# INTELLECTUAL OUTPUT 1: ROOTS Training Toolkit

This document contains a set of tools to help cultural heritage tourism enterprises to develop and present their products and services to the market place.

# Contents

# 1. Introduction

The ROOTs Training Toolkit has been designed to help business advisors and intermediaries (e.g. trainers, business support advisors, business coaches and consultants) to support small and medium sized enterprises (SMEs) to identify and exploit opportunities in cultural heritage tourism.

The Training Toolkit forms part of the Erasmus+ project, Recognising Cultural Heritage Opportunities for Tourism SMEs. The toolkit is supported by four Handbooks which have also been used to inform the development of this Training Toolkit:

- How to Implement Cultural and Heritage Tourism
- Cultural Heritage Tourism Manual
- How to Promote Cultural Heritage Tourism
- How to build local cultural and natural heritage communities

The Training Toolkit comprises:
- A set of exercises for completion by cultural heritage tourism SMEs
- A training delivery plan to enable business advisors to train and support cultural heritage tourism SMEs.

The toolkit covers the business planning process, how to develop and present a cultural heritage tourism 'story' and product and service offering to the market. The Training Toolkit is a practical resource that can also be adapted for use with an array of tourism-based enterprises.

# 2. Ten Myths About Business Plans

Here are ten common myths about business plans:

- All business plans are in writing
- A good business plans need to be long and detailed
- Business plans are primarily used to raise finance
- Writing a business plan is difficult
- It can take months to write a business plan
- Business plans are for accountants and bankers, not business owners
- My business is too small to need a business plan
- My business is different and does not lend itself to having a business plan
- I can pay a consultant to write my business plan
- I know what I am doing and where I am going so, I do not need a business plan

WRONG! WRONG! WRONG! - all enterprises need a current, relevant, easy-to-understand, fit-for-purpose business plan. A business plan is a description of the business covering topics such as objectives, strategies, sales, marketing and financial forecasts. An effective business plan helps to:

- Clarify business ideas
- Identify potential problems
- Set out goals and plans to achieve objectives
- Describe the resources needed to achieve the planned objectives
- Measure progress and continuous growth and improvements in performance.

The planning process which sits behind all effective business plans is arguably more important than the plan itself. The precise layout and contents of your plan whilst important, the planning and thought process resulting in the drafting of the plan is far more important and challenging. Business plans are inherently strategic; an effective business plan shows how the enterprise will get from point A to Point B resulting in profits, revenues and achievements.

Exercises 1 to 8 in the Training Toolkit have been designed to help enterprises to develop a One-Page Business Plan. Exercises 1 – 4 describe how to undertake an overall analysis of the enterprise leading to the drafting of a vision statement and refining the enterprise's Unique Selling Proposition. Exercises 5 – 8 focus on helping enterprises to define their objectives, plans and strategies culminating in a One-Page Business Plan.

# 3. Finding and Telling the Story

Unlike many other enterprises involved in making, marketing and selling a product or service, cultural heritage tourism SMEs need to engage its customers and involve them in an experience – they need to tell and share a compelling story.

In a congested and competitive market place where cultural heritage tourism enterprises must compete for visitors and customers, standing out from other enterprises is essential. This involves defining the enterprise's unique selling proposition (USP). It also involves being able to develop and tell a unique and compelling story to engage potential visitors and customers.

Exercises 9 – 12 have been designed to help enterprises to explore and develop their 'story'. All memorable stories have a beginning, middle and end. The most compelling stories are engaging and help to bring the cultural heritage tourism experience to life. Exercise 9 invites enterprises to 'step into their customer's shoes. Exercises 10 to 12 help them to decide how to tell and share the story.

