



Legacy Business Program

Strategic Marketing Plan

Prepared for
San Francisco Office of Small Business

Prepared by
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October 22, 2021

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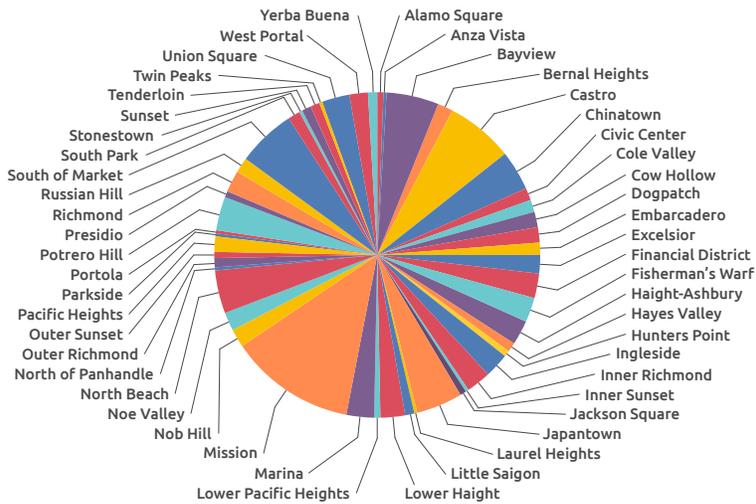
Executive Summary



Investing in our city's anchor institutions at this moment will not only enable our economic recovery, it will also help ensure our neighborhood businesses and nonprofits can continue to thrive and contribute to our city's unique cultural and economic vitality.

– Anonymous

The Legacy Business Program partners are a diverse group of businesses that make up the cultural fabric of the city of San Francisco.



Of those that are listed on the Legacy Registry, fully 60% have operated for over 40 years, and 11% have been in business for more than 100 years. While these businesses have been through difficult times throughout their history, the recent pandemic clearly ranks high among the most challenging of times. Even so, the business owners exhibit considerable resilience, and during the interviews we conducted they articulated remarkably similar ideas about the type of programs they believe would help their businesses.

60%
of Legacy Businesses have been in business for over 40 years

11%
of Legacy Businesses have been in business for more than 100 years

67%
of Legacy Businesses have been on the Registry for fewer than 3 years (18 months were under intermittent lockdown)

Design Media conducted two types of research to better understand the needs of Legacy Program partners: An online survey was sent to all businesses in the Registry; and, one-on-one interviews were done with six businesses chosen by the Office of Small Business. The online survey had an especially robust response rate – over 50% – with 151 responses.

“ We are proud to be a legacy business in San Francisco. The recognition of our years of hard work is important to us. ”
– Anonymous

The research results were clear and unified, and the City’s staff members can feel confident that if they act according to the recommendations below, the programs will be supported and valued by the Legacy Business Program partners.

This plan is presented in three parts. Part 1 outlines recommendations for programs and tactics the City can undertake to support the Legacy Business Program. Part 2 describes programs and tactics recommended for the Legacy Business partners to undertake themselves. Part 3 outlines the implementation plan.

87%
say the Legacy Business Program has helped their business

95%
said they would recommend the program to another eligible business

Part 1:

Plan for the Legacy Business
Program of the San Francisco
Office of Small Business (SFOSB)

Goal

The recommended goal for SFOSB is to successfully define and build an increasing level of awareness for Legacy Businesses. The definition should clearly identify what sets these ventures apart from others, and why people should care. By the end of 2022, there should be a compelling definition of the category, and a measurable level of awareness for San Francisco residents and visitors.

Target Audiences

The target audiences for SFOSB are: (1) residents of San Francisco and (2) tourists from California and beyond. Legacy Business customers fall on a spectrum of locality; many are primarily focused on local customers, for example hardware stores and service retailers, while other Businesses are primarily focused on tourists, such as ferries, restaurants, and attractions. For this reason, our recommendation is that SFOSB target both customer audiences through diverse media.



