



Marketing and Branding Toolkit for Small Dairy Processors in the Northeast U.S.

Guide and Resources

June 2022

the
goodpeopleresearch
company™

NORTHEAST DAIRY BUSINESS
INNOVATION CENTER

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Introduction

As a dairy processor in the Northeast U.S., you have a series of choices to make as you go to market and brand your company. There's no one way to position your company for profit, growth, and sustainability; how you go about it depends on your individual situation and aspirations.

Who are you, and what do you want to be? What is special about your company, and why should consumers or your community care? These are the essential questions to explore when deciding how to approach marketing and branding.

In this Toolkit, we will walk you through this process of exploring and identifying the story you will want to tell in the marketplace, and suggestions for how to tell that story, as well as how to get your products in front of consumers and popularize them most effectively.

THE GOAL OF MARKETING AND BRANDING

“Marketing” is when you pave the way to sell your products in the marketplace

In this toolkit we use the term “marketing” to encompass the steps taken to display the company’s products and get them into the market to make sales. These steps may include, but not be limited to, advertising, promotion, relationship building, social media interaction, and distribution through farmers’ markets, farm stores, online stores, and traditional distributors.

“Branding” is when you position your company in the consumer’s mind – you communicate “who you are”

We define “branding” here as the steps taken to communicate an image of the company, which may include the design of the company’s logo and promotional materials, including the company’s website, as well as the language and storytelling the company uses to describe the distinctive role the company feels it plays in the marketplace or community.

Marketing and branding are “cyclical” endeavors – they are ongoing

When a consumer-facing company markets and brands itself successfully, its brand passes through four key thresholds:

- *Awareness*, when it is **noticed** by consumers;
- *Assessment*, when it is **defined** in the consumer’s mind;
- *Use*, when the consumer **uses** or **consumes** or **experiences** the brand and its products; and
- *Advocacy*, when the consumer feels strongly enough about the value of the brand that they **promote** it to others so they will experience it and, in turn, promote it further.

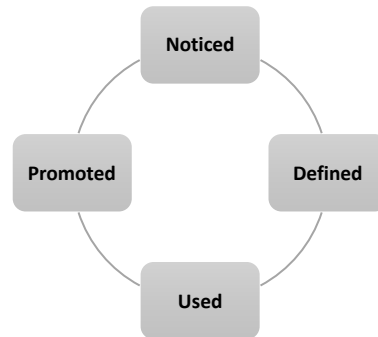


Figure 1: Brand lifecycle in marketplace

This phased process characterizes the real life experience your company and brand has in the marketplace. It forms a cycle that is constantly evolving based on the conscious decisions you make about how you want to present your company and the experience consumers will have with your products. You can help consumers notice, define, use, and promote your products and your company. Each phase feeds the subsequent phase and starts the cycle all over again.

The Foundation: What do you think is important?

To help make the marketing and branding cycle work for you, your company’s marketing and branding need *intention* and *direction*. Before you do anything, you should be able to answer the following questions clearly and succinctly (you might want to write them down):

What is your *vision*?

This is the “why” you do what you do. It’s how you see the world and what you think is important about your purpose and role in it.



What is your mission?

Based on your vision, this is what you do, how you do it, and whom you do it for. Your mission statement follows this pattern: We ____ by ____ for _____. To integrate your vision into this statement, you could add: We ____ by ____ for _____ *because* _____.

(Below in this toolkit, you will find a detailed discussion of how to tell a clear story about your brand. Ultimately, this story begins with an understanding of your *vision* and *mission*.)

What are your values?

This is what defines what you will do and what you won't do as a business, and what you decide to promote.

How big you want to grow and what kind of life you want will drive what approach you take to and how much you invest into getting noticed, having people try your products, and how to get customers to promote you.

You don't have to, nor may you want to, do everything that is presented in this toolkit. The outline and resources provide a guide and are there to make you aware of the possibilities should you want to make changes to how you structure your business and/or lifestyle.

Learn from what your peers do

You can learn from peers, especially ones that have been around for some time and have found ways to establish a clear brand in the marketplace. We reviewed more than 135 dairy brands in the northeast and reduced them down to 12 case studies we offer in a document that accompanies this Toolkit.

Understand what consumers think is important

Before you read through this toolkit, it's important also that you have a frame of reference for what your potential customers may look for in a dairy product and brand. In preparation for developing this toolkit, our research team surveyed 750 consumers, mostly in the northeast, about their dairy purchasing patterns, preferences, and perceptions. We cover some of the more salient findings from this survey in the second section, "Phase 2: Getting Defined," below.



The organization of this Toolkit

The following will outline steps to take to move your branding along the four phases discussed above (see Figure 1) a moment ago and outlined again in Figure 2 below. For each section, you will find an explanation, best practices, and a list of resources that may help in each of these phases.

Phase 1: Getting noticed

In this section, we review the types of promotional activities your peers engage in to get their brand name in front of consumers and any partners that may help build their customer base (e.g., other farm stores, groceries, etc.)

Phase 2: Helping customers define your brand

In this section, we walk you through how to tell your story, one that reflects your mission and vision.

Phase 3: Getting customers to use your products and experience your brand

In this section, we catalog the different types of channels for distributing and selling your products – getting them in the hands of customers. These can range from channels you control completely like your website, farm store, or delivery trucks (if you have these) to ones you partially control or don't control, like retail stores, distributors, and resellers.

Phase 4: Inspiring customers to promote your brand

In this section, we review the types of promotional activities your peers engage in to get their brand name in front of consumers and any partners that may help build their customer base (e.g., other farm stores, groceries, etc.)

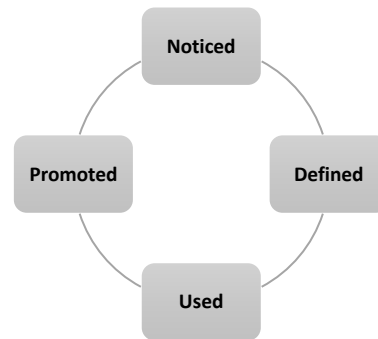
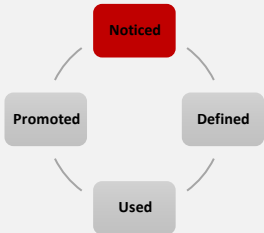


Figure 2: Toolkit organization protocol



Phase 1: Getting Noticed

The first obvious part of having the world discover and experience your products and brand is to make them aware of it. In this section, we review the main promotional channels you likely have available to you and tips on accessing and using them.

