



47TH ANNUAL TRAINING EVENT

STRONGER TOGETHER

POWERED BY SMALL BUSINESS

**TURNING BUSINESS DATA INTO REAL MARKETING PLANS
WITH AI**

ABOUT ME



Sue has over 20 years of experience working with the Small Business Development Center (SBDC), where she helped countless businesses with their business strategy and digital marketing needs. Now, she has embarked on her own venture with *Just Sue Creative*, a business that focuses on **website design, SEO services, branding, content creation, and comprehensive marketing solutions.**



Sue Pitts, Founder
JustSueCreative.com
Sue@JustSueCreative.com
712-269-9977



Just Sue

“

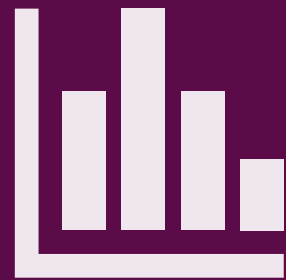
I've spent years advising businesses on how to strategically align their digital and business strategies, only to watch them not fully execute it. Now, I want to not only do it for them but ensure strategy and education are woven into every step.

”



GOALS AND OBJECTIVES

Use Real Data to
Guide AI



Identify meaningful
customer segments



Develop targeted
messaging



Turn strategy into a
structured marketing
plan



LET'S ADDRESS IT



Is Using AI "Cheating"?

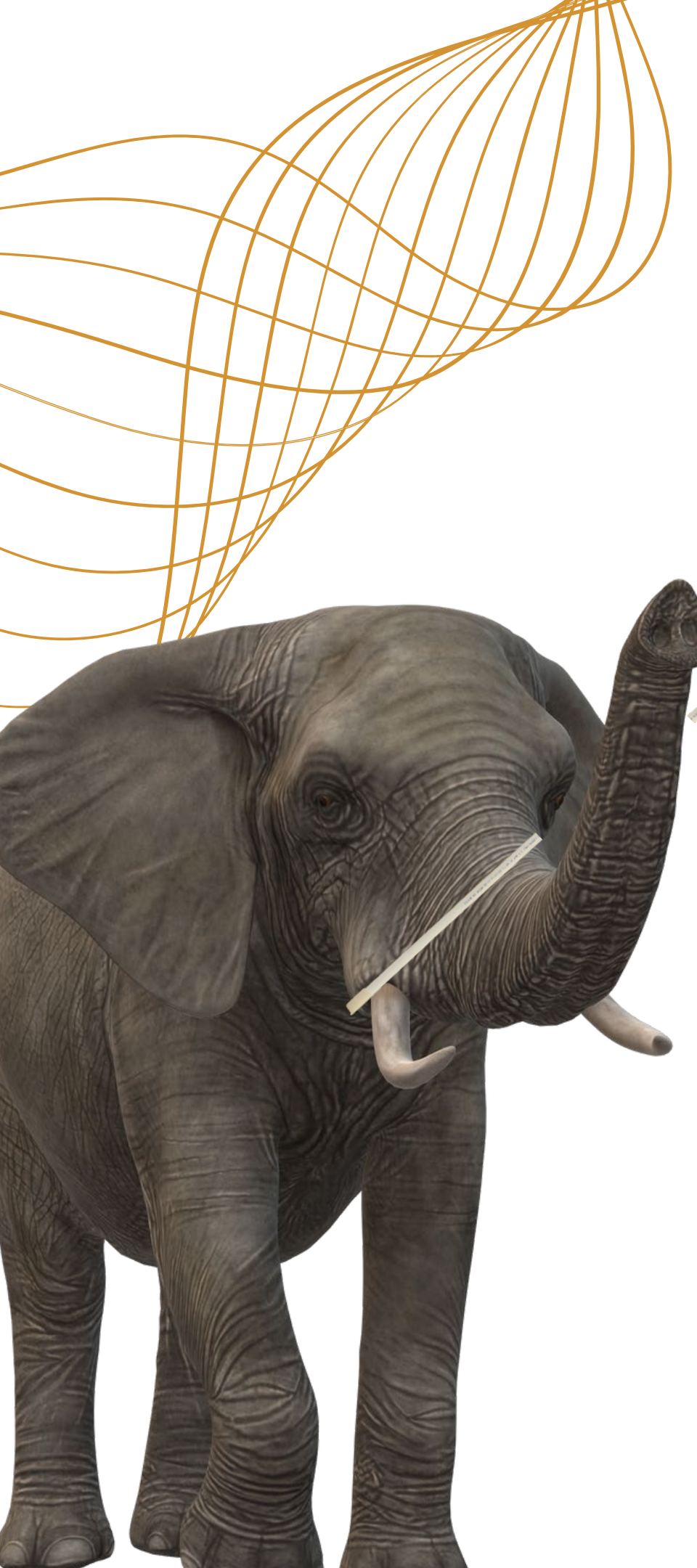
- AI is a tool, not a crutch. Just like any tool, its value depends on how you use it. If you skip the research and strategy, you're left with a hollow plan.

