



# Marketing Toolkit for MSPs





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## Introduction

As a skilled managed services provider (MSP), you know how to solve business technology problems on behalf of your customers. But in a competitive market or playing field, do you know how to market strategically on behalf of your business?

CompTIA's *Marketing Toolkit for MSPs* is a step-by-step guide to help you:

- Assess your current marketing efforts.
- Gain a deeper understanding of your target audience's IT challenges, needs and motivations.
- Strengthen your competitive advantage.
- Create marketing goals and a budget.
- Choose a mix of marketing approaches.
- Track your marketing successes.

In an evolving advertising landscape, MSPs need digital marketing skills and channels to meet their company and sales goals. This guide examines best practices for:

- Website marketing.
- Email marketing.
- Pay-per-click (PPC) advertising.
- Search engine optimization (SEO).
- Content marketing, including video marketing.
- Social media marketing.

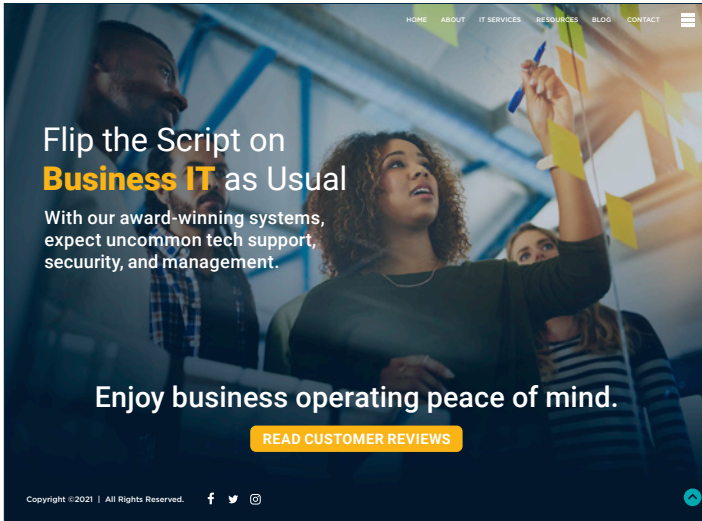
## Who This Is For

This toolkit is designed for solution/service providers that want to leverage marketing to compete and grow their business, specifically:

- New MSPs needing to create a strong marketing foundation but not sure where to start.
- Solo owner-operators or small MSP teams that don't have dedicated marketing staff but need to enable greater sales with proven marketing tactics.
- Medium-size MSPs looking to energize their marketing playbook with newer, digital approaches.

## What's Included

As a turnkey resource, this toolkit includes more than 15 completed examples and customizable templates, which you can use in your business right away.





|                    | Best Practice Questions   | Your Answers |
|--------------------|---|--------------|
| Headline           | <ul style="list-style-type: none"> <li>In a few words, what is it that you offer?</li> <li>What readers can do or experience as customers of your MSP?</li> </ul>   |              |
| Key Differentiator | <ul style="list-style-type: none"> <li>How is your MSP qualified to deliver on its headline?</li> <li>Do you specialize in serving specific industries?</li> <li>Is your technology or process unique?</li> <li>What metrics quantify your point of differentiation?</li> <li>Do you offer a business model that other MSPs don't?</li> </ul> |              |
| Benefits           | <ul style="list-style-type: none"> <li>What can readers accomplish or experience if they hire you to manage their business technology needs?</li> </ul>   |              |
| Call to Action     | <ul style="list-style-type: none"> <li>What action should readers take next?</li> </ul>   |              |

| Company Goal | Sales Funnel Stage | Marketing Goal | Supporting Tactic | Metrics for Success |
|--------------|--------------------|----------------|-------------------|---------------------|
|              |                    |                |                   |                     |
|              |                    |                |                   |                     |
|              |                    |                |                   |                     |
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|              |                    |                |                   |                     |
|              |                    |                |                   |                     |
|              |                    |                |                   |                     |

Each marketing tactic in steps 7 and 8 includes at-a-glance information to help you identify best uses, the skill level and time necessary to complete it as well as a cost range for budget purposes.

### Networking at a Glance

|                   |  |
|-------------------|--|
| Best Uses         | <ul style="list-style-type: none"> <li>✓ Generate leads</li> <li>✓ Increase company/brand awareness</li> </ul> |
| Skill to Complete |  <p>Intermediate</p>        |
| Time              |  <p>8-10 hours a week</p>   |
| Cost              | \$1,000-\$2,500/year plus cost of time spent networking  |

Use this information and the toolkit to create goals and find tactics that work best for you, your resources and business.

**Let's get started!**



# 1 | Complete a Marketing Audit

As tempting as it is to start testing out different marketing tactics, solution/service providers should take stock of their marketing assets and efforts. Think of this step as your marketing audit.

A marketing audit is a lot like a network audit you perform for customers. It identifies areas of marketing strength as well as gaps or opportunities for improvement.

A marketing audit:

- Documents existing resources your MSP has for marketing and sales.
- Creates a benchmark for tracking future marketing efforts.
- Pinpoints channels or tactics you may have overlooked.



Download the [Marketing Audit Questionnaire/Checklist](#) (Figure 1) to get started.

**Figure 1:** Marketing Audit Questionnaire/Checklist

|  | Y/N | If No, When to Evaluate? |            |              |
|--|-----|--------------------------|------------|--------------|
|  |     | Now ASAP                 | Next Month | Next Quarter |
| <b>Resources</b>   |     |                          |            |              |
| Do you have a business name and logo?                      |     |                          |            |              |
| Have a business website?                                   |     |                          |            |              |
| Maintain a database of prospects, leads and customers?     |     |                          |            |              |
| Use marketing automation software?                         |     |                          |            |              |
| <b>Customer Experience</b>                                 |     |                          |            |              |
| Have you defined the demographics of your target audience? |     |                          |            |              |
| Completed personas for ideal customers?                    |     |                          |            |              |
| Mapped customer journey/experience?                        |     |                          |            |              |
| <b>Competition</b>   |     |                          |            |              |
| Have you identified your top 3 competitors?                |     |                          |            |              |
| Know how they market their solutions/services?             |     |                          |            |              |
| Completed a competitive analysis?                          |     |                          |            |              |

|  | Y/N | If No, When to Evaluate? |            |              |
|--|-----|--------------------------|------------|--------------|
|  |     | Now ASAP                 | Next Month | Next Quarter |
| <b>Value Proposition</b>   |     |                          |            |              |
| Have you explained your value proposition?                               |     |                          |            |              |
| Identified your key differentiator?                                      |     |                          |            |              |
| <b>Marketing Goals</b>   |     |                          |            |              |
| Have you defined marketing goals?  |     |                          |            |              |
| Do marketing goals align with company sales goals/sales funnel?          |     |                          |            |              |
| <b>Marketing Budget</b>  |     |                          |            |              |
| Do you allocate a % of company gross revenues for marketing?             |     |                          |            |              |
| If yes, what % do you allocate? _____                                    |     |                          |            |              |
| <b>Marketing Tactics</b>   |     |                          |            |              |
| Do you use traditional marketing tactics?                                |     |                          |            |              |
| Networking?  |     |                          |            |              |
| Referral programs?   |     |                          |            |              |
| Cold calling?  |     |                          |            |              |
| Press releases?  |     |                          |            |              |
| Exhibits at local events?  |     |                          |            |              |
| How about digital marketing tactics?                                     |     |                          |            |              |
| Website marketing?   |     |                          |            |              |
| Email marketing?   |     |                          |            |              |
| Pay-per-click (PPC) advertising?   |     |                          |            |              |
| Search engine optimization?  |     |                          |            |              |
| Content marketing?   |     |                          |            |              |
| Video marketing?   |     |                          |            |              |
| Social media marketing?  |     |                          |            |              |
| <b>Metrics as of ___/___/_____</b>                                       |     |                          |            |              |
| Database   |     |                          |            |              |
| _____ # of prospects   |     |                          |            |              |
| _____ # of leads   |     |                          |            |              |
| _____ # of customers   |     |                          |            |              |
| Website scorecard (using Hubspot's free <a href="#">Website Grader</a> ) |     |                          |            |              |
| _____ /30 points for performance   |     |                          |            |              |
| _____ /30 points for SEO   |     |                          |            |              |
| _____ /30 points for mobile optimization                                 |     |                          |            |              |
| _____ /30 points for security  |     |                          |            |              |



|   | Y/N | If No, When to Evaluate? |            |              |
|---|-----|--------------------------|------------|--------------|
|   |     | Now ASAP                 | Next Month | Next Quarter |
| <b>Promotional emails</b>                         |     |                          |            |              |
| _____ average open rate                           |     |                          |            |              |
| <b>LinkedIn</b>                                   |     |                          |            |              |
| _____ # of updates                                |     |                          |            |              |
| _____ # of followers                              |     |                          |            |              |
| _____ # of visitors                               |     |                          |            |              |
| <b>Facebook business page</b>                     |     |                          |            |              |
| _____ # of people reached                         |     |                          |            |              |
| _____ # of post engagements                       |     |                          |            |              |
| _____ # of page likes                             |     |                          |            |              |
| <b>Twitter</b>                                    |     |                          |            |              |
| _____ # of tweets                                 |     |                          |            |              |
| _____ # of tweet impressions                      |     |                          |            |              |
| _____ # of profile visits                         |     |                          |            |              |
| _____ # of followers                              |     |                          |            |              |
| <b>Tracking</b>                                   |     |                          |            |              |
| Regularly survey customers to gauge satisfaction? |     |                          |            |              |
| Monitor metrics?                                  |     |                          |            |              |

Once you've completed the audit, look for rows where you indicated No and start to prioritize based on areas you need to evaluate:

- Now.
- Next month.
- Next quarter.

The work you complete in steps 5-8 of this toolkit will help confirm marketing areas to prioritize immediately, compared to those that can wait a bit.



## 2 | Adopt a Customer-Centric Mindset

Why do some marketing efforts generate leads and engagement while others fail to do anything? Often, it's because the marketer doesn't understand the customer or see business technology issues from the customer's perspective.

A customer-centric mindset gives your marketing efforts laser focus, which leads to better marketing and business outcomes. Two activities can help you accomplish this mindset:

- Creating customer personas.
- Mapping the customer journey.

### Creating Customer Personas

Think about your ideal customer. Describe their goals, a typical workday, the websites and information sources they use. Drawing on your experience and using market research, explain:

- Obstacles they face in choosing your company's solutions and services.
- Business challenges that your company solves.
- Criteria they use when evaluating solution/service providers.

Give them a name and maybe add a stock photo. What you've created is a customer persona—a semi-fictional representation of your ideal customer. Customer personas put a face to your target audience.

Why do personas make sense for MSP marketers? Simply put, they remind you to keep a customer focus when creating marketing content and tactics. Customer personas help you develop marketing messages that speak to your target audience, not to you.

What does a completed customer persona look like? Figure 2 is an example.

**Figure 2:** Customer Persona Example

## Steve, CEO of local orthopedic and sports medicine center

|  |   |  |
|--|---|--|
| <p><b>AGE</b> 57<br/> <b>FAMILY</b> Married with two children<br/> <b>EDUCATION</b> MBA<br/> <b>HOUSEHOLD INCOME</b> Six figures<br/> <b>TITLE</b> CEO<br/> <b>LOCATION</b> Your market area</p> | <p><b>PERSONAL</b></p> <ul style="list-style-type: none"> <li>• Disciplined, organized, focused</li> <li>• Strong ties to local charities, his church and alma mater</li> <li>• Active in fundraising efforts benefitting local school sports organizations</li> </ul> <p><b>GOALS</b></p> <ul style="list-style-type: none"> <li>• Open a fourth clinic location to serve their growing customer base.</li> <li>• Recruit three new orthopedic surgeons.</li> <li>• Negotiate a strategic partnership with a neighboring bone and joint institute.</li> </ul> <p><b>TYPICAL DAY</b></p> <p>Steve gets to work early—no later than 7 am—to review his schedule and priorities. Most of Steve’s day is dedicated to meeting with senior staff and business partners. When he’s not in meetings, Steve likes to review current/projected company financials. Before stepping into the CEO role, Steve served as the CFO for 8 years. He’s a numbers guy and highly analytical.</p> <p><b>WEBSITES</b></p> <ul style="list-style-type: none"> <li>• Google</li> <li>• Wall Street Journal</li> <li>• Forbes</li> </ul> <p><b>DEVICES</b></p> <ul style="list-style-type: none"> <li>• Smartphone</li> <li>• Laptop</li> </ul> <p><b>SOCIAL NETWORKS</b></p> <ul style="list-style-type: none"> <li>• LinkedIn</li> </ul> | <p><b>PREFERRED COMMUNICATION</b></p> <ul style="list-style-type: none"> <li>• Email</li> <li>• Phone</li> </ul> <p><b>INFO SOURCES</b></p> <ul style="list-style-type: none"> <li>• Word of mouth/recommendations from other private practice owners</li> <li>• Whitepapers</li> <li>• Business use cases</li> <li>• Webinars</li> </ul> <p><b>COMMON OBJECTIONS TO YOUR COMPANY’S SOLUTIONS AND SERVICES</b></p> <ul style="list-style-type: none"> <li>• Multi-year contract</li> <li>• Long wait times to close out help desk tickets</li> <li>• Inconsistent follow through on expected upgrades</li> <li>• Service level agreement exceptions and limitations</li> </ul> <p><b>CHALLENGES THAT YOUR COMPANY SOLVES</b></p> <ul style="list-style-type: none"> <li>• High turnover for IT specialist staff</li> <li>• Unpredictable expenses in maintaining legacy hardware/infrastructure</li> <li>• Network and IP phone issues needing on-site support at different clinic locations</li> </ul> <p><b>CRITERIA FOR EVALUATING MSPs</b></p> <ul style="list-style-type: none"> <li>• Experience</li> <li>• Credibility</li> <li>• Reliability</li> <li>• Scalability</li> <li>• Reviews/testimonials</li> </ul> |
|--|---|--|



“I want to spend more time growing our business than hearing about technology issues.”

In practical terms, how does a completed customer persona inform your marketing strategy as a technology solution/service provider? Draw on customer persona insights to tailor your marketing channels and messaging.

A solution/service provider targeting users with Steve’s demographics might:

- Incorporate testimonials from other healthcare customers on your website.
- Include use cases in email marketing campaigns for prospects.
- Create sponsored content and message ad campaigns on LinkedIn.

When creating customer personas, answer the following questions and use the template on the next page:

1

**Name/role/company**

What is your ideal customer's name, role, and company?

2

**Demographics**

What is your customer's age, marital status, number of children, highest education level/degree achieved, household income, title, and business location?

3

**Photo/avatar**

Some MSPs find it helpful to add a photo when completing a customer persona. If you don't find a photo you like, an avatar works just as well.

4

**"I want..." statement**

What are your customer's IT needs and goals? Phrase them in the form of an "I want" statement. For example: Steve wants to find a solution/service provider to manage all IT issues so that he can focus on growing his company's business.

5

**Personality**

How would you describe your customer's personality/temperament? Is your customer extroverted or introverted? Confident or cautious? More likely to see the big picture or more detail oriented?

6

**Goals/typical day**

What are your customer's business goals? What does a typical day look like?

7

**Websites/devices/social networks**

What websites does your customer visit during the workday? What devices are used? How about social networks?

8

**Preferred communication/info sources**

How does your customer prefer to communicate and interact with you? When researching solution/service providers, what information sources does your customer seek out?

