

Optimum Business

Toolkit

We are committed to providing connectivity solutions that support digital transformation and help our small business community thrive.

With the Optimum Business Toolkit, access timely tips, helpful resources, and expert advice to grow your small business.

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One-click access to resources for planning and growing your business from the SBA and the nation's largest network of free, expert business mentors.

- [Growing Your Business](#)
- [Getting More Funding For Your Business](#)
- [Building Your Business Plan Template](#)

Small Business Tips

Building Your Brand for Social Media Marketing Success

If you are seeking long-term success for your business and social media campaigns, counting likes is not enough. The better engagement metric to focus on is the connection your audience has with your brand.

With 80% of consumers more likely to consider products and solutions from the brands they follow on social channels, brand awareness is cited as a top priority for marketers.¹

Your brand is the most valuable tool you have in your arsenal and social media is an extension of that. Once you establish your brand values and voice, what you say to the world on social media becomes a lot easier.



How To Tip: Create a brand manifesto. List the reasons you founded your brand and what you stand for. Writing it down will keep it top of mind, and your customers will celebrate you for those reasons.

What is a Brand?

It's the vision and the driving force behind everything your organization does.

- What values are important to you as a business owner?
- What values are important to your customers? The answer to this question should really be influencing every single decision that you make even outside of social media.

It's why the company was started.

- Small businesses have a unique opportunity to tell their origin story. Was your business founded for a particular reason? That's something that will be celebrated by your consumer.
- Your brand should reflect the way you commit to do business. Show your consumers how you follow up on promises.

It's why employees get up in the morning.

- Your employees, when treated well, will be your biggest endorsers and drive traffic to your business.
- Consumers notice how companies treat their employees. Especially during the unprecedented circumstances caused by Covid-19, putting the care and safety of your employees first is noticed and rewarded by your customers.

It's why your customers care.

- When consumers can go anywhere for products and services, why do they need you?
- What makes you different?

Small Business Tips

How to Measure Your Brand Awareness?

Brands can be measured on four pillars of equity and momentum, according to the BAV Model.*



- **Differentiation** measures the degree to which a brand is seen as different from others.
- **Relevance** measures the breadth of a brand's appeal.
- **Esteem** measures how well the brand is regarded and respected.
- **Knowledge** measures how familiar and intimate consumers are with the brand.

Exploring the relationships of these four dimensions reveals a lot about a brand's current and future status.



How To Tip: Boost differentiation by creating photos and videos that keep your brand's unique aesthetic and color choices in mind.

New brands show low levels on all four pillars, but strong new brands show higher levels of Differentiation. A brand that shows high levels on all four pillars has achieved leadership brand status. Leadership brands are brands that are able to effectively convey 1) the attributes that are most meaningful to the companies they represent, and 2) what makes them unique.

Your brand equity is at its peak when your brand strength and brand stature are high or when brand strength is higher than brand stature. This translates to strong brand identity.

Learn more about how to boost your small businesses sales through social media

[View our Small Talks video recap](#) ▶

*Advertising agency Young and Rubicam (Y&R) developed a model of brand equity called Brand Asset Valuator – BAV Model. Based on research with almost 200,000 consumers in 40 countries, BAV provides comparative measures of the brand equity of thousands of brands across hundreds of different categories.

1. <https://neilpatel.com/blog/how-to-create-a-social-media-branding-strategy-from-scratch/>

Social Media Platforms

Use different social media platforms for different business objectives



TWITTER

News + Articles + Conversation

Example: You opened a new location



FACEBOOK

Building relationships + Brand Loyalty

Example: You are holding a 1 year anniversary event



YOUTUBE

Brand Awareness + How To Searches

Example: You want to demonstrate how to use a product



INSTAGRAM

Building Relationships + Lead Generation

Example: You want to showcase new renovations to your store



PINTEREST

Lead Generation For Visual Items

Example: You want to share a new menu item



LINKEDIN

Business Development + News/Articles Conversations

Example: You want to announce your business is hiring

Learn how social media can help you achieve your business goals.