Protect Your Data

- Don't upload sensitive customer or confidential business information unnecessarily. Remove names, emails, phone numbers and other identifying information when it isn't needed for the analysis.

Verify the Output

- AI can make incorrect assumptions, miss context and reinforce bias. Review recommendations against your actual business knowledge and data.



THE BIGGEST AI MISTAKE SMALL BUSINESSES MAKE

They ask AI to create marketing before defining:

- Target Market
- Message
- Offer
- Positioning

AI amplifies strategy. It cannot replace it.



HOW AI CAN POWER-UP YOUR MARKETING

1. Audience Insights & Segmentation

- Customer Segmentation
- Buyer Personas
- Predictive Analytics/Behaviors

2. Content Creation

- Blog Posts and Articles
- Social Media Content
- Email Marketing
- Ad Copy
- Product Descriptions

3. Customer Engagement and Personalization

- Personalized Recommendations
- Dynamic Website Content
- Survey and Feedback Requests

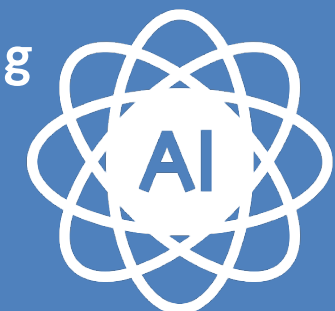
4. Search Engine Optimization (SEO)

- Keyword Research
- On-Page SEO Optimization
- Content Refreshing
- Local SEO

5. Data Driven Insights and Analytics

- Trend Analysis
- Campaign Performance Analysis
- Customer Sentiment Analysis
- Competitive Analysis

This slide shows just how many areas AI can help in Marketing. Today we're going to focus on how to use AI strategically for marketing planning using YOUR information.



Prompt

Research current 2026 wedding trends that could affect how a Midwest wedding venue markets itself. Identify three trends worth exploring. Use current, credible sources and cite them. Explain why each trend could matter specifically to a Midwest venue.

Chat GPT

1. Weddings are becoming more personalized and experience-driven

Gen Z is now a major force in the wedding market. The Knot's 2026 Real Weddings Study reports that Gen Z represents 41% of the wedding market and describes a movement away from "cookie-cutter" weddings toward celebrations built around **authenticity, intention, and personal expression**.

Zola's 2026 survey of more than 11,500 couples found something similar. Couples are incorporating personalized food, interactive experiences, vintage elements, unusual entertainment, signature drinks and mocktails, and traditions chosen because they mean something to the couple rather than simply because they're expected.

Why this matters to a Midwest venue: A venue shouldn't market only the building, tables and number of chairs. It should show **what couples can do with the space**.

Instead of:

"Beautiful event space accommodating up to 250 guests."

Marketing could emphasize:

"Make the space your own."

Then show dramatically different real weddings in the same venue: modern, romantic, vintage, casual, upscale, cultural, outdoor, etc. For a Midwest venue, flexibility can become a competitive advantage, particularly if the venue has indoor and outdoor spaces, few décor restrictions, flexible catering or room for unconventional activities.

