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Safeguard



Milestone

MARKETING

The Milestone Marketing Guidebook

Turning business achievements, large and small, into powerful marketing opportunities.

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Your Safeguard consultant is ready to help bring your achievements to life with ideas, services and products that create an impactful marketing campaign.



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Every business has its milestones along the road to success. An anniversary, a new location opening, hitting a significant sales goal or commemorating the retirement of a founder. This guide will show you how to leverage milestones into promotions that will help you differentiate your business from the competition, attract new prospects and enable growth.

Celebrating your business success

In today's tough business climate, it's important to make the most of any opportunity that can draw positive attention to your business. Your milestone not only offers a good reason to promote, it conveys to your customers and prospects that your company is doing well. A well-planned and executed promotion pays dividends by:

- **Increasing new and repeat business**
- **Steadily growing sales**
- **Spreading recognition in the community**
- **Boosting employee morale, performance and loyalty**
- **Establishing a clear, competitive advantage**
- **Growing Profits**

This Guidebook highlights key strategies, ideas and tactics for creating a successful promotion that will generate interest and drive new business your way. As you peruse it, remember your Safeguard consultant has the support and experience to make your campaign a big success.

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Creating a special, commemorative logo is often the first step in an anniversary promotion. This eye-catching embossed-foil version speaks quality and can be used on packaging, promotional materials and signage.

Getting started

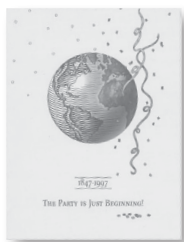
A successful Milestone marketing campaign starts with a solid plan that includes specific goals you want the campaign to achieve. Here are some common challenges and opportunities to take into consideration when determining what the campaign should accomplish:

- Do you want to give your business more credibility?
- Do you want to pump new life into your services or products?
- Are you ready to launch a new service or product line?
- Do you want to refresh your brand to align with a changing marketplace?
- Do you want to differentiate your business from competitors?
- Do you want to generate more awareness and sales leads?
- Are you looking for a way to galvanize and motivate your sales force and employees?

Begin by involving your Safeguard consultant and key people in your business to determine a strategy that is right for the dynamics of your business culture and market. Hold a brainstorming session to discuss the ideal strategy for your milestone promotion and set one or two key business goals. A second, equally important outcome of the brainstorming session should be a clear, concise and meaningful message that supports your goal or goals.

For example, if your goal is to boost customer satisfaction and stimulate repeat business, an effective tool is a special newsletter that announces your milestone and features testimonials from satisfied customers. It's a great way to use current customer satisfaction to generate new interest and sales.





Chicago Tribune's 150th anniversary card, on the inside, it reads: *As we at the Chicago Tribune kick off our 150th anniversary, we want you to know that you mean the world to us. Happy New Year.*



For more substantial recognition, a Verde Marble plaque *not only makes a big statement, it can be displayed where your customers are likely to see it.*

Stability generates loyalty

Did you know that only 44% of businesses survive the first 5 years?* That gives your business a great reason to celebrate each and every one of the “early years.” Your customers not only want to see you succeed, they take a special pride in knowing they helped you get off the ground.

A new year is a good time to promote your anniversary since it gives you the chance to thank customers for their support in the previous year while inviting them to continue doing business with you.

Even though you may have only been in business for one year, you can still leverage the same strategies used by companies that have been around for 150 years! Take a look at the card published by the Chicago Tribune newspaper. A New Year's message like this can work just as well for a 1st anniversary. In fact, promoting that the celebration of your successful partnership is just beginning is ideal for new companies.

Of course, most young companies don't have a lot of money to spend on promotions. A little creativity goes a long way to making a small budget look bigger. Your Safeguard consultant will help ensure that you get the most impact out of every dollar with small but impressive touches like foil seals that can easily be applied to all your correspondence, packaging and envelopes.

Marketing Milestone Tip: When dealing with a newer company, customers want to feel that the company is in business to stay; that's why conveying a sense of stability is so important. Use themes like **“We're #1 and growing strong”** to reinforce your company's strong position in the marketplace.

Anniversary Promotional Idea: Since your company is young, you have a great opportunity to directly involve your customers in its history. Recognize their value by enrolling them in a “Charter Club.” Send them a certificate, complete with an anniversary seal, acknowledging the importance of their support during your early years.



Individual customer anniversaries

You have the chance to turn a first anniversary into a relationship-building opportunity. Your Safeguard consultant can help you create personalized “thank-you” cards and premiums to acknowledge the milestone on a customer-by-customer basis.

For example, the card can read: **“It’s our first anniversary as your financial advisor. Thank you for your business and we look forward to another successful year together.”** Your Safeguard consultant can help you make it extra special by creating “thank-you” gifts to go with the card such as customized chocolates and candies. This is a great way for a salesperson or team to impress customers or prospects when paying them a visit.

