

CompTIA Marketing Toolkit



A Marketing Plan Roadmap

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MARKETING TOOLKIT OVERVIEW

Successful marketing begins with a plan. This Marketing Toolkit guides you through the eight stages of building and executing a plan that will help you attract prospects, convert visitors to leads, and turn happy customers into advocates for your services.

Practical steps guide you through each stage. Tools and templates provide you with resources marketing professionals use on their own campaigns. The Marketing Toolkit is designed to help you do three things:



1. Spark ideas to launch a successful marketing program tailored specifically for technology solution providers.



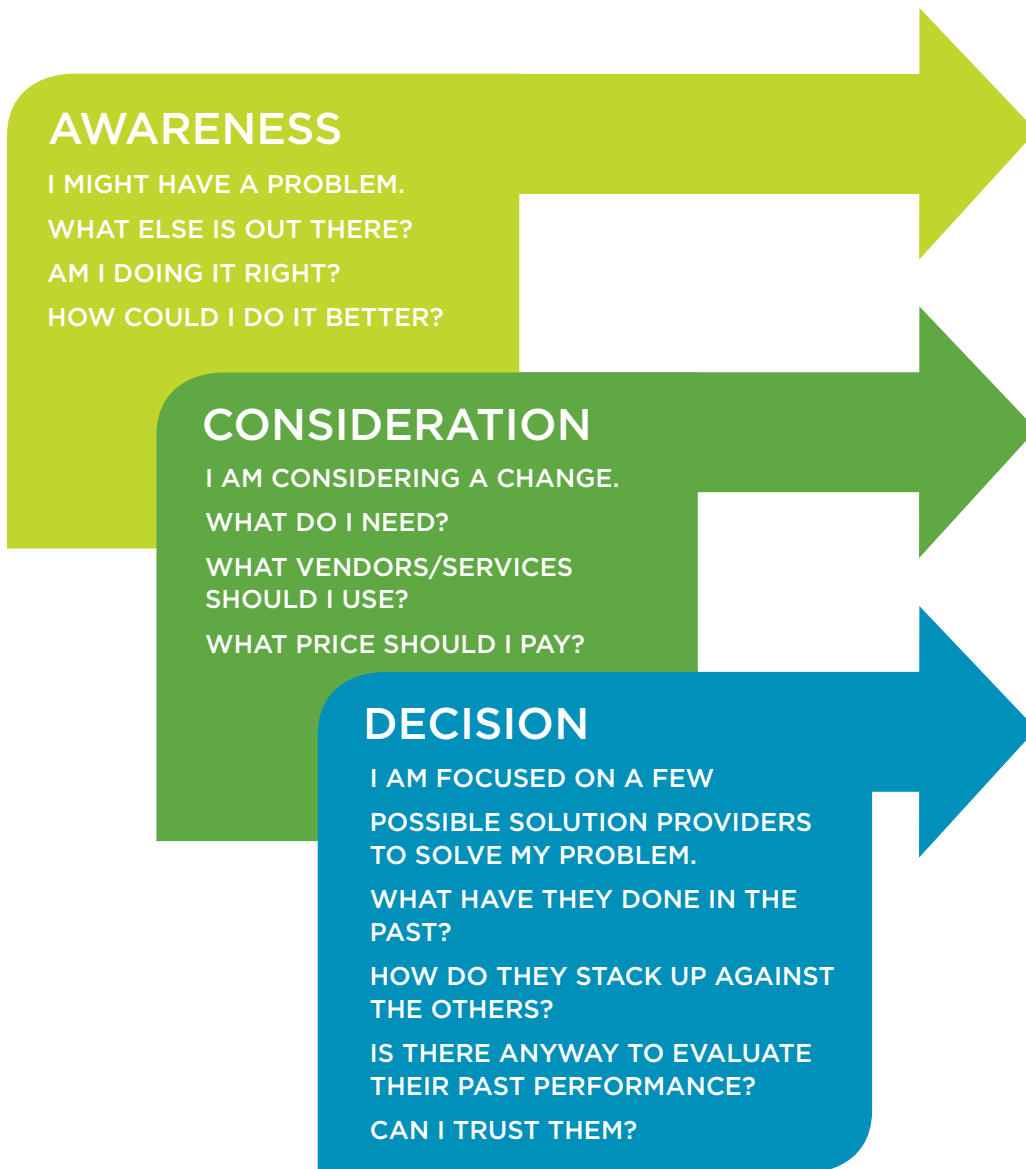
2. Ignite a marketing strategy that drives demand for your products and services.