[View our Small Talks video recap](#)

3 Steps to Take Before You Can Measure the Impact of Your Social Media Campaigns



Measuring your social media campaign results is key because it helps you understand what content is working. However, to measure impact, there are three things you need to do first.

1 Switch to a Business Account

This allows you to analyze top performing posts and audience demographics to understand how your audience behaves.



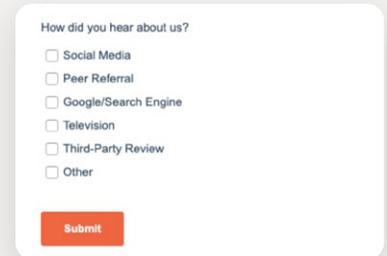
2 Set up a Facebook Pixel Account

This will help you measure the impact of social media on lead generation through conversion tracking and retargeting.



3 Survey Your Audience

Ask how or where customers and clients found out about your business to determine the percentage coming from social channels.



Remember, to measure your social campaign's impact, you must also understand what posts on which platforms are most effective. By tracking your campaign's results, you can make improvements in areas that are directly tied to your ROI, like engagement, conversions, loyalty, and more.

Consider which tools and software are best for you, and how you will track your social media impact to create deeper relationships with your customers and followers.

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More Effective Email Marketing Begins with Defining Your Audience



1 Send the right message to the right people at the right time.

An effective email is a relevant email. No matter what you sell, you need to have a clear idea of who your audience is in order to effectively communicate with them. The key is to understand what your buyers want and tailor email campaigns to your audience's needs.

2 Establish your goals

You can research the average email stats for your industry and use them as benchmarks for your campaign. For an example, knowing that the average click-through rate (CTR) for a business services email is 8.01% will help you measure campaign results.

3 Segment your campaigns

On average, segmented campaigns result in 23% higher open rates and 49% higher click through rates than unsegmented campaigns.



How To Tip: Just by identifying a single characteristic that you want to filter your audience by, you can start to be more intentional about what you say. And by sending more targeted messages to smaller segments, you'll learn more from how these contacts interact with campaigns.

4 Personalize your messages

Customers are 29% more likely to open personalized emails—and those emails drive 6x times more transactions than generic ones. According to Campaign Monitor, emails with personalized subject lines are 26% more likely to be opened. And Experian found that personalized emails get 6X higher transaction rates.

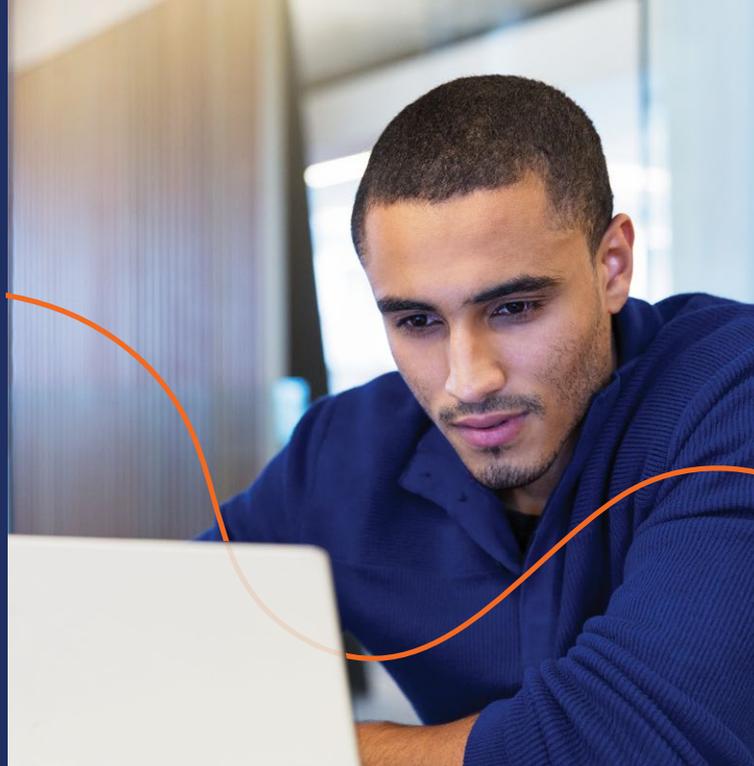


How To Tip: Gather customer data through purchase behavior, customer survey forms, or if you have a marketing automation platform, you can track and target audiences with those tools based on your business objectives.