Promotional Channels

- Website
- Social Media
- Email Newsletter
- Local Media and Directories
- Business to Business Co-Promotions
- Signs and Displays
- Agritourism
- Sponsorship
- Advertising
- Awards/Competitions
- Buyer Shows

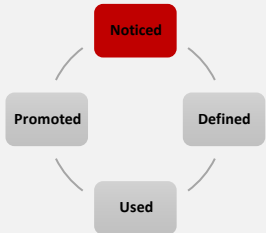
Best Practices

- Save yourself time and work right up front by laying out a monthly calendar of all your marketing and messaging. This is where you'll plan all your social media posts and content, newsletter dates, product pricing and wholesale sheet updates, and advertising deadlines. It'll take you some time to set it up, but it'll save you time and this template will be easy to keep using each month.
- Make sure all your marketing ties together. Don't have a different message for Facebook than you do for your newsletter. You can use each channel to connect people to your other channels, such as asking people who receive your newsletter to like and follow you on Facebook.



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Phase 1: Getting Noticed



Website

Do I really need a website if I'm on Facebook and Instagram? Yes! Your site may be the first impression you make on a potential customer, so make sure it reflects well on you, your farm or operation, and your brand. Make it easy for your customers to find out about your products, how to reach you, and where to buy them. Your website can be expanded to provide an online shop, focusing first on local pickup and delivery, and eventually more widely on regional and nationwide shipping. Don't forget to keep it up to date - nothing sends a worse signal to customers than encountering outdated information.

Website Building Resources

There are many options for building a website, including hiring someone to build it for you. However, it is getting easier and easier to create your own professional websites, including ones with e-commerce capabilities. Here are a few of the many sites that provide this service.

- squarespace.com
- wordpress.com
- wix.com
- godaddy.com/websites/website-builder
- zyro.com
- weebly.com

Social Media

Facebook

While Instagram is the hot new social media site, plenty of folks still go to Facebook first. Make sure to create a business Facebook page and update two to three times per week. To save time, link your Instagram posts to your Facebook page and get 2-for-1! Don't forget to reply promptly if anyone comments on your post or contacts you via Facebook.

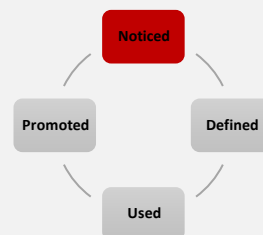
Instagram

If you must pick one, Instagram is the place to start! Instagram is image-focused, so get busy taking pictures of your beautiful farm, cute animals, delicious products, or people enjoying them. Pro tip: save time by linking your Instagram account to your business Facebook page. When you post on Instagram, it'll post the same thing on Facebook instantly.



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Phase 1: Getting Noticed



Additional Resources: Social Media and Digital Marketing

- <https://www.udemy.com/courses/marketing/>
- <https://www.udemy.com/course/local-digital-marketing>
- <https://digitalmarketinginstitute.com/students/courses>
- <https://blog.hubspot.com/marketing/social-media-marketing>
- <https://neilpatel.com/what-is-social-media-marketing/>
- <https://coschedule.com/blog/how-often-to-post-on-social-media>

Newsletter

Offering a newsletter sign-up to your customers keeps them in the loop and offers you opportunities to reach out to them on a regular basis. You might offer news of special events, coupons, and even recipes. Depending on the size of your business and your customer base, newsletters can go out weekly, bi-weekly, monthly, or quarterly and can vary with the season. Make sure people can sign up for your mailing list via a button on your website, Facebook or Instagram page, and even on a paper sheet at the farmers' market. A free online newsletter software program such as [MailChimp](#) makes creating a good-looking newsletter simple with pre-made templates.

Newsletter Resources:

mailchimp.com

flodesk.com

sendinblue.com

<https://www.canva.com/create/newsletters/>

constantcontact.com

[The Ultimate Guide to Email Marketing](#) - Hubspot

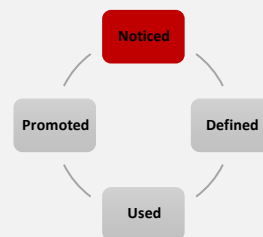
Local Media – Press Relations

Don't forget to reach out to your local media if you have a special event or new product to introduce. This can include newspapers, television stations, or radio - even local food bloggers. These folks are always looking for content and good local stories.



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Phase 1: Getting Noticed



Doing some (or all) of the work for them is helpful - learn to write a good newsworthy press release. Look for fun and natural occurrences to highlight, such as your anniversary of 10 years in business or serving your 1,000th customer. Let them know if you have recently won an award. You get the idea.

Becoming a member of your local Chamber of Commerce, Tourist Board, or other business group is another way to increase your prominence in the community. Networking at these group events will bring you into contact with local media and other businesses who could partner with you.

Co-Promotion with Other Farms & Businesses

Look for opportunities with other local businesses to do co-promotional events. It could be as easy as inviting a food truck on your farm on a day when you're having a special event. It could be a wine and cheese-pairing event with a local winery (or brewery). Restaurants are another great option; see more about working with restaurants below.

Signs and displays

To be eye-catching and draw people to your farmers market booth or farm store, you'll need to have some good quality, professional signage made featuring your name and logo. Local print shops can help, and national brand stores like Staples provide sign design and printing services.

Online options such as [canva.com](https://www.canva.com) can help you create marketing materials that are consistent across assets, from business cards to banners. Canva can even guide you through creating Instagram and Facebook stories.

Agritourism

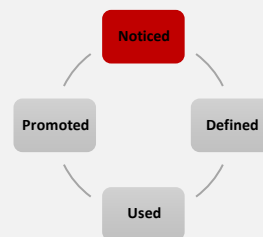
Agritourism allows you to reach a new audience in the most direct way possible - face to face! You are hosting them in your "home," so make it welcoming with signage, clean bathrooms, friendly staff, and clearly designated parking. Look for local "artisan trails" that you can join, including getting listed in a local or regional tourism directory. Reach out to hotels with brochures and establish an on-going listing in local weekly papers.

Inviting people to your farm for special events, tours, and tastings introduces them to you, lets them see your operation, taste your products, and meet your animals. It can work with tourists and locals alike. You



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Phase 1: Getting Noticed



can target all kinds of different groups - think a happy hour crowd for wine and cheese or invite young families to meet the year's new calves or lambs. Experiential interactions like this (both good and bad!) stick in the mind of the customer for much longer than a brief interaction at a market, so be sure to make a good impression.