3. Flame strategies with goals, metrics, and measurements to help you gauge performance and repeat success.

The Buyer's Journey

The Marketing Toolkit is built around the contemporary buyer's journey from start to finish. Consider the purchase process from the buyer's perspective illustrated below.



The 8 Stages of a Marketing Plan

Stage 1: Assess the Market

Understand the industry and marketplace.

Stage 2: Know Your Competition

Analyze your competition and develop your competitive wedge.

Stage 3: Find your Sweet Spot

Hone in on clients who need the services you provide.

Stage 4: Tell a Compelling Story

Define your value proposition and key differentiators.

Stage 5: Align Sales & Marketing

Foster interdependence and shared goals among sales and marketing efforts.

Stage 6: Define your Goals

Tie goals to management benchmarks and sales targets.

Stage 7: Select Attractive Marketing Tactics

Find the optimal mix of marketing tactics to attract, convert, and delight buyers through the buyer's journey.

Stage 8: Measure Performance

Establish marketing metrics and performance targets to repeat successes and avoid failures.



STAGE 1

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Stage 1

STAGE 1: ASSESS THE MARKET

Analyzing market conditions is crucial to spending your marketing dollars wisely. Market research gives you insight into industry trends that provide a sound perspective for making business decisions.

Assessing the market helps you better understand the following:

- How do external factors such as government regulations, economic conditions, and the political landscape influence my ability to compete?
- What are my strengths and weaknesses? What can I leverage? What will hinder my growth?
- What is the likely demand for my solutions and how much market share should I pursue?

STEP 1:

Take the pulse of your market and learn how to identify high-growth verticals that deliver value.



• **GUIDE:** 10 Steps to Assessing Your Market Potential



• **GUIDE:** SWOT Analysis

STAGE 2

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Stage 2

STAGE 2: KNOW YOUR COMPETITION

Competitive analysis is the process of examining how your company actually performs in comparison to similar businesses. Examining your competitive environment prepares you to set goals and priorities while keeping one step ahead of your competition.

STEP 1: Identify Your Competitors

What is the share of demand you can tap? Identify your competitors in the market and take a close look at what they offer. Compare your own offer against those of others to identify will drive sales.

Use the Competitive Matrix to identify your competitors.



• **TEMPLATE:** Competitive Matrix

STAGE 3

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Stage 3

STAGE 3: FIND YOUR SWEET SPOT

Your sweet spot is customers most likely to need the services you provide and purchase what you have to offer. These are the people who feel your offering was designed especially for them. Sweet spot customers will usually cost you less to acquire and less to retain than any other potential customer. Use your knowledge of your product and the problems you solve to find your sweet spot customers.

STEP 1: Establish Your Customer Persona

Why do some marketing messages attract buyers while others fail to generate interest? Often it's because the marketer doesn't understand what matters to the customer. Clearly understanding your buyers and their journey helps you craft messages that are more customer-centric and less product or company focused. A Customer Persona will also help your team stay focused on targeting clients who want and need your services.

Customer Personas are important because they do the following:

1. Personas put a face to the prospective customer. Use them to tailor your messages and offerings to a specific type of buyer rather than a generic group of unknown clients.
2. Personas remove the tendency to think of yourself as the customer. Personas provide the structure to keep you objective.
3. Personas guide you through the process of developing marketing communications across mediums (print, digital, online, events, etc.).
4. Developing personas offer a great opportunity for sales and marketing teams to work together on a shared task.

Use the Customer Persona Guide to define your ideal buyer.



• **GUIDE:** Customer Persona Guide

STEP 2: Locate Your Sweet Spot

By identifying your customer “sweet spot” or target market, you can position and promote your product or service directly to the customers you defined in the Customer Persona. This will not only help you connect with the prospective buyers who are most likely to use your product or services, but also increase the likelihood of closing deals faster.

Use the Sweet & Sweeter Spot Analysis Guide to find out how to prioritize your marketing resources.



• **TEMPLATE:** Sweet & Sweeter Spot Analysis

STAGE 4

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Stage 4

STAGE 4: TELL A COMPELLING STORY

The marketing message is a key instrument in reaching your target sweet spot client. Your “story,” or value proposition, is the foundation for everything you do. The bottom line is that no one cares what you do until they care what you can do for them. A strong value proposition speaks directly to your sweet spot target audience and tells them exactly why they should purchase your products and services. A strong value proposition is also a clear statement of the concrete value and results a customer will get from purchasing and using your products and/or services. Learn how to build a compelling story that communicates your value and keeps your prospective buyers engaged.

