



**Entrepreneur
& Family**
BUSINESS COUNCIL

Brand & Marketing



Patty Rioux

ODEA

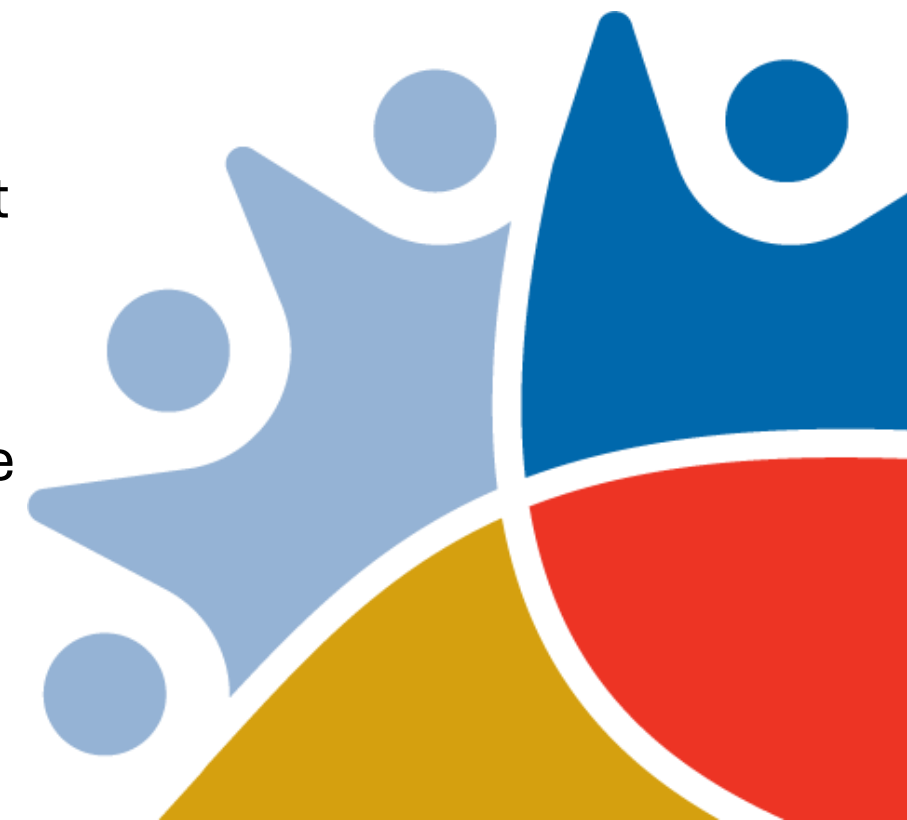
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Presenter Intro

For almost 30 years, Patty has been a marketing strategist and writer in a variety of roles. With experience in both agency and client settings, she has the perspective of both sides of the desk.

Patty has worked with a wide range of clients and teams from entrepreneurial start-ups to multi-national corporations spanning a variety of industries including steel, chemical, tech, distribution, financial and professional services, and B2C products.

She has the ability to not only focus on the core of a business but recognize what makes it exceptional. Her strategic approach teaches clients how to communicate their unique qualities while ultimately driving growth and sales.



Marketing in Entrepreneurial and Family Businesses

- Let's talk brand
- Let's talk marketing
- Marketing planning
- Marketing strategies and tactics
- Analysis and metrics
- Group project – POSTS plan



What Is a Brand?

“The set of expectations, memories, stories, and relationships that, taken together, account for a consumer’s decision to choose one product or service over another.” – Seth Godin

What a brand **is not**:

- ≠ Your logo
- ≠ Your website
- ≠ Your tagline

It’s how people feel and what they expect when they engage with you.



Everything your audience *thinks* they know about you and what you offer.

FACTUAL

**EFBC supports over 100
Chicagoland businesses**

EMOTIONAL

**The members seem to
be my “people”**

Even if you don't purposefully
create your brand,
you still have one.