**Here are ten top tips to bring stories to life:**

- An enterprise's cultural heritage tourism story should be at the heart of its visitor/customer experience – it should be told in the initial marketing messages (leaflets and advertising), reflected on the website and in the live, on-site experience.
- Enterprises MUST use a range of communication methods before, during and after the on-site experience as this will keep customers and visitors engaged and interested for longer and potentially triggering second, third and fourth visits.
- Enterprises MUST be interested in its visitors and customers by engaging with them, talking to them, listening to them, sharing ideas and news with them throughout the visitor/customer journey.
- Enterprises MUST have a simple and interesting story and reinforce it wherever possible enabling people to relate to it and to feel part of the experience.
- Enterprises MUST give people something to do, not just something to read. Linking the message to the experience increases learning and enjoyment so make displays interactive and participative not static.
- Enterprises MUST make its story relevant, personal and accessible possibly using people in costume dress to tell the story – appeal to the five senses to evoke feelings and sensations rather than relying on sight or sound.

- Enterprises MUST design attractive displays, leaflets, panels, audio tours, guided walks and audio-visual presentations that are short, interesting and packed with memorable anecdotes and tales.
- Enterprises MUST involve people and encourage group interaction. This can be achieved by asking visitors questions, using their experiences and encouraging them to think for themselves and to explore and to have FUN – enterprises should avoid simply imparting information.
- Enterprises MUST use real things, use real examples, tell real stories and talk about real characters and tales from the people who lived and worked there.
- Enterprises MUST make their experiences exciting, fun and avoid formal, serious displays and talks.

# 4. Marketing and Promotions

Cultural heritage tourism enterprises are in competition with competitors from the world of entertainment who know and understand how to use the power of marketing and the Internet. Every enterprise now needs to understand that it is first and foremost a marketing organisation that just happens to be in the cultural heritage tourism sector. The success of all tourism enterprises starts and ends with understanding and meeting the needs of its customers and visitors.

Having 'stepped in the customer's shoes' hopefully, enterprises will have a stronger understanding of their visitor and customer needs. Now what is required is to help them to raise awareness and to engage them. Marketing and promotions are key and this means understanding the power of social media.

Exercises 13 – 16 are designed to help enterprises to exploit and harness the power of imagery, social media and promotions. Exercise 17 culminates in helping enterprises to plan and implement carefully crafted and constructed social media campaigns to create awareness and to engage potential and actual visitors and customers.

## 5. Exercise 1: Your Enterprise – An Overview

This exercise is designed to help you to think about your cultural heritage enterprise, what makes it successful, where you want to be in five years and what potential ideas and projects you want to develop going forward. Try to complete this exercise with someone outside of your enterprise as it will help to give you a fresh perspective.

| | |
|---|---|
| • **Describe your enterprise in one sentence.**<br><br>• **Where are you going with it?**<br><br>• **What will it look like in five years?** | |
| • **What market need will your enterprise meet?**<br><br>• **What are you in this market/sector?**<br><br>• **What is your passion?** | |
| • **What achievements would you like to celebrate this this year?**<br><br>• **And what about next year?** | |
| • **What has made your enterprise successful to date?**<br><br>• **What will make it successful in the future?** | |
| • **What business ideas and business projects have you to develop your enterprise?**<br><br>• **What is holding you back from implementing them?** | |

# 6. Exercise 2 SWOT Analysis

This exercise is about preparing a SWOT Analysis. SWOT diagrams or matrices are a key part of any business planning or analysis. SWOT stands for **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats.

Strengths and weaknesses are internal factors (i.e. within an organisation) and opportunities and threats are external factors (i.e. external to an organisation). A SWOT analysis typically consists of four boxes, one for each area. They are especially useful when trying to decide whether to embark on a certain venture or strategy by visualising the pros and cons. By clearly outlining all positives and negatives of a project, SWOT analysis makes it easier to decide whether to move forward.

## How to Do a SWOT Analysis

### Step 1: Determine the Objective
Decide on a key project or strategy to analyse and place it at the top of the page.

### Step 2: Create a Grid and Label
Draw a large square and then divide it into four smaller squares. Write the word "Strengths" inside the top left box, "Weaknesses" inside the top right box, "Opportunities" within the bottom left box, and "Threats" inside the bottom right box.

|  | | |
|---|---|---|
| **Internal** | **Strengths:** | **Weaknesses:** |
| **External** | **Opportunities:** | **Threats:** |

**Step 3: Fill in the SWOT Matrix**

Add factors that affect the project to the applicable boxes. Components of a SWOT analysis may be qualitative and anecdotal as well as quantitative and empirical in nature. Factors are typically listed in a bullet form.