<https://chatgpt.com/share/6a9b185b-b724-83ea-85d2-45aa9ec6dbb1>

YOUR BUSINESS INFORMATION

1. Give it business context

- Products and services
- Mission, values and positioning
- Business plan
- Website and marketing materials

2. Define your brand

- Voice and personality
- Value proposition
- Key messages
- What makes you different

3. Give it structure

- Goals
- Target markets
- Priorities
- Constraints such as budget, geography and capacity

DATA TYPES

SEO Project Intake Form

Our Services
• Websites
• SEO
• Design

Contact Us
712-269-9977
www.justsuecreative.com

Company:
The Bees Kneez

Business Value Proposition

What problem does your target market face that you solve? Describe in detail the specific issue or need your target audience has and how your products or services provide a solution.

Our target market is not only delicious but also increasingly aware of products that are healthy. Honey, in part, provides many benefits, and...

How do you address this problem? Explain the methods, products, or services you utilize to solve your target market's problem. Be specific about the features or aspects of your offerings that meet your customer's needs.

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Prompt

Using the attached detailed information about my Honey Business called Bees Kneez, create a tagline that highlights our strengths and personality to help focus in on our ideal target markets.

Chat GPT

Here are a few tagline suggestions that highlight *Bees Kneez's* core values and unique approach to sustainable honey production and education:

1. "Pure Honey, Purely Local – Delivered Sustainably, Every Time"
2. "Fresh Honey, Close to Home – Sustainably Harvested, Naturally Pure"
3. "From Hive to Home, Sustainably Delivered by Bike"
4. "Nurturing Nature, One Drop of Honey at a Time"
5. "Sustainably Sweet – Honey as Nature Intended"

Each tagline brings out the eco-friendly, local, and health-conscious aspects that define your brand and resonate well with eco-conscious customers, aspiring beekeepers, and health-focused consumers. Let me know if any of these resonate or if you'd like to refine them further!

<https://chatgpt.com/share/67227711-5120-8002-bff5-50d0240ad11f>

CUSTOMER AND SALES DATA

DATA TYPES

1. Where is this Data

- CRM (Customer Relationship Management) , Square, Shopify Wix, Mailchimp, Spreadsheets, POS records appointment software customer lists

2. Understand Customer Types and Preferences

- Analyze demographics, purchase history, and engagement levels
- Identify key customer segments for targeted messaging

3. Refine Marketing Messages

- Tailor content based on common customer questions and interests
- Highlight specific products or services relevant to each group

4. Personalize Campaigns and Promotions

- Offer targeted discounts or promotions based on purchase history
- Send personalized recommendations to boost customer engagement

You do not need names, email addresses or phone numbers for this analysis. Remove these for security and privacy

Prompt

Attached is basic information from my customer list for The Beez Kneez. analyze this and 1. provide the 5 top take aways from this data and then proceed to give me an outline of a marketing plan that includes key messages and seasonality suggestions

Chat GPT

The data provides insights into customer behavior and preferences for The Beez Kneez. Here are the top five takeaways:

1.Customer Purchase Frequency: There's a range in purchase frequency, indicating varying loyalty levels. Some customers make multiple purchases, while others are one-time buyers. This suggests potential for targeted loyalty programs to increase frequency among less frequent buyers.

2.Product Preferences: The most popular items include honey jars (in various sizes), honey gift sets, and urban beekeeping workshops. This split implies a market for both consumable products and educational experiences.

3.Geographic Focus: Customers primarily come from cities like Maplewood, Minneapolis, and Shoreview, indicating a strong local or regional customer base.

4.Spending Tiers: Customer spending varies, with some customers spending significantly on bundled products or multiple items. Identifying high-spend customers could allow for premium offerings or targeted promotions.