The city has an opportunity to just kind of own and promote its heritage and its wealth of legacy businesses.

– Joe Burgard, Red & White Fleet



Unique Value Proposition

“Our San Francisco Legacy.”* San Francisco has an established reputation for uniqueness, diversity, and history. That reputation was built over decades, including during the 1960s, when stories of social change abounded. The city remains full of marvelous stories, and each Legacy Business has a rich story to contribute. By collecting, framing, and communicating these stories, we will build upon the unique value of San Francisco.

*“Our San Francisco Legacy” is presented as a concept, not a formal tagline nor creative copy. If accepted, formal copy will be developed and presented as part of a go-forward project plan.

>80%

of Legacy customers are local to the City – and to the neighborhood

>70%

of Legacy Businesses are dependent on walk-in traffic for over half of their sales

55%

of Legacy Businesses are dependent on at least some tourist business

Recommended Marketing/Promotions Strategy

In order to create awareness of the Legacy Program businesses, we recommend a blend of programs designed to reach both locals and tourists. The recommendation includes online and outdoor marketing, public relations, and partner collaboration. The marketing will be neighborhood focused to enable residents and visitors to better understand the living history of their neighborhood.

1 

Public Relations is recommended for launching the program and generating excitement, to be followed by pitching of the unique Legacy Business partner stories to local press with articles and interviews on TV/radio stations (e.g., KQED’s Forum).

2 

Outdoor advertising that is locally-focused on the neighborhood level. Bus stop posters (and potentially outdoor boards), in the neighborhoods that have higher numbers of Legacy partners, will communicate “Our San Francisco Legacy” and feature Legacy Businesses that can be found in the immediate radius (within 6-7 blocks) of the bus stops.

3 

Wildcard: Enable local artists to create outdoor murals that focus on businesses within neighborhoods engaged in “Our San Francisco Legacy.”

4 

Explore financial cooperation with other SF agencies.

5



Publish a book, "Our San Francisco Legacy," created from the stories and photos of the Legacy Business Partners. Organize the book by neighborhood. Consider exploring financial cooperation with SF Travel and distribute to hotels, tourist venues/stores, and bookshops.

6



Create a series of short-form videos (60-90 seconds) featuring the best, most visual stories. Create compilations that can be shown at events and through partners (like the Roxie and Red and White fleet).

7



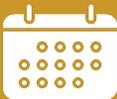
Leverage and amplify Legacy partner activity, including videos, stories, and relevant social media posts.

8



Meet with, and define, collaboration opportunities with both SF Heritage and SF Travel. These relationships, if undertaken at the City level, could provide very powerful support for the Legacy Business partners.

9



Create a community of Legacy Businesses. Set up mixer events to enable introductions with like-minded businesses.

10



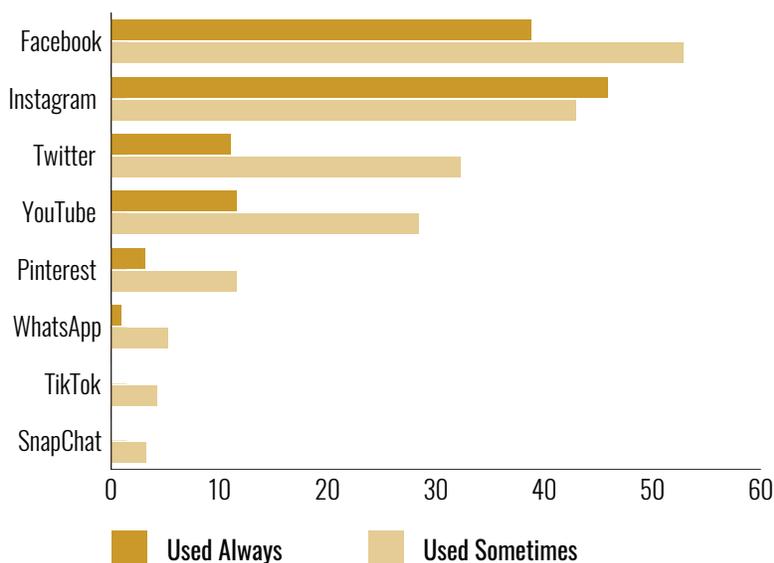
Create QR codes, possibly in the shape of the Legacy Business Program torch, for the storefront windows of Legacy Businesses, which people could click to see historical information about the business.