**Step 4: Draw conclusions**

Analyse the finished SWOT diagram. Be sure to note if the positive outcomes outweigh the negative. If they do, it may be a good decision to carry out the objective. If they do not, adjustments may need to be made, or else the plan should simply be abandoned

**Example of a SWOT Analysis**

### Strengths
- Providing the best travel deals, even before starting to shop
- Insightful, data-driven research
- Data sets that gather billions of flight and hotel prices
- Informing users about price changes (e.g. when it fits their budget)
- Comparing different options from all airlines
- Saving user data to provide the best service in the future

### Weaknesses
- New in the market, more marketing efforts are needed
- Small team of 10 people (not enough number of "Data Analysts")
- Lack of different language skills; especially German and French
- Mobile app version is not available yet

### Opportunities
- Big amount of time spent looking for flight deals (3.7 hours)
- Current services are not personalized enough
- No big competitor in terms of handling big data properly - untrusted services in the market
- Happy users - positive reviews received in short time period

### Threats
- Not enough funds for strong marketing campaigns
- Usage of local traveling agencies, therefore difficulty of getting the attention of these agencies to use Travelr
- Airlines sending deals directly to their existing customer base
- Difficulty of hiring international talent - visa sponsorships etc.

# 7. Exercise 3: Crafting Your Vision Statement

This exercise will help you to envisage the kind of enterprise you want to be (and do not want to be) in terms of your products and services, customers and your environment.

| Describe three characteristics of your product and/or service: | | Describe three characteristics of what your product and/or service will NOT DO: |
|---|---|---|
| | **What is the product or service?** | |
| Describe three of your BEST current customers target groups or your ideal customer target groups: | | Describe three of your target groups you WOULD NOT be better off serving: |
| | **Who is the customer?** | |
| Describe three characteristics of successful cultural heritage tourism enterprises you admire and would like to emulate: | | Describe three characteristics of other cultural heritage tourism enterprises you WOULD NOT LIKE to emulate: |
| | **What is the business environment?** | |

**Now use your answers to craft your Vision Statement**.

**Step 1: Create a vision statement by filling in the blanks below**. Read it back or better still have someone else read it back to you. How does it sound?

---

**Vision Statement (first draft)**

Within the next ……… years, grow <insert enterprise name> into a successful local/regional/national enterprise <delete as appropriate> providing ……….<insert description of products or services>…………. to ………<describe your ideal customers>……

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**Step 2: Rewrite your vision statement** above, modifying it into your own words.

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**Step 3: Now re-write this statement into a positive, optimistic, no limits, outrageous vision statement!**

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**Example Vision Statement:**

"Over the next 2 years, we will provide 100,000 health conscious young people with a wacky, fun-filled visitor experience which showcases how our locally grown organic foods and ingredients can be used to create delicious, healthy and nutritious meals in our Creative Cuisine café bar."

**Creative Organic Food**

# 8. Exercise 4: Your USP

A *unique selling proposition*, which defines your organisation's unique position in the marketplace, is an important part of creating pricing power and an experience your customers will love and enjoy. A strong *unique selling proposition* enables you to stand apart from competitors and actively focus your energy on creating things that cater to your ideal group of customers.

**Examples of GREAT USP statements:**

- **M&Ms:** "The milk chocolate melts in your mouth, not in your hand"
- **AVIS Car Rentals:** "*We're number two. We try harder*"
- **Disney:** "The happiest place on earth"
- **Country:** "Bhutan, happiness is a place"
- **Chessington Zoo:** "A world of adventure".

**Create your USP:**

| | |
|---|---|
| **Step 1: Describe Your Target Audience** | Before you can even start marketing your services, you need to know who you are targeting. In this step, you want to be as specific as possible and build on ideas and information from completing other ROOTS exercises |
| | |
| **Step 2: Explain the Problem You Solve or the Experience You Provide** | From your prospective customer's perspective, what is the problem you solve or the experience that you provide? |
| | |
| **Step 3: List the Biggest Distinctive Benefits** | List 3 - 5 of the biggest benefits a customer gets from choosing your cultural heritage tourism experience or products. |
| | |

| | |
|---|---|
| **Step 4: Define Your Promise** | Write down the promise(s) you make to your customers. |
| | |
| **Step 5: Combine and Rework** | Based on your answers in step 1 – 4 combine your ideas into one simple paragraph. |
| | |
| **Step 6: Cut it Down** | Condense your paragraph into a single sentence – this is now your USP! |
| | |

Now try out your USP with at least 10 people to gauge their reaction and then make refinements if needed.