Sponsorship

Sponsorship is another way to get your product and business out in front of people while also demonstrating your support of the local community. It could be a charity walk or run, a little league or soccer team, or school fundraiser. Staffing a booth or providing free samples of your products at the event is another great way to extend your reach.

Advertising

Some well-placed advertisements can successfully get the word out to your customer base and introduce your products to new customers. It helps to know who your typical customers are so that you can better target them, and people like them.

Start small with your local newspapers or radio stations, or specialty local and regional magazines focused on tourists.

Advertising on Facebook, Google, and other social media sites is another way to reach a target audience. Your posts will show in the feeds of people who like your business, so start with reaching out to "friends of friends," or select customer ages and geography. It's also a good idea to look at the resulting data collected by these sites to find out how many people clicked on your ad, visited your site, or took advantage of a coupon or special offer you made. Then expand on what's working!

Awards – Competitions

Even if your footprint is local, gaining recognition from national or international organizations raises your profile and enhances your brand. Independent, third-party affirmation of the quality of your product is powerful. Search for competitions that have entry requirements you can meet and that are respected by your peers.

Here are some to give you an idea:

[Specialty Food Association - "sofi" awards](#)

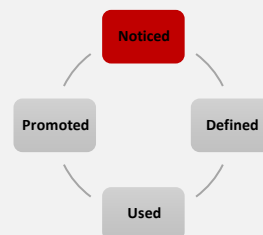
[Good Food Foundation Awards](#)

[American Cheese Society | Judging & Competition](#) - includes categories for butter



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Phase 1: Getting Noticed



[US Dairy Sustainability Awards](#)

[World Cheese Awards - Guild of Fine Food](#)

[World Championship Cheese Contest](#)

[World Dairy Expo Championship Dairy Product Contest](#)

State-Level Awards

<https://mainecheeseguild.org/>

[New England Green Pastures Award](#)

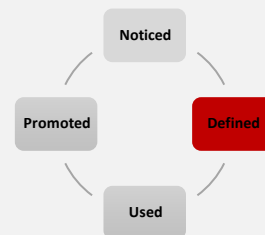
Buyer Shows

If you are looking for a distributor or want to connect with buyers from institutions who may want your products, you can connect with them at trade show devoted to business-to-business exposure and education. Examples of this type of show are ones The Specialty Food Association hosts -- the Summer and Winter Fancy Food Shows in New York City and Las Vegas. There are other national and regional trade shows you can sign up for. These shows are often also good for understanding what your peer dairies are doing in terms of new product and promotion, and you can often attend educational sessions as well. Some examples:

[Summer Fancy Food Show](#)

[Local Food Trade Show of New England — SBN Sustainable Business Network](#)

There are many opportunities a small business can access. The ones you choose to make use of will depend on your time, budget, and the quality of each that is local and accessible to you. The key is to plan and consider the combination of promotional opportunities that works best for you.



Phase 2: Helping customers define you

Once you've gotten your customers' attention – they've seen your brand advertised, came across you on Instagram, or found their way to your website – you have the chance to tell them your story. This story, whether conveyed in word, images, videos, or all three, is the primary way your customers will decide whether your brand, among the many out there, should get their further attention and, hopefully, support. This is where you engage the customer and hope that they connect emotionally with your products and brand.

How you tell your story is a critical piece to your branding; it is the most powerful thing you can control when it comes to how your brand will be thought of.

In this section we provide a guide to telling the story you want others to spread about you.

Know and be yourself

The first thing that's important in helping consumers define who you are is to be sure of it yourself. We mentioned in the introduction that having intention and direction in your marketing and branding is paramount.

Learn how to talk about your vision, mission, and values in different circumstances

One sentence each:

Vision: We are _____ with a goal of _____.

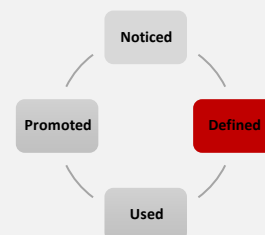
Mission: We _____ for _____ by _____.

Values: We believe _____ are essential to accomplishing our mission.



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 2: Getting Defined



Example:

We are a small family dairy with a goal of preserving our beautiful countryside for future generations. We make pure, delicious milk and ice cream for families in our community by using only the finest ingredients and the most skilled cheese artisans. We believe that if we keep our animals happy and fiercely protect the land they graze on, your culinary experience with our products will be more satisfying.

These statements of vision, mission, and values can be relayed separately, or can be joined together.

There are different circumstances when you will want to tell your story but are afforded different degrees of space in which to do it in the context of different promotional opportunities. Below, we outline the most common scenarios, and how a description of your company and products may differ: the *tagline*, the *elevator pitch*, and the *one paragraph/one pager*.

Develop a Tagline

Describe your business in one short sentence or less. This may accompany your logo, or it may be required for a social media profile like Instagram.

- Jasper Hill Farm, Vermont: *A Taste of Place*
- Arethusa Farm, Connecticut: *Milk Like it Used to Taste*
- Turner Dairy Farm, Pennsylvania: *Quality You Won't Find Anywhere Else*

Have an Elevator Pitch ready at all times

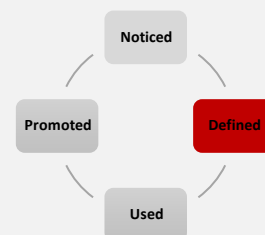
You have 30 seconds to describe your business – what you do and WHY you do it. Typically, your story explains a problem you solve or a need you fulfill, for whom, and how you do it. Why you do it makes it compelling. (Usually, 1-2 sentences...expanding on the tagline language)

- We're a small cheesemaking company in Pawlet, VT that hand-makes artisanal, small batch cheese from local milk, with an aim of continuing the traditions originally established in the 1800s.
- Jasper Hill is a working dairy farm with an on-site creamery in the Northeast Kingdom of Vermont. An underground aging facility maximizes the potential of cheeses made by the creamery, as well as those made by other local producers. Leftover whey from the cheesemaking process is fed to heritage breed pigs, roaming the woodlands beyond the cows' pasture.



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Phase 2: Getting Defined



- Since 1930, Turner's has been producing the freshest, best tasting dairy products right here in Western Pennsylvania.
- Established in 2000, Blue Ledge Farm is a first generation, family owned and run goat dairy and cheese-making operation. Our mission is to create a high-quality product built on the cornerstones of respect for consumers, land, and animals as well as our local community.