9

**Objections/solved challenges/evaluation criteria**

What are your customer's objections to choosing managed IT services? What business challenges does your company solve? What criteria does your customer use when evaluating providers?



Download the [Customer Persona Template](#) (Figure 3) to get started.

Figure 3: Customer Persona Template

**1 Name, role, company**

**2** AGE  
FAMILY  
EDUCATION  
HOUSEHOLD INCOME  
TITLE  
LOCATION

**3**

**4** "I want..."

**5** PERSONAL  
.  
.  
.

**6** GOALS  
.  
.  
TYPICAL DAY  
.  
.

**7** WEBSITES  
.  
.  
DEVICES  
.  
.  
SOCIAL NETWORKS  
.  
.

**8** PREFERRED COMMUNICATION  
.  
.  
.  
INFO SOURCES  
.  
.  
.

**9** COMMON OBJECTIONS TO YOUR COMPANY'S SOLUTIONS AND SERVICES  
.  
.  
.  
CHALLENGES THAT YOUR COMPANY SOLVES  
.  
.  
CRITERIA FOR EVALUATING MSPs  
.  
.

## Mapping Customer Journeys

After you've created customer personas, think about how they experience your business as prospects, leads and customers of managed IT services. Mapping these experiences or journeys will help you:

- Pinpoint motivations and needs throughout the prospect-lead-customer lifecycle.
- Identify opportunities where you can improve the customer experience.
- Accomplish a customer-centric mindset.



Broadly, customer journeys consist of three stages:

**1. Awareness**

- Customers are aware that their current IT infrastructure and/or staffing aren't meeting business needs.
- They are interested in improving what they have or understanding alternative options.
- They research online for more information, articles, blogs, or thought leadership pieces on managed IT services.

**2. Consideration**

- Customers believe that they need to make a change, which would require a change to their current setup or hiring a third party to manage their technology needs.
- They have identified a few viable solutions and want to explore these options.
- They will search for vendors, solutions, price, and requirements to help them make a better decision.

**3. Decision**

- Customers narrow their choices down to one or two solution providers and commit to moving forward.
- They request a consultation and review your quote or proposal in order to make a decision.
- Mapping customer journeys—and all the interactions they have with your business—doesn't require specialized or expensive software. Using a spreadsheet, you can map out the journey. A completed example is Figure 4.



Figure 4: Customer Journey Example

|                          | Awareness  |   | Consideration   |   |   | Decision   |   |  |  |
|--------------------------|--|---|---|---|---|--|---|--|--|
|                          | Research managed services  | Research your MSP   | Contact sales/request quote   | Complete consultation   | Review SLA/pricing/terms  | Onboard as new customer  | Monthly billing   | Quarterly business review  | Renew contract   |
| Actions                  | <ul style="list-style-type: none"> <li>• Researches local MSPs.</li> <li>• Finds your business in Google Maps.</li> </ul>                    | <ul style="list-style-type: none"> <li>• Reads Google reviews.</li> <li>• Visits your website.</li> <li>• Contacts other local business owners for recommendations.</li> </ul>  | <ul style="list-style-type: none"> <li>• Calls at 5:10p and leaves a voicemail message.</li> </ul>  | <ul style="list-style-type: none"> <li>• Meets with MSP account executive and senior engineer.</li> </ul>   | <ul style="list-style-type: none"> <li>• Analyzes the SLA line by line.</li> </ul>  | <ul style="list-style-type: none"> <li>• Reviews onboarding tasks, schedule, and planning documents.</li> </ul>                                    | <ul style="list-style-type: none"> <li>• Analyzes invoice to make sure there are no unexpected fees.</li> </ul>   | <ul style="list-style-type: none"> <li>• Reviews stats/metrics.</li> <li>• Explains strategic direction for business.</li> </ul> | <ul style="list-style-type: none"> <li>• Reviews and signs contract.</li> </ul>                            |
| Thinking                 | <ul style="list-style-type: none"> <li>• Legacy hardware is expensive to maintain.</li> <li>• High turnover for IT support staff.</li> </ul> | <ul style="list-style-type: none"> <li>• We need to reduce our IT costs.</li> <li>• Not sure if support plans fit our business needs.</li> </ul>  | <ul style="list-style-type: none"> <li>• I wish I could get pricing or make an appt online.</li> </ul>  | <ul style="list-style-type: none"> <li>• The engineer has deep technical expertise.</li> <li>• I can see the value of outsourcing IT to local experts.</li> </ul>                             | <ul style="list-style-type: none"> <li>• I need to do my homework on this provider before making a decision.</li> </ul>   | <ul style="list-style-type: none"> <li>• This vendor is very organized.</li> </ul>   | <ul style="list-style-type: none"> <li>• This invoice is what I expected.</li> </ul>  | <ul style="list-style-type: none"> <li>• I have a vendor that can scale with us as we grow.</li> </ul>                           | <ul style="list-style-type: none"> <li>• I wish we made the move to managed IT services sooner.</li> </ul> |
| Feeling                  | <ul style="list-style-type: none"> <li>• Burned out.</li> <li>• Wary of getting locked into multi-year contracts.</li> </ul>                 | <ul style="list-style-type: none"> <li>• Impressed by number of 4- and 5-star Google reviews.</li> <li>• Interested to learn more.</li> </ul>   | <ul style="list-style-type: none"> <li>• Unsure about the potential benefits.</li> </ul>  | <ul style="list-style-type: none"> <li>• Overwhelmed by different packages and options.</li> </ul>  | <ul style="list-style-type: none"> <li>• Nervous but committed to moving forward with one of two providers.</li> </ul>  | <ul style="list-style-type: none"> <li>• Hopeful that the onboarding/transition is smooth.</li> </ul>  | <ul style="list-style-type: none"> <li>• Satisfied to have a dedicated team responsible for all IT needs.</li> </ul>  | <ul style="list-style-type: none"> <li>• Impressed with provider's proactive monitoring.</li> </ul>                              | <ul style="list-style-type: none"> <li>• Thankful to focus on growing the business.</li> </ul>             |
| Opportunities to improve | <ul style="list-style-type: none"> <li>• Offer no contract/month-to-month billing and/or money back guarantee.</li> </ul>                    | <ul style="list-style-type: none"> <li>• Encourage existing customers to complete testimonials/Google reviews.</li> <li>• Explain on website how support plans can be customized to suit all business needs.</li> </ul> | <ul style="list-style-type: none"> <li>• Create online tools to enable getting a quote and making an appointment.</li> <li>• Hire after-hours answering service.</li> </ul> | <ul style="list-style-type: none"> <li>• Simplify the number of packages and what's included.</li> <li>• Create a chart that will help prospects compare each package and options.</li> </ul> | <ul style="list-style-type: none"> <li>• Check in with prospect 48 hours after submitting SLA to answer questions and confirm decision-making timeframe.</li> </ul> | <ul style="list-style-type: none"> <li>• Create questionnaire to track customer satisfaction with onboarding process and communication.</li> </ul> | <ul style="list-style-type: none"> <li>• Check in with customer two days after first invoice to ensure that support, communication, and billing are in sync with expectations.</li> </ul> | <ul style="list-style-type: none"> <li>• Schedule yearly cybersecurity training for customer.</li> </ul>                         | <ul style="list-style-type: none"> <li>• Ask customer to complete a testimonial/Google review.</li> </ul>  |

Figure 5 is a template you can customize for your business. For each step in the journey template, solution/service providers should answer the following questions:

- 1 **Actions:** What actions are customers taking?
- 2 **Thinking:** What are they thinking?
- 3 **Feeling:** How are they feeling?
- 4 **Opportunities to improve:** Are there opportunities for our business to improve how it appeals to this customer?



Download the [Customer Journey Template](#) (Figure 5) to map out your customer experience.

Figure 5: Customer Journey Template

|   |                          | Awareness                 |                   | Consideration               |                       |                          | Decision                |                 |                           |                |
|---|--------------------------|---------------------------|-------------------|-----------------------------|-----------------------|--------------------------|-------------------------|-----------------|---------------------------|----------------|
|   |                          | Research managed services | Research your MSP | Contact sales/request quote | Complete consultation | Review SLA/pricing/terms | Onboard as new customer | Monthly billing | Quarterly business review | Renew contract |
| 1 | Actions                  |                           |                   |                             |                       |                          |                         |                 |                           |                |
| 2 | Thinking                 |                           |                   |                             |                       |                          |                         |                 |                           |                |
| 3 | Feeling                  |                           |                   |                             |                       |                          |                         |                 |                           |                |
| 4 | Opportunities to improve |                           |                   |                             |                       |                          |                         |                 |                           |                |

Solution/service providers should map out journeys for **each** of their customer personas.

Once completed, look for points in the journey where the customer is frustrated, unsure, unhappy or overwhelmed. What process, service or staffing improvements can you make to ensure that all customer interactions with your business are successful ones, resulting in happy, satisfied customers? Use the opportunities to improve section of the customer journey map as a list of business continuous improvement considerations.

MSPs may also consider layering in additional detail for each step or column, for example:

- Duration.
- Channels in addition to website:
  - Google.
  - Social networks.
  - Word of mouth.
  - Print.
- Customer satisfaction survey scores.
- Value perception.
- Level of effort required.

#### Customer journey resources from CompTIA:

[Customer Experience Trends in the Channel](#) research report  
[The Technology Buyer's Journey: A Roadmap to Success](#)



## 3 | Study the Competition

If you know your primary competition for managed IT services (and you should), it's wise to study the solutions that competing providers offer and how they market them. In short, you should complete a competitive analysis, which is analyzing how your company performs in comparison to the competition.

Why is a competitive analysis worth your time? Analyzing the competition helps you:

- Identify business trends and opportunities.
- Fine-tune marketing goals and objectives.
- Make informed marketing decisions.
- Strengthen your competitive advantage and value proposition.

A comprehensive competitive analysis consists of three primary sections:

### 1. Company information

- Location
- Annual revenue
- # of employees/contractors
- # of years in business

### 2. Product information

- Solutions/services offered
- Target markets
- Pricing
- Key competitive advantage

### 3. Marketing channels and tactics

- Traditional marketing
- Website
- Search engine results
- Social networks

Figure 6 is a completed example.

**Figure 6:** Competitive Analysis Example

|                            | Your Company  | Competitor #1   | Competitor #2  | Competitor #3  |
|----------------------------|---|---|--|--|
| <b>Company info:</b>       |   |   |  |  |
| Location                   | Dallas, TX  | Dallas, TX  | Forth Worth, TX  | Plano, TX  |
| Annual revenue             | \$1M  | \$1.5M  | \$750K   | \$1M   |
| # of employees/contractors | 10  | 11  | 7  | 6  |
| # of years in business     | 12  | 10  | 4  | 13   |
| <b>Product info:</b>       |   |   |  |  |
| Solutions/services offered | <ul style="list-style-type: none"> <li>• Managed IT</li> <li>• Cloud computing</li> <li>• Cybersecurity</li> <li>• Backup and recovery</li> <li>• Vendor and license management</li> <li>• Managed telecom</li> </ul> | <ul style="list-style-type: none"> <li>• Managed IT</li> <li>• Co-managed IT</li> <li>• Cloud computing</li> <li>• Cybersecurity</li> <li>• Backup and recovery</li> <li>• Vendor and license management</li> <li>• Endpoint management</li> <li>• Managed telecom</li> <li>• Consulting</li> </ul> | <ul style="list-style-type: none"> <li>• Managed IT</li> <li>• Cloud computing</li> <li>• Cybersecurity</li> <li>• Backup and recovery</li> <li>• Vendor and license management</li> <li>• Managed telecom</li> <li>• A/V</li> </ul> | <ul style="list-style-type: none"> <li>• Managed IT</li> <li>• Cloud computing</li> <li>• Cybersecurity</li> <li>• Backup and recovery</li> <li>• Vendor and license management</li> <li>• Endpoint management</li> <li>• Managed telecom</li> </ul> |
| Target markets             | <ul style="list-style-type: none"> <li>• Healthcare</li> <li>• Insurance</li> <li>• Legal</li> <li>• Manufacturing</li> <li>• Real estate</li> <li>• Retail</li> <li>• Non-profit organizations</li> </ul>            | <ul style="list-style-type: none"> <li>• Automotive</li> <li>• Healthcare</li> <li>• Finance</li> <li>• Insurance</li> <li>• Legal</li> <li>• Engineering</li> <li>• Manufacturing</li> <li>• Real estate</li> </ul>  | <ul style="list-style-type: none"> <li>• Finance</li> <li>• Insurance</li> <li>• Legal</li> <li>• Engineering</li> <li>• Manufacturing</li> <li>• Real estate</li> <li>• Retail</li> </ul>   | <ul style="list-style-type: none"> <li>• Finance</li> <li>• Investment</li> </ul>  |
| Pricing                    | <ul style="list-style-type: none"> <li>• Per user</li> <li>• Per device</li> <li>• AYCE</li> <li>• A la carte</li> </ul>  | <ul style="list-style-type: none"> <li>• Three package tiers:</li> <li>• Silver</li> <li>• Gold</li> <li>• Platinum</li> </ul>  | <ul style="list-style-type: none"> <li>• Monitoring only</li> <li>• Per user</li> <li>• Per device</li> <li>• AYCE</li> <li>• A la carte</li> </ul>  | <ul style="list-style-type: none"> <li>• A la carte</li> </ul>   |
| Key competitive advantage  | <ul style="list-style-type: none"> <li>• 24/7/365 support without long-term contracts</li> </ul>  | <ul style="list-style-type: none"> <li>• Enterprise-level IT support for small to medium-sized businesses (SMBs)</li> </ul>   | <ul style="list-style-type: none"> <li>• Serving SMBs all across Texas</li> </ul>  | <ul style="list-style-type: none"> <li>• Specializes in IT solutions/ services for private equity firms, hedge funds and asset managers</li> </ul>   |

|                               | Your Company   | Competitor #1   | Competitor #2   | Competitor #3  |
|-------------------------------|--|---|---|--|
| <b>Traditional marketing:</b> |  |   |   |  |
| Active locally                | Yes  | Yes   | Yes   | Yes  |
| Examples                      | <ul style="list-style-type: none"> <li>Participates in chamber of commerce</li> <li>Is a referral partner for commercial real estate brokers who lease office space in Dallas</li> </ul> | <ul style="list-style-type: none"> <li>Offers IT training and internships for young adults</li> <li>Hosts monthly cybersecurity workshops for SMBs on YouTube</li> <li>Interviewed on IT and cybersecurity trends for locally produced TV show</li> </ul> | <ul style="list-style-type: none"> <li>Answers IT questions for local business newspaper readers in "Ask an Expert" column</li> </ul> | <ul style="list-style-type: none"> <li>Participates in local investor mastermind groups</li> <li>Active in local charity and fundraising events</li> </ul> |
| <b>Website:</b>               |  |   |   |  |
| Easy to navigate              | Yes  | Yes   | No  | Yes  |
| Mobile friendly               | Yes  | Yes   | Yes   | Yes  |
| Keywords/phrases used         | <ul style="list-style-type: none"> <li>Managed IT</li> <li>Reliable</li> <li>Trusted</li> <li>Partner</li> <li>Success</li> </ul>  | <ul style="list-style-type: none"> <li>Enterprise IT</li> <li>Managed IT</li> <li>Co-managed IT</li> <li>Innovative</li> <li>Proactive</li> <li>Results</li> <li>Customer satisfaction</li> <li>Community</li> </ul>                                      | <ul style="list-style-type: none"> <li>Local engineers</li> <li>Managed IT</li> <li>Affordable</li> <li>Small business</li> </ul>     | <ul style="list-style-type: none"> <li>Custom IT solutions</li> <li>Wealth management</li> <li>Safeguard</li> <li>Virtual CIO</li> </ul>                   |
| Incorporates video            | Yes  | Yes   | No  | Yes  |
| Call to action                | <ul style="list-style-type: none"> <li>Download this managed services guide</li> </ul>   | <ul style="list-style-type: none"> <li>Schedule a free 2-hour network audit</li> </ul>  | <ul style="list-style-type: none"> <li>Contact us</li> </ul>  | <ul style="list-style-type: none"> <li>Request an IT consultation</li> </ul>   |
| Blog                          | Yes  | Yes   | No  | No   |
| Answers FAQs                  | Yes  | Yes   | No  | Yes  |
| Chatbot                       | Yes  | Yes   | No  | Yes  |
| Links to social networks      | Yes  | Yes   | Yes   | Yes  |