Milestone Marketing Tip: Don’t just celebrate big anniversaries that end in 0 or 5. Come up with a special promotion that puts odd-year anniversaries to good use, too. Seventeen® magazine makes a big deal out of anniversaries that end in 7. Heinz celebrates couples who have been married for 57 years – reinforcing the company’s 57 varieties product claim.

Promotional Idea: Package a “best-of-the-best” product as a souvenir of your anniversary celebration or follow the example of Williams-Sonoma who created a special, commemorative cookbook to honor the company’s 40th anniversary. Apply a foil anniversary seal to make the presentation of your souvenir memorable and impressive.



Banners and signage: advertising space for your celebration

When you drive up to your store or place of business, take a fresh look at the outside. Imagine a banner featuring your logo and celebration theme – perfectly positioned for all to see. Not only is it an attention getter, it is an excellent way to build credibility with potential customers. Commonly used anniversary headlines include “**Proudly serving you for 5 years.**” Or, to reinforce your business’ contribution to the community, localize the headline, as in “Proudly serving ‘name of your town/city’ for 5 years.”



To keep the atmosphere of celebration going inside, think about extending the messaging to pennants or smaller banners. Keep a big bowl of customized chocolates wrapped in foil for everyone who comes in. Even the smallest touch can be a memorable one while encouraging anyone and everyone to feel part of the celebration.

Milestone Marketing tip: Effective marketing builds equity and power by using the same message and graphics across a number of vehicles. Create a postcard or direct mail flyer based on the signage that announces your promotion and send it to customers and prospects a few days before your event or promotion begins.



A one-two marketing punch: combine an anniversary and sale event

Turn your Anniversary or milestone achievement into a sales-driven event by combining it with a special promotion. For example, don't just say it's your 3rd Anniversary. Promote your 3rd "Get Ready For Winter" Sale. This conveys both a milestone and a reason to come in for a great deal.

Add extra power to your promotion by including a weekly drawing. It will help keep the celebration excitement fresh while giving customers a reason to come back time and time again.

Giveaways are always incredibly popular and powerful. Offer customers a free hat or T-shirt featuring your commemorative anniversary logo. Make sure you give them to vendors, too. When worn, they are advertising your success!

Your Safeguard consultant is your one-stop source for putting ideas like these into action. He or she knows how to help you determine sizes and quantity, make the right style and color choices, figure out the best type of signage or banner for your particular venue and make sure it all looks like a professionally coordinated initiative.



Acknowledging customers: without them, you'd have nothing to celebrate

The most important audience for your campaign consists of the customers who supported you through the years and who continue to patronize your business. You should not only make them aware of your celebration, you should include them in it.

There are all kinds of ways to be sure they get the recognition they deserve, including:

- Send special, hand-signed “thank-you” cards embossed with your commemorative logo
- Feature them in a commemorative booklet that thanks your most loyal customers
- Give them a commemorative premium such as a hat or bag with your logo on it, a high-quality pen bearing your slogan or a customized box of chocolates
- Create a poster identifying loyal customers and how long you’ve been doing business together and place it in your lobby





Commemorative watches will be worn with pride by employees who meet a sales target or win a sales contest during your promotion.

Your employees: your best ambassadors

Make sure you include your employees in your promotion. After all, each and every one is a 'brand ambassador.' Hats, shirts, jackets – all emblazoned with your commemorative logo and slogan – will convey their pride in the company while also spreading the word about your years in business. Employees love to wear them and value them as collector's items. In fact, one company's employees enjoyed wearing the apparel from a first anniversary celebration so much, it became their official uniform.

In addition, consider a special promotion or contest just for your employees. Give plaques to "charter" employees who were with you from the beginning. Hold an internal sales contest linked to the milestone — with a special perk or gift for the employee who converts the most leads into sales during the promotion.



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Campaigns for service providers

You don't have to have a brick and mortar storefront or location to celebrate a milestone event or anniversary. Consulting and service firms can get a lot of marketing mileage out of a campaign, too. Especially if you're in the type of business where you don't see or interact with clients on a regular basis.

Your campaign doesn't have to just celebrate years in business. For example, if you provide computer services you can make some noise by celebrating an industry milestone such as the 20th anniversary of the PC. It's a great way to keep yourself top of mind with clients while reminding them how much they depend on your expertise.

You can also celebrate "client anniversaries" by sending out special customized cards that recognize 1, 5, 10 or 15-year relationships. Add a promotional premium, such as an elegant pen, to make your message extra memorable and long lasting.