5 Generate Greater ROI

Targeted emails that help increase engagement will help your small business build trustful relationships and generate greater ROI.

5 Best Practices for Writing and Designing More Effective Email Campaigns



1 Start with a strong subject line

Standing out in overly cluttered inboxes and reaching customers starts with carefully crafting your subject line. In fact, 47% of marketers test different email subject lines to optimize performance.¹ You will improve the effectiveness of your email campaigns when you consider some common best practices when writing your subject lines:

- Keep your messages short with as few words as possible
- Write a line that will grab attention but keep it relevant
- Summarize your email so recipients know what to expect
- A/B test your subject lines to determine what works best

2 Make your copy concise and scannable

Your audience is busy, and if they only have a few seconds to glance at your email, make sure your message counts. Consider laying out your story in a hierarchy and keeping your word count concise. You want the information you share to be clear and compelling enough that your audience will want to click through to learn more. Creating a layout that is scannable and using bullet points for key messages can help.

3 Keep your layout clean and engaging

A disorganized email design can make recipients feel overwhelmed and lead to increased abandonment. There are some tried and true ways to avoid this mistake and lay out your email campaigns to be visually engaging and not overly designed.

- **Use white space** – leaving space around your email content can help lead a clear path to what you want your readers to focus on.
- **Guide through design** – keeping your content alignment consistent and your sections defined will help your reader navigate your message more successfully.



Ideal email copy

50 to 125 words results in response rates over 50%.²

Ideal subject line

28 to 50 characters due to growing mobile open rates.²

5 Best Practices for Writing and Designing More Effective Email Campaigns

- **Keep your email on brand** – be sure to use the same voice, colors, fonts and logo to help ensure your audience knows the email comes from your company.
- **Incorporate unique visual content** – use engaging images, GIFs, and animations to break up the written content and create a memorable experience.

5 Comparison test to optimize performance

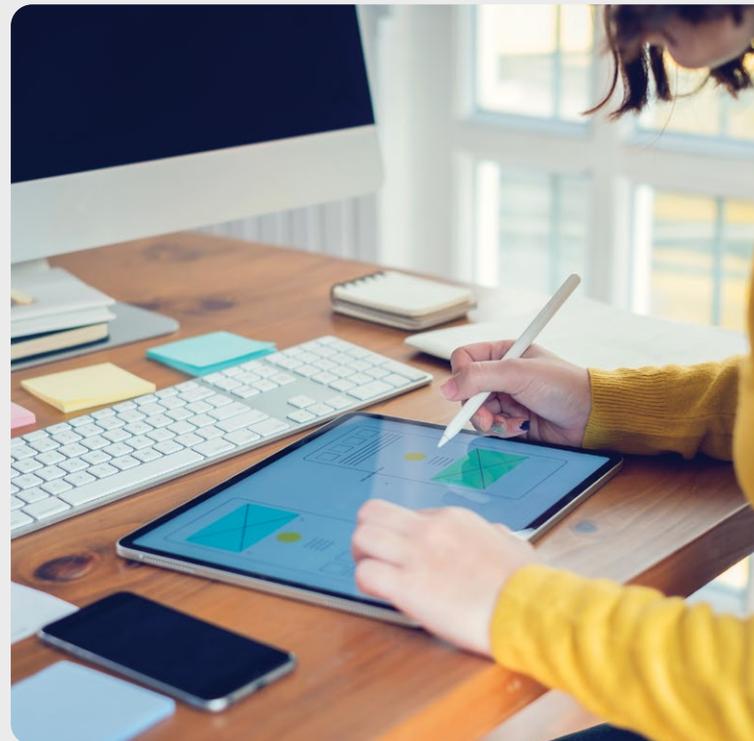
By testing variations in your email campaigns you can identify what version delivers the best results. Consider A/B split-testing text versus images, long format versus short, or a static photo versus a video link. Conducting your own comparison tests will provide the insights you need to improve your email marketing performance



Save the emails that stand out to you and research some effective layouts you can use for inspiration.