|  | Your Company   | Competitor #1   | Competitor #2   | Competitor #3   |
|--|--|---|---|---|
| <b>Search engine results:</b>                |  |   |   |   |
| Organic placement for "Managed IT in Dallas" | Page 3   | Page 1  | Page 7  | Page 3  |
| Paid placement                               | No   | Yes   | No  | No  |
| Claimed business in Google Maps              | Yes  | Yes   | No  | Yes   |
| Google reviews                               | 4.7 rating average/24 reviews  | 4.9 rating average/72 reviews   | N/A   | N/A   |
| <b>Social media:</b>                         |  |   |   |   |
| Facebook                                     | <ul style="list-style-type: none"> <li>• 215 company likes</li> <li>• 234 company followers</li> <li>• 1 post/month frequency</li> <li>• Low engagement</li> </ul> | <ul style="list-style-type: none"> <li>• 1,118 company likes</li> <li>• 1,242 company followers</li> <li>• 20 posts/month frequency</li> <li>• Medium engagement</li> </ul> | <ul style="list-style-type: none"> <li>• 37 company likes</li> <li>• 54 company followers</li> <li>• 1 post/quarter frequency</li> <li>• No engagement</li> </ul> | <ul style="list-style-type: none"> <li>• N/A—not on Facebook</li> </ul>   |
| Twitter                                      | <ul style="list-style-type: none"> <li>• 54 followers</li> <li>• 10 posts/month frequency</li> <li>• Low engagement</li> </ul>                                     | <ul style="list-style-type: none"> <li>• 702 followers</li> <li>• 25 posts/month frequency</li> <li>• Low engagement</li> </ul>   | <ul style="list-style-type: none"> <li>• 702 followers</li> <li>• 25 posts/month frequency</li> <li>• Low engagement</li> </ul>                                   | <ul style="list-style-type: none"> <li>• N/A—not on Twitter</li> </ul>  |
| LinkedIn                                     | <ul style="list-style-type: none"> <li>• 149 followers</li> <li>• 10 posts/month frequency</li> <li>• Low engagement</li> </ul>                                    | <ul style="list-style-type: none"> <li>• 1,523 followers</li> <li>• 20 posts/month frequency</li> <li>• Medium engagement</li> </ul>  | <ul style="list-style-type: none"> <li>• 149 followers</li> <li>• 10 posts/month frequency</li> <li>• Low engagement</li> </ul>                                   | <ul style="list-style-type: none"> <li>• 122 followers</li> <li>• 10 posts/month frequency</li> <li>• Low engagement</li> </ul> |
| Instagram                                    | <ul style="list-style-type: none"> <li>• N/A—not on Instagram</li> </ul>   | <ul style="list-style-type: none"> <li>• 844 followers</li> <li>• 10 posts/month frequency</li> <li>• Low engagement</li> </ul>   | <ul style="list-style-type: none"> <li>• N/A—not on Instagram</li> </ul>  | <ul style="list-style-type: none"> <li>• N/A—not on Instagram</li> </ul>  |
| YouTube                                      | <ul style="list-style-type: none"> <li>• N/A—not on YouTube</li> </ul>   | <ul style="list-style-type: none"> <li>• 173 subscribers</li> <li>• 4 videos/year frequency</li> <li>• Medium engagement</li> </ul>   | <ul style="list-style-type: none"> <li>• N/A—not on YouTube</li> </ul>  | <ul style="list-style-type: none"> <li>• N/A—not on YouTube</li> </ul>  |



Download the [Competitive Analysis Template](#) (Figure 7) to capture competitor information. Most of your research on competitors can be completed online.

**Figure 7:** Competitive Analysis Template

|                            | Your Company | Competitor #1 | Competitor #2 | Competitor #3 |
|----------------------------|--------------|---------------|---------------|---------------|
| <b>Company info:</b>       |              |               |               |               |
| Location                   |              |               |               |               |
| Annual revenue             |              |               |               |               |
| # of employees/contractors |              |               |               |               |
| # of years in business     |              |               |               |               |
| <b>Product info:</b>       |              |               |               |               |
| Solutions/services offered |              |               |               |               |
| Target markets             |              |               |               |               |
| Pricing                    |              |               |               |               |
| Key competitive advantage  |              |               |               |               |

|                               | Your Company | Competitor #1 | Competitor #2 | Competitor #3 |
|-------------------------------|--------------|---------------|---------------|---------------|
| <b>Traditional marketing:</b> |              |               |               |               |
| Active locally                |              |               |               |               |
| Examples                      |              |               |               |               |
| <b>Website:</b>               |              |               |               |               |
| Easy to navigate              |              |               |               |               |
| Mobile friendly               |              |               |               |               |
| Keywords/phrases used         |              |               |               |               |
| Incorporates video            |              |               |               |               |
| Call to action                |              |               |               |               |
| Blog                          |              |               |               |               |
| Answers FAQs                  |              |               |               |               |
| Chatbot                       |              |               |               |               |
| Links to social networks      |              |               |               |               |

|   | Your Company | Competitor #1 | Competitor #2 | Competitor #3 |
|---|--------------|---------------|---------------|---------------|
| <b>Search engine results:</b>                     |              |               |               |               |
| Organic placement for "Managed IT in [city name]" |              |               |               |               |
| Paid placement                                    |              |               |               |               |
| Claimed business in Google Maps                   |              |               |               |               |
| Google reviews                                    |              |               |               |               |
| <b>Social media:</b>                              |              |               |               |               |
| Facebook  |              |               |               |               |
| Twitter   |              |               |               |               |
| LinkedIn  |              |               |               |               |
| Instagram   |              |               |               |               |
| YouTube   |              |               |               |               |

While we'll do a deep dive into more technical aspects of marketing tactics later in this toolkit, it's important to complete a competitive analysis so that you can literally see how your MSP business stacks up to the competition.

Solution/service providers should pay special attention to the Products section of the competitive analysis: Do you offer the solutions and services that customers need or think they need?

In the Marketing Channels and Tactics section of the competitive analysis, where do you want to move the marketing needle for your business? What channels and tactics do you find most promising for your target audience and marketing budget?

#### Competitive analysis resources from CompTIA:

[Trends in Managed Services](#) research report

[Trends in Managed Services](#) Volley podcast



## 4 | Strengthen Your Value Proposition

In a marketplace where every MSP offers a wide array of IT services with best-in-class support and flexible pricing, why do customers choose your business? What sets you apart from the competition?

It's your value proposition—the value customers will experience by choosing you as an MSP. A value proposition explains why your company is uniquely qualified to manage customers' business technology needs. Your value proposition is the heart of your competitive advantage.

A value proposition:

- ✓ Considers your target audience.
- ✓ Identifies the pain points you solve.
- ✓ Describes the benefits customers will experience.
- ✓ Explains why your MSP is different from the rest.

What it isn't:

- ✗ Slogan or motto.
- ✗ Mission statement.
- ✗ Filled with business, marketing or IT jargon.

The most successful value propositions are brief—to be read in five seconds (or less). Consider the value proposition example in Figure 8.

Figure 8: Value Proposition Example



HOME ABOUT IT SERVICES RESOURCES BLOG CONTACT

- 1 Flip the Script on **Business IT** as Usual
- 2 With our award-winning systems, expect uncommon tech support, security, and management.
- 3 Enjoy business operating peace of mind.
- 4 [READ CUSTOMER REVIEWS](#)

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↑

As shown in Figure 8, a successful value proposition consists of:

**1**

#### **Headline**

- Like any good news article, a strong value proposition has an attention-grabbing headline.
- In a few words or one short sentence, spark your audience's curiosity about what your business offers. Motivate them to keep reading.

**2**

#### **Key differentiator**

- What sets you apart from other MSPs is your key differentiator.
- Do you serve specific industries, have a unique business model, or use a compelling technology? Shout that out here.
- Lean on the competitive analysis you completed in [step 3](#).

**3**

#### **Benefits**

- A successful value proposition explains the benefits—the positive impacts that customers will experience by using your solutions and services.
- In two to three short sentences, describe what readers can do or appreciate as your customers.

**4**

#### **Call to action**

- To put the finishing touch on your value proposition, include a call to action (CTA)—compel your audience to take the next step.
- The CTA could be for readers to Read Customer Reviews, Schedule a Consultation, Subscribe to Our Newsletter, Get Started and so on.



Want to create one for your MSP business, but not sure where to start?  
An example of a Value Proposition Worksheet is Figure 9.

**Figure 9:** Value Proposition Worksheet Example

|                    | Best Practice Questions   | Your Answers   |
|--------------------|---|--|
| Headline           | <ul style="list-style-type: none"> <li>In a few words, what is it that you offer?</li> <li>What readers can do or experience as customers of your MSP?</li> </ul>   | <ul style="list-style-type: none"> <li>Flip the Script on Business IT as Usual</li> <li>Enterprise-Grade IT for Your Local Business</li> <li>IT Security, Support, and Solutions—We Got You</li> <li>Managed IT—Reimagined</li> </ul>  |
| Key Differentiator | <ul style="list-style-type: none"> <li>How is your MSP qualified to deliver on its headline?</li> <li>Do you specialize in serving specific industries?</li> <li>Is your technology or process unique?</li> <li>What metrics quantify your point of differentiation?</li> <li>Do you offer a business model that other MSPs don't?</li> </ul> | <ul style="list-style-type: none"> <li>Award-winning systems</li> <li>Specializing in healthcare IT</li> <li>More than 20 years' experience helping local businesses compete and grow</li> </ul>   |
| Benefits           | <ul style="list-style-type: none"> <li>What can readers accomplish or experience if they hire you to manage their business technology needs?</li> </ul>   | <ul style="list-style-type: none"> <li>Business operations peace of mind</li> <li>Increased profitability with reduced IT operating expenses</li> <li>Proactive monitoring to prevent/manage downtime</li> <li>Predictable invoicing with no surprise or hidden fees</li> <li>Future-proofing against costly security attacks</li> </ul> |
| Call to Action     | <ul style="list-style-type: none"> <li>What action should readers take next?</li> </ul>   | <ul style="list-style-type: none"> <li>Get Started</li> <li>Schedule a Consultation</li> <li>Read Customer Reviews</li> <li>Subscribe</li> <li>Contact Us</li> </ul>   |



Download the [Value Proposition Worksheet Template](#) (Figure 10) to articulate your competitive advantage.

**Figure 10:** Value Proposition Worksheet Template

|                    | Best Practice Questions   | Your Answers |
|--------------------|---|--------------|
| Headline           | <ul style="list-style-type: none"><li>• In a few words, what is it that you offer?</li><li>• What readers can do or experience as customers of your MSP?</li></ul>  |              |
| Key Differentiator | <ul style="list-style-type: none"><li>• How is your MSP qualified to deliver on its headline?</li><li>• Do you specialize in serving specific industries?</li><li>• Is your technology or process unique?</li><li>• What metrics quantify your point of differentiation?</li><li>• Do you offer a business model that other MSPs don't?</li></ul> |              |
| Benefits           | <ul style="list-style-type: none"><li>• What can readers accomplish or experience if they hire you to manage their business technology needs?</li></ul>   |              |
| Call to Action     | <ul style="list-style-type: none"><li>• What action should readers take next?</li></ul>   |              |



## 5 | Set Marketing Goals

If you care about your business success as a solution/service provider, you care about setting your marketing goals and reviewing them on a regular basis. Why? Marketing goals set the purpose and direction of your campaigns and efforts. With goals, your promotional activities find shape and meaning.

Marketing goals help you:

- Identify specific marketing objectives.
- Consider the right marketing resources.
- Stay focused on the results you want to achieve.

Marketing goals are broad statements of what you want to accomplish, for example:

- Grow awareness of the company or specific solutions.
- Increase website traffic.
- Generate more leads.
- Convert more prospects to leads.
- Increase customer engagement.
- Cross-sell more services to existing customers.

### The Sales Funnel

Of course, your marketing goals should align with stages in the sales funnel. Your marketing efforts should cultivate awareness, interest, desire, and action—known as AIDA—from your target audience.

As shown in Figure 11, marketing provides the right information in the right format at the right time and place at each stage in the funnel.

Figure 11: Stages in the Sales Funnel



Figure 11 also shows the narrowing nature of sales funnels. For every 100 prospects who enter the top of your sales funnel, three to 10 might become marketing qualified leads (MQLs), depending on your MSP's conversion rate.

## What to Include in Your Marketing Goals

As you start to define your marketing goals, make sure that each goal:

- ✓ Aligns with a company goal.
- ✓ Pinpoints the stage of the sales funnel.
- ✓ Identifies supporting marketing tactics.
- ✓ Includes metrics for success.

Figure 12 is an example of a marketing goal worksheet.

**Figure 12:** Marketing Goal Worksheet Example

| Company Goal   | Sales Funnel Stage | Marketing Goal        | Supporting Tactic            | Metrics for Success                                     |
|--|--------------------|-----------------------|------------------------------|---|
| Grow recurring monthly revenue (RMR) by 15% by 2024 Q4 | • Middle           | • Generate more leads | • Referrals                  | • Decrease customer acquisition cost by 10% by 2024 Q2  |
|  |                    |                       | • Cold calling               | • Increase sales close rate by 3% by 2022 Q2            |
|  |                    |                       | • Search engine optimization | • Grow organic traffic by 7% by 2023 Q1                 |
|  |                    |                       |                              | • Improve clickthrough rate by 2.5% by 2023 Q1          |
|  |                    |                       | • Paid search                | • Increase paid search ad impressions by 10% by 2022 Q2 |
|  |                    |                       |                              | • Grow clickthrough rate by 1.75% by 2022 Q2            |
|  |                    |                       | • Email marketing            | • Increase email growth list rate by 10% by 2022 Q2     |
|  |                    |                       |                              | • Improve email open rate by 2.5% by 2022 Q4            |
|  |                    |                       | • Social media               | • Attract 10% more LinkedIn followers by 2023 Q4        |
|  |                    |                       |                              | • Increase # of YouTube subscribers by 15% by 2024 Q4   |



Download the [Marketing Goal Worksheet Template](#) (Figure 13) to define your marketing goals.