Keep a One-Pager/Paragraph on hand for press or publicity opportunities

You've been asked to write two paragraphs about your business for your local newspaper (expand on your elevator speech language)

From Turner Dairy Farm, Pennsylvania:

Local Agriculture is the heart & soul of what we do – Turner's partners exclusively with 35 local, family dairy farms within 70 miles of our processing facility. Our farm partners are endlessly dedicated to healthy, happy cows and sustainably cultivating their land. All Turner's milk and dairy products are free from antibiotics and artificial growth hormones (rBGH).

Turner's has earned more than 100 awards for taste and quality at national dairy product competitions since 1998. In 2021, Turner's became the first Pennsylvania Dairy to extend their shelf life for fresh milk and cream beyond previous government mandates. Turner's shelf-life extension is verified by 3rd party quality testing and approved by the Pennsylvania Department of Agriculture.

We hold ourselves to a higher standard of quality has always been at the forefront because we believe your family deserves it.

From Blue Ledge Farm, Vermont:

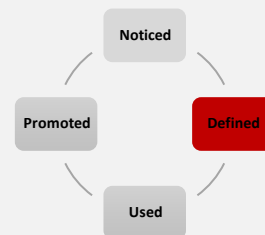
At Blue Ledge Farm we believe in a food system that is based on a cornerstone of respect for the land, the animals, and the consumer as well as our local community. We celebrate the opportunity to raise healthy, contented animals and make great cheese!

Blue Ledge Farm began as a dream in Florence, Italy where Greg and Hannah met while studying the art and culture of Europe. In 2000, at the tender age of 23, the two began the work of



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Phase 2: Getting Defined



transforming an old cow dairy farm back into production with goats. The barn which once housed seventy Holstein cows would now be home to their Alpine and LaMancha dairy goats. We began milking four goats at Blue Ledge Farm and began processing cheese two years later. Today we milk over one hundred goats and produce eleven types of cheese (described on our Cheese page), from very fresh to semi-aged bloomy rind cheeses, to harder cheeses aged three months. True to our mission, our focus is always on sustaining a high-quality, consistent product with lots of attention and gentle handling.

The 150 acres of Blue Ledge Farm consist of woods, hayland, pasture and wetland. In 2004 we financed our cheese room construction by selling our development rights to the Vermont Land Trust, thereby ensuring that our land will always be open and never developed. In 2009, wetlands were identified as one of our great natural resources and so we agreed to conserve our fifty acres of wetland and return them to their natural state as a valuable part of our ecosystem. Our goats spend their spring, summer and fall days browsing in the woods, return to the barn for 4 pm milking and lounge around in a grass pasture as evening sets. Our goats live a life of luxury and as we run from job to job across the farm, we sometimes wonder who works for who!

When Greg and Hannah aren't milking goats or making cheese, they can be found in their painting studio. Check out Greg's oil paintings [here](#) and Hannah's [here](#).

Translate your story into images and/or video to supplement your main storytelling

People learn differently. Some people are primarily *auditory* – they learn best by hearing or reading; some are primarily *visual* – they learn best by seeing images, charts, and diagrams. Still others are primarily *kinesthetic*, they learn best by experiencing or feeling. The more ways you can communicate a consistent story, the better the chance that you will connect with a customer. Here are a couple examples:

Blue Ledge Farm (Vermont) logo:

Blue Ledge Farm (blueledgefarm.com) created a logo that tells a story of its business using a simple image and a simple message. While they make cow's milk cheese, their primary focus is on goat's milk; the logo features two goats together on a "ledge" and the use of a distinctive blue reinforces the "blue" in the company name at the same time it evokes a joyful impression of a sunny blue sky, and happy animals. The logo does a good job of symbolizing the experience the consumer has with the Blue Ledge website and other iterations of the brand experience (e.g., packaging).

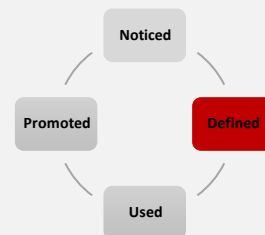


Figure 3: Blue Ledge Farm logo



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 2: Getting Defined



Jasper Hill Farm (Vermont) video:

Jasper Hill Farm (jasperhillfarm.com) presents a documentary style video on the “About” page of its website (<https://www.jasperhillfarm.com/about>). It’s professional, it tells the story of the business from the point of view of its founders and gives the viewer a bit of a tour of the farm and the cheese making process.

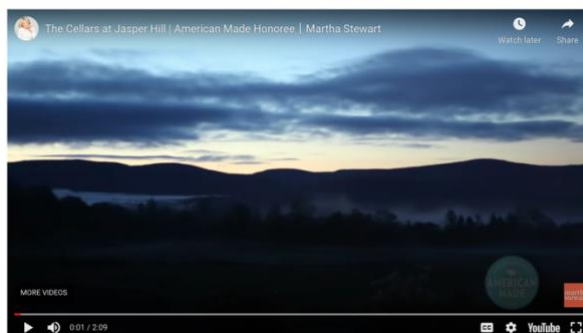


Figure 4: Image of Jasper Hill Farm video

Many dairy processors have similar videos on their sites with varying degrees of professional polish. The Jasper Hill Farm example is professionally produced, but in many instances, less polished video is as or more effective in that it reinforces the character of a small, local, and possibly “pure,” enterprise.

Arethusa Farm (Connecticut) timeline:

Arethusa Farm (arethusa.com) is a relatively modern brand (20+ years) of milk, cheese, butter, and ice cream. The current owners who purchased the farm in 1999 create an image that honors the history of the farm which dates to 1868. To reinforce the blend of old and new, the company uses a traditional looking logo and features, on the “About” page of its website a colorful timeline chronicling the evolution of the farm from 1868 to the present.

Many dairies will feature a timeline of sorts to anchor their brand in tradition; the Arethusa example is particularly colorful and illustrative and communicates the story of the business quite effectively.

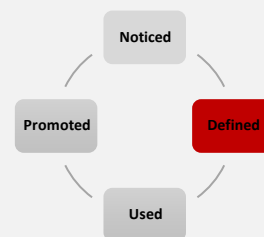


Figure 5: Partial image of Arethusa Farm “timeline” from its website



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Phase 2: Getting Defined



A note about what consumers want to hear

It's important to keep in mind that not all consumers are alike and that some will be more likely to find your brand appealing than others. This comes down to personal preference and values; you should not, and likely do not, take this personally. The more “authentic” you are in your practices and storytelling, the more focused will your core customer group likely to be.

The most important takeaway from this phenomenon is that you should focus on the consumers that are most likely to be your customers and pay attention to their preferences and needs. This will reinforce your brand appeal and others who may be attracted to your product and message will take note.