4 Use calls-to-action that convert

Calls-to-action (CTAs) are used to drive your email audience to click or tap and get the response you want. Consider using buttons in a color that stands out with short messages that tell people what they are opting in for (i.e., Learn More, Sign Up). Including links within your text can also be very effective in presenting your call to action in context and providing a natural user path to further opt-in.



For more email marketing tips for small business

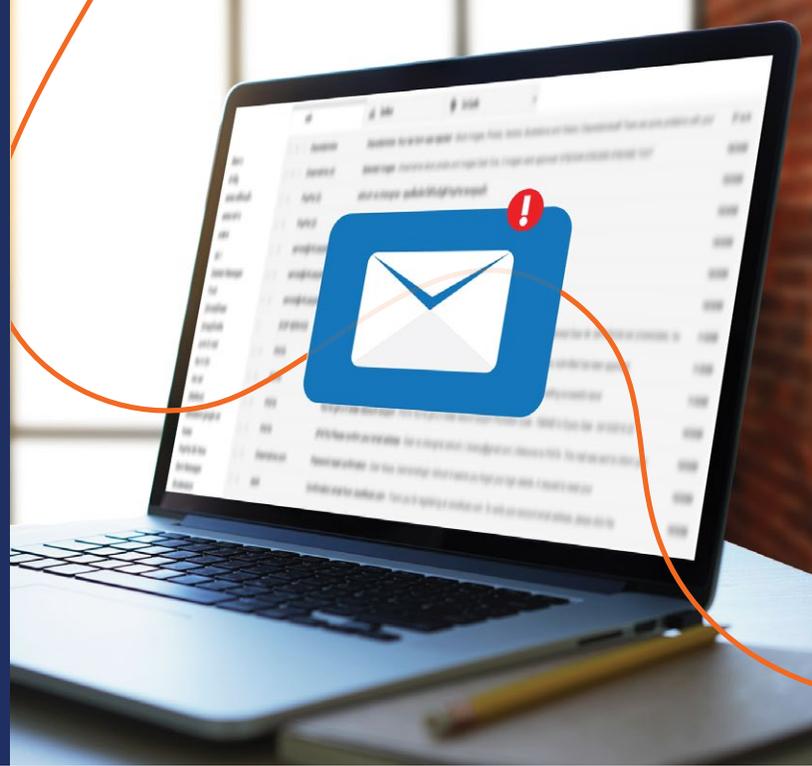
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2. <https://blog.hubspot.com/marketing/email-design>

Small Business Tips

Free Email Marketing Tools For Your Small Business



Email is one of the most effective marketing tactics, but it can be very time-consuming. From spending hours creating emails to then monitoring responses — it can quickly become overwhelming and hinder productivity while dragging down your email marketing ROI.

Unfortunately, many companies remain in this state because they are not ready to invest in a tool to simplify the process. But with the number of free email marketing tools, you can take advantage of the features that drive open and click-through rates without the expense.

Here are the top 3 free email marketing tools that will help motivate you to automate and simplify the process, saving you time and money.



How To Tip: Customers see a significant increase of 93% in open rates and 174% in click-rates with automated emails.¹

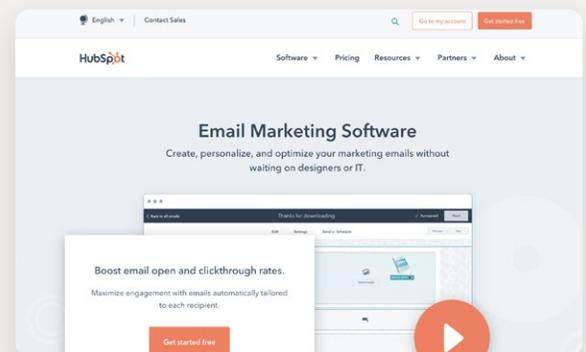
HubSpot Email Marketing

HubSpot, perhaps best known for their marketing automation platform, recently launched a free email marketing tool that can support many of a small business's transactional email needs.

HubSpot Email Marketing's free version allows you to send kickback emails from lead offers, thank you emails after purchase, or promote current campaigns.