Figure 13: Marketing Goal Worksheet Template

| Company Goal | Sales Funnel Stage | Marketing Goal | Supporting Tactic | Metrics for Success |
|--------------|--------------------|----------------|-------------------|---------------------|
|              |                    |                |                   |                     |
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|              |                    |                |                   |                     |

A common error is to mistake marketing goals for tactics:

- **Goals** are the broad targets you work toward achieving.
  - Goals define the “what” in your marketing equation as in, what do you want to accomplish with your marketing?
- **Tactics** are the specific steps you take to meet your goals.
  - Tactics define the “how” as in, how are you going to accomplish this?
  - We’ll cover tactics in depth in steps 7 and 8.

As you consider goals for each stage in the sales funnel, keep in mind that you are marketing business-to-business (B2B) solutions and services that involve processes of varying complexity.

Technology B2B sales:

- Have a longer buying cycle, compared to business to consumer (B2C) sales.
  - According to a [2018 Gartner study](#), technology buyers spend 16.3 months on average to decide on and buy an IT solution.
  - A longer buyer cycle requires *sustained* marketing goals and tactics throughout the awareness-interest-desire-action (AIDA) sales funnel.



- May involve multiple decision makers.
  - Complex IT purchases involve teams of stakeholders from across organizations.
  - CompTIA's research report, [Considering the New IT Buyer](#), highlights the increasing trend of non-IT staff influencing business technology decisions.
  - As an MSP marketer, you need to craft messaging that appeals to multiple audiences, which is why it's important to complete multiple customer personas in [step 2](#) of this toolkit.
- Require stakeholders to make informed, rational decisions.
  - When choosing vendors, stakeholders need to understand the tangible benefits of working with you.
  - Share metrics, which might include the return on investment, the number of customers you manage, guaranteed uptime percentage, and so on.

Within the sales funnel, MSPs should choose marketing goals and tactics that position your company as a:

- Managed IT/business technology expert.
- Driver of customer profitability, operational excellence, and innovation.
- Partner in your customer's success.

## Post-Sales Funnel Goals

Once your leads become customers, MSP marketing goals shift from sales enablement to customer experience in focus.

Post-sales funnel marketing goals might include:

- Increase cross-sales of specific solutions and services.
- Promote your referral program.
- Grow customer engagement.
- Improve customer satisfaction.
- Increase customer retention rates.

The Customer Journey Map you completed in [step 2](#) will help you choose appropriate marketing goals throughout the customer lifecycle.



## 6 | Create a Marketing Budget

If you're familiar with your MSP's profit and loss (P&L) statement, you know that marketing costs are represented as an operating expense line item. But how are those costs calculated and how do you develop a marketing budget going forward? Rest easy. We'll walk you through it.

A marketing budget:

- Helps you allocate money throughout the year to meet your marketing goals.
- Can be used to track budgeted vs. actual marketing expenses.
- Is a commitment to marketing your competitive advantage as a solution/service provider.

### What to Include

A marketing budget identifies everything your MSP plans to spend on marketing in a year's time, which could include:

- Company branding and logo design.
- Marketing collateral design and printing.
- Copywriting and paid content.
- Marketing automation software.
- Marketing research and data analytics.
- Website design and maintenance.
- Photography.
- SEO consulting.
- Paid search/pay-per-click (PPC) ad spend.
- Media buying and retargeting.
- Telemarketing.
- Trade show participation—booth, travel, hotel, meals and entertainment.
- Public relations/sponsorship events.
- Promotional giveaway items.
- Marketing training.

## How to Calculate Your Budget

Marketing budgets are typically calculated as a percentage of your MSP's gross revenues. The Small Business Administration (SBA) recommends that companies with revenues less than \$5 million spend [7-8%](#) of revenues on marketing each year. (This recommendation assumes your business has annual net profit margins between 10-12%.) A Channel Futures 2020 study of 501 MSPs showed that more than two-thirds (69%) of respondents spend 4% or less of gross revenues on marketing.

The percent of gross revenues you choose for your marketing budget may vary depending on:

- **Marketing goals and tactics:**
  - If your plans call for more ambitious/expensive marketing projects—website design, SEO, paid search, or video creation—your budget might reflect a higher percent of gross revenues.
  - If your plans are to maintain in-place tactics, your budget could be less.
- **Need to outsource:**
  - Smaller MSPs without dedicated marketing staff may choose to outsource some or all marketing responsibilities, in which case the marketing budget may increase.
- **Competitive landscape:**
  - In a crowded online marketplace, you may need to plan for more marketing dollars for digital marketing tactics, including SEO, paid search, and video.
- **Age of your business:**
  - Newer businesses (less than five years old) might budget a higher percent of gross revenues for marketing where more established businesses budget a lower percent.

## Allocate and Track According to Tactic Categories

Once you've defined your budget, it's time to study specific tactics in [steps 7 and 8](#) so that you can allocate and track your spending throughout the year. Rather than spend all of your marketing budget on one tactic category, many solution/service providers opt for an approach where dollars, resources, and efforts are spread out across different channels or tactic categories:

- Print/direct mail.
- Trade shows.
- Sponsorships.
- Referral marketing.

- Telemarketing.
- Pay-per-click (PPC) advertising.
- Search engine optimization (SEO).
- Email marketing.
- Social media marketing.
- Video marketing.

The 70-20-10 rule is an approach where you allocate your marketing budget as follows:

- 70% on tactics that you know perform well.
- 20% on tactics to help fuel your business growth.
- 10% on new or emerging tactics to set you apart from the competition.

Figure 14 is an example budget for an MSP that allocated 6.0% of annual gross revenues of \$1 million for marketing.

**Figure 14:** Marketing Budget Example

|                               | Annual      |                 |                 |                 | January        |                | February       |                | March          |                |
|-------------------------------|-------------|-----------------|-----------------|-----------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                               | % of Budget | Budget          | Actual          | Diff            | Budget         | Actual         | Budget         | Actual         | Budget         | Actual         |
| Print services                | 1.4%        | \$850           | \$779           | \$450           | \$400          | \$392          | \$80           | \$46           |                | \$37           |
| Direct mail                   | 0.0%        | \$0             | \$0             | \$0             | \$0            | \$0            | \$0            | \$0            | \$0            | \$0            |
| Event booth rental            | 2.5%        | \$1,500         | \$1,622         | \$1,500         | \$0            | \$0            | \$0            | \$0            | \$0            | \$0            |
| Event travel/hotel/meals      | 2.5%        | \$1,500         | \$1,454         | \$1,500         | \$0            | \$0            | \$0            | \$0            | \$0            | \$0            |
| Networking                    | 1.5%        | \$900           | \$909           | \$825           | \$75           | \$113          | \$75           | \$98           | \$75           | \$43           |
| Promotional giveaways         | 0.3%        | \$200           | \$179           | \$200           | \$0            | \$0            | \$0            | \$0            | \$0            | \$0            |
| Sponsorships                  | 2.1%        | \$1,250         | \$1,275         | \$1,250         | \$0            | \$0            | \$0            | \$0            | \$375          | \$425          |
| Referral program              | 5.0%        | \$3,000         | \$3,500         | \$2,500         | \$500          | \$500          | \$0            | \$500          | \$500          | \$500          |
| Telemarketing                 | 0.0%        | \$0             | \$0             | \$0             | \$0            | \$0            | \$0            | \$0            | \$0            | \$0            |
| Press releases                | 1.2%        | \$700           | \$705           | \$350           | \$350          | \$364          | \$0            | \$0            | \$0            | \$0            |
| Graphic design                | 3.3%        | \$2,000         | \$1,634         | \$2,000         | \$0            | \$0            | \$1,200        | \$957          | \$0            | \$0            |
| Freelance writer              | 1.7%        | \$1,000         | \$969           | \$500           | \$500          | \$492          | \$0            | \$0            | \$0            | \$0            |
| Website/landing page design   | 4.2%        | \$2,500         | \$1,730         | \$1,500         | \$1,000        | \$990          | \$0            | \$0            | \$0            | \$0            |
| Marketing automation software | 16.0%       | \$9,600         | \$9,600         | \$8,800         | \$800          | \$800          | \$800          | \$800          | \$800          | \$800          |
| Search engine optimization    | 34.0%       | \$20,400        | \$20,400        | \$18,700        | \$1,700        | \$1,700        | \$1,700        | \$1,700        | \$1,700        | \$1,700        |
| Paid search                   | 16.3%       | \$9,800         | \$7,217         | \$9,000         | \$800          | \$774          | \$800          | \$793          | \$800          | \$800          |
| Social media marketing        | 3.0%        | \$1,800         | \$721           | \$1,650         | \$150          | \$124          | \$150          | \$145          | \$150          | \$138          |
| Video creation                | 5.0%        | \$3,000         | \$3,124         | \$3,000         | \$0            | \$0            | \$0            | \$0            | \$3,000        | \$3,124        |
| <b>Total</b>                  |             | <b>\$60,000</b> | <b>\$55,818</b> | <b>\$53,725</b> | <b>\$6,275</b> | <b>\$6,249</b> | <b>\$4,805</b> | <b>\$5,039</b> | <b>\$7,400</b> | <b>\$7,567</b> |

In Figure 14, the MSP allocated half of the marketing budget to SEO and paid search, but also invested in marketing automation software and video. These budgeted amounts are not recommendations but provided for example purposes only.



To start building your own marketing budget, you can rely on accounting software or download the [Marketing Budget Template](#) (Figure 15).

Figure 15: Marketing Budget Template

|                               | Annual      |            |            |            | January    |            | February   |            | March      |            |
|-------------------------------|-------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
|                               | % of Budget | Budget     | Actual     | Diff       | Budget     | Actual     | Budget     | Actual     | Budget     | Actual     |
| Print services                | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Direct mail                   | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Event booth rental            | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Event travel/hotel/meals      | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Networking                    | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Promotional giveaways         | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Sponsorships                  | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Referral program              | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Telemarketing                 | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Press releases                | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Graphic design                | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Freelance writer              | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Website/landing page design   | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Marketing automation software | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Search engine optimization    | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Paid search                   | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Social media marketing        | #DIV/0!     | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| Video creation                | #DIV/0      | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        | \$0        |
| <b>Total</b>                  |             | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> | <b>\$0</b> |



## 7 | Choose Foundational Marketing Tactics

Let's be honest: Choosing marketing tactics is like wandering around a consumer electronics trade show floor in search of a new tech tool—the number of options is overwhelming in almost every product category.

Allow your marketing goals (which you created in [step 5](#)) and your marketing budget ([step 6](#)) to keep you on the straight and narrow in Steps 7 and [8](#) of the Marketing Toolkit. Your primary objective is to select marketing tactics that:

- ✓ Support your marketing goals.
- ✓ Are within budget.
- ✓ Can realistically be accomplished based on internal and external resources.
- ✓ Grow your business.

The last point is important since marketing represents an investment of money, time and resources. Choose marketing tactics wisely so that they ultimately add to, not detract from, your bottom line.



### Traditional, Tried-and-True Tactics

In a modern marketing ecosystem, digital tactics like SEO and paid search get all the attention. What often gets overlooked are traditional, tried-and-true marketing tactics, which include:

- Networking.
- Referral programs.
- Cold calling.
- Press releases.
- Event exhibits.
- Website marketing.
- Email marketing.

## Networking

Networking—sometimes called prospecting—is one of the most powerful marketing tactics an MSP can undertake for business building. As entrepreneur and public speaker Porter Gale puts it, “Your network is your net worth.”

| Networking at a Glance |   |
|------------------------|---|
| Best Uses              | <ul style="list-style-type: none"><li>✓ Generate leads</li><li>✓ Increase company/brand awareness</li></ul> |
| Skill to Complete      | <br>Intermediate           |
| Time                   | <br>8-10 hours a week     |
| Cost                   | \$1,000-\$2,500/year plus cost of time spent networking   |

Successful networking is where you connect and build professional relationships with people who:

- Are likely to need the IT solutions and services you offer.
- Will refer your MSP to others.

These relationships don't happen overnight. They're built on trust and depend on your professional reputation, business results, and willingness to help those in your network—without expectation of asking for something in return.

In a 2020 Channel Futures study of 501 MSPs, more than 90% used networking to find new customers.



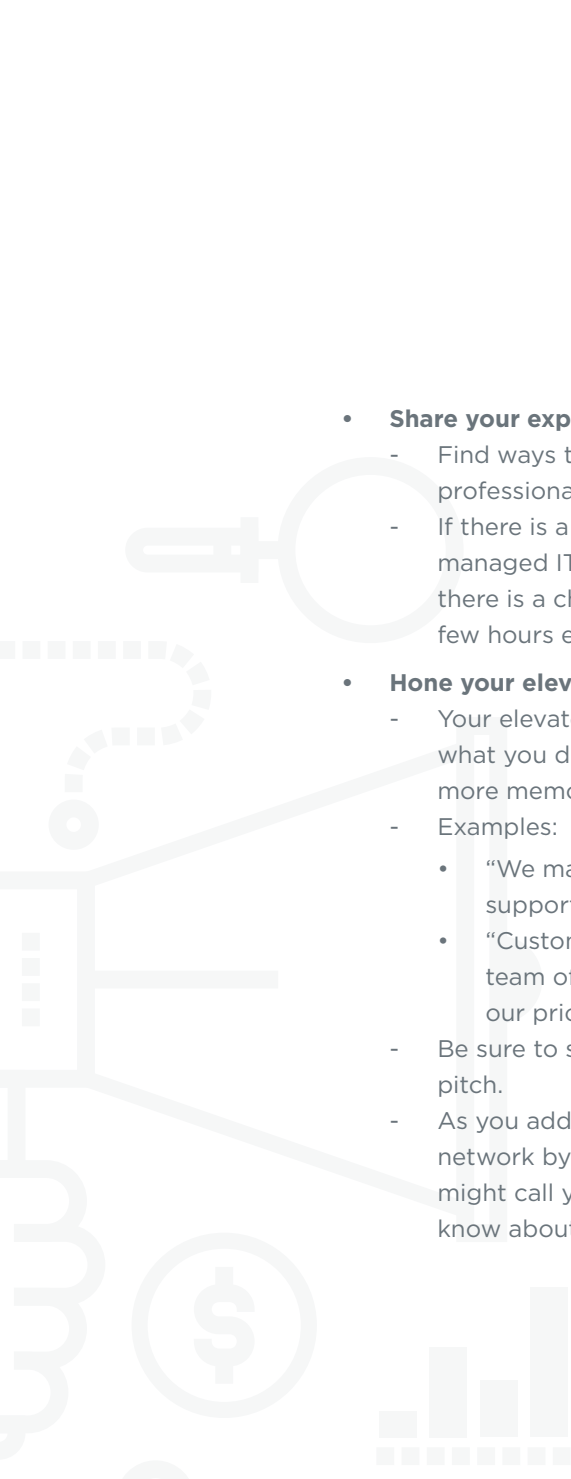
Who should be in your network? Consider:

- Customers.
- Current and past team members.
- Vendors and distributors.
- Other small business owners.
- Industry peers from groups like CompTIA's [Managed Services](#), [Emerging Technology](#) or [Cybersecurity](#) communities.

In short, your professional network should consist of those who trust you as well as those whom you trust.



Best practices for growing your professional network include:

- **Be strategic.**
  - You could hand out business cards to every stranger you meet, but that's neither strategic nor a good use of your time.
  - Purchase leads and research the companies you want to target in advance. Identify possible business IT decision makers and stakeholders. Learn what their professional and social interests are and where you might meet them.
- **Ask your current contacts for suggestions on who to know/follow.**
  - Reach out to your existing network and ask your contacts for who you should know or follow. Ask for an introduction.
- **Get involved.**
  - Look for opportunities to get involved and network with others at local, regional and national organizations:
    - Local chamber of commerce.
    - Business Network International (BNI) chapters.
    - Trade associations like CompTIA.
    - Charitable organizations that align with your values and interests.