If you want to launch a more conventional campaign celebrating your years in business, create a theme and a commemorative logo. To get the most value from your initiative, it's important to take advantage of every communication opportunity. Be sure your logo and message are included on all:

- **Correspondence:** If you're planning on running your Milestone Marketing campaign for an extended period of time (for example, a year-long promotion), incorporate your theme on your business cards, stationery, invoices and all other business correspondence.
- **Sales materials and proposals:** Remind potential customers of your longevity at the time of purchase. Add an embossed logo to presentation folders and proposals. Also print up a special run of brochures featuring your logo and theme. You can even incorporate it into presentation templates.
- **Digital and electronic media:** Make sure your Milestone Marketing theme and logo are front and center on your website. Include a little history pop-up window or timeline that chronicles key moments in your business. And don't forget to add a line such as "Celebrating our 5th Year in Business" to your email signature.

Making the most of a retail milestone

Retailers have a big advantage during milestone promotions for the simple reason that they are regularly visited by customers. Plus, retail locations offer great display space for banners and commemorative graphics. In fact, promotions such as a special, limited-time sale or event are common in the retail world.

Start by announcing your milestone. Create a theme and then have it printed on a banner that hangs on your building's exterior. Make sure you also hang banners or in-store dangles inside, too. The messaging, the graphics and the logo should all be the same for greater impact. Be sure the type is large enough for people to read from an appropriate distance. Your Safeguard consultant can help you determine the right size.

Because their customers come to them, retailers also have the ability to hold in-store events and feature celebratory amenities such as popcorn machines or balloons for kids. For example, Waverly Gift Shop in Des Moines, Iowa, offered a prize for the best customer costume. The owners and staff were astounded by how many people showed up in costume. The store first opened in the 1950s and the winning entrant walked in decked out in 50's garb, complete with a hula hoop.

Don't forget to advertise your Milestone Marketing promotion to drive traffic. Local direct mail and online banners in local news websites are easy to create and relatively inexpensive to produce and distribute. To really boost turnout, be sure to include a coupon! If you can tie the offer directly to your milestone, such as 20% off to celebrate our 20th anniversary – it will make it that much easier to remember. Add some urgency by making it a limited-time offer (i.e., 20% off for 20 days to celebrate our 20th Anniversary).



A menu of ideas for restaurateurs

Restaurants can really create a lot of excitement around a Milestone Marketing campaign. You can go all out by hosting a series of events for different customer groups (*i.e., business, weekend, couples' nights, etc.*), offering special discounts on food and meals and creating special commemorative dishes and beverages. Here are some popular restaurant promotions:

- Roll back prices on desserts to the price they were your first year
- Offer a discount to couples celebrating the same number anniversary that you are
- Give companies a discount on their own anniversary party
- Collect email addresses using an entry form for a raffle
- Give a discount to customers who come in dressed in vintage clothes from the era during which you opened

Your Safeguard consultant can help you design and print special menus, branded apparel for the staff, anniversary signage, banners and brochures, as well as a newsletter and discount coupons. He or she can also offer updates to your website to include your anniversary promotion and make social media recommendations to get the word out!





For companies that don't have the time to produce a newsletter, ask your Safeguard consultant about these full-color newsletters. They're personalized throughout with your company name and Anniversary year. Mail them with your invoices, statements, or other business correspondence.

Creating a Milestone Marketing newsletter

A Milestone Marketing campaign is also a great opportunity to generate some publicity for your company. And a newsletter is an easy, inexpensive way to share the news and gain goodwill from your customers and vendors.

Write up a newsletter with a table of contents that includes the reason why you went into business, your mission statement and a timeline of key moments. Other ways to keep it interesting and engaging are:

- A description about how your industry and its services or products have changed
- A photo of your original staff and one of your current staff – side-by-side!
- Key historic information that coincides with your first year in business such as the sitting president at the time; the most popular band or automobile (include the price!)
- Photographs of your first “office” or vehicle. And, if you have any photos of you with some of your initial clients, make sure you include those, too.
- Feature your most loyal employee or employees
- A reprint of your original brochure cover or logo
- Establish a scholarship or make a donation on behalf of your clients to a favorite non-profit or community school
- Include a special milestone offer for a free consultation or a discount for referrals

Your Safeguard consultant can design, print and mail your newsletter for you and then show you how to use it as a real workhorse asset and can even handle the mailings for you. Not only should you include it in all of your mailings, product shipments and billing statements, you can also hand it out when you call on customers. Make sure there are plenty available in your reception area and don't forget to create a digital version to email to your customers, vendors and prospects.