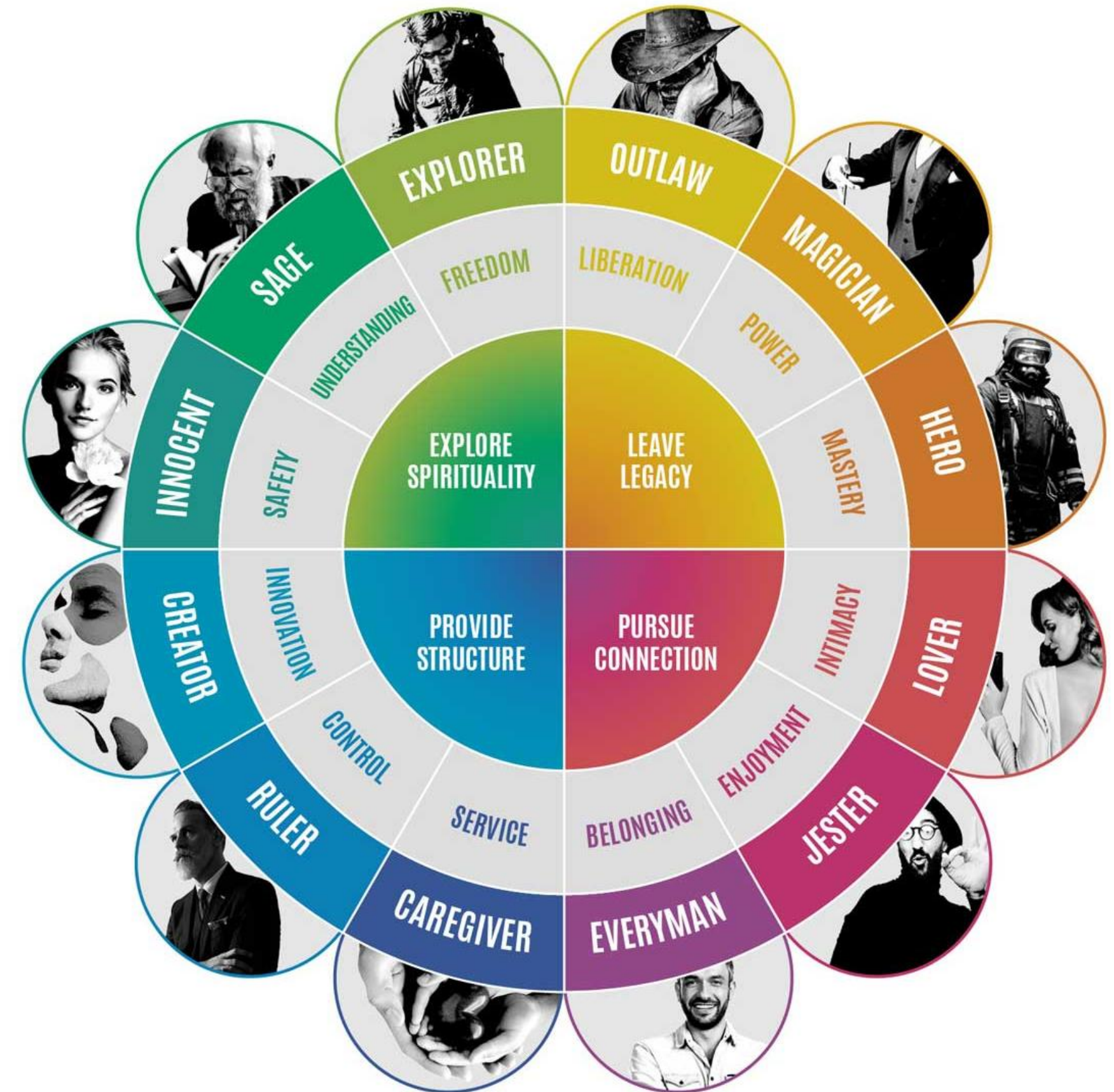
*“I need to connect you with Liz at EFBC.
EFBC is...”*

What Makes a Strong Brand?



Brand Archetypes

- Rooted in the psychology of Dr. Carl Jung, archetypes help brands tap into universal human truths
- They guide how people see, feel, and connect with your business
- Choosing an archetype creates a clear, consistent brand voice and personality
- Brands with recognizable personalities build deeper trust and loyalty
- Archetypes also inspire internal teams by aligning values, mission, and mindset around a shared purpose



Visual Components



COLOR PALETTE



IMAGE APPROACH

ICONOGRAPHY



Verbal Components

TAG

TONE

VOICE

WORDS



Verbal Components

**POSITIONING
STATEMENT**

PILLARS

**POWER
STATEMENTS**

RALLY CRY



Value of a Brand

Kantar BrandZ Most Valuable Global Brands 2024

Brand value represents 32% of company value for the Top 100 Most Valuable Global Brands. Brand value is determined by three key factors:

- Meaningful Difference, predisposing more people to buy and pay more;
- Presence, optimizing brand visibility and salience;
- Future Power, enabling brands to expand into new spaces.

Edelman's 2024 Trust Barometer

When consumers **fully trust** a brand, they're more likely to **purchase (63%)**, **advocate (53%)**, and **stay loyal (55%)**.

84% say they must **share values** with a brand to buy it.

Final thought...

**YOUR BRAND DOESN'T MATTER
IF MY LIVED EXPERIENCE
DEVIATES OR DISAPPOINTS**



What is Marketing?



People

Added to the traditional 4Ps.

All the audiences you must reach – prospects and customers, influencers, analysts, media, investors, etc.

Most important and often overlooked – your team. They deliver the experience.

For some of us, our people are the product. And even product firms rely on people at key moments – sales, support, etc.

