do NOT buy ads from Yelp.**  
The "cost" of your Yelp profile is having to deal with calls and emails from their salespeople. No matter how good the deal sounds, don't purchase any ads from Yelp.

# HOW TO AUDIT

Search for a business's full Name, Address, and Phone Number on Google.com. You should see a large Google Business Profile on the righthand side of your screen, and the Yelp profile within the first few results.

The screenshot shows a Google search for "Portland Roasting Coffee, 815 SE Oak St, Portland, OR (503) 236-7378". The search results on the left include:

- Our Cafes | Portland Roasting Coffee**  
<https://portlandroastingcoffee.com/about/cafes/>  
Our Cafes. **Oak Street Cafe**. At the corner of SE Oak & Sandy 815 SE Oak St | Portland, OR 97214. Phone: 503-334-4685. Hours from M-F: 7am - 7pm | Sat: 8am ...
- Oak Street Event Space | Portland Roasting Coffee**  
<https://portlandroastingcoffee.com/oak-street-event-space/>  
815 SE Oak Street | Portland, OR 97214. Here is a map of our Event Space. Are you looking to have your next meeting or event at the Oak St Cafe? Fill out the ...
- Portland Roasting Coffee**  
<https://portlandroastingcoffee.com/>  
Light | Single OriginBUY. Tour the roastery click here for information. Locate **Portland Roasting Coffee**. Locate. **Portland Roasting Coffee**, established 1996.
- Portland Roasting Coffee - Home | Facebook**  
<https://www.facebook.com/...> > Businesses > Food & Beverage > Cafe > Coffee Shop  
★★★★★ Rating: 4.5 - 100 votes  
**Portland Roasting Coffee** - Rated 4.5 based on 100 Reviews "Had the opportunity to visit **Portland Roasters** recently. Purchased coffee for ourselves and..."
- Portland Roasting Coffee - 23 Photos & 19 Reviews - Coffee & Tea ...**  
<https://www.yelp.com/> > Food & Coffee & Tea >  
★★★★★ Rating: 4.5 - 19 reviews - Price range \$  
19 reviews of **Portland Roasting Coffee** "This review is just for the cafe itself, although there's ... 815 SE Oak St ... Buckman, Central Eastside, Southeast Portland.  
Missing: 236-7378 | Must include: 236-7378

On the right, the **Portland Roasting Coffee** Google Business Profile is displayed, showing a 4.7 star rating from 48 reviews, the address (815 SE Oak St, Portland, OR 97214), and hours (Closed, opens 7AM Mon -). A blue checkmark icon is overlaid on the search results.

Also perform a search at Google for your business's main keywords. What directories show up?

The screenshot shows a Google search for "wedding cakes portland". The search results include:

- Wedding Cake Bakeries in Portland, OR - The Knot**  
<https://www.theknot.com/> > Wedding Vendors > Wedding Cake Bakeries > Oregon  
Wedding Cake Bakeries in Portland, OR. Cupcake Jones. (29) greater Portland Metropolitan area. SeriousCake.com, LLC. (10) West Linn, OR. Featured. Shawn's Sweet Creations. (4) Lux Sucre Desserts. (25) Wilsonville, OR. Lightning Cupcakes & Cakes. (4) Portland, Oregon & surrounding areas. Dove Haven House Bake Shop. (0) ...
- 19 Best Portland Wedding Cake Bakers | Expertise**  
<https://www.expertise.com/or/portland/wedding-cakes/>  
We Looked at 153 Wedding Cake Bakers serving Portland and Picked the Top 19. Back to Eden Bakery. Baker & Spice. Decadent Creations Bakery. Dream Cakes. Helen Bernhard Bakery. JaCiva's Bakery and Chocolatier. La Joconde Cakes. Le Cookie Monkey.
- Portland Wedding Cakes - Reviews for 67 OR Cakes - WeddingWire**  
<https://www.weddingwire.com/> > ... > Wedding Cakes > Oregon Wedding Cakes  
Find the best **Portland Wedding Cakes**. WeddingWire offers reviews, prices and availability for 67 **Wedding Cakes in Portland**.

---

See if those directories offer the chance to create a free profile.

## **USEFUL TOOLS**

### **Google Business Profiles (Free)**

*<https://business.google.com>*

Google's free tool offers a wide range of features for free visibility when someone searches for you on Google.

### **Yelp for Business Owners (Free)**

*<https://biz.yelp.com>*

Yelp's equivalent of Google Business Profiles offers similar features.

---

# LOCAL ANALYTICS

Prominent local search sites like Google and Yelp provide basic metrics around the number of impressions of your profile, and in some cases more detailed information around the number of phone calls they refer to you or driving directions they produce.

## WHAT TO CONSIDER



### **Directionally accurate, specifically imprecise.**

Google's numbers represent a good barometer for the overall health of your profile, but should be analyzed alongside your web analytics and point-of-sale system.