## 9. Exercise 5: What's Working in Your Enterprise?

It is just as important to know what works well in your enterprise as what does not work well. Use the keywords list at the bottom of this page to help you brainstorm ideas about what is and is not working as well as you would like it.

| What currently works well in my enterprise? | How can we improve and build on this? |
|---|---|
| | |
| **What does not work well in my enterprise right now?** | **How can we solve and improve on what is not working as well as it could be working?** |
| | |

**Key Word Prompts:**

| | | | |
|---|---|---|---|
| • Management of employees<br>• Key business processes<br>• Facilities and attractions | • Employee benefits<br>• Inventory control management<br>• Internal controls<br>• Expenditure control | • Sales revenues<br>• Profitability and operating margins<br>• Return on investment<br>• Product quality | • Marketing and promotions<br>• Website and digital marketing<br>• Customer/visitor numbers |

## Critical Issues Examination

Select three of the things that are NOT working well and that are limiting your enterprise's growth, profitability, or effectiveness. This exercise will help you to differentiate between symptoms and root causes so that you can see more clearly what needs to happen to achieve a permanent and effective change.

| List 3 issues or symptoms | What is the root cause of this? | What needs to change? | How will results be measured? |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

**Example**

| Visitor numbers are 20% lower than last year | New competitor attractions have opened this year increasing competition for visitors | Increase market awareness of our attractions and why people should visit our enterprise | Implement a new website supported by an aggressive social media campaign resulting in 10,000 new Facebook followers |
|---|---|---|---|

**Crafting Meaningful Strategies**

From the exercise above, select up to areas that are critical to growing and developing your enterprise and draft a strategy statement for each one below that you will take forward and implement.

| | |
|---|---|
| **1.** | |
| **2.** | |
| **3.** | |
| **4.** | |

**CHECK:** Do these strategies describe:

- How the business will be developed and managed in the future?
- How will you capitalise on market opportunities?
- How you will resolve critical issues which are impacting on your enterprise?

# 10.   Exercise 6: Planning Your Objectives

This exercise is about how to plan and review your enterprises business objectives. Objectives clarify what it is you are trying to accomplish in a specific and measurable way including setting out a clear timescale for when each objective is to be completed. For an objective to be effective, it needs to be well-defined with quantifiable elements that can be measured. Ideally, your objectives should link directly to your vision for the enterprise.

**Examples of Objectives**

| These Are Not Effective or SMART Objectives | |
| --- | --- |
| Develop a sustainable business minimising peaks and troughs | Not specific, no way to measure |
| Develop a strategic marketing alliance with key partners | Not specific, which partners, to achieve what? |
| Develop and introduce new products to grow the business | Vague with no specified products and lacks any statement of financial impact |
| Improve profitability and cash flow to support business growth | Needs more detail and needs to be qualified |
| Reduce inventory levels | Unclear with no timescale and excludes measurable indicators |

| These are Stronger Examples of SMART Objectives | |
| --- | --- |
| Increase sales by 25% to €1m in 2019 and €1.25m in 2020 | Specific and measurable |
| Increase production from 10,000 units to 15,000 per month effective from June 2019 | Clear and very specific |
| Improve overall product margin by 40% by reducing discounts on low volume products to 3% and enforcing a minimum 45% margin on all new products | States a clear goal and how it will be achieved |
| Reduce inventory by €5K by end of June 2020 | Clear, measurable with an agreed timescale |

Use this exercise to define your objectives in each of the course business areas: Financial; Marketing and Sales; Operations; Human Resources; Research & Development; and Other.