STEP 1: Write Your Value Prop

A strong value proposition is essential for communicating to customers why your business is better than, and different from, your competition. In addition, a value proposition shows why your company is worth doing business with.

Value propositions are especially important for technology business owners because without brand recognition, it can be difficult to demonstrate why getting to know the company is worth the customer’s time.

Use the Value Proposition & Key Differentiators Guide to build your own compelling value proposition and tell customers your story.



• **GUIDE:** Developing a Compelling Value Proposition & Key Differentiators

STAGE 5

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Stage 5

STAGE 5: ALIGN SALES & MARKETING

As buyers take control of their purchasing processes, aligning sales and marketing teams is more important than ever. Unfortunately, these two complimentary and interconnected functions often become siloed or misaligned. The problem comes from a difference in perspective.

- Sales teams are concerned with meeting immediate revenue goals. Marketing departments are charged with thinking about a longer-term strategy.
- Sales can feel the information Marketing provides does not create actionable leads. Marketing can wonder why Sales does not follow up on opportunities they hand over.
- Sales sometimes misunderstand the work Marketing does as creating “fluff.” Marketing sometimes misinterpret Sales as failing to follow through on the company’s strategic mission.

A good marketing plan takes a holistic approach, aligning sales and marketing goals, and defining of who does what and when. Aligning the different strengths of sales and marketing creates a united front for driving demand, eliminating inefficiencies, and closing deals faster. The first step in aligning sales and marketing is digging deeper into the buyer’s journey.

STEP 1: Understand the New Buyer’s Journey

Unity between Sales and Marketing teams is more important than ever. Consumers do more of their own research and they engage with more content to support their decision-making.

Today’s savvy, educated, overworked buyer will have shopped for options, compared pricing, and determined requirements before ever engaging with your business. According to the Harvard Business Review, 60% of a buyer’s decision-making is done before they ever talk to your Sales Team for the first time. With access to competitive pricing and online user evaluations, the consumer often makes the sales person the very last step in his/her buyer’s journey.

The Internet has changed how buyers find us, evaluate our services, and make buying decisions. The wealth of online information has shifted power away from the sales person and put it into the hands of the buyer.

Study the Buyer’s Journey Guides to better understand the roles of marketing and sales during the buyer’s decision-making process.



• **GUIDE:** The Buyer’s Journey

STEP 2: Create a Sales Enablement Plan

Marketing plays an important role in the sales process; find and attract qualified buyers while driving demand for your products and services.

Sales enablement equips the Sales team to use the assets created by Marketing to attract buyers during the “awareness” stage and establish credibility during the “consideration” and “decision-making” stages of the buyer’s journey. Ultimately, a sales enablement plan helps close deals faster.

Use the Sales Enablement and Funnel Guide to purposefully tie marketing and sales to a common goal, and enable your team to move the buyer towards a buying decision.



• **GUIDE:** Sales Enablement and Sales Funnel

STAGE 6

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Stage 6

STAGE 6: DEFINE YOUR GOALS

Marketing requires the same planning and goal setting as any other function of your business.

Many times when business owners begin developing an integrated marketing plan, they overemphasize tactics. *Should we invest in this trade show or sponsor that event? How many lunch and learns should we host? Should we use Facebook, Twitter, or Google+? Should we generate blogs four or ten times a month?*

SEO, e-mail campaigns, social media engagement, online content development, and offline efforts are all fundamental pieces to a successful integrated marketing approach, but they are simply tactics and tools. Your efforts will be much more successful and easier to implement if you begin with strategic goals.

“If you don’t know where you’re going, you’ll end up somewhere else.” (Yogi Berra)

In this step, you will learn how to connect your marketing goals to management goals and position marketing as a strategic part of your overall business and revenue success.

STEP 1: Align Your Marketing Goals with Management Goals

Filling the top of the funnel with qualified leads that meet your sweet spot criteria begins with a keen understanding of your management goals and sales targets. Too often marketing goals are lumped in with sales goals, ignoring the connection between marketing and the organization's strategic goals. Misdirected marketing will leave you both broke and tired.

Marketing should be a strategic asset of your success as it integrates across departments to achieve wider goals for the organization.