### **Place ZERO trust in Yelp's numbers.**

Yelp's impression and phone call numbers are also directionally accurate, but their Return on Investment calculator is completely bogus, with a suspect basis in reality.

## HOW TO AUDIT

Analytics are usually provided as part of signing up for a Local Profile. Google provides certain benchmarks but it's difficult to compare metrics across accounts.

## USEFUL TOOLS

### **Google Business Profile Insights (Free)**

<https://business.google.com/>

See how many times your Profile appears in Google Search and Maps, including how many actions customers are taking.



# SOCIAL PROFILES

Whether or not your business has the time, energy, or budget to be active on social media, all businesses should claim a profile on each major social media channel. At a minimum, these profiles often rank well in Google when people search for your business.

## WHAT IT AFFECTS

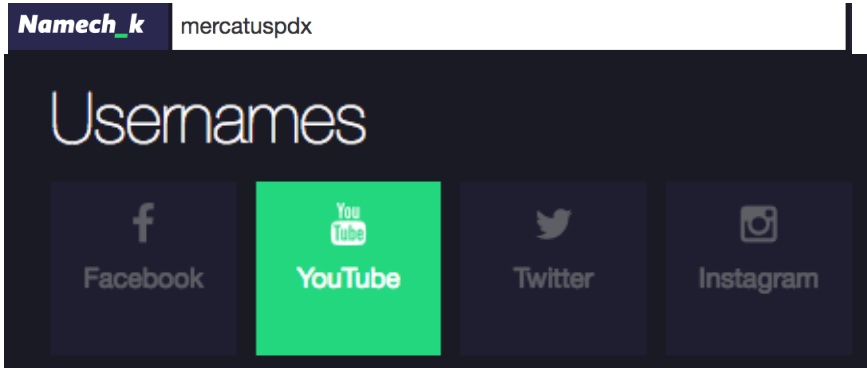
SEO, Social Media.

## WHAT TO CONSIDER

- Claim, whether you'll use it immediately or not.**  
You never know what direction you'll decide to go in, so claim a desirable profile name for your business as soon as you can to ensure it's still available if/when you want it.
- If possible, claim the same profile name on all networks.**  
The more consistent you can be, the better.
- If possible, register for a *business* page or profile.**
- Upload a good logo and/or photo to each profile.**  
Customers are more likely to purchase from a business with a professional social media appearance.
- Direct customers to a channel where you're active.**  
If you don't plan to be active on a particular network, direct customers who visit that profile to somewhere more desirable, like your email newsletter or website.

## HOW TO AUDIT

Enter your desired profile name at <https://namechk.com>



The Namechk tool will show you the availability of that profile name on most major social networks (exception: LinkedIn).

## USEFUL TOOLS

**Facebook (Free)** - <https://www.facebook.com/business/pages/set-up>

**Instagram (Free)** -  
<https://www.instagram.com/accounts/emailsignup/>

**Pinterest (Free)** - <https://business.pinterest.com>

**Twitter (Free)** - <https://twitter.com/i/flow/signup>

**LinkedIn (Free)** - <https://www.linkedin.com/company/setup/new/>

**YouTube (Free)** - [https://www.youtube.com/create\\_channel](https://www.youtube.com/create_channel)





# COMMUNITY

Where community really matters is in real-world involvement. But make sure this real-world involvement is reflected online.

## WHAT IT AFFECTS

SEO, Social Media.

## WHAT TO CONSIDER

Real-world involvement could be participating in your local neighborhood association, sponsoring local charities, or pitching in for school fundraisers.

### Each time you're involved:

- Create and post photos and/or videos of the event to your website, in your email newsletter, and on social profiles.
- Ask the organization to add your logo and a link to your website from their members or sponsors page.
- Ask for a shoutout from the organization in their newsletter or on social media.

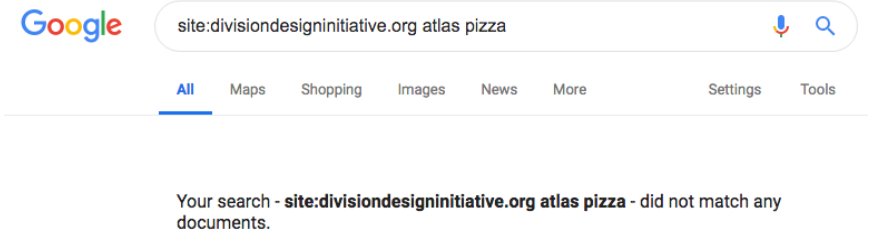
Also consider joining, and adding your business to, NextDoor.