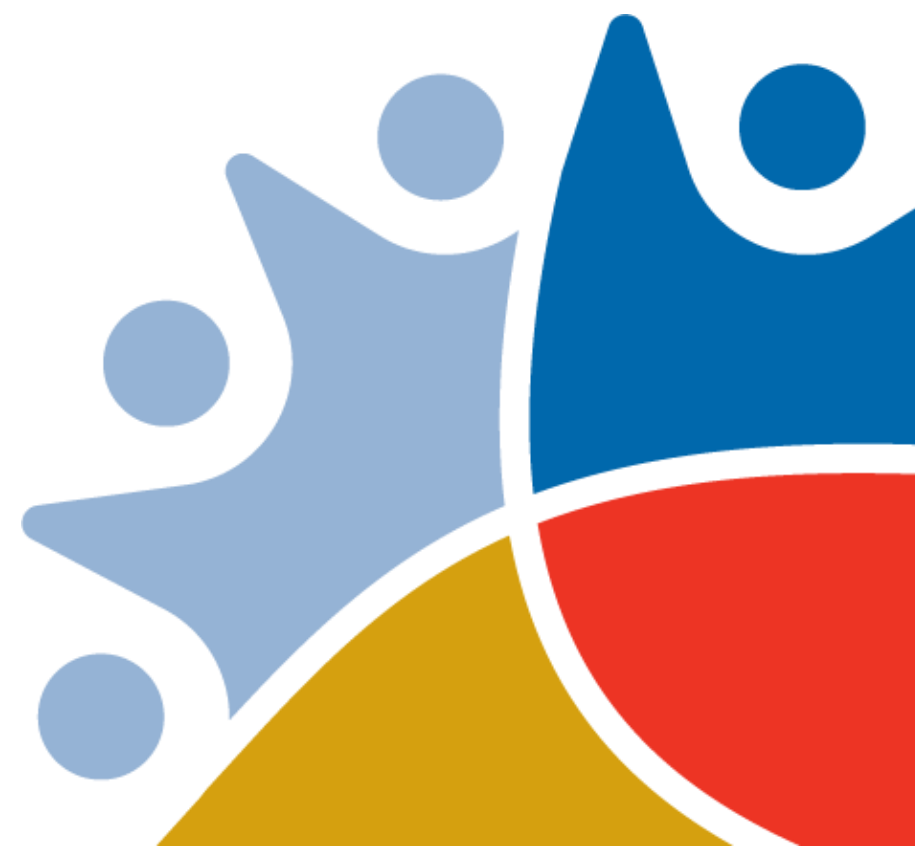


Product

All decisions surrounding the offering of you service(s) or product(s) that drive all other decisions for Ps across marketing

Tangible & Intangible
Features & Design
Quality & Performance
Packaging
Warranty & Guarantee
Support & Service

Not just specs – the whole customer experience (onboarding, support, guarantees) can create preference and differentiation



Price

All decisions surrounding the monetary value at which a product or service is offered to customers