- 
- **Share your expertise.**
    - Find ways to share your IT expertise and network with other business professionals.
    - If there is a CEO or executive roundtable in your area, ask to speak on managed IT ROI or cybersecurity trends and connect with members. If there is a charitable organization in need of business IT help, donate a few hours each week and connect with other volunteers.
  - **Hone your elevator pitch.**
    - Your elevator pitch is a brief explanation—one to three sentences—of what you do and how you help your customers. The shorter and the more memorable your elevator pitch is, the better.
    - Examples:
      - “We make IT happen. Managing networks, servers, PCs and IT support for small businesses since 2004.”
      - “Customers like ABC Manufacturers hire us when they need a local team of dedicated IT specialists. Your business IT peace of mind is our priority one.”
    - Be sure to schedule a time to follow up after delivering your elevator pitch.
    - As you add prospects to your network, you should maintain your network by keeping in touch and staying top of mind. For example, you might call your network contacts each quarter to check in or let them know about a new product or service you’re launching.

## Referral Programs

Referral programs—also called customer loyalty programs—are a popular marketing tactic for solution/service providers. Referral programs provide incentives to existing customers to refer their business contacts to your MSP. It's a B2B networking play—amplified.

|                   |  |
|-------------------|--|
| Best Uses         | <ul style="list-style-type: none"><li>✓ Generate leads</li><li>✓ Improve customer engagement</li></ul> |
| Skill to Complete | <br>Beginner          |
| Time              | <br>2-4 hours a week |
| Cost              | Annual cost will vary depending on the incentive and number of referred customers in a year.           |

Referral programs done right can be a source of high converting leads and new business. Some B2B referral programs offer an 11% prospect-to-customer conversion rate, compared to a 2.23% median conversion rate (CVR) for PPC advertising across all industries surveyed, according to a [WordStream 2014 analysis](#).

A successful referral program spells out:

- **Who can make a referral:**
  - Is the program limited to existing customers only? Existing customers and vendors? How about your staff?
- **What a qualified referral is:**
  - Does the business being referred need to have a minimum number of employees?
  - Is it required that the business being referred contract for managed IT services vs. break-fix?
- **Conditions to receive an incentive:**
  - Is the referral program for leads and new customers? Or new customers only?
- **What the incentives are:**
  - Credit on the referrer's next invoice?
  - Gift cards, money or tangible products?
  - Are incentives available to the referrer and business being referred?
- **How incoming referrals are tracked:**
  - What CRM or system will you use to track all business referrals?



Best practices for promoting referral programs include:

- Building a landing page and online form to collect referral information.
- Creating email and social media campaigns to encourage customers to advocate for your business.
- Calling your best customers—evangelists for your MSP—to explain the referral program and the types of prospects you are hoping to find.
- Thanking every person who submits referrals, qualified or not.

## Cold Calling

If you believe the pundits, cold calling or telemarketing is dead. Yet 59% of MSPs surveyed by Channel Futures use cold calling for customer acquisition.

Cold calling is a proven marketing tactic with a higher prospect-to-customer conversion rate ([2%](#) according to marketer Charlie Cook) than cold or unsolicited emailing ([1%](#) according to Clearbit). However, cold calling isn't for every MSP; it requires skill, patience and a high tolerance for accepting rejection.

| Cold Calling at a Glance |  |
|--------------------------|--|
| Best Uses                | ✓ Generate leads   |
| Skill to Complete        | <br>Intermediate      |
| Time                     | <br>8-10 hours a week |
| Cost                     | Cost varies depending on the valuation of your time and hours spent.                                     |

If your prospects are busy, your cold calls run the risk of being seen as a nuisance. This is why calling to request an appointment is the ideal way to respect your prospect's time.

We suggest you call, ask for the appointment and let the prospect know exactly what you intend to discuss.

Use a call script to ensure your message is consistent and well-rehearsed. While you don't want to sound like a recording, you do want to be clear about why you are calling.

Script examples:

- **Short and to the point:**
  - "Hi [prospect name]. I'm [name] with [MSP name], and we manage IT for more than 30 local businesses. Would love to schedule a 10-minute call later this week or next to see if we can be of help to you and your business."
- **Referencing a shared connection:**
  - "Hi [prospect name]. I'm [name] with [MSP name]. I was talking with [shared connection name] at [shared connection company], and they suggested I reach out to you. Can I get on your calendar for a 10-minute meeting next week to learn more about your IT needs and if we can help you with support and service?"
- **Highlighting experience working with similar companies:**
  - "Hi [prospect name]. I'm [name] with [MSP name]. Our bread and butter is helping small businesses like [customer name] get more profit and work completed by us managing their IT needs. Do you have 10 minutes free later this week for us to learn more about how we might be of service?"



Cold calling best practices:

- Place calls during workdays/work hours only.
- Ideal times to call are between 10 and 11 a.m. and after 2 p.m.
- Get to the point of your call quickly—a request for an appointment. Skip conversation starters like, "How are you doing today?"
- Avoid business jargon.
- Be truthful when referencing customers you do business with or your MSP's performance metrics.
- Don't let rejection affect you personally.

## Press Releases

Perhaps your MSP snagged a highly coveted partner award or your technicians earned advanced CompTIA certifications. Maybe you are celebrating a significant anniversary as a locally owned and operated business.

You should share this good news on different social networks, which we'll discuss in [step 8](#). You should also consider posting and sending out a press release, which complements marketing efforts to increase company/brand awareness.

| Press Releases at a Glance |  |
|----------------------------|--|
| Best Uses                  | ✓ Increase company/brand awareness   |
| Skill to Complete          | <br>Beginner          |
| Time                       | <br>2 hours as needed |
| Cost                       | \$20-\$200 per press release if you outsource distribution   |

Announcements considered “newsworthy” or fit to print are:

- **Significant:**
  - Your MSP is expanding into new market areas, opening new office locations or launching new services/products, for example.
  - Vendors are recognizing and awarding your team for IT service, sales excellence or other metrics.
- **Timely:**
  - Occurred recently—within the last two weeks.
  - Launching soon—like a large event you are holding or sponsoring later this month.
- **Impactful:**
  - Something that might affect readers.
  - Worth reading or talking about.

A press release consists of the following:

- **Headline:**
  - Your headline should summarize the content of your press release.
  - Keep your headline to no more than 60 characters, **including** spaces, so that the entire headline will be readable in search engine results.
- **1<sup>st</sup> Paragraph**—The Who, What, Where, When and Why:
  - The first paragraph identifies your company, what you do, where you’re located, when your news took place/will take place, and why your news should be circulated and read.
  - Keep this paragraph to 35-45 words.
- **2<sup>nd</sup> Paragraph**—A Quote:
  - The second paragraph should include a quote from your MSP’s CEO, business leader or spokesperson.
  - The quote should enhance the credibility and professionalism of your press release.
- **3<sup>rd</sup> Paragraph**—Boilerplate Description and Contact Details:
  - Include a standardized “About [MSP Name]” description and include contact details if readers have follow-up questions.

The best day and time to send a press release is Thursday between 10 a.m. and 2 p.m., according to Prowly, a PR software firm. The average open rate for press releases sent on Thursdays is [26.76%](#), compared to 2.07% for releases sent on Saturdays.





You should send the press release to those who would be interested in the news you'd like to share:

- Journalists.
- Bloggers.
- News editors.
- Local websites.
- Wire services.

For a fee, a digital newswire service can distribute your press release for you. Once your release is distributed, wait two to three days and then follow up by phone. These initial contacts should lay the groundwork for ongoing relationships with key members of the press. You should also post your press release to your website or blog.

## Event Exhibits

While exhibiting at large, national trade shows may be out of reach, budget wise, for most small to medium solution/service providers, getting a table or small booth at local and regional events is more affordable. Exhibits are helpful for maintaining visibility, building company/brand awareness, generating leads and relationship building.

| Event Exhibits at a Glance |  |
|----------------------------|--|
| Best Uses                  | <ul style="list-style-type: none"> <li>✓ Increase company/brand awareness</li> <li>✓ Generate leads</li> <li>✓ Build and strengthen relationships</li> </ul> |
| Skill to Complete          |  <p>Intermediate</p>  |
| Time                       |  <p>10-20 hours of planning and prep per event</p>                        |
| Cost                       | \$500-\$1,500/day to rent a tabletop or 10' x 10' booth space  |

Consider the target audience and number of attendees you might engage at a particular event or show. Follow this timeline to get maximum return from any event, show or conference:

**When event is announced:**

- As soon as event details are announced, contact organizers to see if they are looking for presenters or accepting speaker proposals.
- Offer to speak on topics that demonstrate your IT expertise.

**8 weeks prior to event:**

- If you're accepted as a presenter, share your enthusiasm on social media and include event hashtags so that your posts can be easily found.
- Review the show display rules carefully so that you know what to bring.
- Order signage, printed collateral and giveaways.

**6 weeks prior:**

- If the event is local, check out your table/booth space for lighting.
- Confirm what you're getting as an exhibitor. Is it a 6-foot draped table or 10' by 10' block of raw space with pipe-and-drape walls?
- Buy or ask for a list of attendees who pre-registered. Send emails and postcards asking them to visit your booth.

**1 day prior:**

- Set up table/booth.
- Confirm exhibit hours.
- Troubleshoot any last-minute details.

**Day of:**

- Use icebreaker questions to engage visitors:
  - What brings you to the event?
  - How are you liking the show?
  - What did you think of the keynote?
- Your primary goals are to create dialogue and learn about the prospect's IT interests/needs.
- Collect business cards/contact information.



**2 days after:**

- Follow up one on one with warm leads.
- Send an email to other visitors thanking them for their visit and encouraging them to subscribe to your newsletter or blog.

## Website Marketing

Your website is more than an online business card. It's your marketing hub or home base. It's where you explain your business purpose, the industries you serve and the specific business technology solutions you offer. Think of your website as the foundation of your digital presence.

Websites aren't considered nice to have or optional for MSPs. They're a minimum requirement for doing business today and getting found by prospects, leads and customers alike.

| Website Marketing at a Glance |  |
|-------------------------------|--|
| Best Uses                     | <ul style="list-style-type: none"><li>✓ Increase company/brand awareness</li><li>✓ Convert prospects to leads</li><li>✓ Generate leads</li></ul> |
| Skill to Complete             | <br>Advanced  |
| Time                          | <br>4-6 hours a week to create content                        |
| Cost                          | \$30-\$80/hour to hire web designer;<br>\$100-\$180/hour to hire web developer   |

Successful websites (Figure 16 is an example) combine thoughtful design and superior performance, including:

**1. Simple and easy-to-identify navigation menu:**

- Your website navigation menu (typically located at the top of the screen) helps users:
  - See how the website is organized.
  - Find what they're looking for.
- Keep menu items to a minimum so that the menu is uncluttered and easy to read.

**2. Photos and contrasting backgrounds:**

- Relevant photos heighten the visual appeal of any webpage.
- Consider contrasting backgrounds for maximum readability.

**3. Call to action (CTA) buttons located “above the fold”:**

- Turn your CTAs—Request a Consultation, Schedule an Appointment, Contact Us—into clickable buttons.
- Place the buttons in the top 1/3 of the webpage—the part that is visible without the user needing to scroll.

**4. Short, descriptive copy:**

- Opt for short sentences—no more than 20 words per sentence—with your web copy.
- Keep paragraphs short—1-2 sentences per paragraph.
- Chunk content into bite-size pieces using headings and lists.

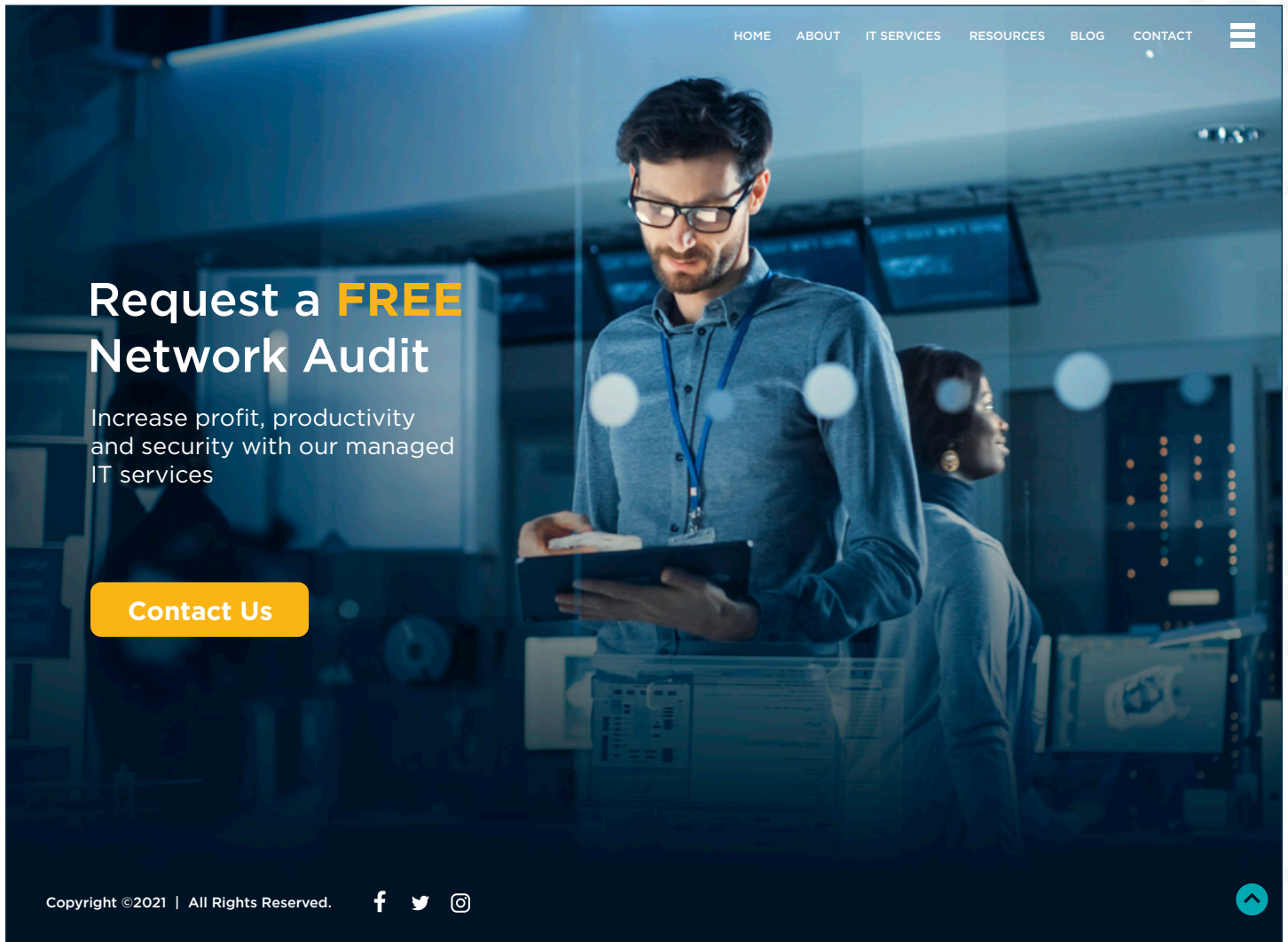
**5. Quick load times:**

- Ideally, webpages should load in two seconds or less.
- Quick load times reduce your bounce rate.
  - Bounce rate is the percentage of users who visit your site but abandon it without exploring additional pages.
  - Quick load time also plays an important role in how your site is ranked for search engine optimization, which we'll cover in [step 8](#).
- Use free tools like the [Pingdom Website Speed Test](#) or Google's [PageSpeed Insights](#) if you want to test your website performance and get recommendations on how to improve it.