## HOW TO AUDIT

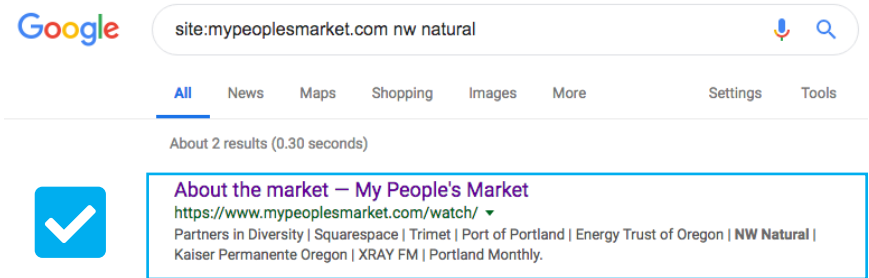
Brainstorm a list of community groups with which you're involved. For each one, search Google with the following string:

*site:organizationwebsite.org “your brand name”*

Does Google see your brand represented on their website?



Despite a thank-you, Google can't "see" the recognition for Atlas Pizza on <https://divisiondesigninitiative.org/partners/>.



Google can clearly see NW Natural's support of My People's Market.

## USEFUL TOOLS

### Google.com Site Search

*“site:” shows all results for a specific keyword from a specific website.*

### NextDoor (Free)

<https://nextdoor.com/business/>

Add your business to the growing community social network.



# REVIEWS & TESTIMONIALS

Reviews and testimonials are some of your most compelling content. 88% of consumers trust online reviews as much as personal recommendations, and they're one of the most authentic ways you can convey what it's like to work with you or purchase from you.

## WHAT IT AFFECTS

SEO, Conversion Rate Optimization.

## WHAT TO CONSIDER

- Are you already capturing feedback from customers?**  
(See “Customer Data” and “Customer Feedback.”)
  
- Are you publishing testimonials from happy customers on your website?**  
This is great for SEO and can induce more customers to buy from you.
  
- Do NOT explicitly ask for reviews on Yelp.**  
It violates their Service terms and can flag your account.

## HOW TO AUDIT

Search for a business's full Name, Address, and Phone Number on Google.com.

You should see at least a handful of gold stars appear in the first few results and on the Google Business Profile.

About 4,100 results (0.95 seconds)

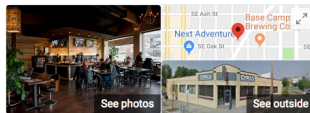
Our Cafes | Portland Roasting Coffee
https://portlandroastingcoffee.com/about/cafes/
Our Cafes. Oak Street Cafe. At the corner of SE Oak & Sandy 815 SE Oak St | Portland, OR 97214. Phone: 503-334-4685. Hours from M-F: 7am - 7pm | Sat: 8am ...

Oak Street Event Space | Portland Roasting Coffee
https://portlandroastingcoffee.com/oak-street-event-space/
815 SE Oak Street | Portland, OR 97214. Here is a map of our Event Space. Are you looking to have your next meeting or event at the Oak St Cafe? Fill out the ...

Portland Roasting Coffee
https://portlandroastingcoffee.com/
Light | Single OriginBUY. Tour the roastery click here for information. Locate Portland Roasting Coffee. Locate. Portland Roasting Coffee, established 1996.

Portland Roasting Coffee - Home | Facebook
https://www.facebook.com/...
Portland Roasting Coffee - Rated 4.5 based on 100 Reviews "Had the ... sit Portland Roasters recently. Purchased coffee for ourselves and...

Portland Roasting Coffee - 23 Photos & 19 Reviews - Coffee & Tea ...
https://www.yelp.com
Portland Roasting Coffee - Rating: 4.5 - 19 reviews - Price range: \$
19 reviews of Portland Roasting Coffee "This review is just for the cafe itself, although there's ... 815 SE Oak St ... Buckman, Central Eastside, Southeast Portland. Missing: 236-7378 | Must include: 236-7378



Portland Roasting Coffee

Website Directions Save

4.7 ★★★★★ 48 Google reviews

Cafe

Address: 815 SE Oak St, Portland, OR 97214

Hours: Closed Opens 7AM Mon -

Phone: (503) 334-4685

Suggest an edit

Questions & answers

Be the first to ask a question

Ask a question

Popular times

Sundays

USEFUL TOOLS

Whitespark Google Review Link Generator (Free)

https://whitespark.ca/google-review-link-generator/

Google encourages you to share links to review your business with your customers, but because of the way Google is coded, it's difficult to find the exact link to share with them.

Use this free tool from Whitespark to get the direct link to share with your customers.



# SEO

There are a number of straightforward, low-cost techniques that can help you stand out on Google fairly quickly—many of which are represented elsewhere in this roadmap.