5.Seasonal Purchasing Trends: Purchases occur across various months, with some clustering in specific months like May, July, and August, possibly influenced by seasonal demand or product

EMAIL AND SOCIAL MEDIA INSIGHTS

DATA TYPES

1. Use Email Engagement Metrics

- Track open rates, click-through rates, and engagement to understand customer interests
- Identify popular content to guide future email topics and timing

2. Leverage Social Media Performance

- Analyze top-performing posts and audience engagement patterns
- Focus on posts with high shares, comments, and reactions to identify popular themes

3. Refine Campaign Timing with AI

- Optimize email send times and social media posting schedules based on past performance
- Increase reach and engagement by posting when audiences are most active

4 Tailor Messages with Data-Driven Insights

- Use engagement data to personalize messaging and topics
- Create content that resonates more by aligning with proven audience interests



Prompt

Analyze Facebook insight data and identify common themes or topics that received high engagement. Suggest a calendar of posts and topics that would better match up with the insights and leverage our social media presence

Chat GPT

The analysis of Facebook insights for Bee's Kneez revealed several post themes with strong engagement:

1.Fun Bee Facts – Posts sharing interesting or quirky facts about bees generated the highest engagement rate, averaging around 13.3%. Examples include posts about bees' ability to recognize faces and their unique communication through the "waggle dance."

2.Sales & Events – Promotional posts, particularly around flash sales or exclusive holiday offers, attracted significant attention with an average engagement rate of 12.1%. A "20% off on honey jars" post, for instance, was among the highest performers.

3.Honey Health Facts – Content discussing the health benefits of honey also performed well, with an engagement rate of 11.6%. Posts focusing on honey as a natural energy source and its immune-boosting properties were especially popular.

4.Bee Education – Informative posts about the lifecycle of bees or the ecological benefits of beekeeping ranked just below, with an average engagement rate of 11.4%.

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WEBSITE DATA

DATA TYPES

1. Understand Visitor Behavior with Google Analytics

- Track traffic sources, landing pages, engaged sessions, conversions and key actions and average engagement time

2. Gain Search Insights with Google Search Console

- Analyze search queries to understand what users are looking for on your site
- Find keywords that bring in traffic and use them to guide content updates

3. Optimize for Local Visibility

- Use search data to identify local search terms and adjust content accordingly
- Boost local SEO by focusing on location-based keywords

4. Refine SEO and Content Strategy with Data

- Adjust content based on visitor preferences and search trends
- Use insights to create content that aligns with audience interests and search intent



Prompt

Using the attached Google Search Console, Google Analytics and business information, identify the strongest opportunities to increase qualified organic traffic. Separate your recommendations into:

1. What the data clearly supports
2. Opportunities worth testing

The data points to a fairly clear SEO story for Bees Kneez: **organic search is already a strong, qualified acquisition channel**, so the biggest opportunity is not simply “get more traffic.” It is to expand visibility around the non-branded searches that are already close to stronger rankings and connect those searches to pages that demonstrate meaningful engagement and business actions.

1. What the data clearly supports

Local honey and delivery should remain the highest SEO priority

This is the strongest combination of search demand, rankings and website behavior.

Search Console shows:

“**local honey minneapolis**”: 30,200 impressions, position **5.2**, 1,480 clicks

“**minneapolis honey delivery**”: 15,400 impressions, position **6.4**, 910 clicks

“**raw honey minneapolis**”: 17,400 impressions, position **7.1**, 780 clicks

/local-honey-delivery: 78,200 impressions, 3,160 clicks, position **7.1**

And GA4 shows /local-honey-delivery has:

12,760 views

138 seconds average engagement

1,125 key events

That makes this more than a traffic opportunity. Visitors reaching this content appear to be taking meaningful actions.

<https://chatgpt.com/share/6a9b2410-eda0-83ea-8d32-5610d269cead>

TARGET MARKETS

1. Define Your Ideal Customer

- Consider demographics: age, location, income, job title, and more
- Explore psychographics: interests, lifestyle, values, and purchasing motivations

2. Segment Your Audience

- Group customers by shared traits or needs to tailor marketing messages
- Create distinct audience segments for more effective outreach

3. Research Market Trends and Competitors

- Analyze industry trends and competitor approaches to see where you can stand out
- Identify gaps in the market or underserved customer needs

SETTING UP YOUR MARKETING STRATEGY

Use AI to Help Define Your Target Market

For Established Businesses:

- Analyze existing customer data to create detailed buyer personas
- Use AI-driven insights from CRM, website analytics, and purchase history to improve segmentation

For Startups:

- Begin by defining an initial target market and gathering preliminary data
- Use AI tools to research competitors and analyze general industry trends to inform audience segmentation

Prompt:

Research the potential target markets for a new brewery in Oskaloosa, Iowa. Use current demographic, economic and community information from credible sources. Consider Oskaloosa as well as the realistic surrounding trade area. Identify up to five potential customer segments worth exploring. For each segment, explain what evidence supports it, what need or behavior makes it relevant, and what additional information we should validate before choosing it as a target market. Cite your sources.