Online Strategy

Leverage the assets being created as part of the marketing strategy and extend them to online use. Retweet/reshare activity from Legacy partners to extend their reach to new audiences.

- Use the #sflegacybiz hashtag in all posts. Create a content calendar for Legacy Business posts to plan social media content and posts in advance (e.g., one Legacy Business spotlight per week) and share with SF Heritage.
- Enhance the Legacy Business Registry website to include an events calendar, video highlights section, partnership possibilities/examples through a Log In area.
- Add a sidebar on the Legacy Business Registry website for more dynamic content – an automated feature to retweet/reshare relevant #hashtags.
- Use the Instagram, Facebook, and Twitter accounts to post stories of Legacy partners (creative can be a mix of photo panels and short-form videos). Add TikTok and YouTube to the social media arsenal. These are ideal platforms for storytelling and short-form video.
- Enhance the Legacy Business Registry website by adding a field “Date Added to the Registry” for each Legacy Business listing, pulling data from existing fields in the Legacy Business Registry database.
- Enhance the Legacy Business Registry website by adding a field in the registry “Known For” that enables businesses to list signature meal items, or other things unique to them.
- Create a new page on the Legacy Business Registry website that promotes special offers from partners (e.g. Holiday sales, limited-time events, etc.)
- Add a “News” webpage to the Legacy Business Registry website, pulling data from the existing News section of the Legacy Business Registry database.

Most Popular Social Media Platforms Used to Promote Business



15%
*of Legacy
 Businesses consider
 eCommerce their
 primary customer*

Business Networking/Partnerships

The research shows that few partners are aware of SF Heritage and SF Travel, even though many of them would potentially benefit from working with these associations. Most of the business owners indicated a strong interest in partnering with like-minded (or neighboring) businesses but didn't know how to meet or go about creating partnerships. The partnership between the Red and White fleet and Roxie Theater is a good model of cooperation that can be extended and copied.

- **Create mixer events for the Legacy Businesses to get together and collaborate.**
- **Invite the mayor and supervisors to the Legacy Business mixers.**
- **Invite SF Heritage and SF Travel to present at the Legacy Business mixers.**
- **Invite educational speakers to present at the Legacy Business mixers.**
- **Build cross-promotions with SF Travel and SF Heritage. Both have websites, newsletters, etc.**
- **Partner with San Francisco Planning and the Historic Preservation Commission.**

“The Legacy Business Registry status provides visibility, credibility and recognition that is important to us. We appreciate the connection to other Legacy businesses.”
 – Anonymous

Materials/Collateral

The Legacy Business partners are not asking for additional materials nor collateral. What follows are some ideas designed to build loyalty to the program and create awareness of Legacy Businesses in tourist locations.

- **Create “Our San Francisco Legacy” paper brochures highlighting Legacy Businesses by neighborhood for distribution with SF Travel, hotels, and retailers.**
- **Create an electronic copy of the “Our San Francisco Legacy” brochure to broaden its reach and allow Legacy Businesses, merchant groups, civic leaders and other stakeholders to share the brochure within their networks. SFOSB can share the brochure on its website(s) and e-newsletter.**
- **Create a Legacy logo pin – give one to every business upon entry to the Registry.**
- **Make enough additional pins to sell.**

93%

of Legacy Businesses expect the Legacy program to provide assistance or advice with Marketing & Promotions

75%

of Legacy Businesses expect the Legacy program to provide assistance or advice for Connections with Other Legacy Businesses

92%

of Legacy Businesses have websites

We have decals on our box office windows so anybody that's coming through our doors is going to see a thing that says we're a Legacy Business. I would say that's the predominant way that we promote it. We're going to be getting, I think, a plaque from Legacy Business, which is really exciting.