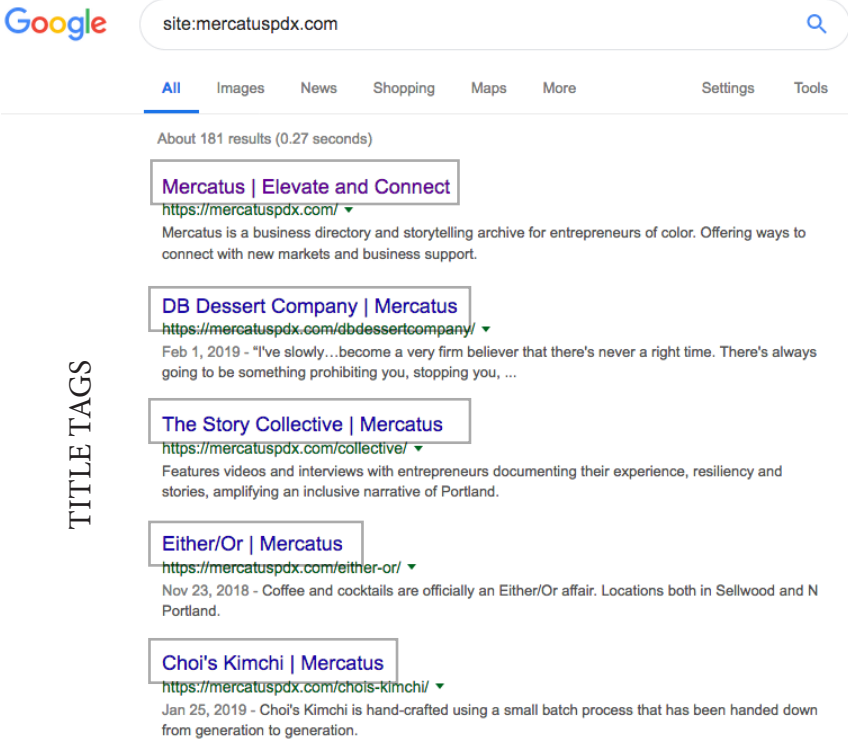
## WHAT TO CONSIDER

- Use keywords in your Title Tags.**  
Title Tags are not obvious when viewing a webpage, but they're the most important on-page attribute for SEO.
- Implement user experience (UX) best practices.**  
Good UX is good SEO. Search engines like fast-loading websites, clear navigation, and obvious contact info.
- Claim your local profiles.**  
Presenting consistent, accurate information for your business across major directories can lead to higher rankings.
- Get customers to review you.**  
Get a process in place to ask for customer feedback, if you don't have one already. Reviews have become “table stakes” for local rankings in many business categories.
- Be involved in your community.**  
“Votes,” or backlinks, from websites of community organizations you're involved in (such as charities and chambers of commerce), and stories about your business in local newspapers and blogs, are a strong influence on your search engine rankings.

# HOW TO AUDIT

We've already covered how to audit many of these considerations (“Website User Experience,” “Local Profiles,” “Reviews & Testimonials,” and “Community”).

To audit your Title Tags, perform a *site:yourdomainname.com* search at Google. The blue links are your Title Tags.



The screenshot shows a Google search interface. The search bar contains the text "site:mercatuspdx.com". Below the search bar, there are navigation tabs for "All", "Images", "News", "Shopping", "Maps", "More", "Settings", and "Tools". The search results are displayed below, starting with "About 181 results (0.27 seconds)". The first result is "Mercatus | Elevate and Connect" with the URL "https://mercatuspdx.com/". The second result is "DB Dessert Company | Mercatus" with the URL "https://mercatuspdx.com/dbdessertcompany/". The third result is "The Story Collective | Mercatus" with the URL "https://mercatuspdx.com/collective/". The fourth result is "Either/Or | Mercatus" with the URL "https://mercatuspdx.com/either-or/". The fifth result is "Choi's Kimchi | Mercatus" with the URL "https://mercatuspdx.com/chois-kimchi/".

**TITLE TAGS**

About 181 results (0.27 seconds)

**Mercatus | Elevate and Connect**  
<https://mercatuspdx.com/> ▼  
Mercatus is a business directory and storytelling archive for entrepreneurs of color. Offering ways to connect with new markets and business support.

**DB Dessert Company | Mercatus**  
<https://mercatuspdx.com/dbdessertcompany/> ▼  
Feb 1, 2019 - "I've slowly...become a very firm believer that there's never a right time. There's always going to be something prohibiting you, stopping you, ...

**The Story Collective | Mercatus**  
<https://mercatuspdx.com/collective/> ▼  
Features videos and interviews with entrepreneurs documenting their experience, resiliency and stories, amplifying an inclusive narrative of Portland.

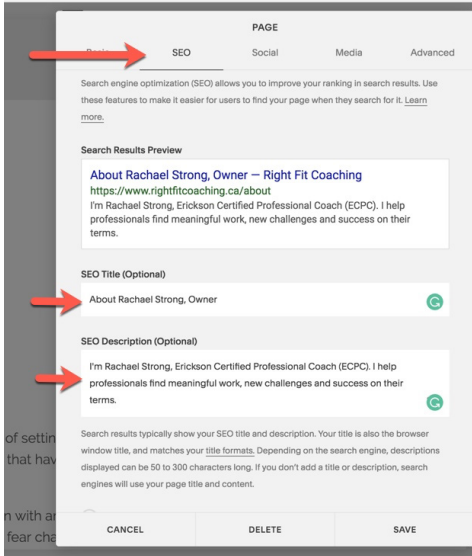
**Either/Or | Mercatus**  
<https://mercatuspdx.com/either-or/> ▼  
Nov 23, 2018 - Coffee and cocktails are officially an Either/Or affair. Locations both in Sellwood and N Portland.