Use the Goal Setting Guide to define management goals that drive attainable and profitable marketing goals.



• **GUIDE:** Goal Setting Guide

STEP 2: Set Marketing Goals

After defining your executive goals in Step 1, you are ready to define your marketing goals. Using the Marketing Goal Template, set marketing goals that are tightly aligned with your management goals. Think about what you want to achieve. What goals does marketing have to attain to help you reach those goals?

Caution: Be careful not to confuse goals with tactics. In Stage 7, we will explore the various types of marketing tactics used to help you achieve specific goals.



• **GUIDE:** Marketing Goal Template

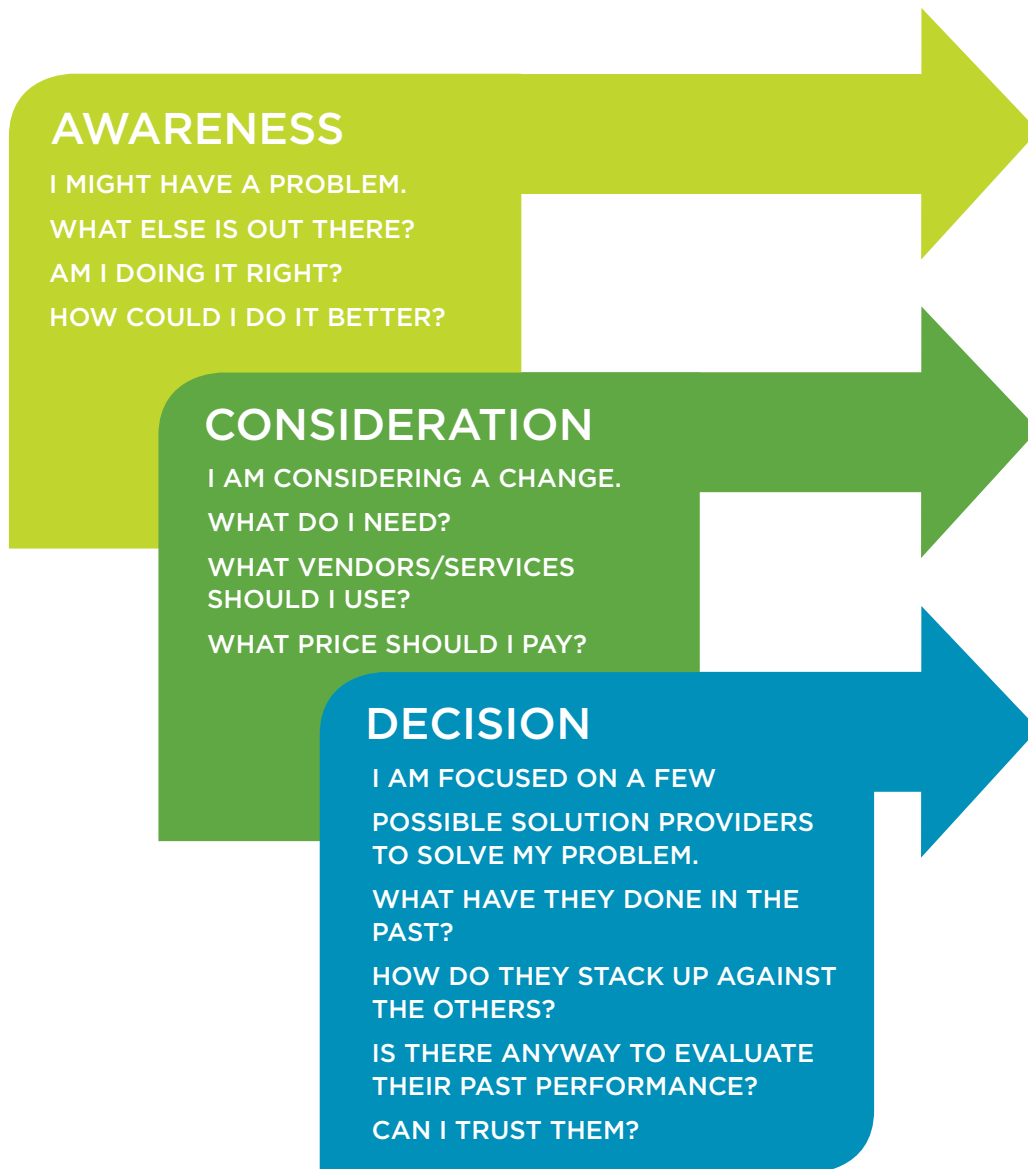
STAGE 7

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Stage 7

STAGE 7: SELECT MARKETING TACTICS TO SUPPORT YOUR GOALS

Find the optimal mix of marketing tactics to attract, convert, and delight buyers throughout the buyer's journey.