List Price & Discounts

Tiers & Subscriptions

Terms

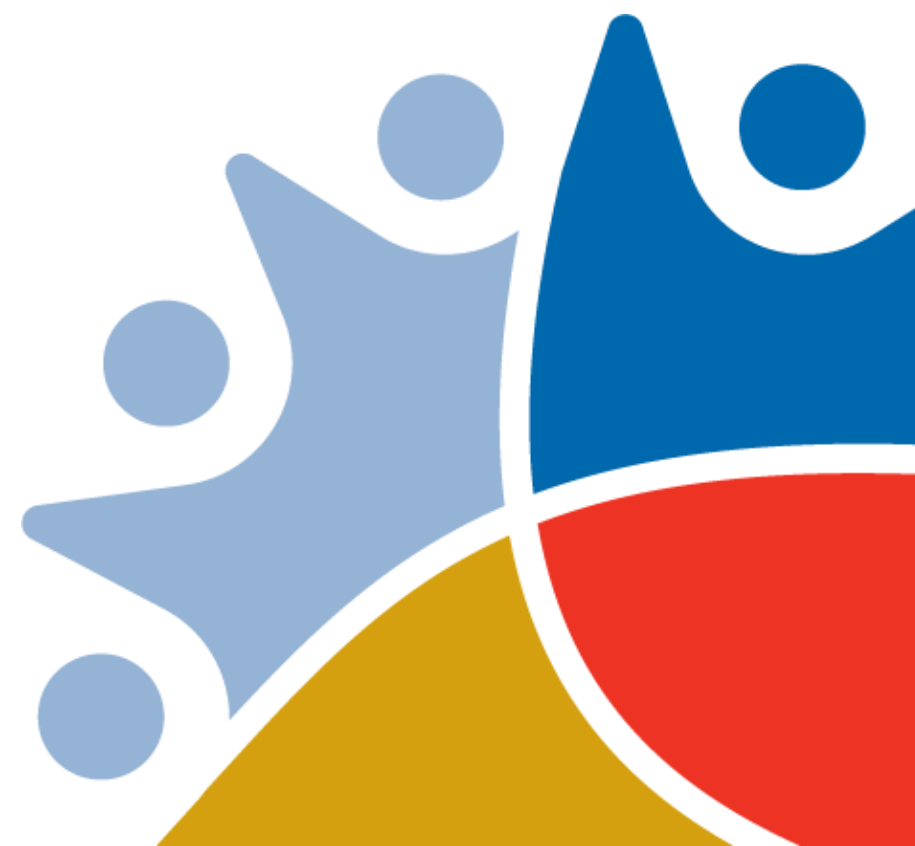
Pricing Strategies –

Cost-based

Value-based

Dynamic pricing or Indexed

Heavy psychology - \$9.99



Place

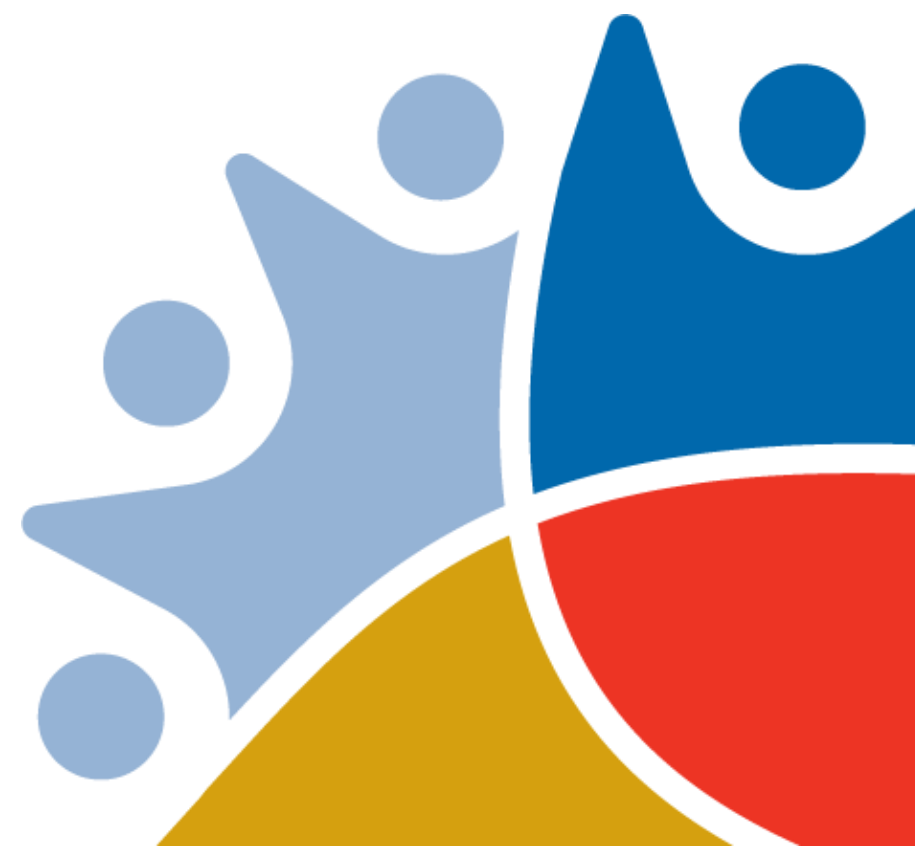
All decisions surrounding how a product or service is made available to customers, covering the distribution channels and locations where it can be bought.

Not only where you sell your service(s) or product(s) but can also include where customers discover your service(s) or product(s).

Direct & Distribution

Physical Locations & eCommerce

Logistics & Supply Chain



Promotion

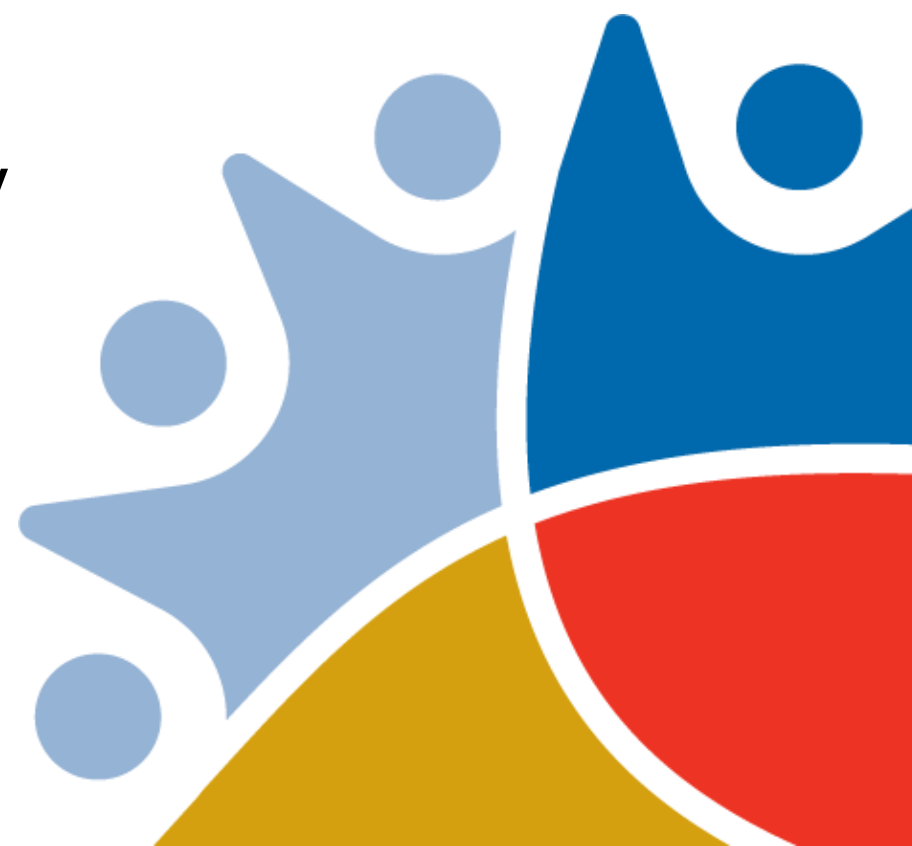
All decisions surrounding how to create awareness, generate interest, and ultimately drive sales