**6. Mobile friendly:**

- If you use a web analytics tool, you may notice that most of your website traffic is from desktop devices.
- Is it therefore mission critical for your website to be mobile friendly? Yes, because the mobile version of your website is the starting point for Google indexing.
- Use Google's [Mobile-Friendly Test](#), which is free, to see how your website renders on a mobile screen.

Figure 16: Website Example



## Content that Converts Prospects to Leads

What successful websites also share is content that compels prospects to give them their contact information.

As reported by FirstPageSage, an SEO agency, the average rate for converting prospects to marketing qualified leads (MQLs)—leads who are interested in your solutions and services and more likely to become customers—is [3.5%](#) for the IT staffing and service industry.

The content that prospects want—and would give their contact information for—is more than an infographic. It's a deep dive into a specific business technology issue or trend and can take many formats:

- Detailed checklists.
- Case studies or business use cases.
- Whitepapers.
- Research reports.
- Buyers' guides.
- Ebooks.

These publications are examples of lead magnets—items or services you offer for free in exchange for visitor contact details.

Lead magnets help visitors solve problems and gain an insider's edge on an issue they are researching. Lead magnet publications are considered long-form content and should range from 6-50 pages in length.

If writing enough original content for an eBook is not your strong suit, license it. There are vendors—some of which specialize in content creation for MSPs—that license blog articles, brandable eBooks, videos and more for a fee.

Best practices for converting visitors to leads using lead magnets are:

### 1. **Develop a landing page:**

- A landing page is a standalone webpage containing a simple form for visitors to enter contact information.
- The form should ask visitors for:
  - First and last name.
  - Work email address.

**2. Create a clickable CTA button:**

- The CTA—Get Your Free Buyer’s Guide, for example—is a clickable button that is enabled once visitors enter their contact information.



**3. Direct leads to a thank you page:**

- This page is where the lead can download the publication.
- The thank-you page also confirms that the lead has been added to your mailing list.

## Email Marketing

Email marketing is the utility team player of foundational marketing tactics. It’s helpful for keeping leads warm and increasing customer engagement. Email marketing can assist in customer onboarding efforts, customer satisfaction surveys, driving traffic to your website and more.

Email marketing is a preferred tactic of solution/service providers. According to the 2020 Channel Futures study, more than 70% of MSPs used email for customer acquisition.

| Email Marketing at a Glance |  |
|-----------------------------|--|
| Best Uses                   | <ul style="list-style-type: none"><li>✓ Keep leads warm</li><li>✓ Boost customer engagement</li><li>✓ Increase company/brand awareness</li></ul> |
| Skill to Complete           | <br>Intermediate  |
| Time                        | <br>2-4 hours a week to create targeted email campaigns       |
| Cost                        | \$20-\$199 per month for email software  |

For email marketing to be successful, you must think in terms of campaigns—coordinated groups of email messages that are sent to leads and customers over defined periods of time.

Broadly, there are three types of email marketing campaigns:

**1. Awareness campaign:**

- An awareness campaign targets prospective customers who have expressed interest in your solutions but are not ready to make a decision.
- This type of campaign reaches out monthly with the following to help keep your business top of mind:
  - Educational downloads.
  - Thought leadership pieces.
  - Invites to special events.

**2. Nurture campaign:**

- A nurture campaign is for leads who have heard your sales pitch but aren't ready to take the next step.
- This type of campaign reaches out frequently with the following to help leads feel confident about choosing your MSP for their business technology needs:
  - Customer testimonials/success stories.
  - Step-by-step explanation of customer onboarding process.
  - Answers to frequently asked questions (FAQs).

**3. Customer-touch campaign:**

- The customer-touch campaign delights and informs users throughout the customer experience or journey.
- This type of campaign reaches out monthly with:
  - Product/service updates.
  - How you help customers safeguard their data and be more productive and profitable.
  - Information on referral/customer loyalty programs.
  - Details on customer-focused events and activities.



## How to Craft a Campaign-Worthy Email

Once you've decided on the campaigns you need, how do you create emails that your audience wants to read? Best practices are:

### 1. Choose a winning subject line:

- Find a subject line that speaks to your readers' motivations and place in the sales funnel (Figure 17).
- Aim to keep your subject line between 28-50 characters long, not including spaces.
- Avoid using email spam trigger words/phrases in the subject line:
  - Save up to
  - No cost
  - Click below
  - Free trial
  - No strings attached
  - Risk free
  - Limited time

### 2. Include preheader text:

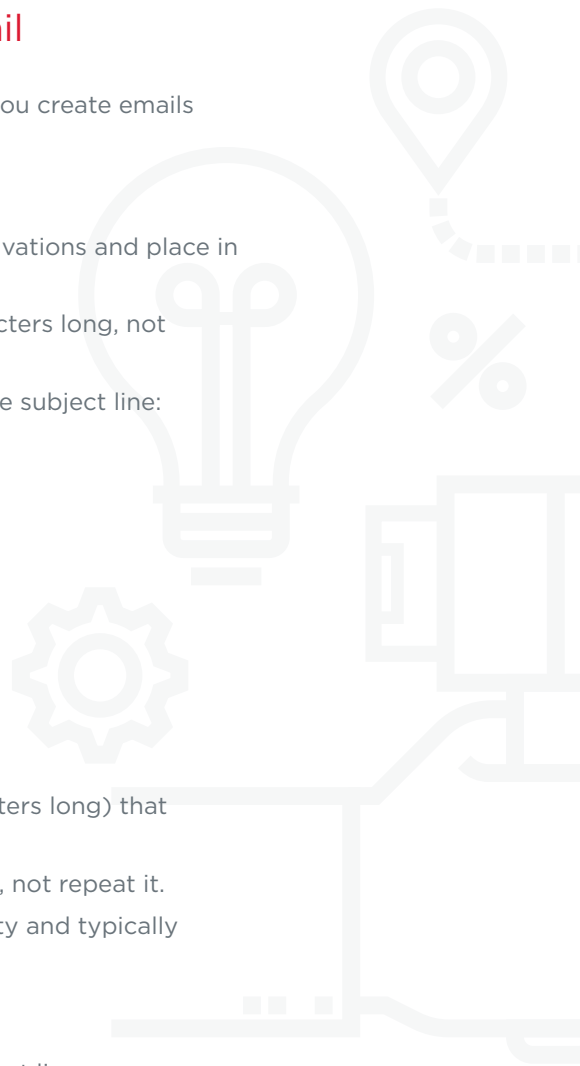
- Preheader text is a short line of text (40-130 characters long) that appears after the subject line of your email.
- This line of text should complement the subject line, not repeat it.
- Preheader text is designed to spark readers' curiosity and typically includes its own CTA.

### 3. Make it personal:

- Use the reader's name in the email greeting or subject line.
- Personalize the body of your email copy to the reader's company name or industry.

### 4. Get to the point:

- Keep email copy between 50 and 125 words.
- Paragraphs should be short (1-2 sentences).
- Use lists to break up text.



**5. Be helpful:**

- Strike a helpful and conversational tone.
- Educate and inform; don't sell.
- Explain benefits, not features.
- Avoid slang and business or IT jargon.

**6. Include one CTA:**

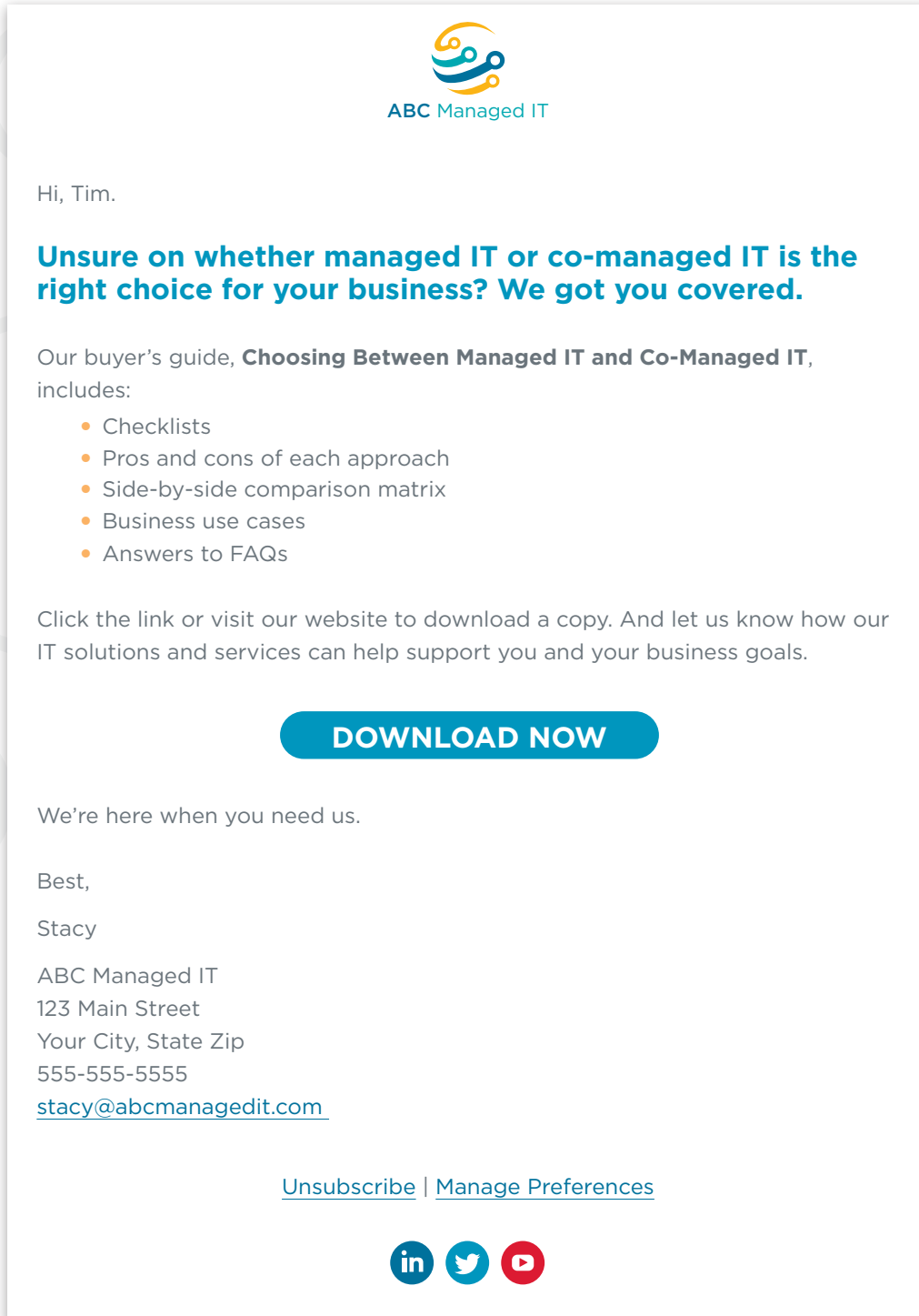
- Keep it simple: One CTA per email.
- Make the CTA a clickable button to help guide the reader's behavior.
- Use contrasting button colors so that the CTA is easy to identify.

**7. Make it easy to opt out:**

- Include links for readers to unsubscribe or manage their email preferences.

Figure 17 is an example of an email from a lead nurturing campaign.

Figure 17: Email Example





## 8 | Consider Next-Level Digital Tactics

Digital marketing is a broad category, encompassing everything from your website and email, which we examined in [step 7](#), as well as blogs, social media, videos, search ads and more. What makes these tactics digital is that they are deployed online or using electronic devices.

Why should solution/service providers care about strengthening their digital marketing know-how and growing their online footprint? Unlike traditional tactics that primarily depend on broadcasting your message to a large group of consumers, digital marketing allows you to:

- ✓ Attract and connect with targeted audiences.
- ✓ Scale efforts quickly.
- ✓ Boost engagement.
- ✓ Track success.
- ✓ Refine and optimize specific tactics.

Downsides to digital marketing—are there any? Compared to traditional approaches, digital marketing requires greater technical skills, and these skills need continual updating. Digital marketing isn't necessarily free or low cost; An MSP might pay \$30,000+/year to an outside agency to keep their website optimized for search engines.

No matter which online tactics you pursue, digital marketing is **best** used in tandem with traditional marketing methods like networking and cold calling. As marketers can attest, these approaches complement—and in many cases—amplify one another.

## The Importance of Being Found Online

In [step 7](#) of this toolkit, we explained that having a website is a minimum requirement for doing business as an MSP. Just as important is the ability of business consumers to *find* your website and the solutions and services you offer.

A [2017 Gartner study](#) of 750 B2B buyers found that 27% of their time was spent independently researching problems, solutions and requirements online, compared to 17% meeting with vendors. A [2019 Gartner survey](#) found that B2B customers relied on a vendor's website nearly as much as they did on a vendor's sales rep to complete a purchase.

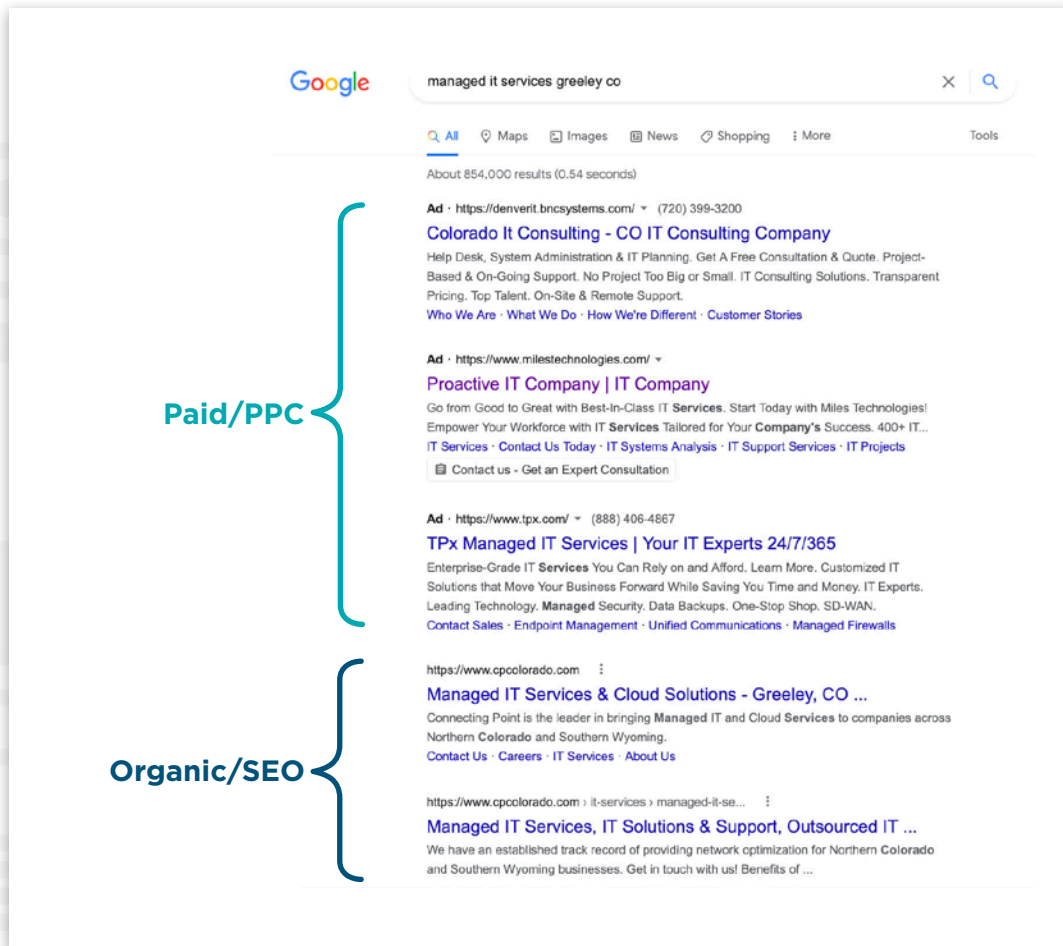
How then do B2B customers find your website? This is where search engines, keywords, your website visibility and content, and digital marketing budget play hefty roles.