**Choi's Kimchi | Mercatus**  
<https://mercatuspdx.com/chois-kimchi/> ▼  
Jan 25, 2019 - Choi's Kimchi is hand-crafted using a small batch process that has been handed down from generation to generation.

Your Title Tags should contain keywords related to your business and be compelling; you should have a unique Title Tag for every page. Google Trends can help you figure out which keywords to include in your Title Tags.

# UPDATING YOUR TITLE TAGS

## Squarespace



To change a page's Title Tag:

In the Home Menu, click “Pages.”

In the Pages panel, hover over the navigation title. Click the icon next to the title.

Click the “SEO” tab. Add the SEO Title. Click “Save.”

## Shopify (Homepage)

From your Shopify admin, go to Online Store > Preferences.

Enter a title and meta description for your store, following SEO best practices. Click “Save.”

## Shopify (Product Page)

In the Search engine listing preview section, click “Edit website SEO.”

In the Page title field, enter a descriptive title and enter a description (meta description) for the page's search engine listing. Click “Save.”

## Search engine listing preview

Edit website SEO

### Dock Shoes

<https://johns-apparel.com/products/dock-shoes>

These stylish leather dock shoes have a nonslip sole and feature contrasting grommets. Great for summer! John's Apparel is happy to feature these comfortable sl...

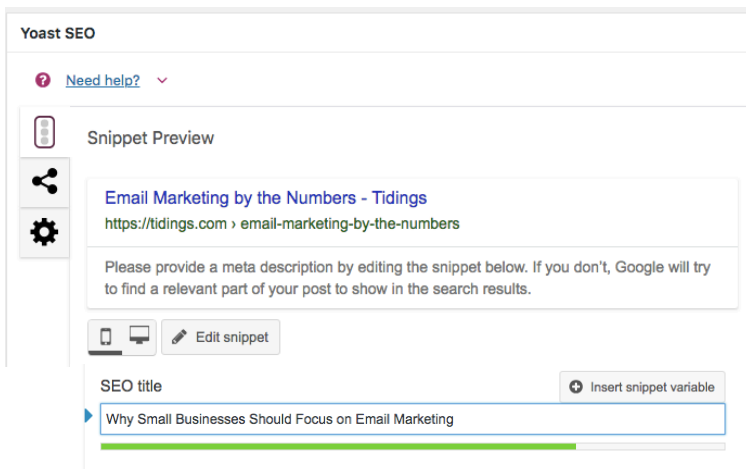
## Wordpress (via Yoast Plugin)

First install the Yoast SEO plugin from <https://wordpress.org/plugins/wordpress-seo/>.

Once installed, visit the page or post you wish to optimize.

Scroll beneath the page/post content to find the Yoast SEO panel. Click the “Edit snippet” button.

Enter the SEO Title you wish to add and then click “Update” (or “Publish”) to save the post or page.



The screenshot displays the Yoast SEO interface. At the top, it says "Yoast SEO" with a "Need help?" link. Below that is a "Snippet Preview" section. The preview shows the title "Email Marketing by the Numbers - Tidings" and the URL "https://tidings.com › email-marketing-by-the-numbers". A message below the preview asks the user to provide a meta description. At the bottom, there is an "Edit snippet" button and a text input field for the "SEO title" containing the text "Why Small Businesses Should Focus on Email Marketing".



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## **USEFUL TOOLS**

### **Google Trends (Free)**

*<https://trends.google.com>*

A free tool that shows the relative search volume of any keyword.

### **Yoast for Wordpress (Free)**

*<https://yoast.com>*

A free plugin that allows you to easily edit the Title Tag of any page on your Wordpress website.



# SOCIAL MEDIA

Social media consistently ranks as one of the top three marketing channels among small business owners. You don't have to be a technical expert to be great at social media, and the possibility of one of your posts going viral holds tremendous appeal.

## WHAT IT AFFECTS

Referrals & Word of Mouth, Paid Advertising.

## WHAT TO CONSIDER

- You don't own your followers.**  
Unlike your customers' email addresses, you don't own their social profiles -- the social media companies do. So be wary of investing *too* heavily in social media.
- Social media platforms are becoming pay-to-play.**  
Related: these platforms can charge you to reach your followers anytime they like. Facebook in particular has made it much more difficult to reach fans organically.
- Social media is not a transactional channel.**  
Generally speaking, customers on social media are there to be social, not to buy from you. Email and SEO are more transactional.
- Social media platforms come and go.**  
Remember MySpace? Customers can leave a given platform rapidly; it may already be happening to Facebook.