Communicating your positioning statement and differentiators to potential customers

What is most often thought of when we talk about marketing

Resonance – Distinction - Consistency

Paid – Earned – Owned



Promotion Planning



Buyer Personas

Research-based profiles of buyers
(not stereotypes)

Demographics and psychographics

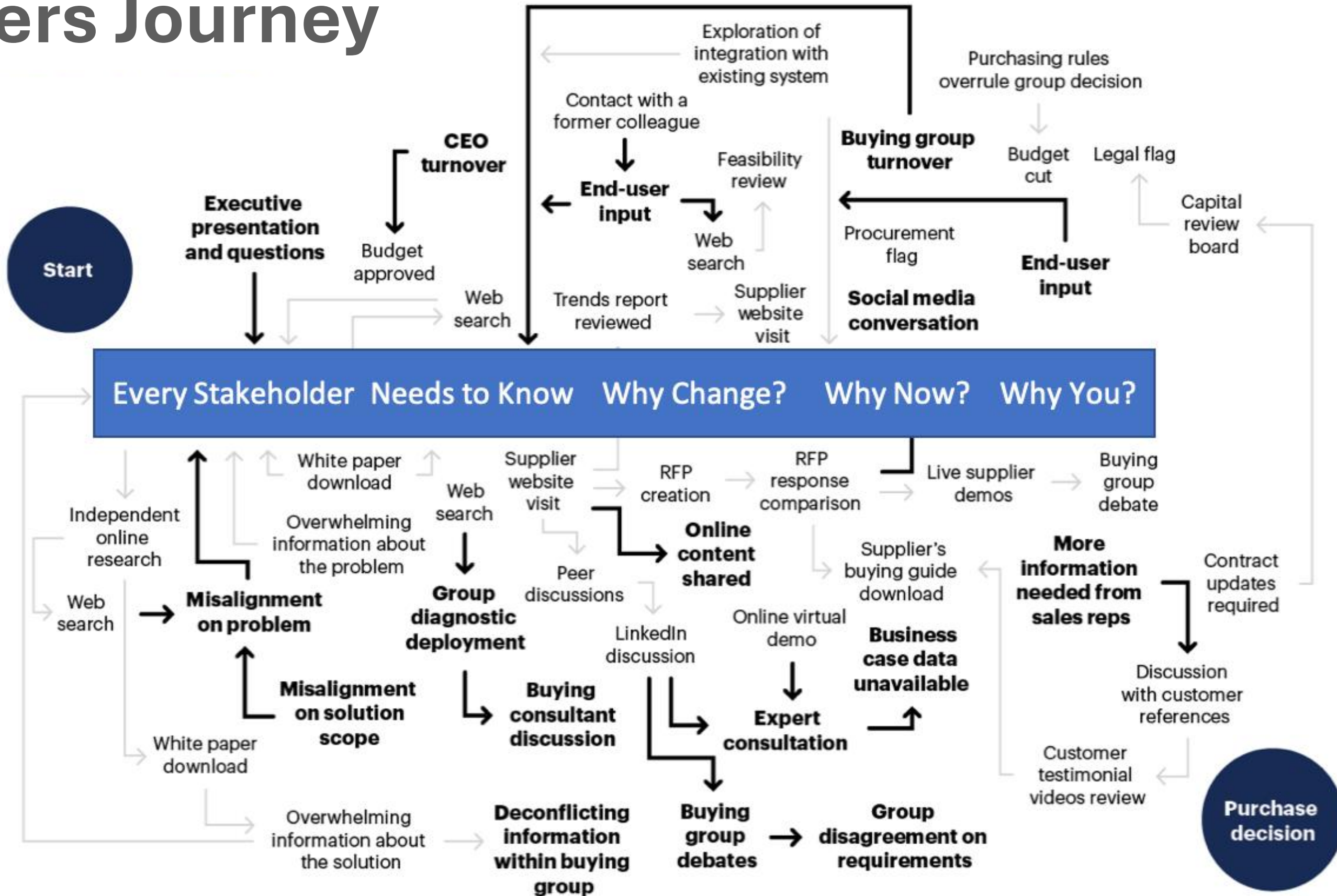
Built from data + observation + interviews