Get to know your core customers as well as you can, either through personal interactions, social media, or, if you can, sending out an occasional survey or request for feedback.

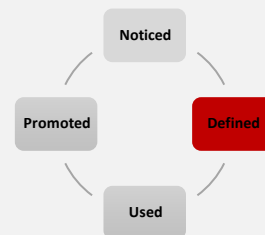
Below, we share some discoveries we made from a survey we conducted in June 2022 with 750 consumers (aged 18+), with an emphasis of those who live in the Northeast region of the U.S. The patterns that emerge from our survey data suggest that those who typically shop outside of the main chain grocery stores (approximately 20% of consumers), and are in the Northeast region, place significantly greater importance on a brand being local and on the “story” the brand tells than those who typically shop for dairy products in chain grocery stores.

See Figures 6-10 below for some insight into how your likely customers think about dairy products:

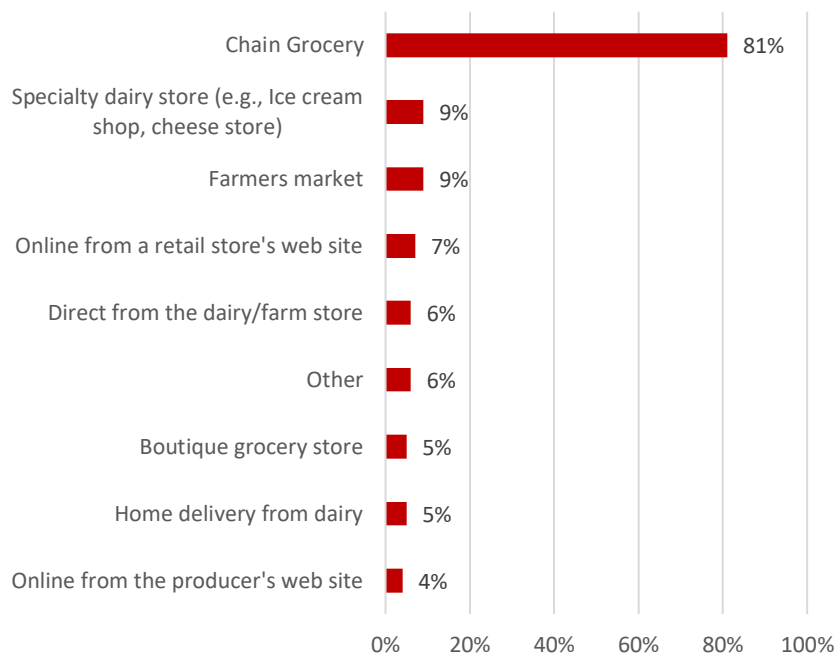


Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 2: Getting Defined



Where do you typically buy dairy products (Select all that apply.) (n=750)



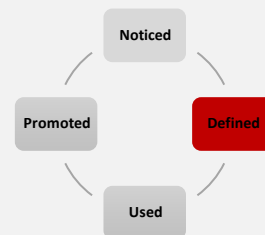
The approximately 20% of consumers who report they typically buy dairy products outside of chain grocery stores are most likely your core potential customer. These shoppers report that they buy dairy products direct from dairies, and/or farmers markets, and/or through home delivery, among other means.

Figure 6: Source: The Good People Research Company survey of consumers, June 2022 (n=750)



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 2: Getting Defined



Importance of Producer's "Story" When Purchasing Dairy Products – Consumer (n=750)

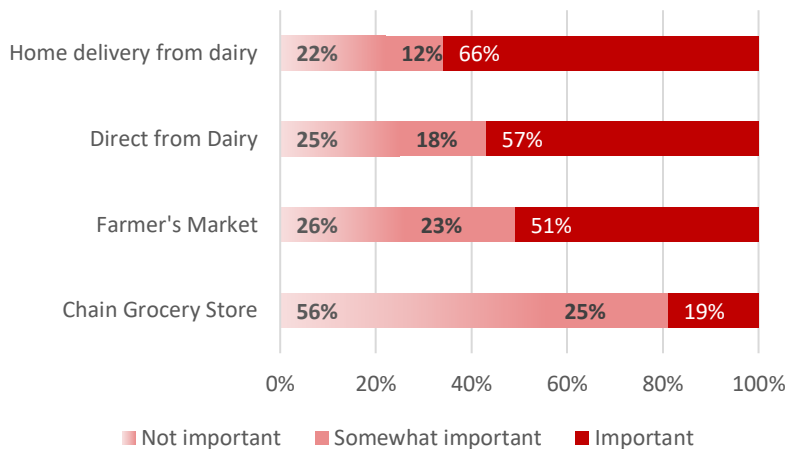


Figure 7 to the left suggests that those who report they tend to buy dairy products outside of chain grocery stores find the “story” behind the dairy and product important at a significantly greater rate than those who report they typically buy from a chain grocery store.

Figure 7: Source: The Good People Research Company survey of consumers, June 2022 (n=750)

Importance of Dairy being "local" - Consumers (n=750)

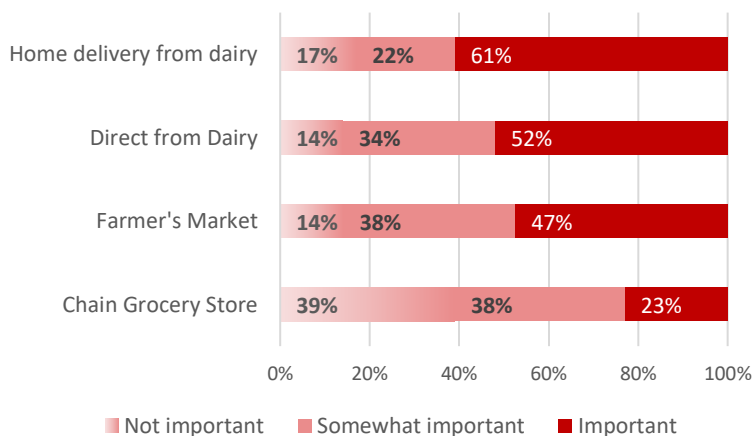


Figure 8 to the left suggests that those who report they tend to buy dairy products outside of chain grocery stores find the dairy producer “being local” is important at a significantly greater rate than those who report they typically buy from a chain grocery store.