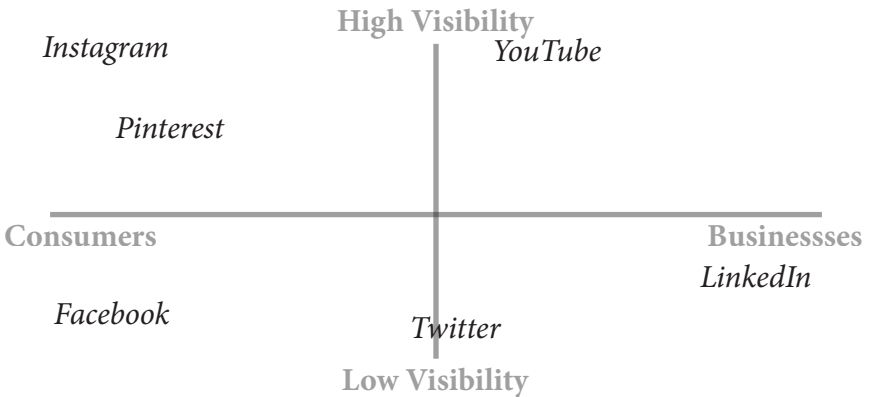


- **Prioritize your time based on where your customers are.** You don't need to be active on every platform. Participate on the ones where your customers are (if you're not sure where they are, survey them to find out).

## HOW TO AUDIT

Because a “successful” social media presence means different things for different businesses, it's very difficult to audit. Perhaps the best way to audit your presence is to know if you're spending your time on the right platforms.

The graphic below reflects our assessment of where the average business can be most visible with the least amount of effort based on its customer base.



## USEFUL TOOLS

Buffer (\$10/mo.)

<https://buffer.com>

Buffer enables you to schedule and cross-promote your content on multiple social media platforms.

# APPENDIX

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## Additional Considerations & References

70	Trademark
72	Accounting & Bookkeeping
73	Payments & Point of Sale
74	Scheduling & Booking
75	Website Header/Footer
76	Social Media Worksheet
78	Event Marketing Checklist
80	Mobile Management





# TRADEMARK

Not every new business needs to file a trademark; we suggest speaking with a lawyer for at least an initial consultation before settling on a name. The last thing you want to do is build a successful company only to find out you've infringed on someone's trademark and be forced into years of legal battles or the headache of changing your name and branding later on.

## WHAT TO CONSIDER



**Do you eventually hope to sell beyond Portland?**

Be sure to check whether a company in another state may already have a trademark claim.



**Are other companies already ranking for similar names in Google?**

You definitely want to make sure you're not infringing on their potential trademark already.

## HOW TO AUDIT

The US Patent and Trademark Office maintains a public search engine at <https://tess.uspto.gov> that can be useful for a high-level overview of how crowded your prospective namespace is, but it's no substitute for speaking with an expert.

“Blossom Home” is not a good choice for a name, as there are multiple live trademarks for that name in the TESS database:



Trademarks > Trademark Electronic Search System (TESS)

TESS was last updated on Mon Feb 18 03:47:01 EST 2019



TESS HOME NEW USER STRUCTURED FREE FORM BROWSE DICT SEARCH QG PREV LIST NEXT LIST IMAGE LIST BOTTOM HELP

Logout Please logout when you are done to release system resources allocated for you.

Start List At: OR Jump to record: 3 Records(s) found (This page: 1 ~ 3)

Refine Search (blossom home)[COMB] Submit

Current Search: S10: (blossom home)[COMB] docs: 3 occ: 13

Serial Number	Reg. Number	Word Mark	Check Status	Live/Deac
1 88276823		BLOSSOM HOME	TSDR	LIVE
2 87363744		BRUSHED BLOSSOM HAND-RENDERED FASHION FOR WOMEN, CHILDREN AND HOME.	TSDR	DEAD
3 85801296	5091376	BLOSSOM HOME	TSDR	LIVE

“Native Blossom Studios” looks like a good choice for a name, as there are no live trademarks returned by the TESS database:

TRADEMARK



No TESS records were found to match the criteria of your query.

Click on the ← BACK button in your browser to return to the previous TESS screen

USEFUL TOOLS

TESS from USPTO (Free)

https://tess2.uspto.gov

Search the US Patent and Trademark Office to see if there are similarly-named companies already operating in your industry.

---

# ACCOUNTING & BOOK-KEEPING

Your accounting software is also an important repository of customer data that other software can leverage for marketing and re-marketing.

## WHAT TO CONSIDER



### How easy is it to export customer data?

Ideally your accounting software is a cloud-based system that can sync with other cloud-based marketing software.

## USEFUL TOOLS

### Quickbooks Online (\$20/mo.)

*<https://quickbooks.com>*

Straightforward cloud accounting software.

### Xero Accounting (\$30/mo.)

*<https://xero.com>*

Straightforward cloud accounting software.





# PAYMENTS & POINT OF SALE

The data that your POS collects can (and should) form the basis for a whole host of future marketing activities.