Use to align product, content, sales, and
channels

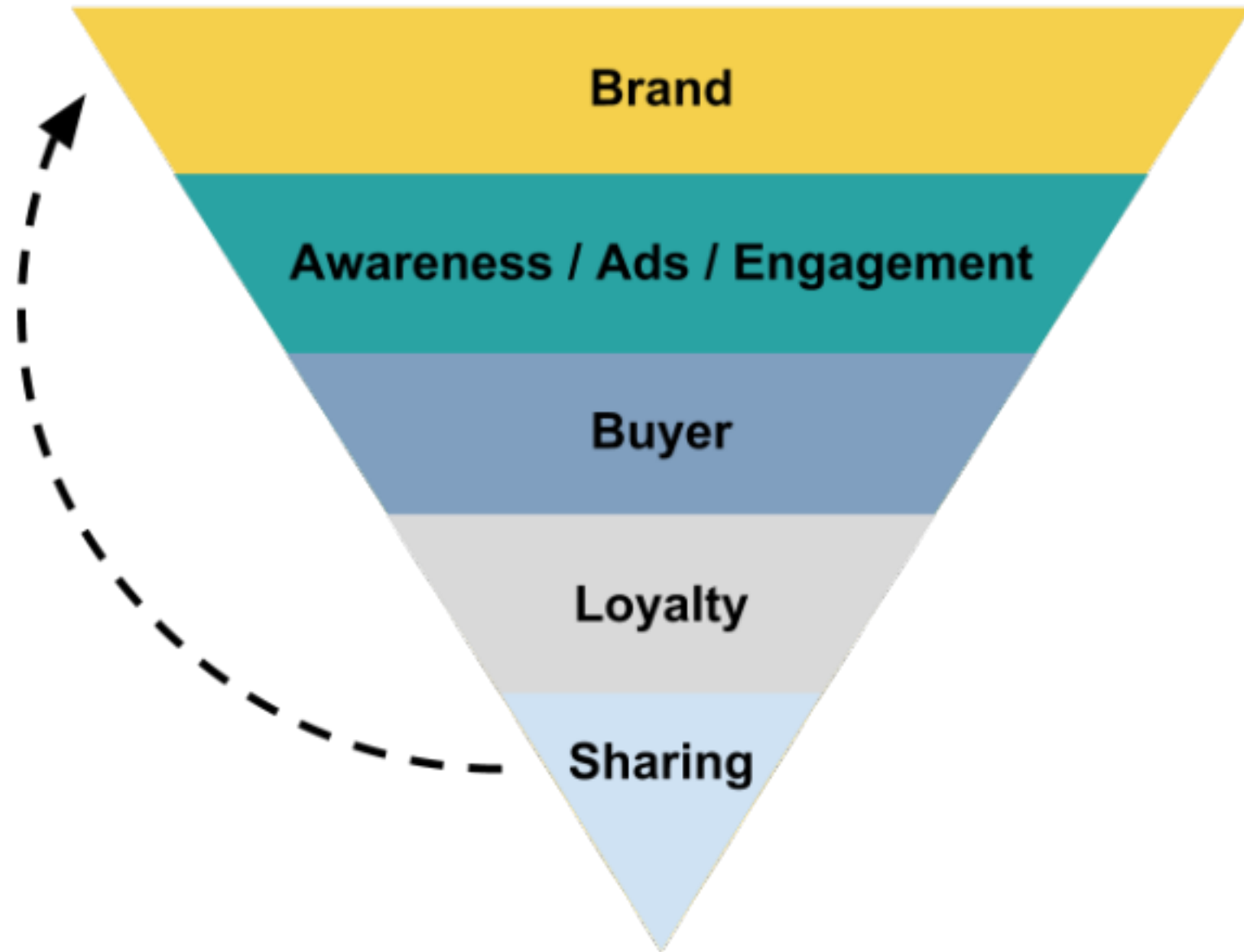
NOTE: B2B deal with buying committees
averaging 13+ members