| Description of the Activity Required | What will happen and when? | What is the financial impact? |
|---|---|---|
| **1. Type of Objective: <insert>** | | |
| | | |
| **2. Type of Objective: <insert>** | | |
| | | |
| **3. Type of Objective: <insert>** | | |
| | | |
| **4. Type of Objective: <insert>** | | |
| | | |
| **5. Type of Objective: <insert>** | | |
| | | |
| **6. Type of Objective: <insert>** | | |
| | | |

## Example for Creative Organic Foods: Marketing

| To increase visitor numbers to 100K per annum by 2020 | More aggressive marketing strategies showcasing our new attractions | Expenditure of spend of €5K per quarter on digital marketing plus a new website |
|---|---|---|

*Crafting Your Objectives*

Using the ideas from above, draft a set of SMART (i.e. specific, measurable, achievable, realistic, time bound) objectives making sure your first two objectives relate to sales and profitability. Your objectives should be one sentence, easy to understand and SMART.

1.  **Sales Objective:**

    |  |
    |---|

2.  **Profitability Objective: <insert>**

    |  |
    |---|

3.  **<insert name of > Objective:**

    |  |
    |---|

4.  **<insert name of > Objective:**

    |  |
    |---|

5.  **<insert name of > Objective:**

    |  |
    |---|

6.  **<insert name of > Objective:**

    |  |
    |---|

7.  **<insert name of > Objective:**

    |  |
    |---|

## Example for Creative Organic Foods: Marketing

"To launch a marketing strategy supported by a new website and a digital marketing campaign resulting in 10K Facebook followers and 100,000 visitors to Creative Organic Foods by 2020."

## 11.    Exercise 7: Business Improvement Projects

It is important that you can convert ideas for improvement into clear mini projects designed to deliver the improvements and impact on performance that you are seeking. This exercise is about turning your strategies into plans.

| Strategy or objective: | | | | | |
|---|---|---|---|---|---|
| **Project Name:** | | | | | |
| What impact would completing this project have? | | | | | |
| How will you measure the results? | | | | | |
| What are the next 3 – 5 steps you need to take? | | | | | |

### *Integrating Objectives, Strategies, and Plans*

Choose five projects from the preceding page and complete the chart below.

| Objective or Strategy | Project to be Completed | Person Responsible | Completion Date |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **Plan 1** | | | |
| | | | |
| **Plan 2** | | | |
| | | | |
| **Plan 3** | | | |
| | | | |
| **Plan 4** | | | |
| | | | |

## Example

| | | | |
|---|---|---|---|
| Increase visitor numbers by 20% | New website and social media campaign | Anne-Marie Jones | June 2020 |

## 12.  Exercise 8: Your One Page Plan

This exercise is about pulling all your ideas and notes from the ROOTs exercise handbook into a meaningful One-Page Business Plan. By completing each of the ROOTs exercises, you will have refined and developed your enterprise's vision as well as drafting a set of objectives which you have supported by a set of clear strategies. You will also have drafted a set of business improvement projects that include a set of SMART plans and actions.

Although this is referred to as a One-Page Business Plan, it can of course be spread over several pages which reflects your enterprise's size and complexity – the best advice is to **KEEP IT SHORT and SIMPLE**.

Once you have drafted your plan, present and discuss your plan with stakeholders, employees and managers. Check that the plan is realistic and achievable considering your resources and the time scales you have set.

Once you are satisfied with the final plan, share it and communicate it as widely as possible. Refer to the plan weekly, if not daily. Use your One-Page Business Plan as your 'TRUE NORTH' and directional guide. When you and your team, prepare operational plans and targets, make sure they are consistent with your One-Page Business Plan.

Take the time at least monthly, if not weekly, to review and up-date your One-Page Plan as this will keep it current and alive – business plans should be a living, breathing and evolving plan and NOT a document stored in a filing tray and dusted off once a year!