Marketing Toolkit for Northeast U.S. Dairy Processors

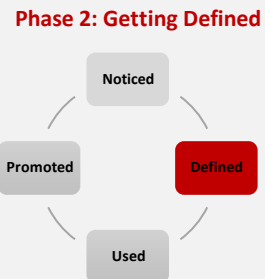


Figure 8: Source: The Good People Research Company survey of consumers, June 2022 (n=750)

Consumer Report of Preference for Word Use on Dairy Products (n=750)

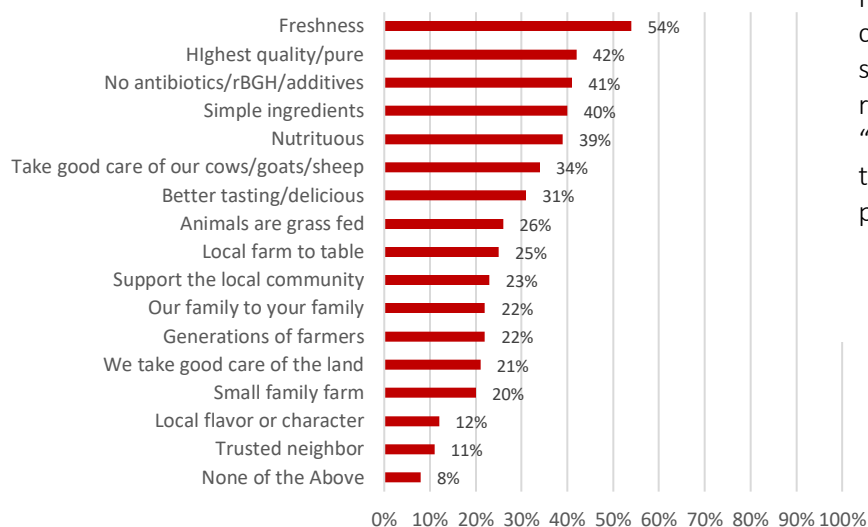
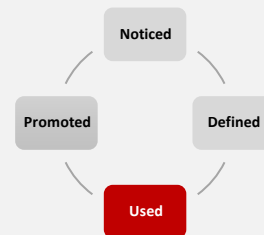


Figure 9 to the left suggests that consumers – who shop in chain grocery stores as well as those who do not – report that “freshness,” “quality,” “purity,” and nutrition are foremost on their mind when evaluating dairy products.

Figure 9: Source: The Good People Research Company survey of consumers, June 2022 (n=750)

What we learn from the information above is that the story you tell about your business is important, and the story should be local and should emphasize freshness, quality, purity, and taste above other product features. *The “story” itself likely functions to reinforce the notion of freshness and quality; that is, it makes the claim of freshness, purity, and nutrition more immediate and believable.*



Phase 3: Getting customers to use your products

Ok, customers have heard about you and are intrigued by your story. Or maybe they have not heard about you yet. At this point, you need to make it as easy as possible for customers to get and try your products and experience your brand in the context of enjoying your products – the emotional tie they will make between brand and product if the experience is enjoyable (which we’re sure it will be!).

In this section, we outline the different sales channels most likely available to you. These channels are literally how you get your products into the hands of consumers so they can experience your product and hopefully become lifelong customers.

Retail Channels

Online – Ecommerce on your website

One of the increasingly common direct methods of selling to consumers is the online catalog – the ability to display your products online. Many website platforms such as Squarespace.com, Wordpress, and Wix.com have modules that enable you to present your products and collect payments online. For some products, and for companies that don’t have vehicles to make delivery on their own, shipping may be expensive and add considerable cost to each order. For many dairy producers, however, selling your products online to an audience that is increasingly comfortable with buying food products online is worth exploring.

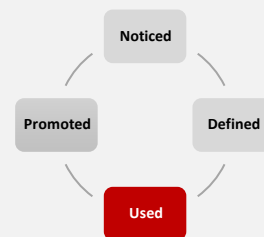
On Farm - The Farm and Farm Stands

Inviting customers to your farm for tours, special events, or to purchase products is a great way to reinforce your authentic story and brand - people can see for themselves exactly how you steward the land, care for your animals, or make your products.



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 3: Getting Customers



Tours can be offered on your schedule, including by appointment, and special events can be scheduled well in advance, so you'll be prepared with staffing and a stock of products and merchandise for sale. Events focused on holidays and seasonal or new product offerings and flavors make sense, but if you have baby animals, also consider inviting customers to come out to see them!

- Advertise your farm store with large readable signs. Make sure to include prominent signs that indicate your hours as well as when you are "open."
- List your farm store in any farming directories or guides, or any promotional tourist-focused "trails."
- If you are inviting people to come for tours or to spend time at your site, provide a clean site with parking, restrooms, rules, and prices clearly outlined.

Off-Site Retail Stores

For companies that have their own farm stores, and especially those that don't, selling your products through another company's farm store is a viable option, particularly if your products complement theirs and can enhance the customer's experience at their store. Research other farm stores in and outside your area to see if you can contribute to their offerings and create a win-win.

Some companies also can establish retail shops away from their farms. Consider how possible this might be for you. It has the twin effect of providing an additional selling channel at the same time it considerably expands a company's ability to market and brand to a larger audience.

Farmers Markets

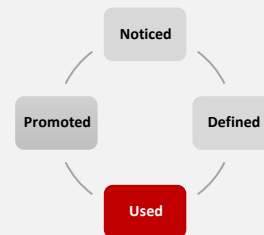
Selling your products at farmers markets can be a good way for a new or growing business to establish your brand and begin creating a loyal customer base. It's an opportunity to have customers try your products, and while they're there, add themselves to your mailing list (or follow you on social media). When you gain enough momentum, consider expanding into a CSA (your own or in combination with other vendors) or even restaurant sales.

Don't forget to bring your high-quality, professional signage to these events!



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 3: Getting Customers



Other tips:

- Be personable and engaging with customers
- Offer recipe or food pairing recommendations
- Put together bundles of items for sale. For example, if you make cheese, put together a bundle with crackers, jam, or local honey
- Don't forget to have a newsletter sign-up sheet available
- Collaborate with other vendors, especially the ones serving food at the market who could use your products as ingredients in/on the foods they sell

Home Delivery

Some dairy processors offer local home delivery services, the way milk and other dairy products were traditionally delivered. Home delivery offers a powerful way to connect directly with your customers on a weekly basis, along with a story that emphasizes tradition, community, and personal connection. It also comes with a lot of work! Setting up the service, ensuring your product keeps fresh after delivery (even if customers are not home to receive it) and running the routes year-round in all types of weather can be a real challenge. However, there are a number of dairies that are bringing this service back in a successful way.