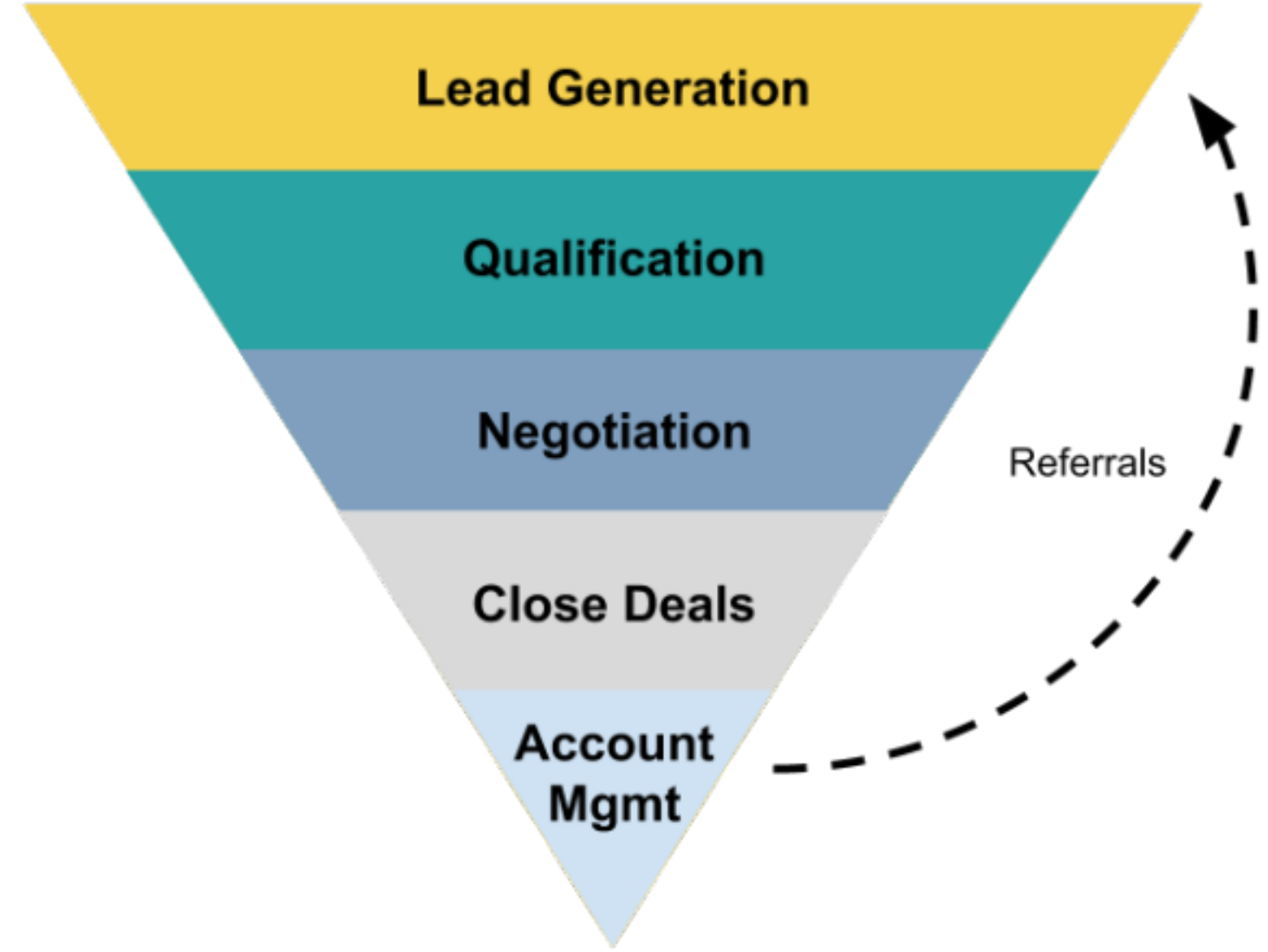
Buyers Journey



Marketing Funnel



Sales Funnel





Tech Stack

Web – CMS, Analytics, SEO, Ad Tech, Tracking

Lead Management – Biz Intelligence, CRM

Delivery - Marketing Automation, Email System

Social – Platforms, Management

+ Lots More

POSTS

Borrowed from Forrester Research

People

Opportunity

Strategies + Tactics

Technology

Success



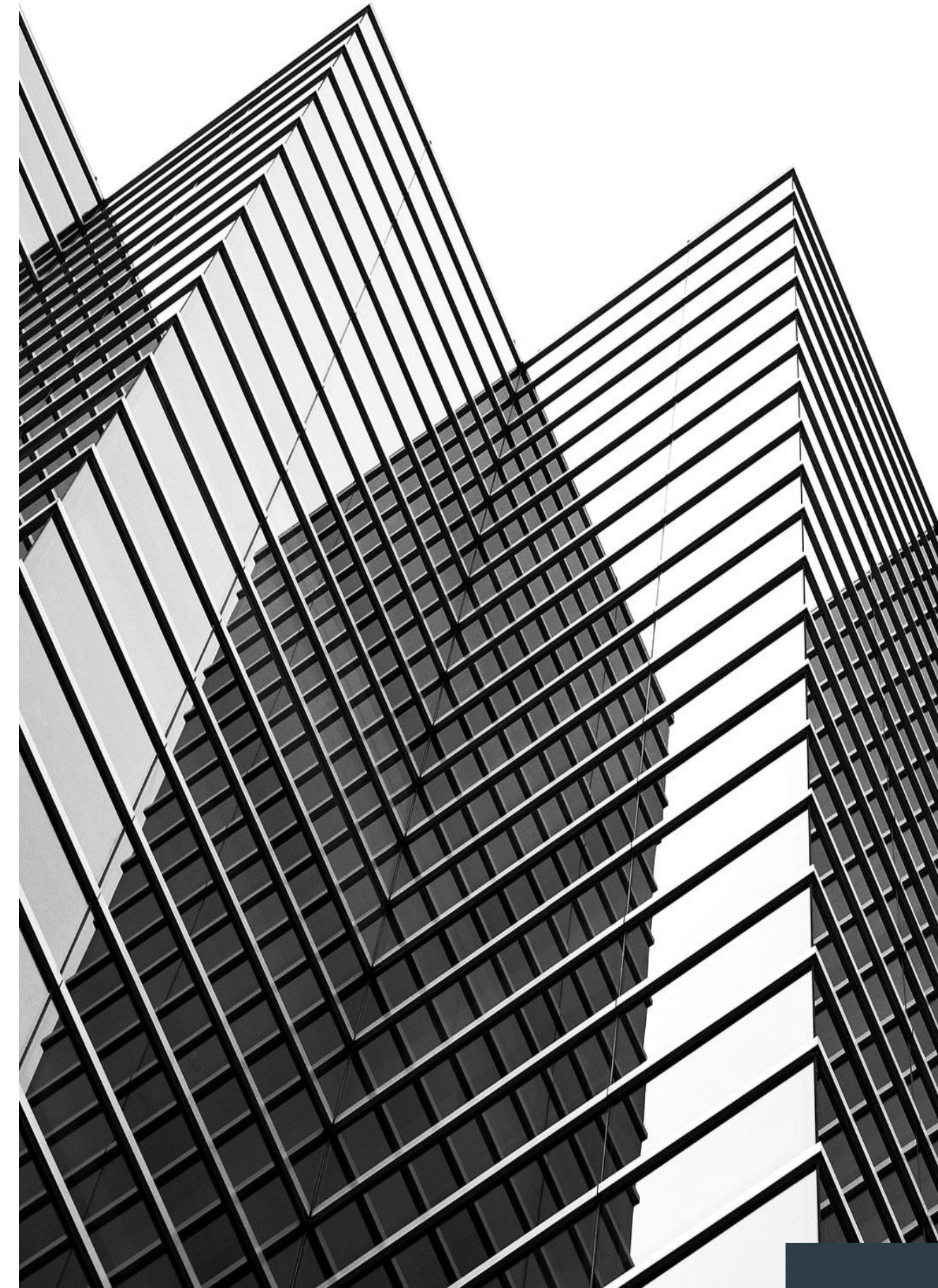
POSTS

Group Exercise:

How should EFBC market our new Business Curriculum?