# My One-Page Business Plan

| <Insert Enterprise Name> + Logo | |
|---|---|
| **Date Start:** | **Date End:** |

| **Vision:** |
|---|
| *<Insert your enterprise vision>* |

| **Objectives and Strategies:** |
|---|
| *<Insert your enterprise's objectives and strategies>* |

| **Business Improvement Projects and Plans:** |
|---|
| *<Insert your enterprise's projects and plans>* |

## 13.  Exercise 9: Step into Your Customer's Shoes!

It is likely that many of your customers will be 'first-time visitors' to your cultural heritage enterprise. Imagine that Peter and Sarah have recently visited your enterprise and that they are telling some of their friends about your cultural heritage attraction. What might they be saying? What might they say was their favourite memory or experience of visiting your enterprise? How excited or animated might they be about their experience?

To complete this exercise, you need to think like a customer. Note down your answers and consider what you think they might say and how this compares to what you would like them to be saying!

|  |
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How might you be able to capitalise on the positive things they said and how might you be able to make improvements on the things about which they were less complementary?

|  |
| --- |
|  |

## 14.   Exercise 10: Discovering Your Cultural Heritage Story

Do you have a story to tell about your cultural heritage enterprise? People love to hear the history and about the people who worked or lived in and around cultural heritage sites – stories help to bring sites to life and engage people in the experience and the emotion and heritage. What is your story?

| What is the local or historical significance of your site? |
|---|
|  |
|  |

| Why does your cultural heritage enterprise exist today? How did it come to be? |
|---|
|  |
|  |

| Who lived or worked on your site? What is their story and what adversities, or challenges did they have to overcome? |
|---|
|  |
|  |

| How are you currently making the most of your story? |
|---|
|  |
|  |

## 15.    Exercise 11: Create Your Story and Share It!

All stories have a beginning, a middle and an end. Your story **MUST** start with a **STRONG** beginning which entice and enthuse people about the experience they are about to have – you need to build **EXCITEMENT** and **SUSPENSE**.

| |
|---|
| **How can you excite visitors on arrival, so they want to learn and find out more about your cultural heritage story?** |
| |
| **Is there an opportunity to excite or intrigue them on arrival, in the car park or whilst buying their tickets so their experience has already started?** |
| |
| **Do you have an opportunity to intrigue or surprise them right from the start?** |
| |
| **What is (could be) their first experience after buying their entrance ticket?** |
| |
| **How do you or how can you start to tell your story?** |
| |
| **How can you engage visitors by making your exhibits and communications more interactive?** |
| |
| **How do you bring your story to life … through exhibits, signs, booklets, videos, animations or people or interactive displays?** |
| |

The middle of your story is where you bring your story to life and trigger your visitor's curiosity, enjoyment and interest.

| |
|---|
| **Can you use experiences, aromas, sounds and 'stage props' to transport visitors back in time? Can you use smells, noises and sensations and tap into the five senses: sight, touch, taste, hearing and smell?** |
| |
| **Can you use animated displays, case studies or people dressed in period costume to tell your story? Do you have photographs of characters from the time or of the buildings as they were – what can you do to bring the experience to life?** |
| |
| **Is there a character from the past that you can use in the telling of your story? What myths and legends are there that you can share?** |
| |

The end of your story is **VERY IMPORTANT** – happy, satisfied customers share and tell others of their experience – they **SPREAD the WORD!** Remember people want to learn, feel part of the experience and connect with your story.

| |
|---|
| **What is the significance of your story? How did it change in history? Why was it important and how can you make it memorable?** |
| |
| **Are any aspects of today's customs, traditions and locality still influenced or affected by what happened?** |
| |
| **Explain how your story is still relevant to today and what happened to the people involved in your story – did they invent something, die a heroic death, leave a legacy?** |
| |
| **How can you end your story and your cultural heritage experience in a way that is memorable and exciting? Is there a surprise or a discovery that you could include at the end of the visit?** |
| |
| **If your experience ends with a gift shop or a café, how do you use the opportunity to build your story such as using authentic recipes for dishes on your menu or selling unusual ingredients or mementos?** |
| |

# 16.  Exercise 12: Your Story Action Plan

Reflecting on Exercises 1 - 3, you should now have identified strengths and gaps or areas for improvement in your story and how you tell it. What changes can you make and what actions can you implement to improve the presentation of your cultural heritage story?

Use the following tables to identify a set of changes and improvements you want to implement over the next 12 months. You might find it helpful to brainstorm ideas and to involve others such as team members to develop your plans.