TACTIC 1: Build Content That Attracts Buyers

As discussed above, the Internet has dramatically changed how customers buy.

Since buyers are using the Internet to begin purchasing and make more than 60% of their buying decision before they engage with your sales team, content must be a major part of your marketing strategy.

Content is the education and thought leadership you build to attract buyers when they are looking for answers and just beginning the buyer's journey. Every company or organization can make a valuable contribution to the education of the marketplace. "Content marketing," as it known today, is often the preferred tactic for building trust with buyers and enticing to learn more about your products and services.

While social media and blogs have garnered a lot of recent attention, these tools are simply venues for getting your content in front of buyers. In the guides below, we will explore how to create content that will attract buyers and how to schedule and plan your content deployment.



• **GUIDE:** Best Practices for Building Content that Connects You to Buyers



• **GUIDE:** Content Builders



• **TEMPLATE:** Editorial Calendar (Microsoft Excel file)

TACTIC 2: Convert Visitors to Leads

Now that you've determined which content will have the greatest power to attract buyers, it is time to build offers that convert visitors to your content into leads.

To convert visitors, present an offer as easy as possible to access. In the guides below,, we show you how to create and present offers that entice visitors to leave their contact details with you. We also show you how to nurture the buyer with additional offers that build trust, brand recognition, and demand for your products and services.



• **GUIDE:** Building Your Offer



• **GUIDE:** 5 Steps for Attracting Buyers to You

TACTIC 3: Find Clients Through Actionable Out-Bound Marketing

As the Internet and mobile devices offer new methods of advertising, outbound marketing has lost some of its longstanding appeal. Nonetheless, outbound marketing is still important for companies looking to get on the map and reach the widest possible audience in the shortest amount of time.

Outbound marketing also proves to be particularly effective in business-to-business marketing and in transactions involving higher-end products. Although these customers may research other companies (inbound marketing), they will eventually seek out personal contact established through face-to-face meetings or through networking at industry events and trade shows.

In this guide, we discuss the best practices around setting appointments, choosing call lists, and getting sales a seat at the table.



• **GUIDE:** Out-Bound Marketing Guide

TACTIC 4: Optimize Your Web in Order to Get Found

An important factor in maintaining visibility on the web is making sure your web site and content are optimized for Internet search engines.

Major Internet search engines are focusing on creating the best possible user experience, which means these engines list website results by relevance. Google Fellow, Amit Singhal has said that “Google site quality algorithms are aimed at helping people find, “high-quality,” sites by reducing the ranking of low-quality content.”

The recipe to search engine optimization (SEO) is frequently posting high-quality content with well-placed keywords. The guides below show you how to put SEO into action.



• **GUIDE:** 9 SEO Best Practices



• **GUIDE:** SEO Getting Started

TACTIC 5: Mobile Marketing Tactics to Promote and Drive Demand

Savvy marketers are discovering they can engage mobile users with the right strategies. Findings from several mobile advertising companies highlight successful mobile marketing strategies and show that the time is now for marketers to consider how to incorporate mobile into their efforts.



• **GUIDE:** Mobile Engagement Strategies

TACTIC 6: Generate Leads Through Digital Marketing

Gone are the days when the messages people got about your products or services came from you and consisted of only what you wanted them to know. Digital marketing now gives visitors real-time information and education to help buyers find you and make a buying decision. In addition, digital marketing allows you to access a wealth of information about visitors’ activities across multiple channels, including web click-through rates and social media engagement.

In the guide below, we explore types of digital marketing and techniques for improving traffic and lead generation.



• **GUIDE:** Digital Marketing Guide

TACTIC 7: Campaigns That Keep Your Brand Top of Mind

Campaigns are effective for keeping your product/services on visitors' minds. When combined with appointment setting and follow up, email, direct mail, social media and blog distribution are powerful tools for influencing, educating, and pushing buyers down the sales funnel to a buying decision. Since no one campaign is built alike, this guide is designed to help you think through your campaign goals and to set up and execute a successful campaign.