When a customer searches for “managed IT services [your city or area]” using Google, Google's search engine springs into action. It doesn't actively search the 1+ trillion websites available. Rather, it searches an index of relevant web pages and applies an algorithm to rank the results.

As shown in Figure 18, Google search results are either:

- **Paid:**
  - Businesses bid to have their ads displayed above organic results for specific keywords.
  - Every time a user clicks their ads, the businesses pay a fee per click.
  - This type of marketing is called pay-per-click (PPC).
- **Organic:**
  - Highly visible, high-quality websites that most relevant to the keyword are ranked and displayed below paid ads.
  - Organic means that a website's rank and placement in the search results are not influenced by paid advertising.
  - This type of marketing is called search engine optimization (SEO) and can take months, if not more than a year, to accomplish improved organic results for specific keywords or phrases.

Figure 18: Paid vs. Organic Search Results for “managed IT services greeley co”



## Keywords

For PPC and SEO strategies to be successful, you need to understand what keywords are being searched, for example:

- Managed services.
- Outsourced IT support.
- Computer support and services.
- Business technology management.
- Small business tech support.

Search engine marketing websites, which are fee/subscription based, allow you to enter a keyword to get a sense of:

- **Volume:**
  - Volume is the number of times a keyword is searched in an average month.
- **Difficulty:**
  - Difficulty refers to how hard or easy it is to rank on search engine results pages (SERPs) for a keyword.
  - A high difficulty score indicates that many businesses are competing for the same keyword.
- **Organic click-through rate (CTR):**
  - Organic CTR predicts the percent of users who are likely to click on organic search results.

Some websites allow you to research your competitors' use of keywords and rank position. For example, you might identify the keywords your competitors rank for as well as related keywords they don't rank for. The latter indicates where you might compete using PPC or SEO.

## Pay-Per-Click (PPC) Search Ads

Once you've researched possible keywords, you may decide to allocate a portion of your marketing budget for PPC search ads—the text-based ads that appear above organic results.

If you don't have the expertise, resources or longer timeframes to optimize your website for organic search, this type of paid advertising may be a great fit. Compared to SEO, PPC search ads offer quick results and the ability to target highly specific audiences.

Need to drive traffic to your website or a landing page and generate leads? PPC search ads can help. Want to engage users who have visited your website as well as existing customers? PPC search ads can help with that too.

## PPC Search Ads at a Glance

|                   |  |
|-------------------|--|
| Best Uses         | <ul style="list-style-type: none"><li>✓ Drive website traffic</li><li>✓ Generate leads</li><li>✓ Boost customer engagement</li><li>✓ Improve company/brand awareness</li></ul> |
| Skill to Complete | <br>Advanced  |
| Time              | <br>2-4 hours a week to create and monitor campaigns  |
| Cost              | \$2,000-\$3,000 per month if you outsource it and your goal is lead generation   |

The rate for converting visitors to marketing qualified leads (MQLs) using PPC search ads varies between [3-4%](#), according to WordStream, an online advertising SaaS provider.

So while you could spend as little as \$100 a month on PPC search ads, you're not likely to experience meaningful results if lead generation is your marketing goal and you're using high-volume keywords. Pronto Marketing, for example, recommends that MSPs start advertising on Google with a [\\$2,000-\\$3,000 per month budget](#) in order to create a digital pipeline of leads.

## Targeting Specific Audiences

Why do digital marketers love PPC? You can zero-in on extremely specific audiences. For example, Google Ads allow you to target users according to:

- Company size:
  - Small employer (1-249 employees)
  - Large employer (250-10K employees)
  - Very large employer (10K+ employees)



- Industry:
  - Construction
  - Education
  - Finance
  - Healthcare
  - Hospitality
  - Manufacturing
  - Real estate
- Highest level of education attained:
  - High school
  - Bachelor's degree
  - Advanced degree
- Interests and habits:
  - Banking and finance
  - Media and entertainment
  - Technology
  - Vehicles and transportation
- What they are actively researching:
  - Computers and peripherals
  - Business and industrial products
  - Business services
  - Telecom

The customer personas you completed in [step 2](#) of this toolkit are ideal references when choosing audience criteria.

## How PPC Search Ads are Ranked

How are PPC search ads selected and ranked on search engine results pages?

Google Ads considers:

1. Target cost per action:
  - This is your average cost to get a conversion using a search ad.
  - A conversion could be users providing their contact information in order to get a lead magnet, for example.
2. Relevance:
  - Your search ad text is relevant to what's being searched. It includes the right keywords.
  - Your website or landing page are highly visible and high quality.
3. Click-through rate (CTR):
  - A higher-than-average CTR indicates that your search ads are relevant and helpful to users.

## How to Write PPC Search Ad Copy

Unlike display ads that rely on images to attract the user's attention, search ads are text based. With Google Ads, you have headlines, descriptions, and paths (or display URLs) to earn reader interest and clicks.

Your goal is to create different headlines and descriptions that Google's machine learning model can combine and test for responsive search ads. Best practices are:

### Headlines with keywords:

- Your headline is the most important part of a search ad; it announces what you do.
- The maximum number of characters per headline is 30, including spaces.
- Create 2 headlines that incorporate your keywords.
- Add location if you specialize in certain cities or areas.
  - Examples:
    - Managed IT In [Your City]
    - [Your City]'s Top-Rated MSP

### Headlines without keywords:

- Within an ad group, you can choose 6-8 additional headlines, but don't include your keywords.
- Use numbers—if your features or benefits are quantifiable, spell that out.
  - Examples:
    - 24/7/365 Local Support
    - 8,700+ Tickets Resolved
    - Reduce IT Costs by 21%
- Focus on how you solve customer problems.
  - Examples:
    - Your Virtual IT Dept
    - IT Problems Solved Fast
- Experiment with shorter and longer headlines within the 30-character limit.
  - Examples:
    - Award-winning MSP
    - Enterprise IT for SMBs
    - Network Security Specialists

### Descriptions:

- Descriptions provide information about your MSP that you can't squeeze into a 30-character-limit headline.
- Descriptions complement your headlines, but they should not repeat headline text or keywords.
- The maximum number of characters per description is 90, including spaces.
- Provide at least two unique descriptions per ad group.
  - Example:
    - Unlock business operations peace of mind with our top-rated IT solutions and support.


If you plan on managing PPC ad campaigns on your own, use the Google Ads Keyword and Performance Planners to optimize your ad copy for maximum effectiveness. To learn more about Google search ads and what's available to you, visit and bookmark the [Google Ads Help Center](#).

## Search Engine Optimization (SEO)

Search engine optimization is improving your website so that it ranks high in organic search results. Organic means the website ranking is **not** influenced by paid ad campaigns.

Digital marketers love SEO because it generates a lot of traffic. Consumers trust and click on high-ranking organic search results more than paid ads. Sistrix reviewed [80,000 million keywords](#) and billions of Google search results and found the average click-through rate (CTR) is 28.5% for the 1<sup>st</sup> position, 15.7% for the 2<sup>nd</sup> position, and 11% for the 3<sup>rd</sup> position.

Ranking high in organic search results is great for attracting leads and growing company/brand awareness. It also boosts your credibility and authority as a leading MSP.

| SEO at a Glance   |  |
|-------------------|--|
| Best Uses         | <ul style="list-style-type: none"> <li>✓ Drive website traffic</li> <li>✓ Attract leads</li> <li>✓ Improve company/brand awareness</li> <li>✓ Boost credibility</li> </ul> |
| Skill to Complete |  <p style="text-align: center;">Expert</p>  |
| Time              |  <p style="text-align: center;">6-10 hours a week to create optimized content</p>         |
| Cost              | \$2,500-\$5,000 per month if you outsource it  |

For MSPs who are new to digital marketing, the learning curve for mastering SEO is steep, given that many aspects are highly technical. Search engines like Google frequently refine ranking parameters, standards and guidelines. Competition for popular keywords and phrases is high. It can take six months to a year (or more) for SEO efforts to improve your rank position and website traffic.

Solution/service providers may choose to outsource SEO strategy and tactics, in which case you should budget \$2,500-\$5,000 a month. DIY efforts to succeed at SEO or organic search take time, planning, resources and great website content.

## 10 Ranking Factors for Organic Search

Did you know that search engines consider more than 200 factors when selecting and ranking websites for organic search results? We won't cover all 200, but the following 10 are important.

### 1. Security:

- A secure website is one that search engines and visitors can trust, which means that it:
  - Has an SSL certificate and is HTTPS secured.
    - The website uses SSL technology to encrypt HTTP requests and responses.
  - Uses plugins and themes that are up to date.
    - Updating website plugins and themes keeps hackers at bay.

### 2. Crawlability:

- A crawlable website is easy for search engine robots (also known as crawlers) to crawl and:
  - Includes an XML sitemap.
    - The sitemap lists all the pages you want crawled, indexed and included in search results pages.
  - Incorporates a robots.txt file.
    - Robots.txt explains which pages should be crawled vs. which pages should be ignored.

### 3. Page speed:

- Page speed is how long it takes to load a webpage.
- Pages should take 2 seconds or less for optimal SEO.
- Improving page speed means:
  - Using browser caching.
  - Compressing images and choosing the best file formats.
  - Limiting the number of redirects.

### 4. Mobile friendliness:

- A mobile-friendly website is one that renders well on mobile devices, including smartphones and tablets.
- Most small business websites are built using responsive design. To make sure yours is, use [Google's Mobile-Friendly Test](#).

### 5. User engagement:

- A website with good user engagement means that users value what they find there.

- User engagement metrics include:
  - Click-through rate (CTR).
  - Time on site.
  - Bounce rate.
- Great content, easy navigation, and eye-catching graphics all contribute to improved user engagement.

## 6. High-quality, highly visible content:

- Website content that is high quality and highly visible to search engines:
  - Is in sync with search intent.
    - Your content addresses what visitors are searching for, whether that's research information about managed IT or more specific details about products like an AWS virtual server.
  - Has a catchy, specific headline.
    - Include numbers where possible—"23% Reduction in IT Spend: Managed IT for SMB Case Study."
  - Is at least 2,100 words long.
    - Long-form content is best. Hubspot found that the ideal length for a blog post is [2,100-2,400](#) words.
  - Uses the target keyword in the copy.
    - Depending on the length of your web copy, you should include your target keyword at least 2-5 times but make sure that your keyword efforts sound natural.
    - Be mindful of how often you use your target keyword in web copy; jamming your keyword over and over is called keyword stuffing and can wreak havoc on your site's ranking.
  - Is published using HTML.
    - HTML content offers the metadata that search engines need for crawling, indexing and ranking.

## 7. Links:

- A website with high-quality inbound, outbound and internal links help search engines determine the authority and relevance of the content:
  - Inbound links (also called backlinks) are links to your website **from** outside websites. The inbound links you want are from reputable websites that generate a lot of high-quality traffic.
  - Outbound links are links from your content **to** reputable outside websites.
  - Internal links help visitors jump from one page to another on your site.

## 8. On-page SEO:

- On-page SEO means that individual web pages have been improved to rank higher in searches and earn quality traffic.
- Improving on-page SEO calls for:
  - Adding keyword phrases in page titles.
  - Using header tags that show how website content is organized.
  - Creating meta descriptions (of no more than 160 words) that summarize the content of a web page and may appear as a snippet in search results.
  - Including keywords in alt text for images.
  - Using structured data (called Schema Markup) that tell search engines how to classify website content.

## 9. Business listings:

- Business listings refer to companies that are listed as businesses in Google Maps, social networks and other directories.
- Being listed as a business helps further your company's credibility, authority and trustworthiness.
- To ensure your MSP is listed as a business:
  - Create a [Google My Business](#) account (it's free).
  - Complete your [Business Profile](#).
  - Create business pages at LinkedIn and other social networks.
  - Include your name, address and phone number (NAP) consistently in your website and across all listings and external business pages.
    - Make sure your NAP matches character for character how your business is listed in Google My Business.

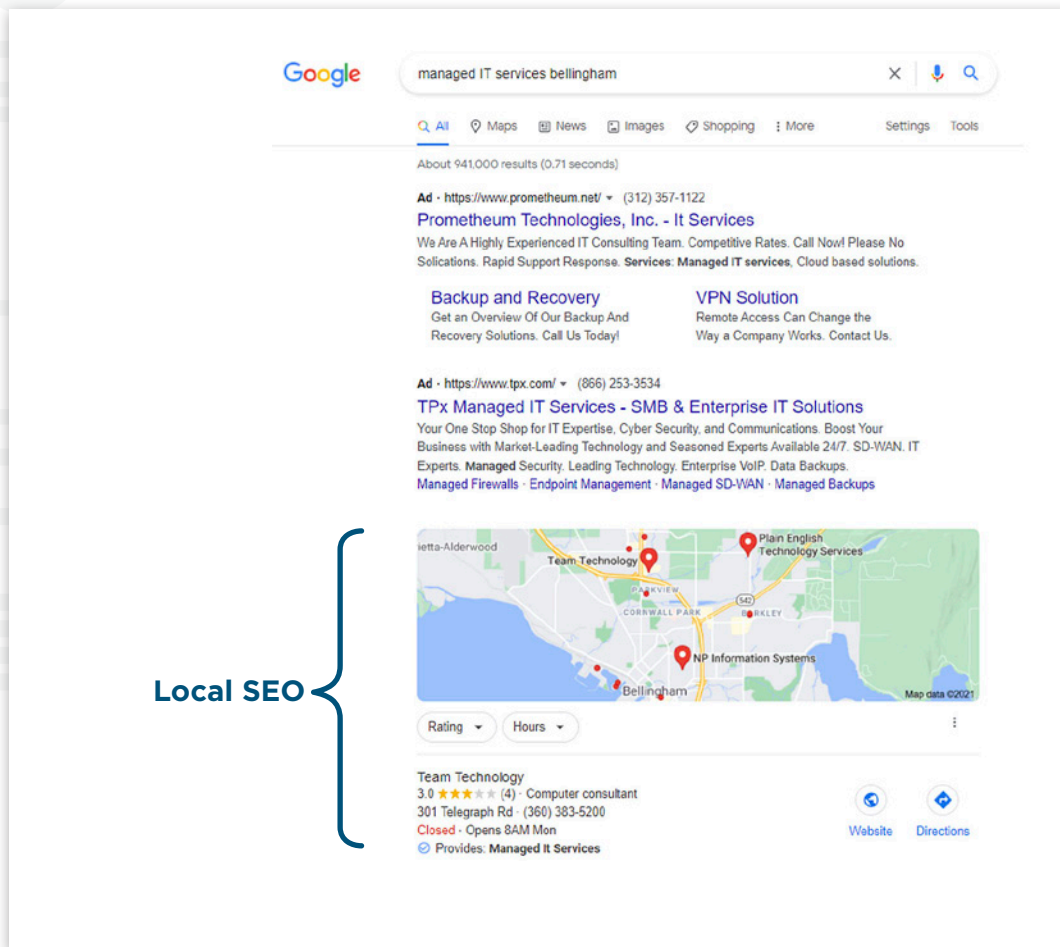
## 10. Domain age:

- The age of your domain or website is a ranking factor.
- Older, more established websites tend to rank higher than newer ones.