– Lex Sloan, Roxie Theater

Legacy Business Plaques

SFOSB should continue to build upon and expand its Legacy Business bronze plaque program to benefit as many Legacy Businesses as possible, including those businesses that are able to mount bronze plaques on their exterior of their buildings and those that cannot for any number of reasons.

1. Provide free bronze plaques to those Legacy Businesses that are able to mount them on their building exteriors.
2. Provide free or discounted bronze plaques to those Legacy Businesses that are able to mount them on their business interiors.
3. Design etched plaques that are similar in design to the bronze plaques but are thinner and can be mounted to glass surfaces.
4. Design virtual plaques that are similar in design to the bronze plaques.



Onboarding New Legacy Businesses

Inclusion in the Legacy Business Registry is an acknowledgement of the Legacy partner’s contribution to the city’s cultural fabric. Even though it is currently difficult to conduct in-person ceremonies, we do recommend that a kit be given or sent to all inductees to congratulate them on their accomplishment.

The kit could include:

1. **Certificate for Legacy Businesses**
2. **Legacy logo pin**
3. **Letter of congratulations (including URL to the Legacy website)**
4. **List of neighboring Legacy Businesses**
5. **Window clings**
6. **Point-of-sale stickers**
7. **Bronze Plaque questionnaire**

Opportunities

Official support from the City outside of SFOSB would be appreciated by the partners. Having their local supervisors visit, support, and promote the Legacy Businesses in their districts would help communicate the story of “Our San Francisco Legacy.”

Very few of the Legacy Business partners are participating in loyalty programs. There is an opportunity to create and introduce a simple loyalty program exclusively for the Legacy Businesses. The following preliminary ideas can be developed further.

1. **Offline: Punch cards are an easy loyalty tool to create, with the customers having to complete a set number of punches from businesses to win a prize.**
2. **Online: Users who post photos of themselves at Legacy Business partner locations and use the official hashtag #sflegacybiz can either win a prize or be highlighted online by the City.**

84%

of Legacy Businesses cite “Recognition” as the reason they applied to the Legacy Registry

57%

of Legacy Businesses cite “grants”

54%

of Legacy Businesses cite “Marketing & promotional help”

Summary

As stated above, San Francisco has an established reputation for uniqueness, diversity, and history. Our Legacy Businesses each have a story to tell, and those stories – assembled, cultivated, and shared – form a mosaic worthy of the art that decorates the city’s secret staircases. San Francisco retains its individualistic nature through scores of businesses and the unique stories they have to tell. The City is positioned perfectly to become a master storyteller for these worthy ventures.

“Our San Francisco Legacy”



Part 2:

Plan for the Legacy Business Partners





The status symbol is very valuable. To be able to say that we are a Legacy Business means a lot to our staff, patrons and board members.

– Anonymous



Goal

The recommended goal for the Legacy Business partners is for 30% of them to begin promoting their status as an “Our San Francisco Legacy” partner and integrating the idea of Legacy into their brand identity. Partners that meet this goal by the middle of 2022 will be eligible for spotlighting in the “Our San Francisco Legacy” campaign.

Target Audiences

Existing clients and new prospects (varies broadly between local and tourist customers, depending on the business).

Unique Value Proposition

My business is unlike any other business in the city. It has history and we are “Our San Francisco Legacy.”



We need more social promotion and partnership with the city.