## WHAT TO CONSIDER

- Do you hope to sell online at least as much as you do offline?**  
Shopify Point of Sale is your best bet.
- Do you plan to sell primarily offline?**  
Square is your best bet.

Square offers best-in-class marketing solutions, such as email, that build on its native features. Its website product (Weebly) is substandard, however. There are third-party tools that sync Square inventory with your Wordpress or Squarespace website, but this may be clunky if you plan to do a lot of Ecommerce business.

## USEFUL TOOLS

### Shopify Point of Sale

<https://www.shopify.com/pos>

The best choice if you want to sell online and offline equally.

### Square

<https://square.com>

The best POS choice if you expect to sell primarily offline.



# SCHEDULING & BOOKING

Online booking services reduce the friction for customers to schedule an appointment with you and in many cases, the convenience factor might be the decision-making criterion for your prospects, particularly if they skew under age 40.

## WHAT TO CONSIDER



**Choose a vendor that's on Google's approved list of "Reserve" partners.**

Companies on this list have integrated with Google Business Profiles to allow searchers to make appointments with you directly from Google search results.

You won't get anywhere near the same results from a vendor who's not on this list.

## HOW TO AUDIT

Make sure your scheduling & booking vendor's logo appears somewhere on this page of Reserve with Google partners:

*<https://www.google.com/maps/reserve/partners>*

# WEBSITE HEADER AND FOOTER

Every business is different, but below is a suggested header and footer for a typical small business website, highlighting key pages.

LOGO	<b>Call to Action</b> (503) 555-5555
<a href="#">Home</a>   <a href="#">Buy [Products] Online</a>   <a href="#">Where to Find Us</a>   <a href="#">Press &amp; Reviews</a>   <a href="#">Wholesale</a>   <a href="#">About</a>   <a href="#">Contact</a>	
-Product Type 1 -Product Type 2 -Product Type 3 -etc.	
<hr/>	
Business Name Address Line 1 Address Line 2 (503) 555-5555 email@businessname.com	Subscribe to our newsletter <div style="border: 1px solid black; padding: 5px; display: inline-block;">enter your email address</div> <div style="display: flex; gap: 10px;"><div style="border: 1px solid black; padding: 2px 5px;">FB</div><div style="border: 1px solid black; padding: 2px 5px;">IG</div><div style="border: 1px solid black; padding: 2px 5px;">etc</div></div>

# SOCIAL MEDIA WORKSHEET

Social media is a great way to get to know customers and potential customers. It's a social environment, a place to meet people and showcase your brand. It is not a place to make sales, so guard your time on social media wisely (because it's easy to spend too much time on social media and get distracted from direct revenue activities).

## FIND YOUR CUSTOMERS

The Pew Research Center studies who uses each social media platform by age and gender as well as race, location, education, and income. Use this information and compare it to your ideal customer(s) to help you find your customers. You might consider also asking customers which social media platform(s) they use.

## NUMBER OF ACTIVE ACCOUNTS

Actively use 1-2 social accounts. Schedule your posts (see below).

## CLAIM SOCIAL MEDIA ACCOUNTS

Use Namechk to find and reserve social media accounts.

Claim the username for as many profiles as you can – all if possible (you never know which direction you'll go in).

Set up the profile on each platform (e.g., photo, logo, description).

If you're not active on a particular platform, let people know where to find you on social media, or send them to your website or email subscription form so they can sign up to get more information.

## SCHEDULE POSTS

Use Buffer to schedule your posts. Scheduling posts allows you to spend one or two days a month creating and scheduling posts and then spend the rest of the month responding to comments.

It's OK to run the same post on each platform – people use different platforms and you're a small business with limited time.

Leverage cross-posting whenever you can. For example, within Instagram you can also connect Facebook and Twitter accounts and post to those accounts at the same time.

## ENGAGE

Your time is valuable. Spend 15 minutes in the morning and 15 minutes in the evening responding to comments and questions. Respond to everyone – responses don't need to be immediate.

## HASHTAG BASICS

Facebook, LinkedIn, Instagram, and Twitter all accept hashtags. People can follow specific hashtags (e.g., #Portland) related to specific topics. This may help your post get found online, but there are no guarantees of being seen, with or without hashtags.

**Twitter:** posts with up to 3 hashtags get the most engagement

**Instagram:** allows up to 30 hashtags, but ~9 works best

**Facebook:** posts with 1-2 hashtags get the most engagement

**LinkedIn:** use no more than 5 hashtags

**What to hashtag?** If you're at an event, check if the event has a hashtag so you can let people know you'll be there (or you're there). Start with the basics, like location (e.g., #Portland) and items you are selling (e.g., #earrings, #shirts, #cookies). Search for existing hashtags; don't make up your own.

# MARKETING EVENT CHECKLIST

Bring tools with you so current and future customers will remember you long after the event.

## OFFLINE COLLATERAL

Give potential customers the opportunity to remember you after the event. Include contact information (website, name, phone, etc.). Options include flyers, business cards, or specials.