Group Exercise:

Audience Issue / Opp



Tactics

Content marketing – written, audio, visual, video

Advertising

Media relations

Social media marketing

SEO/AGO/PPC

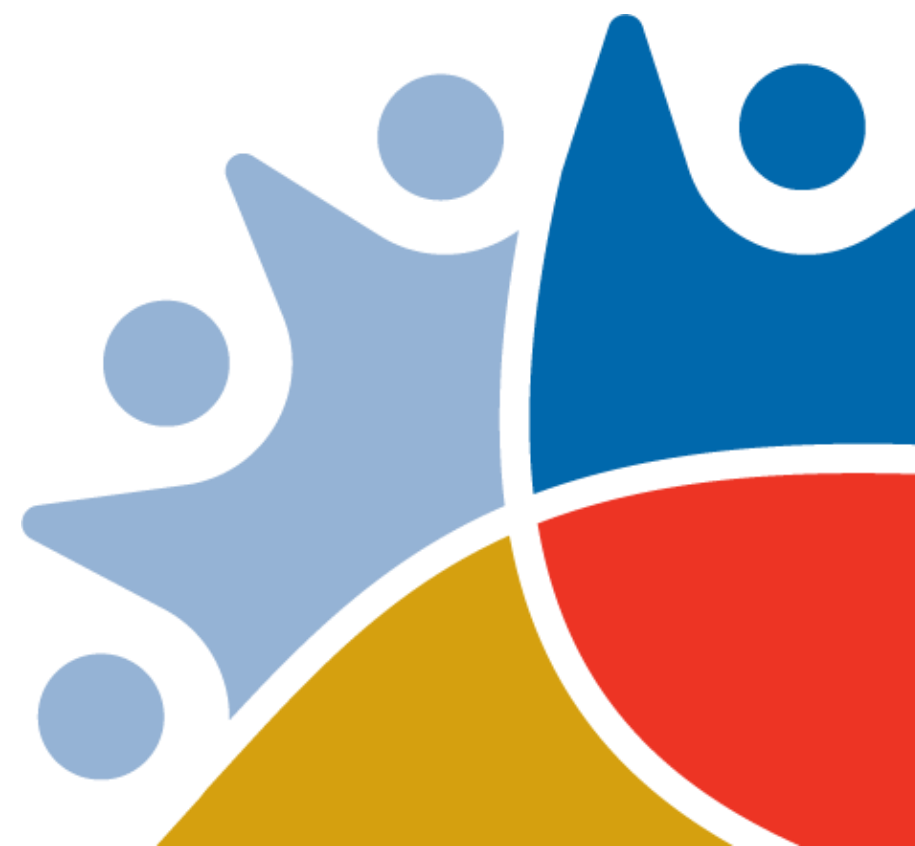
Email

Direct mail

Events

Sales support

Other



RESONANCE
DISTINCTIVENESS
CONSISTENCY

Three Last Messages

**LIVED
EXPERIENCE
ALWAYS WINS**

**CONTENT
REMAINS
KING**

**AVOID BEIGE
BE
BOLD**

Thank You



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