– Anonymous



95%

of Legacy Businesses said they would recommend the program to another eligible business

78%

of Legacy Businesses say the Legacy Business Program has helped their business

Recommended Marketing/Promotions Strategy

In order for Legacy Businesses to benefit from the City's "Our San Francisco Legacy" campaign, they must embrace the idea of incorporating Legacy into their individual brands. Legacy graphics and messaging should be visible at all consumer touchpoints, prompting customers to either ask, "What is a Legacy Business?" or to make the connection between the campaign and the individual business.

1



Registry certificates are best displayed in locations where customers and staff can easily see them. Framing the certificate is recommended to both add importance and protect the certificate from damage.

2



Owners are encouraged to document their Legacy stories with words, photos, and videos.

3



Post the owner's Legacy story and Legacy branding inside stores and on their websites.

4



Educate all employees on the definition of Legacy Businesses and the owners' Legacy stories.

5



Forge relationships with other neighborhood Legacy Businesses.

Online Strategy

- Use the #sflegacybiz hashtag whenever possible.
- Owners post their Legacy stories (in chapters, if possible) to Instagram, Facebook, and Twitter.
- Repost relevant news from neighborhood Legacy Businesses.



Business Networking/Partnerships

- Encourage owners to attend Legacy Business mixer events and to meet their neighbors and/or other compatible businesses.
- Learn more about SF Heritage and SF Travel and what they can do for their business.

Materials/Collateral

- If the City publishes a book to celebrate the Legacy Businesses, Legacy Businesses should be encouraged to either carry the book or promote their participation in the book.
- All Legacy Businesses should be encouraged to order or buy the Legacy Business plaque and to post it prominently. These plaques are elegant badges of honor, and if placed external to the business, will create a visual connection to the “Our San Francisco Legacy” campaign. We will also implement non-bronze alternative plaques and virtual plaques.
- Whenever collateral or other materials are created, Legacy Businesses should consider adding the Legacy Business Program logo on the material.

Summary

The Legacy Business partner plan is designed to work in tandem with the Legacy Business Program plan for SFOSB. This reciprocal amplification will enable a greater reach for the unique value proposition of “Our San Francisco Legacy” and create superior overall value for the participants.

Part 3:

Project Implementation for the Legacy Business Program Plan



Following is the implementation plan for the Legacy Business Program portion of the strategic marketing plan, including a general timeline and responsible entities.



Short-Term Projects

Short-term projects can be implemented relatively quickly and easily under present staffing, contracts, and budget allocations.

Select “Our San Francisco Legacy” or a similar phrase as a formal tagline and develop formal copy as part of a go-forward project plan.

(SFOSB to select tagline; Design Media to develop formal copy)

Use the #sflegacybiz hashtag in all posts. Create a content calendar for Legacy Business posts to plan social media content and posts in advance (e.g., one Legacy Business spotlight per week) and share with SF Heritage.

(SFOSB to implement)

Add a sidebar on the Legacy Business Registry website for more dynamic content – an automated feature to retweet/reshare relevant #hashtags.

(Design Media to implement)

Enhance the Legacy Business Registry website by adding a field “Date Added to the Registry” for each Legacy Business listing, pulling data from existing fields in the Legacy Business Registry database.

(SFOSB to populate database; Design Media to implement)

Enhance the Legacy Business Registry website by adding a field in the registry “Known For” that enables businesses to list signature meal items, or other things unique to them.

(SFOSB to populate database; Design Media to implement)

Add a “News” webpage to the Legacy Business Registry website, pulling data from the existing News section of the Legacy Business Registry database.

(SFOSB to populate database; Design Media to implement)

- Create a Legacy logo pin – give one to every business upon entry to the Registry. Make enough additional pins to sell.
(Design Media to provide design guidance; SFOSB to order)
- Provide free bronze plaques to those Legacy Businesses that are able to mount them on their building exteriors.
(SFOSB and Priority Architectural graphics to implement through existing contract)
- Onboarding new Legacy Businesses: Acknowledge the inclusion of new businesses added to the Legacy Business Registry and develop a kit to be given or sent to all inductees to congratulate them on their accomplishment.
(SFOSB and Design Media with Andrea Baker Consulting)
- Coordinate and support up to three (3) publicity opportunities and mixers. Prepare a "how-to" guide for coordinating future events.
(Design Media with Andrea Baker Consulting)
- Announce the marketing program to the partners to give them time to prepare and to build excitement around the program.
(SFOSB to populate database; Design Media to implement)



Medium-Term Projects

Medium-term projects can be implemented with additional SFOSB staff and/or funding.