Potential Target Markets for an Oskaloosa Brewery

Strongest audiences to explore

Local adults 25–55 looking for a social gathering place

Working professionals and skilled-trade employees for after-work, group and company occasions

William Penn visitors, alumni and sports audiences

Regional destination customers from communities such as Pella, Ottumwa and Knoxville

Community-event, outdoor and family-social groups

Key finding:

The opportunity is likely **not just “craft beer drinkers.”** The stronger positioning is around the **experience, occasion and reason people choose to gather there.**

Before choosing a target market: Validate local going-out habits, spending, preferred food/drink options, event demand, drive distance and what would make customers choose the new brewery over existing options.

[See Full AI result with supporting evidence and sources](https://chatgpt.com/share/6a9b26cf-f768-83ea-9ea1-3d144f4d1637)

<https://chatgpt.com/share/6a9b26cf-f768-83ea-9ea1-3d144f4d1637>

CREATING YOUR MESSAGE

SETTING UP YOUR MARKETING STRATEGY

1. Identify the Unique Problem for Each Market

- Pinpoint the specific pain point or challenge faced by each target audience segment. (Need, Desire, Problem or Motivation)

2. Define How Your Solution Meets Their Needs

- Clearly articulate how your product or service solves the unique problem for each group.

3. Tailor the Message to Each Market's Priorities

- Highlight the benefits that matter most to each segment, such as cost savings, convenience, or expertise.

4. Differentiate Your Solution for Each Audience

- Showcase what makes you the best option, tailored to each group's expectations and preferences

Prompt:

Based on the target-market research, develop a preliminary value proposition for each potential market. Clearly separate what is supported by the research from assumptions about the brewery that still need to be defined. Do not invent features, services or competitive advantages that we have not provided.

CHAT GPT

Preliminary Messaging Direction

The target-market research points to one strong theme:

The brewery is not simply selling beer. It is creating another reason for people to gather, connect and spend time in Oskaloosa.

Messaging opportunities by audience:

Local adults: A place to meet, connect and enjoy time together.

Working adults: After-work connection, relaxation and informal gatherings.

William Penn community: A gathering place around games, visits, events and celebrations.

Regional visitors: Part of an Oskaloosa day or night out.

Community/event customers: A place to extend the outing, activity or celebration.

Potential umbrella message:

Come together in Oskaloosa.

<https://chatgpt.com/share/6a9b2a8e-7c44-83ea-96f3-5d4067bc349c>



[Link](#)

MARKETING PLAN WORKSHEET



It to gather key information that will shape your
ll in each question to provide a foundation for AI to
build a tailored strategy.

1. Business Goals and Objectives

- What are the primary goals for this marketing plan? (e.g., increase brand awareness, boost sales, grow customer loyalty)
- Are there specific metrics you want to achieve? (e.g., % increase in traffic, lead generation, engagement rate)

2. Audience Segmentation

- Who are your primary customer segments? (list demographics, behaviors, and needs)
- What are the main challenges or pain points for each audience segment?
- What platforms or channels does each segment engage with most frequently? (e.g., social media, email, website)

3. Brand Message and Value Proposition

- What problem does your product or service solve for each target audience?
- Why should customers choose you over competitors? (list any unique qualities, expertise, or benefits)

- Describe the brand tone or voice you'd like to convey. (e.g., friendly, professional, informative)

4. Key Marketing Channels and Tactics

- Which channels do you plan to use? (select from options like social media, email, PPC, SEO, etc.)
- What specific tactics do you envision for each channel? (e.g., influencer partnerships on social media, automated follow-ups in email)