## CREDIT CARD PAYMENTS

Be prepared to take in-person credit card payments. Most people do not carry cash or checks. We recommend Square or Shopify for taking in-person payments.

A mobile device with Square or Shopify app (phone or tablet) Chip and a swipe reader for Square or Shopify.

Square card readers: <https://squareup.com/shop/hardware/us/en>  
Shopify card readers: <https://www.shopify.com/pos/hardware>

Experienced business tip: if you are established and use these tools frequently, give customers the opportunity to give you feedback at the bottom of your sales receipts:

- Square: <https://squareup.com/customer-engagement/feedback>

- Shopify: Shopify suggests using a follow-up email using the free app Happy Email (<https://beeketing.com/happy-email>) to make personal contact and ask for feedback.

## EMAIL MARKETING

Be sure to provide people with the opportunity to sign up to get email updates from you. Even if you don't use the list immediately, it's important to give people the option to sign up. We suggest doing this electronically using Mailchimp Subscribe to save yourself the time of having to update your list manually.

A tablet with Mailchimp Subscribe installed (in addition to the device you use to take payments).

If you don't have a tablet, create a paper sign up sheet asking people to sign up for email updates. Be sure to ask for the person's name and email address.

Set up Mailchimp Subscribe for iPad:

<https://mailchimp.com/help/set-up-mailchimp-subscribe-for-ipad/>

Set up Mailchimp Subscribe for Android:

<https://mailchimp.com/help/set-up-mailchimp-subscribe-for-android/>

## PREP (NIGHT BEFORE)

Charge devices (tablets/phones) to 100% in case you do not have access to an electrical outlet.

*Note: you need two devices—one for taking credit card payments and one for collecting email addresses via MailChimp Subscribe.*

Update phones and tablets to the most recent software.

Practice using credit card and email marketing software if it is new to you.

Put your marketing materials with other event items.

# MOBILE BUSINESS MANAGEMENT

Digital Marketing tools you can use from your phone or tablet:

## OFFLINE COLLATERAL

If you have a Google Business Profile, Small Thanks with Google helps you spread word-of-mouth with offline collateral.

## GOOGLE DOMAINS

You can purchase a domain on Google Domains and add Google Workspace to your domain from your mobile device.

## G SUITE

Google has mobile apps for managing your email, calendar, file storage, contacts, and creating documents (word processing, spreadsheets, and presentations).

## FINANCE

Banks/credit unions, Quicken, and Xero all have mobile apps to help you manage your accounting and bookkeeping. You may need to do the initial setup on a desktop computer, but you can manage your finances on mobile.

## WEBSITE

You will need to create/develop your website on a desktop computer (or hire someone to do it for you).

Squarespace is by far the best website to update from a mobile phone or tablet. They have apps to manage your website, update products, write blog posts, and view analytics.



From the Shopify app you can make changes to your products and add new products to your website. Taking payments will also adjust the inventory available on your website. There are no additional tools for updating your website from a mobile app.

The Wordpress mobile app will let you add/update/delete pages or blog posts, manage comments, add media, review stats (requires installing the Jetpack plugin).

## **POINT OF SALE**

Square and Shopify allow you to take payments from your phone or mobile device. Square's mobile app is very robust and allows you to take payments, create invoices, review transactions and reports, add and manage customers, and add and manage items (products). Shopify's mobile app allows you to manage products, take payments, and review reports.

## **EMAIL MARKETING**

Mailchimp app: create and send emails, manage contacts, and track campaign results.

Mailchimp Subscribe: collect name and email addresses to add to your list (for use at events).

## **SOCIAL MEDIA**

Although it is easier to create accounts on a desktop computer, you can do everything from your mobile device.

Social media was built for mobile. You can use any social media platform from your mobile device to post updates and respond to comments or messages.

We recommend using Buffer to schedule posts. Buffer has a mobile app so you can schedule posts directly from your phone.

# ABOUT THE AUTHORS

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David Mihm  
Freelance  
Consultant

David Mihm is first and foremost an advocate for sustainable digital marketing techniques for small businesses.

In 2012, he sold his former company GetListed.org to Moz, helping over 3 million businesses get better visibility in the local search engines.

In 2021, he sold his second startup Tidings, helping small businesses send over 3.5 million newsletters to their subscribers, to DemandScience.

He's also a co-founder of the Local University conference series.

In his spare time, he enjoys travel (to world-class links courses in particular), Oregon-made craft coffee and craft beer, and spectator sports of almost all kinds—go Blazers!

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Jen McFarland helps businesses find and implement the best business growth tools to meet their 3-5 goals.

Jen's passionate about helping business leaders strengthen their leadership and mindset around technology initiatives.

In addition to her consulting work, Jen's weekly podcast, the Third Paddle, explores transformational journeys, women's issues, and equity.

Jen roasts her own coffee, loves her goofy dog, and is an avid baseball fan. You can find her at Portland Pickles games and the occasional Mariners game all summer long.

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