- Create a new page on the Legacy Business Registry website that promotes special offers from partners (e.g. Holiday sales, limited-time events, etc.)
- Public Relations: launching the program to be followed by pitching of the unique Legacy Business partner stories to local press with articles and interviews on TV/radio stations (e.g., KQED's Forum).
- Outdoor advertising that is locally-focused on the neighborhood level. Bus stop posters (and potentially outdoor boards), in the neighborhoods that have higher numbers of Legacy partners, will communicate "Our San Francisco Legacy" and feature Legacy Businesses that can be found in the immediate radius (within 6-7 blocks) of the bus stops.
- Explore financial cooperation with other SF agencies.
- Create a series of short-form videos (60-90 seconds) featuring the best, most visual stories. Create compilations that can be shown at events and through partners (like the Roxie and Red and White fleet).

Leverage and amplify Legacy partner activity, including videos, stories, and relevant social media posts.

Meet with, and define, collaboration opportunities with both SF Heritage and SF Travel. These relationships, if undertaken at the City level, could provide very powerful support for the Legacy Business partners. Build cross-promotions with SF Travel and SF Heritage. Both have websites, newsletters, etc.

Create a community of Legacy Businesses. Set up mixer events to enable introductions with like-minded businesses. Engage with local merchant associations and business leaders and encourage them to host events. (e.g., Ocean Avenue and Richmond merchant associations have held prior mixer-type events to highlight Legacy Businesses in their districts). At these events, Legacy Businesses can get together and collaborate. Invite educational speakers to present at the Legacy Business mixers. Invite the mayor and supervisors to speak at the Legacy Business mixers. Invite SF Heritage and SF Travel to present at the Legacy Business mixers.

Use the Instagram, Facebook, and Twitter accounts to post stories of Legacy partners (creative can be a mix of photo panels and short-form videos). Add TikTok and YouTube to the social media arsenal. These are ideal platforms for storytelling and short-form video.

Partner with San Francisco Planning and the Historic Preservation Commission.

Provide free or discounted bronze plaques to those Legacy Businesses that are able to mount them on their business interiors.

Design etched plaques that are similar in design to the bronze plaques but are thinner and can be mounted to glass surfaces.

Design virtual plaques that are similar in design to the bronze plaques.

Implement Part 2, the plan for the Legacy Business Partners, encouraging them to promote their status as an "Our San Francisco Legacy" partner and integrate the idea of Legacy into their brand identity.



Long-Term Projects

Long-term projects can be implemented with additional SFOSB staff, budget, planning, partnerships, and/or contracts with contractors.

Enhance the Legacy Business Registry website to include an events calendar, video highlights section, partnership possibilities/examples through a Log In area.

Wildcard: Enable local artists to create outdoor murals that focus on businesses within neighborhoods engaged in “Our San Francisco Legacy.”

Publish a book, “Our San Francisco Legacy,” created from the stories and photos of the Legacy Business Partners. Organize the book by neighborhood. Consider exploring financial cooperation with SF Travel and distribute to hotels, tourist venues/stores, and bookshops.

Create QR codes, possibly in the shape of the Legacy Business Program torch, for the storefront windows of Legacy Businesses.

Offline: Punch cards are an easy loyalty tool to create, with the customers having to complete a set number of punches from businesses to win a prize.

Online: Users who post photos of themselves at Legacy Business partner locations and use the official hashtag #sflegacybiz can either win a prize or be highlighted online by the City.