5. Budget and Resource Allocation

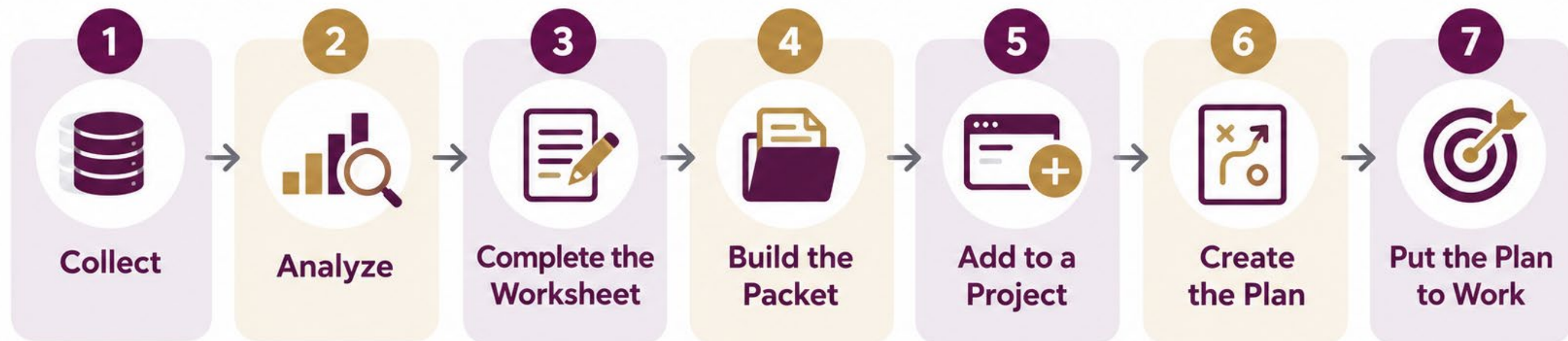
- What is the total budget for this plan? (include a breakdown if possible)
- Are there any specific areas where you'd like to allocate more resources? (e.g., content creation, paid ads)

6. Seasonal and Time-Based Considerations

- Are there seasonal trends or peak times in your industry?
- What holidays, events, or special dates could be used for themed campaigns?
- Any specific promotions or launches planned for the year? (e.g., product releases, holiday sales)

PUTTING IT ALL TOGETHER

From Data to Marketing Plan



Use business data, AI analysis, your completed worksheet, and supporting materials to build a practical, actionable marketing plan.

MARKETING PLAN PACKET

- Business information
- CRM/customer data
- Email data
- Social media data
- Website/analytics data
- Data analysis and insights

- Target markets
- Messaging/value proposition
- **Completed Marketing Plan Worksheet**
- Supporting business and marketing materials

USE THIS PROMPT!



Using my completed Marketing Plan Preparation Worksheet and the supporting business and customer data I've provided, develop a practical marketing plan for my business.

Clearly distinguish between recommendations supported by my information and assumptions that still need validation.

Include:

Priority marketing goals

Target markets

Value proposition/key message for each market

Recommended marketing channels and tactics

Budget and resource allocation

Metrics to measure success

Quarterly priorities based on seasonality and business goals



Prioritize the recommendations. Do not recommend more activities than the stated budget, time and resources can realistically support.

Identify any important information that is missing before making recommendations that depend on it.

Marketing Plan Preparation Worksheet: [Attach or paste completed worksheet here]

NOW PUT THE PLAN TO WORK



Once AI understands your business, target markets, message and strategy, use that foundation to create:

- Annual or quarterly marketing calendars
- 30-day content calendars
- Social media posts and campaigns
- Email campaigns and newsletters
- Blog and SEO content plans
- Paid ad campaigns and copy
- Promotional campaigns
- Landing page and website content
- Customer follow-up and retention campaigns
- Campaign measurement and reporting

You don't start over. Keep using the same strategy and business context to guide each next step.



Complete the Session Survey

1. **Open** the event app.
2. **Find** this workshop session.
3. **Tap** the session title.
4. **Scroll down** to the survey.
5. **Fill out** and submit your feedback.

Share your perspective to shape future event topics and speaker selections.

ABOUT ME



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