**Examples of actions (what);**

- Re-writing and developing your story
- Researching elements of your story (e.g. key characters, myths and legends)
- New photographs and display panels
- Reviewing and up-dating leaflets and brochures reflecting your story
- Re-thinking where and how you promote your enterprise locally and regionally
- Replacement or new signage especially in waiting or queuing areas to inform and entice visitors
- Customer service training especially in relation to your story
- Creation of story-telling characters with costumes to act as visitor guides
- New food menu with specially named dishes and traditional recipes associated with your story
- Commissioning of interactive displays to bring your story to life
- Redecoration and deep cleaning of your site to refresh its appearance viewed through the eyes of your visitors
- New product lines in the gift shop reflecting your story with special consideration of children's gifts and presents
- Introduction of visit treasure trail or quizzes linked to your story
- Introduction of a souvenir booklet and/or product memorabilia (e.g. branded key rings, pens, post cards and note books)

Be creative and involve visitors team members, family and friends – you can even get inspiration by visiting and talking to other cultural heritage enterprises about how they develop and present their story.

**My Story Improvement Action Plan**

Use the following table to plan and monitor the implementation of your improvement ideas.

| Action (What) | Who | When | Resources And Budget | Progress |
|---|---|---|---|---|
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## 17.  Exercise 13: Tell Me About Your Cultural Heritage Tourism Enterprise

Potential visitors need to know and understand why they should visit your cultural heritage tourism enterprise. What will they experience, gain or learn from visiting?

| What is important or significant about your cultural heritage experience? |
| --- |
| 1. |
| 2. |
| **How has this impacted how people live/play/work today?** |
| 1. |
| 2. |
| **How can you build on this significance to embellish your visitor's experience and enjoyment?** |
| 1. |
| 2. |
| **Jot down examples of the benefits and learning that visitors will gain from visiting your cultural heritage tourism experience.** |
| 1. |
| 2. |
| **How will you communicate and share the significance of your cultural heritage tourism experience to potential visitors?** |
| 1. |
| 2. |

## 18.  Exercise 14: The Imagery You Use to Promote Your Enterprise

In this exercise, you will review all the images, visuals and branding that you are currently using on your enterprise's website, brochures, information packs, leaflets and displays. Use this exercise to check that you are using appropriate and the best images and visuals.

| Are you satisfied with the images and branding currently in use | YES | NO | Comments/Actions/Improvements |
|---|---|---|---|
| **People:** (e.g. costumes, smiling faces, engaged expressions, colours, attractive) | | | |
| **Involve 'doing':** (e.g. showing the engagement and experience) | | | |
| **Show past v present:** (e.g. what was it like in the past and how is it now?) | | | |
| **Engaging:** (e.g. do people look like they are enjoying and engaged in activities and the experience?) | | | |
| **Branding:** (e.g. consistency in the use of logos, colours and fonts) | | | |
| **Vibrant/colourful/fun:** (e.g. are resources eye catching and interesting) | | | |
| **Website:** (e.g. is it easy-to-use, eye-catching, engaging, interesting, links are all working, interactive?) | | | |
| **Leaflets:** (e.g. compliant with branding guidelines, easy-to-read, attractive, interesting) | | | |
| **Panels and Displays:** (e.g. compliant with branding guidelines, easy-to-read, attractive, interesting) | | | |
| **Point of Sale Displays:** (e.g. compliant with branding guidelines, easy-to-read, attractive, interesting) | | | |
| **Other Points to Consider:** | | | |

## 19.   Exercise 15: Define Your Marketing Messages

Think about your key cultural heritage enterprise, what are the key promotional messages that you need to communicate to your visitors that will enthuse them and motivate them to visit and engage in your cultural heritage tourism experience?

| List three key experiences you deliver that will make your visitors feel like explorers again? |
| --- |
| **1.** |
| **2.** |
| **3.** |
| **Draft three messages for each of your experiences that you can use in your promotions that will make visitors want to visit your enterprise?** |
| **1:** |
| |
| |
| **2.** |
| |
| |
| **3.** |
| |
| |

## 20. Exercise 16: Marketing Action Plan

Reflecting on Exercises 1 - 7, you should now have identified strengths and gaps or areas for improvement in how you market your cultural enterprise tourism enterprise. What changes can you make and what actions can you implement to improve the marketing of your cultural heritage tourism enterprise?