The ease of use of HubSpot's free email tool is one of its greatest benefits. The tool features a convenient drag-and-drop visual editor, and it also comes with ready-made templates to get you going instantly.

Its native integration with other HubSpot tools, like the free-forever CRM, is a business essential. Once you sign up for your account, you get access to both tools so you can create a centralized contacts database, organize it in lists, and manage and track email performance.



Free Email Marketing Tools For Your Small Business

Mailchimp

Mailchimp is a leader in email marketing tools that you have probably heard of. Their free plan provides you with basic email marketing features such as email creation and scheduling. What makes this a great email marketing tool is its smart recommendations feature, which provides you with valuable audience insights to optimize your marketing efforts.

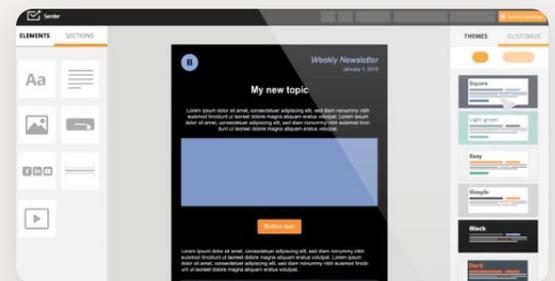
Using the Content Manager, you can store your images and files for quick access and easily design emails. Mailchimp also lets you automate your emails at the crucial steps of the buyer journey, allowing you the ability to deliver welcome emails, order confirmations, abandoned cart reminders, and more.



Sender

Sender's email marketing tools come with beneficial features to ensure deliverability. It gives you the ability to create stunning newsletters without any HTML knowledge and personalize newsletters for each recipient. Easily choose from a template and customize it with elements like images, videos, and text.

In addition, Sender's robust analytics feature lets you track results and helps you build accurate buyer profiles based on your subscriber's actions.



Here are some additional free email marketing tools to check out:



How To Tip: Some email marketing tools allow you to remain on a free plan as long as you have 2,000 or fewer contacts in your audience.

For more tips on the email marketing strategies for small businesses

[View our Small Talks video recap](#)

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- 1. <https://mailchimp.com/features/automations/customer-journey-builder/>

Expert Advice

Tips from Two Extraordinary Entrepreneurs



This Black History Month, we continue to honor past, present, and future Black entrepreneurs by sharing advice from two extraordinary women. Mary Webber is CEO of L & R Human Resource Consulting, which provides strategic guidance and training to businesses and HR professionals. Lindsey Holmes is CEO of Usable Tech, an online strategy and management firm specializing in Social Media Campaigns, Management and Mobile Application Development. We asked both women to share tips and lessons learned that could help future entrepreneurs find success as well.

Q: What advice do you have about starting a business?

Lindsey: Just do it. Do it now and whether you have the means or not - do it 'lean.' But by all means, do it NOW. Many of us fall into the old business stereotypes that say that you need a fancy office with a secretary. That mindset can be defeating for most. And it's definitely not necessary. I think Covid has shown us that virtual offices can actually be much more productive as well as cost-effective. Starting your business for as little as possible now allows for a lean mindset from the start.

Mary: In speaking from my own experience, there are multiple steps I would give about starting a business. For starters, I would say make sure that your business involves your passion and that it solves a problem. If you are not doing what you love, how can others be enthused about it? Additionally, if it doesn't solve a problem, what steps or pivot moves can you make to ensure that the product or services you offer solves a problem? Once you have determined the "problem-solving idea," develop a roadmap or business plan. With all the free services and classes now available, I would advise you to either enroll virtually or make appointments with different agencies that provide guidance and information about securing funding to grow a business. Decide on a business structure (i.e., sole proprietorship, partnership corporation, or nonprofit). Be prepared to pay federal business taxes, income and employment taxes, plus state and local taxes for your business. Obtain any federal and state licenses and permits needed to run the business. If you have employees, be sure to seek an HR professional or consult with an employment representative who can assist with legal issues that arise.



Tips from Two Extraordinary Entrepreneurs

Q: What recommendations would you make for setting goals and achieving goals?