Examples:

Crescent Ridge Dairy, MA
South Mountain Creamery, MD/PA/DC/VA
Ritchey's Dairy, PA
Shaw Farm, MA

Community Supported Agriculture (CSA)

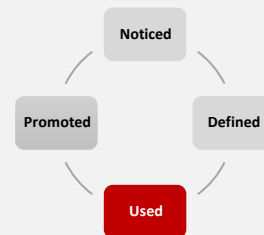
If you like connecting with your customers directly, consider trying a Community Supported Agriculture program. The primary benefit to the producer is having an infusion of cash early in the season for planning purposes. The challenge for many CSAs is coordinating weekly deliveries and keeping items cold until they are picked up.

For dairy processors that have a narrow range of products, partnering with a farm that sells a variety of produce could be a way to participate in an established CSA without "owning" it. CSA customers could



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 3: Getting Customers



add an optional “dairy share” to their delivery in the same way that local meat or flowers are often additions to the traditional bundle. Recipes or food pairing suggestions are always welcome, especially for specialty items or flavors that are new to a customer.

Best practices

- Include a mini-newsletter or farm update with recipes with each box. Sharing this type of information helps retain CSA customers.
- Make sure customers can find all the relevant information and sign up online.
- Consider marketing to groups like businesses and neighborhood associations where you can make a single drop for multiple shares.
- Treat your CSA customers well – they are valuable!

Local/Regional Resources

Here are a few examples of CSAs that offer dairy shares or dairy add-on shares:

- <https://gardenofvefarm.com/csa/cheese-dairy/>
- <https://thefarmbus.csaware.com/store/>
- <https://loudounfarms.org/local-produce/csa/>
- <https://www.bellairfarm.com/addon>
- <https://remembrancefarm.webs.com/dairy-csa>

Restaurants

Depending on your product line and marketing goals, restaurants may be natural and desirable partners for you. Reaching restaurant patrons means new customers for your products and strengthening connections with local businesses is good practice. To connect with restaurants, you need to understand chefs as well as their customers. The farm-to-table movement and emphasis on sourcing fresh and local products make this a win-win partnership for both sides.

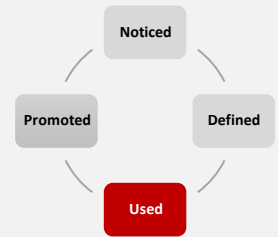
Some best practices for working with restaurants:

- Seek out restaurants that offer daily or weekly specials or seasonal menus where your products would be a good fit
- Start small by identifying a few chefs who you respect and want to build a relationship with
- “Under-promise and over-deliver” - quality and consistency are key
- Connect at the right time for the restaurant
 - Don’t drop in. Set up a time to come by for the chef to taste your samples, and bring your product spreadsheet with cost, quantity, and availability (if seasonal)



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 3: Getting Customers



- Avoid lunch or dinner service. The best times are generally weekdays between 9-11 or 2-4
- Update your product sheet as needed if your products change seasonally.
- Ask restaurants that you supply to promote your business on their menu, website, and social media by using your logo and link to your website.
- Be professional with invoicing and on-time delivery. Have a regular order deadline and delivery day established, and set up easy electronic payment options, if you haven't already done so.

Local Resources:

Additional Resources:

- [Marketing Fresh Produce to Restaurants](#), University of Kentucky Cooperative Extension (2018)
- [Marketing to Restaurants | NC State Extension](#) (2010)

A great example of how a local dairy facilitates and promotes its availability in restaurants can be found on Monument Farms' website: <https://www.monumentfarms.com/#>

Distributors and Wholesale

Food wholesalers, or distributors, act as a middleman in moving product from your farm to other businesses and institutions. Working with a food wholesaler or distributor can be a good choice if you want to move larger volumes of product. The services do come with an associated cost that many farms see as worthwhile through time saved on delivery.

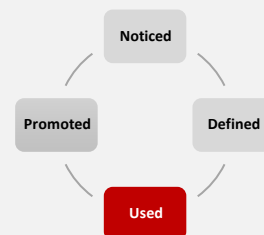
Best Practices

- Proper documentation/food safety plan: Make sure you are certified by the state for safe dairy production and distribution.
- Packing standards & labeling: Talk to distributors about their packing standards and how they need your products labeled.
- Form a strong relationship: As with any business relationship, find out how to work best together. Plan on meeting each off-season to evaluate the season and plan for the upcoming year.
- Utilize forward Contracts when working with wholesale buyers to plan together for the season.



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 3: Getting Customers



Local/Regional Resources

- Crown O’Maine Distribution, ME, NH, MA. <https://www.crownomaine.com/>
- Native Maine Produce & Specialty Foods. ME, NH, MA. <https://www.nativeme.com/>
- Lancaster Farm Fresh Co-op (Wholesale). PA. Make deliveries in the Northeast, Mid-Atlantic, Southeastern US. <https://lancasterfarmfresh.com/wholesale/>
- **Black River Produce**, VT, (800) 228-5481
- **Provisions International**, White River Jct VT, (802) 291-6100
- **Seacrest**, MA
- **Formaggio Kitchen**, MA
- **Saxelby Cheesemongers**, NYC
- **Food Matters Again**, NYC
- **Food Connects**, Brattleboro VT
- **Myers Produce**, Northern VT
- **Green Mountain Farm Direct**, VT
- **Dole & Bailey**, MA

Food Hubs

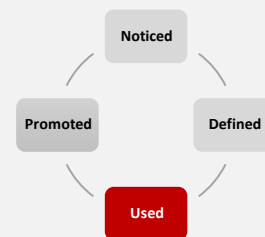
As they behave much like distributors, consider participating in a Local Food Hub in your area. The organizations benefit farmers by connecting them with additional (often larger) markets, and providing services like marketing, accounting, sales, and education. Food hubs can offer a single drop-off point for multiple farmers that also serves as a single pick-up point for distributors and customers. Many focus on providing access to fresh, local foods in underserved areas.

- Search for Local Food Hubs in your state here: <https://www.ams.usda.gov/local-food-directories/foodhubs>
- Search by state: <https://sustainableagriculture.net/blog/national-guide-to-finding-local-food/>
- [Eastern Food Hub Collaborative](#)
- [Farm Fresh Rhode Island](#), Pawtucket, RI



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 3: Getting Customers



- [Food Connects](#), Brattleboro, VT
- [Three River Farmers Alliance](#), Exeter, NH

Grocery Stores

Grocery stores can be a good market for dairy processors who can provide a larger and consistent volume of products. However, it's good to start smaller by selling directly to the public, small country stores, or restaurants before you attempt to step up to the grocery store market. Starting slow will allow you to make your production consistent and strengthen your marketing skills.