Use the following tables to identify a set of changes and improvements you want to implement over the next 12 months. You might find it helpful to brainstorm ideas and to involve others such as team members to develop your plans.

**Examples of actions (what);**

- Re-writing and developing your marketing plan
- Undertaking customer research and other market research
- Commissioning new and/or up-dating of photographs, branding, leaflets, brochures, signage and display panels
- Conducting visitor and customer surveys to gain feedback on positive elements of their experience and areas for improvement
- Re-thinking where and how you promote your enterprise locally and regionally
- Social media strategy and digital marketing activities
- Network marketing with other local agencies and organisations (e.g. tourist boards, membership bodies and local authorities)
- Reviewing pricing and discounting schemes
- Public relations and publicity strategy
- Commissioning and purchase of new/updated souvenir booklets and/or product memorabilia (e.g. branded key rings, pens, post cards and note books)

Be creative and involve visitors team members, family and friends – you can even get inspiration by visiting and talking to other cultural heritage enterprises about how they market their enterprise.

**My Marketing Action Plan**

Use the following table to plan and monitor the implementation of your marketing plan.

| Action (What) | Who | When | Resources And Budget | Progress |
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## 21. Exercise 17: Social Media Planning Tool

This exercise will help you to plan and schedule individual social media content assets, such as blog posts to support your marketing plan and key marketing messages. The scheduling tool includes sections to fill in for the title of each item, the author, the topic area it covers, and the deadline, as well as the anticipated publication date and time.

The tool provides an easy-to-use format to plan the overall shape and content of a social media campaign. Used as a planning tool, it can quickly and easily be populated with postings and articles that reflect the enterprise's key marketing messages and promotions.

**Step 1: Populate the Social Media Planner**

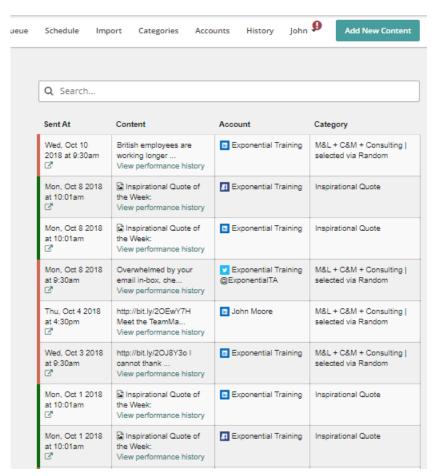| Title | Media | Author | Topic | Deadline | Publish | Time | Notes |
|-------|-------|--------|-------|----------|---------|------|-------|
| **Week 1** | | | | | | | |
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| **Week 2** | | | | | | | |
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| **Week 3** | | | | | | | |
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| **Week 4** | | | | | | | |
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**Step 2:  Draft the Copy**

Rather than drafting the copy as it is required, it is advisable to draft content well in advance. By drafting several month's content in one go ensures there is continuity in the style and key messages throughout the campaign.  It is also more time efficient to set a few hours aside to draft the content in one go.

## Step 3: Using a Scheduling Tool

On-line scheduling tools such as [Meet Edgar](#) enable posts, articles and blogs to be added to an asset library and to be scheduled for release on a specific date and time. These social media assets can then be re-used with assets being automatically to be sent out on pre-determined dates and times thereby ensuring regular social media postings – a massive time saving tool!



If a story or a post is a 'one-time' use, then it can be marked as for 'one-time' use and it will not be repeat posted. Other social media assets will be 'evergreen' therefore are suitable for re-use repeatedly.

Such tools can be used to schedule posts in Facebook, Instagram, Twitter, LinkedIn and so on. One of the powerful benefits of using such a tool is the value they can provide in generating analytical reports to monitor the reach of posts and their effectiveness.

Check out this [short video](#) about how one enterprise uses Meet Edgar to schedule its social media posts.