Lindsey: Be consistent. Do mind maps of your goals. Or simply write them down. Putting your goals on paper and looking at them often is a great way to manifest them. Also, find a workflow around goal setting that works only for you. I use Evernote and its integrations to take me from mind dumping to even creating and managing sales charts. A range of goals can be achieved with the right productivity tool. An added bonus is having all of my goals in the same system. This eliminates distractions as I can avoid moving from one tool to another.

Mary: My advice when setting goals is always to be true to yourself. Set realistic goals that are achievable and attainable. Your goals should be for short term and long term. Short terms goals should bring you closer to fulfilling your long-term goals. The best advice I have learned throughout my journey is that failure is inevitable. Just as we plan to achieve all the goals set, there will be a "bump in the road" along the way that will cause us to reroute or reanalyze the goal and determine what will be the next best step. When this happens, discuss the issue(s), the outcome, and how to avoid a reoccurrence, and readjust your goals for long-term success.

Q: Do you have any suggestions regarding funding or overhead?

Lindsey: As I mentioned starting lean and staying lean will ensure your business stays around for the long haul. I knew that I couldn't afford expensive marketing and CRM tools in the early growth stages of my business, so I didn't try to. That was added pressure that I did not need to put on myself. Instead, I looked for free to low-cost solutions (believe there are some for your industry, just search) or even some that might have been slightly higher out of pocket but that had no monthly payments. These tools have grown with my 15-year-old business and kept me in a lean mindset. Tools don't have to have exorbitant price tags to work.



Q: Are there any essential business communication or technology tools you find useful?

Lindsey: Evernote is my preferred hub. It keeps me productive and allows me to manage all of my thoughts and content easily. Find your hub --that's most essential. Where can you store but also share everything with ease? I also use different integrations -- tools that work well with Evernote that allow me to customize my workflow. Then there is my calendar. I put everything there, from actual calendar dates to To-Dos.

Mary: Pre-Covid, I would have recommended face-to-face connections and in-person training to build personable relationships. However, in the current COVID era, pivoting to a virtual platform has become the norm. Technology savvy knowledge and tools to communicate with companies have become the norm. Companies that are unable to compete in this new arena will be left behind. I would strongly recommend the knowledge and use of virtual tools (i.e., MS Teams, Zoom, WebEx, etc.) to connect with customers/clients, to stay afloat in the current business arena, and provide the same "in-person" service by virtual means.

Tips from Two Extraordinary Entrepreneurs

Q: Do you any personal experience overcoming challenges and persevering you'd like to share?

Lindsey: 'Go for what you know.' I infuse the same things into my business that go into my personal life. I try to be considerate of my loved ones, and my clients are, of course, no different. I think about them when I price, roll out new products, or am asked to take on a project that I might not be able to commit to fully. Spirituality is also a big part of my life. I often pray, meditate and visualize to get the most favorable outcome before a meeting. If business is slow, I ask for God to send me an idea or the patience to get through the drought. Even politically, I take a stand. Though I've always been told to separate business from politics. for example, there is just a certain customer profile that is not congruent to my values and beliefs. In my industry, which is a very personal one, it's important to work with those where there is synergy. Being my authentic self attracts the customers that I want as well.

Mary: On a personal note, I have had to overcome so many challenges that I decided to write a book, "Miracles Still Happen...Trust Me." Having been homeless and divorced with two young children, I have had to overcome many emotional and financial challenges. The greatest challenge was becoming paralyzed at the age of 40, and miraculously (with much perseverance) and determined will, I began to walk again. This paralysis taught me that I had a choice to either accept the condition (paralysis) as a permanent state or fight to walk again to show others that they too can overcome adversities in life if they are determined not to give up. Giving up should not be an option. Success is imminent with sacrifice and commitment. It has been 11 years since I was paralyzed. Since that time, I have completed an HR Certification to represent as an expert in the field of HR, opened an HR Consulting business, and currently have six months remaining for completion of a second Master's Degree in Employment Law from the Shepard Broad School of Law. My favorite quote that sums up overcoming challenges and persevering is, "If you can't fly then run, if you can't run then walk, if you can't walk then crawl, but whatever you do you have to keep moving forward." ~ Martin Luther King



A Small Business Guide to Cybersecurity

As larger companies prioritize and fortify their cybersecurity, small and midsize businesses (SMBs) have become easier targets for cyberattacks.