Best Practices

- Look for grocery stores that prioritize selling local products
- When first approaching a store, find buyers in the department you want to sell to and set up an appointment. Find out whether they have goals for carrying and selling local and regional products. Bring samples, a product list for the full season, pricing, your business license, and any applicable certifications.
- Find out if they require Good Agricultural Practices (GAP) Dairy certification, other certifications, or the dollar amount of product liability insurance you must carry
- Deliver your high-quality products when promised
- Ask the buyer what packing and labeling they prefer and make sure your delivery is clearly labeled with your business name and contents.
- Develop your wholesale pricing so that both you and the market can make a profit. Aim for 35-45% lower than retail/market pricing
- Use a good, clear, professional invoicing system – track deliveries, get signed invoice duplicate and file your copy
- Be aware of the potential need for UPC coding
- Provide signage or shelf talkers that incorporate photos and/or information about the product and your farm, and ask stores to use them - catching customers' eyes will help to move your products faster

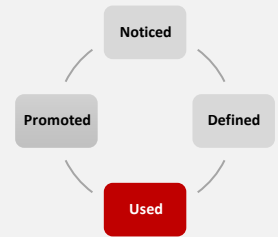
Local/Regional Resources

Though it's a chain, Whole Foods is known for carrying local products. Getting your products into local and regional Whole Foods stores makes for a good goal. But focus first on small local grocers and food co-ops that buy local!



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Phase 3: Getting Customers



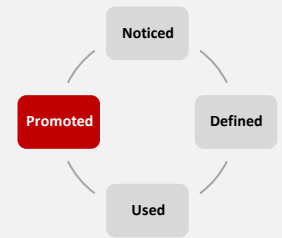
One example is the Harrisburg, PA based [Radish & Rye Food Hub](#)

Schools & Institutions

Schools and institutions seem like natural places to sell your products, especially as schools focus on nutrition and dairy. There may also be strong interest from schools in connecting with local farms. Don't forget, though, that you must meet the scale of their demand. In return, it's a steady market. Both institutions and schools are a great way to get more connected to your community. Many schools and state and private hospitals and institutions are shifting their procurement standards to incorporate more fresh, healthy, local foods, so if your business produces on a large enough scale, it would be a good time to connect with these markets.

Best Practices

- For schools, start by reaching out to smaller private schools over the local public school system
- Contact the school's food buyer, district child nutrition services director, or the Farm-to-School Coordinating Team
- For institutions like hospitals, senior centers, or retirement communities, contact the head chef or food services director
- Set up meetings and bring your pricing sheet as well as samples
- Dedicate time to building relationships and communicate regularly
- Depending on the school or institution, your farm may be required to carry additional liability insurance or third-party food safety certifications like Good Agricultural Practices (GAP)
- Learn about and use Forward Contracts to plan for the season with buyers

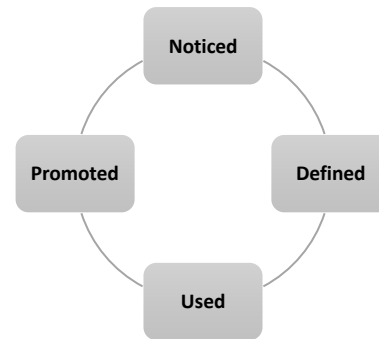


Phase 4: Inspiring customers to promote your brand

Continue authentic storytelling

In the section we remind you that your brand follows a cycle in the marketplace. Once you've managed to get your products into the hands of consumers, it has likely happened because they noticed you and were intrigued by what you appeared to offer, that is, how the consumer "defined" you as something interesting to them.

Now you can cement a relationship with the consumer in a way that inspires them to not only enjoy your product experience, but to promote your brand to others.



Consumers tend to want to promote a particular product or brand for one of two main reasons:

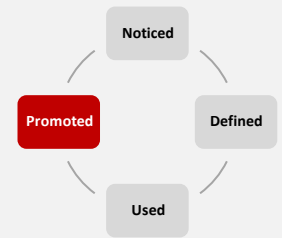
1. They like the person to whom they refer the brand and so they want them to share the joy they received from the product or brand; and/or
2. The brand in some way aligns with their values – how they think things should be – and therefore serves to "amplify" those values. That is, the brand reflects and projects the consumer's self-image and what they stand for. We find many examples of consumers promoting brands that as a way of making a statement about what they value and believe, and what they want others to associate with them (think electric cars, responsibly manufactured clothing, or an exclusive club membership.)

What this means is that the storytelling you developed in Phase 2 where you "define" your brand continues in different forms once you're interacting directly with the customer or the customer is interacting with your products (or farm/plant/retail store).



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 4: Getting Promoted



The customer was likely drawn to you based on the story you are already telling (via words, images, video, packaging, etc.). You should continue to do all those things as naturally and authentically as possible to connect with your current customers.

Engender Rapport and Support

In addition to continuing to tell your story, there's another key dimension of your interaction with customers we'd like to share with you now as a final recommendation.

From 2015-2017, we conducted research on behalf of the Better Business Bureau (BBB, bbb.org) seeking to understand better why consumers may want to buy from one company over another.¹ We found that in general consumers look for five things that companies do that makes the consumer want to continually buy from and promote the company's brand. We called these five things the "5 Gestures of Trust," attitudes and behaviors that any company can practice on a regular basis. They are, to be:

- **Honest** – give customer what they need to know, when they need to know it, in plain language
- **Transparent** – be generous with the information you provide about your company and practices
- **Proactive** – feel the need to provide value to the customer before they ask for it
- **Humble** – recognize and acknowledge that your success is due in large part to your customers, employees, family, and your community
- **Equitable** – share power whenever you can to make doing business with you an "even playing field." Make transactions simple and clear, guarantee the quality of your products, and back that up at every step.

Here are some articles, a podcast, and a report from the BBB that provide more information on this research.

[Report](#) from BBB.

Article in BBB's "Trusted" Magazine: [Do your customers trust your business? Five gestures of trust may determine whether they do or not.](#)

Article in BBB "Trusted" Magazine: [Formula for Building Loyal Customers.](#)

Better Series [Podcast – The 5 Gestures of Trust](#)

Finally, keep the cycle going. Realize that the best way for you to get noticed and start the cycle again is to have customers promote you alongside your own promotion.

¹ See bbb.org/5gestures for more information on this study.