CAMPAIGN TYPES

- 1. Brand Campaign:** A brand campaign educates buyers who are using competitor services and/or not interested in making a technology purchase right now. A brand campaign keeps your brand and value in front of potential customers so that when they change services and/or shop for vendors, they think of your business.

A successful brand campaign will touch potential buyers no more than 2 or 3 times per year.

Newsletters, educational downloads, and thought leadership are good components of this type of campaign.

- 2. Awareness Campaign:** An awareness campaign targets prospective buyers who have expressed interest in your services and provided their contact information in exchange for a free download asset, but are not yet ready to make a buying decision.

A successful awareness campaign will touch buyers quarterly with educational downloads, thought leadership pieces, and invites to special events to reinforce the value of your services and encourage buyers to move forward in their journey.

- 3. Nurture Campaign:** A nurture campaign is designed for prospects who have heard your sales pitch, seen a demo, and probably received a proposal. In spite of all your efforts, these buyers are not yet ready to make a buying decision. Similar to an awareness campaign, a nurture campaign provides more targeted messages around the types of products/services in which buyers have shown previous interest. Invites to reconnect and "status" checks are recommended to keep a close pulse on the needs of buyers should they change their minds and decide to move forward in their buying decision.

- 4. Customer-Touch Campaign:** This campaign is a necessity for every organization with active customers. The customer-touch campaign keeps your services and value top-of-mind with product/service updates, "Did You Know(s)" on the value you add to their businesses, ways to contact you for different services, hours of operation, social media links, and updates on events and activities when they can connect with you. Customer campaigns should touch your clients quarterly and be relevant to what the customer purchased from you.

Use the Campaign Set-up & Checklist Guide to help you build successful campaigns that achieve results you can measure and repeat.



• **TEMPLATE:** Campaign Set-Up & Execution Checklist (Microsoft Word file)



• **GUIDE:** Campaign Checklist

TACTIC 8: Getting Found: The Art of Being Visible

People do business with companies they know and trust. Making your brand visible and being known is a must for attracting, converting, and keeping customers. Now is the time to leverage the connection between digital tools, social networks, and traditional public relations tactics to be visible and make your brand known.

The Visibility Guide walks you through the various types of visibility techniques including press, social, events, and trade shows that build awareness and help you position your brand. The Event Checklist provides you with an annual planner to plan and execute these events. The Seminar Event Checklist is a simple guide for implementing and successfully executing external educational events for maximum visibility to future buyers.



• **GUIDE:** Visibility Guide



• **TEMPLATE:** Event Manager Template



• **TEMPLATE:** Press Release Template



• **GUIDE:** Seminar Event Checklist

TACTIC 9: Provide Credibility to Close the Deal Faster

No one tells your story better than a third party. Showcase your customers' success and let satisfied clients speak for you. Highlight the benefits of your services through customer stories to build trust and credibility with prospective buyers.

Many prospective buyers question claims of credibility and want proof of the value you say you will provide. Letting customer testimonials do your bragging helps your sales team establish trust and close deals faster.

Capture client success stories using the Case Study template. This template serves as an outline for demonstrating your value through the stories of customers who have experienced your services firsthand. The 59 Second Testimonial Guide will help you quickly gather and write testimonials that can be used throughout all of your marketing materials and correspondence.



• **TEMPLATE:** Case Study Template



• **GUIDE:** 59-Second Testimonial Guide

TACTIC 10: Find New Business Through Client Referrals

Customer referrals and recommendations remain the best feeder for high quality leads. Referral leads cost the least to obtain and often close the fastest. Your best leads will always come from clients who “know” your business value.

In the guide below we will explore how to:

- Evaluate your current customer base
- Identify and list possible referral sources
- Develop emails and physical reminders for asking for new business
- Define a process for accepting referrals



• **GUIDE:** Customer Referral Guide

STAGE 8

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Stage 8

STAGE 8: MEASURE PERFORMANCE

Measuring performance and understanding your marketing spending is vital to your ability to show value and return on investment. While the topic of marketing metrics and ROI can spur debate around methodology, performance should be measured at both a tactical and strategic level.

In the Marketing Measurements & Metrics Guide, we review the key performance metrics that matter to a marketing manager and C-level executive.

Finally, a sample Marketing Budget is included to help you budget and plan for your investment into your growth and your company's future.



• **GUIDE:** Marketing Measurements & Metrics Guide



• **GUIDE:** Marketing Budget Sample