According to a recent SBA survey, 88% of small business owners felt their business was vulnerable to a cyberattack.¹ In fact, 43% of cyberattacks are aimed at small businesses, but only 14% of small businesses are prepared to defend themselves. Many small business owners may not be able to afford professional IT solutions or have limited time to devote to cybersecurity.² But with some helpful guidance, small businesses can take proactive measures to protect their business from online threats.

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Start by staying informed

Frequently, security incidents can happen because of user error, web browser exploitation, and social engineering. Cyberattacks are constantly evolving, but there are common types of threats business owners should be aware of and train employees to avoid.

Malware (malicious software) is an umbrella term that refers to software intentionally designed to cause damage to a computer, server, client, or computer network. Malware can include viruses and ransomware.

Viruses are harmful programs intended to spread from computer to computer (and other connected devices). Viruses are designed to give cybercriminals access to your system.

Phishing is a type of cyberattack that uses email or a malicious website to infect your machine with malware or collect your sensitive information. Phishing emails appear as though they've been sent from a legitimate organization or known individual and often entice users to click on a link or open an attachment containing malicious code.

Ransomware is a specific type of malware that infects and restricts access to a computer until a ransom is paid. Ransomware is usually delivered through phishing emails.

DDoS or Distributed Denial-of-Service attack is when a cybercriminal floods a system with large amounts of traffic to tie up a server's resources and deny visitors access.

DNS or Domain Name System is a foundational component of the internet, mapping domain names to IP addresses. A cybercriminal can redirect your traffic to a "spoofed" server in a DNS attack and expose them to phishing schemes and other malicious behaviors.



Seek Automatic DNS/DDoS Protection:

A DNS/DDoS security system that is actively detecting any potential threats to your network can stop attacks from happening.

Proactively plan and protect

Today's small businesses must be proactive rather than reactive with their cybersecurity strategies. They must not just rely on antivirus software but implement more advanced measures to protect their network and business. Here are some steps to consider including in your multi-level cybersecurity strategy:

Conduct a cybersecurity risk assessment

A cybersecurity risk assessment can help identify where your business is vulnerable and inform your plan of action. Some quick links you can use include the Federal Communications Commission (FCC) [cybersecurity planning tool](#) and the Department of Homeland Security's (DHS) [Cyber Resilience Review](#) (CRR) which is a non-technical assessment to evaluate operational resilience and cybersecurity practices.

Get more than antivirus software

Installing antivirus software on all of your company devices (including every mobile device) and ensuring it is up-to-date is crucial. But only a multi-layer strategy that includes DDoS and DNS security provides a more comprehensive protection for your business.

Educate your employees about security

Hackers aren't the only ones who can compromise your data. Your employees, if they're not careful, can put the company's data in jeopardy. Whether someone leaves their work computer unattended or enters their information into an unsecured site, your company's data is at risk.



Know how your business stores and processes data so you can strengthen the weak spots and educate your employees about small business network security best practices.

Implement a backup and recovery plan

Regularly back up the data on all computers. Critical data includes word processing documents, electronic spreadsheets, databases, financial files, human resources files, and accounts receivable/payable files. If possible, back up data automatically or at least weekly, and store the copies either offsite or on the cloud.



Create your cybersecurity checklist

Here is a checklist you can refer to when creating a cybersecurity plan for your business:

- + Stay educated and informed on the newest security threats
- + Educate your employees about data flow and how to keep information safe
- + Implement a backup and recovery plan
- + Download virus protection on all your devices
- + Get security insurance for your business
- + Ensure you regularly patch your operating systems and applications
- + Implement multi-layered cybersecurity defenses that include DDoS mitigation and DNS Security

For more information on cybersecurity protection for your small business, [visit us online](#) or talk to an Optimum Business specialist today at **866-209-1099**.

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2. <https://www.cnn.com/2019/10/13/cyberattacks-cost-small-companies-200k-putting-many-out-of-business.html>

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