Photographs tell your story, too

As you begin to plan your Milestone Marketing campaign, gather any and all photographs that will help tell your company story. Look for photos of:

- **Your first day in business**
- **Your first office or location**
- **Your first employees**
- **The first check you received from a customer**
- **Photos and news clippings**
- **Key products or services you've introduced**
- **Industry specific photos that help establish your timeline and provide context for how much your business has evolved**

Use these photos in brochures, special promotional flyers, press inquiries, newsletters and advertising. Your Safeguard consultant has design services at his or her fingertips to create impactful campaign materials for you, as well as the production know-how and full-color printing services to make a quality job of it all.



Trade shows and community events

If you participate in trade shows, be sure you order enough Milestone Marketing materials to distribute to attendees. Incorporate your campaign theme and graphics into your display and hold a special contest that relates to your milestone event. Special products, special pricing and gifts or premiums will also help build excitement and drive traffic to your booth.

Another way to build awareness while fostering goodwill toward your company is to use your milestone as a reason to sponsor a community event or a non-profit or local school initiative.

Incorporating your milestone into company tours

Many businesses routinely take prospects and new customers on a tour of the company. Be sure to include your milestone story along the way by incorporating key photographs at appropriate stops *(such as your first product on display in a manufacturing plant or a founder's portrait as you enter a conference room.)* Don't forget to provide your tour attendees with your commemorative newsletter and a premium such as a hat or pen.



Getting the word out on your website

Your website is a core component of your business and a 24 hours a day/7 days a week opportunity to promote your Milestone Marketing initiative. Additionally, email blasts and eCoupons are effective strategies for “pushing” your campaign out to your customers and prospects. Here are some actionable suggestions for taking it all online:

- **Apply a digital version of your special logo and theme to your home page.**
- **Create a pop-up window, linked to the logo, that briefly tells your milestone story and how customers can become involved**
- **Send out a series of email blasts to your customers and prospects. Include a contest, promotion or coupon to help drive response**
- **Create a guestbook that allows customers and prospects to send their congratulations. Make sure you include contact fields for capturing their information. Add a thank-you confirmation page that allows them to sign up for future promotion alerts, special offers and new product or service announcements.**





Safeguard Milestone Marketing products and services

Design Services

Any campaign relies on a consistent, professionally designed graphic look to stand out and build awareness. Typography, logo and graphic design, email campaigns, direct marketing campaigns and newsletters – count on Safeguard's team of experienced designers to bring a clean, impactful, professional touch to all of your campaign components.

Full-color printing

You can count on your Safeguard consultant for the design of creative and impactful direct marketing brochures and postcards, as well as high-quality, full-color printing.

Logos & Seals

Our professional designers can create a spectacular, eye-catching commemorative logo or seal for your milestone campaign. It's a graphic way to broadcast your business achievement and it can be used on everything from advertising to premiums, chocolates, signage and your website. Self-adhering seals can be used on packaging, envelopes, employee badges and internal communications.

Announcement Notes & Cards

Special cards announcing your milestone and thanking clients for their business; invitations to an anniversary open house or private sales event – your Safeguard team will custom design them, choose an appropriate format and stock, and then be sure they're printed, along with corresponding envelopes.

Commemorative Stationery & Business Cards

Using commemorative stationery throughout the year and printing special commemorative business cards for yourself and your sales force is an easy, personable way to constantly remind your prospects and customers of your success.



Calendars

The link between the passing of the year and a milestone celebration is a powerful one. A customized calendar with your commemorative logo and campaign slogan is a useful and meaningful way to share and promote your milestone for a full 12 months.

Premiums & Gifts

Chocolates & Candy: Customized confectionary adds an elegant touch to any Milestone Marketing celebration. Your Safeguard consultant has a wide selection of delicious chocolates and gift items that fit your budget and are personalized with your milestone message.

Hats & Shirts: Who doesn't love a free hat or T-shirt? What better way to express your company pride in your milestone achievement? Build employee and customer loyalty and support by giving them quality hats and apparel bearing your anniversary logo and theme.

Pens: When you give out inexpensive pens with your Milestone Marketing logo or theme tagline, everyone who uses them gets the message! Giving special customers more expensive pens is a thoughtful and elegant gesture of thanks for their support and business.

Watches: For your best sales people, your initial customers, your most valuable employees who have been there all along – a commemorative watch is a lasting token of your appreciation and a daily reminder of what their loyalty means to you.

Certificates & Awards

Establishing an annual award, presenting charter clients and employees with a commemorative certificate of recognition — these are two simple, yet impactful, ways to extend the life of your campaign while building loyalty and appreciation from recipients. Your Safeguard consultant can help you choose and customize the appropriate certificates and awards for your Milestone Marketing needs.



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These are only some of the products and services your Safeguard consultant can provide to help you bring your business achievement to life and make your Milestone Marketing campaign as impactful and successful as possible. Give them a call today to discuss your particular milestone and create an effective Milestone Marketing plan.