## Local SEO

For solution/service providers with a physical business location and office hours, local SEO is worth considering. Local SEO is improving the visibility of your business in local search engine results, as identified in Figure 19.

Figure 19: Local SEO Results for “managed IT services bellingham”





For solution/service providers with a physical business location for customers to visit as well as stated hours for being open, local SEO is worth considering. Local SEO is improving the visibility of your business in local search engine results, as shown in Figure 19.

Best practices for optimizing your MSP for local search:

- Encourage customers to write a Google review.
- Use your city as a keyword when creating copy about local events your MSP is sponsoring.
- Include your city in page title tags.
- Use a local SEO content management system plugin so that you can incorporate [local business schema](#) or markup language as you build out webpages.

## How to Outsource Copywriting and SEO



If your MSP lacks the expertise and resources to write website copy or execute SEO tactics, you have options:

- Buy white-label content. You can purchase content from providers that specialize in creating digital marketing content on different technology topics. Look for vendors offering short- and long-form content that targets your keywords.
- Hire an agency to manage your SEO. Look for companies that:
  - Create a comprehensive SEO strategy to support your company and marketing goals.
  - Have a track record for improving metrics that are actionable rather than vanity metrics that look good on paper but don't necessarily drive results:
    - Conversion rate (actionable) vs. number of conversions (vanity).
    - Bounce rate (actionable) vs. number of page views (vanity).
    - Engagement rate (actionable) vs. number of followers (vanity).
  - Regularly communicate progress.
  - Have a strategy for building links, including backlinks from reputable websites.
  - Provide references.

## Content Marketing

Content marketing may sound familiar, but what is it exactly? It's using marketing channels to share relevant and helpful content that attracts, converts and engages your target audience.

Content marketing is ideally suited for the top (awareness) and middle (interest and desire) stages of the sales funnel from [step 5](#) of this toolkit. It's also good for keeping leads warm and engaging customers. Done right, content marketing helps you build trust and authority as a provider of business IT solutions and services.

| Content Marketing at a Glance |   |
|-------------------------------|---|
| Best Uses                     | <ul style="list-style-type: none"><li>✓ Improve company/brand awareness</li><li>✓ Generate leads</li><li>✓ Keep leads warm</li><li>✓ Increase customer engagement</li><li>✓ Boost credibility</li></ul> |
| Skill to Complete             | <br>Intermediate   |
| Time                          | <br>4-6 hours a week to create and distribute content  |
| Cost                          | Cost varies depending on the type of content created.   |

What content marketing is:

- ✓ Informative, educational.
- ✓ Valuable, useful to the end user.
- ✓ What your target audience wants to learn.

What it isn't:

- ✗ Blatant sales pitch for your MSP.
- ✗ Promotion of your solutions and services.
- ✗ Company/brand advertising.

Content marketing plays an important role in supporting B2B consumers' need for information in a purchase. [Gartner research](#) describes the B2B purchase as a six-step process, as shown in Figure 20. Using content marketing, MSP marketers can help buyers or teams of buyers make informed business technology decisions.

**Figure 20:** How Content Marketing Supports B2B Buyers' Need for Information in a Purchase

| Step in B2B Purchase          | What Managed IT Buyers Do in This Step   | Content Marketing Tactics to Support Managed IT Buyers   |
|-------------------------------|--|--|
| <b>Problem identification</b> | <ul style="list-style-type: none"> <li>Pinpoint the business technology problems or challenges their company is experiencing.</li> <li>Research how similar businesses tackle these problems.</li> </ul> | <ul style="list-style-type: none"> <li>Publish a blog article on how a customer accomplished greater performance, productivity and savings with managed IT.</li> </ul>                         |
| <b>Solution exploration</b>   | <ul style="list-style-type: none"> <li>Explore managed IT in detail.</li> <li>Visualize how managed IT would work at their company/business.</li> </ul>  | <ul style="list-style-type: none"> <li>Offer a Managed IT Services Buyer's Guide at your website.</li> <li>Host a webinar titled "Managed IT vs. Co-managed IT: Which One Is Best?"</li> </ul> |
| <b>Requirements building</b>  | <ul style="list-style-type: none"> <li>Develop criteria for hiring a managed services provider.</li> </ul>   | <ul style="list-style-type: none"> <li>Create a "Top 5 Criteria for Choosing a Managed Services Provider" paid search campaign that links to an article at your website.</li> </ul>            |
| <b>Vendor selection</b>       | <ul style="list-style-type: none"> <li>Compare and contrast different MSPs and available solutions/services.</li> </ul>  | <ul style="list-style-type: none"> <li>Post a whitepaper at your website on how your MSP stacks up to the competition and include a comparison chart.</li> </ul>                               |
| <b>Validation</b>             | <ul style="list-style-type: none"> <li>Read customer reviews.</li> </ul>   | <ul style="list-style-type: none"> <li>Share customer testimonials on social media.</li> </ul>   |
| <b>Consensus creation</b>     | <ul style="list-style-type: none"> <li>Build consensus within buying group and including stakeholders.</li> <li>Discuss pros and cons and weigh possible trade-offs.</li> </ul>                          | <ul style="list-style-type: none"> <li>Explain your customer onboarding process in a targeted email campaign.</li> </ul>   |

Examples of content marketing include:

- Posting articles to your website or blog.
- Sharing infographics on social networks.
- Developing an interactive quiz or assessment tool for your website.
- Posting short, informational videos to your website or social networks.
- Serving as a business technology webinar/podcast guest speaker.

Content marketing can be deployed using your website, blog, social networks, videos, newsletter and even pay-per-click (PPC) advertising.

Is all content marketing good for SEO? It depends on the content you create and how and where you distribute it. For example, website content marketing is fertile ground for optimizing text, images and other media for search engines. Serving as a guest speaker on a webinar hosted by another company won't increase the rank of your website in organic searches but sharing your business IT expertise is great for content marketing and influence building.

## How to Create Valuable Content

Best practices for creating content that increases click-through rates (CTRs) and moves prospects down the sales funnel? Follow these steps:

### 1. Identify the most common problems that lead customers to outsource their IT needs.

- Ask yourself:
  - What keeps them up at night?
  - What keeps them from being profitable?
  - What problems inhibit their growth?
- Use Google's Keyword Planner or search engine marketing websites to identify keyword searches related to managed IT topics.
- Examples:
  - Maintaining their server is costly and they're unsure if they should replace it or move infrastructure into the cloud.
  - Their IT staff is overloaded with support requests and unable to tackle more strategic IT projects.
  - They struggle to keep their data secure and meet compliance requirements.

### 2. Build a list of steps to resolve that problem.

- Example:
  - Problem: The target customer is a small business owner whose staff is responsible for a legacy private branch exchange (PBX) phone system. They're interested in moving to a cloud-hosted VoIP phone system, but not sure if their current infrastructure and bandwidth are ideal for moving to the cloud.
- Steps to resolve the problem:
  - Identify communication needs by room and user type.
  - Document network requirements for a cloud-based phone system:
    - Port configuration changes.
    - Configuration of routers, switches and firewalls.
  - Ensure that network device settings provide for optimal quality of service (QOS).
  - Calculate bandwidth capacity needed for voice and data.
    - Identify upload speeds, download speeds, network latency, packet loss and jitter.

### 3. Use data to strengthen your points.

- Data is an effective way to demonstrate relevance by showing outcomes, trends or areas to avoid based on evidence.
- Data helps readers validate their decision-making process.

**4. Create a title that appeals to the reader’s motivations and interests.**



- Example:
  - Is Cloud PBX Right for You? Your Network and Bandwidth Checklist

**5. Distribute using the best channels.**

- Use social media like for short-form content (lists, infographics, videos, images).
- Use your website, blog or LinkedIn articles for long-form content (checklists, articles, buyer’s guides, eBooks, research reports, whitepapers).
  - For long-form content, you may also use a short teaser paragraph on social media and PPC advertising and link readers to your website, blog, or LinkedIn company page/article.

## Video

How important is video for today’s digital marketing campaigns? Very. Video is what users prefer, compared to other marketing content types.

|                   |   |
|-------------------|---|
| Best Uses         | <ul style="list-style-type: none"><li>✓ Increase customer engagement</li><li>✓ Drive website traffic</li><li>✓ Generate leads</li><li>✓ Keep leads warm</li><li>✓ Improve company/brand awareness</li></ul> |
| Skill to Complete | <br>Intermediate   |
| Time              | <br>6-10 hours to produce a 3 min or shorter video   |
| Cost              | \$1,500 per finished video minute if you outsource writing, talent, production and editing.   |

In 2017, HubSpot surveyed more than [3,000 consumers](#) in the U.S., Germany, Colombia and Mexico and found that 54% of consumers wanted to see video from the businesses they support.

If you're not using video in your digital marketing tactics, here are the top three reasons you should:

**1. Higher engagement rates:**

- According to [Vidyard's 2021 Video in Business Benchmark Report](#), 58% of viewers watch business videos that are less than 60 seconds in their entirety.

**2. Better ranking for your website and more traffic:**

- Videos reduce bounce rates and improve dwell time.
  - Dwell time is how long users spend on your website after they've clicked on your URL in search engine results.
- Lower bounce rates and higher dwell times are signals to search engines that your website offers content that users want and value, so your ranking and web traffic increase.

**3. Improved click-through rates (CTRs):**

- Compared to other forms of digital content, videos have the highest click-through rates. In a [recent survey](#), Databox found that YouTube videos have an average CTR of 4-5%.

Videos—ones that are thoughtfully produced and expertly marketed—help users visualize how your solutions and services might be implemented at their companies.

As an MSP, what kind of video content do your prospects, leads and customers want? Consider:

- Company videos:
  - Allow viewers to virtually “meet” your business and team members.
- Thought leadership videos:
  - Build trust and credibility by offering expert insight to a managed IT topic.
- Explainer videos:
  - Describe how your services improve customer profitability, productivity and security.
- Frequently asked questions (FAQs) videos:
  - Answer managed IT questions you commonly receive from prospects, leads and customers.

- How-to videos:
  - Show viewers how to use remote collaboration tools, for example.
- Testimonial videos:
  - Let customers do the talking for you and share their experiences working with your MSP.

Successful B2B videos do these things:

- Have a hook or teaser.
  - Hooks and teasers placed at the beginning (between the first 5-15 seconds) of a video pique interest and give viewers a reason to keep watching.
  - Examples:
    - Asking a question.
    - Stating a problem or challenge.
    - Making a claim—one that is verifiable.
- Tell a story.
  - Videos follow a storytelling arc and include a beginning, middle and ending.
  - Storytelling allows companies to show *how* they accomplish specific IT objectives, not merely tell.
- Evoke emotions:
  - Video marketing messages can inspire a spectrum of viewer emotions, for example:
    - Anticipation
    - Concern
    - Curiosity/interest
    - Reassurance
    - Confidence
- Incorporate large fonts and graphics:
  - Easy to read text and images help reinforce important information.
  - Bold text and visuals also help viewers who learn best via writing.
- Use background music:
  - Music helps set the tone or mood of videos.
  - Soundtracks also signal transitions from one section to the next in videos.

- Have a CTA.
  - In videos, CTAs could be visual, spoken, or both to help guide viewer behavior.
  - For example, on-screen talent in YouTube videos can urge viewers to use the Like, Share and Subscribe buttons and point to where the buttons are located.

When creating video content, many B2B companies seek a finished product that is high production value. This refers to the technical expertise applied in producing video and considers:

- Location sets
- Lighting
- Sound recording
- Video camera equipment
- Sound and film editing
- Graphics and animations

MSPs may outsource video development and production to an agency and, if so, budget accordingly. Agency rates may start at \$1,500 per finished minute of video.



## Planning for Content Marketing Consistency

Successful content marketing requires consistency and advance planning, which makes a content calendar handy. This type of calendar captures when, where and what you're publishing, who you're targeting, the sales funnel stage, and keywords.

A completed example is Figure 21.

**Figure 21:** Content Marketing Calendar Example

| Publish Date    | Channel  | SEO or PPC | Title  | Target Audience | Sales Funnel Stage         | Keywords                  |
|-----------------|----------|------------|--|-----------------|----------------------------|---------------------------|
| Mon, Sept. 3    | Blog     | SEO        | 4 Signs Your Router Has Been Hacked                  | Prospects       | Top/Awareness              | Router, security          |
| Mon, Sept. 3    | Facebook | SEO        | 4 Signs Your Router Has Been Hacked                  | Prospects       | Top/Awareness              | Router, security          |
| Mon, Sept. 3    | Twitter  | SEO        | 4 Signs Your Router Has Been Hacked                  | Prospects       | Top/Awareness              | Router, security          |
| Tues, Sept. 4   | LinkedIn | PPC        | How ABC Manufacturing Reduced IT Spend by 24%        | Leads           | Middle/Interest and Desire | Managed IT services       |
| Tues, Sept. 4   | Twitter  | SEO        | How ABC Manufacturing Reduced IT Spend by 24%        | Leads           | Middle/Interest and Desire | Managed IT services       |
| Wed, Sept. 5    | Facebook | SEO        | What to Expect in a Network Audit [checklist]        | Leads           | Middle/Interest and Desire | Network audit             |
| Wed, Sept. 5    | Twitter  | SEO        | What to Expect in a Network Audit [checklist]        | Leads           | Middle/Interest and Desire | Network audit             |
| Thurs, Sept. 6  | Email    | SEO        | Local Coding Workshops for Teens                     | Customers       | Post/Engagement            | Code                      |
| Thurs, Sept. 6  | Facebook | SEO        | Local Coding Workshops for Teens                     | Customers       | Post/Engagement            | Code                      |
| Fri, Sept. 7    | LinkedIn | SEO        | Top 3 Data Backup Mistakes                           | Prospects       | Top/Awareness              | Backup, security          |
| Fri, Sept. 7    | Twitter  | SEO        | Top 3 Data Backup Mistakes                           | Prospects       | Top/Awareness              | Backup, security          |
|                 |          |            |  |                 |                            |                           |
| Mon, Sept. 10   | YouTube  | PPC        | What's Included in Managed IT Services [video]       | Prospects       | Top/Awareness              | Managed IT services       |
| Mon, Sept. 10   | Facebook | PPC        | What's Included in Managed IT Services [video]       | Prospects       | Top/Awareness              | Managed IT services       |
| Mon, Sept. 10   | LinkedIn | PPC        | What's Included in Managed IT Services [video]       | Prospects       | Top/Awareness              | Managed IT services       |
| Tues, Sept. 11  | Email    | SEO        | 5 Main Components of a Request for Proposal          | Leads           | Middle/Interest and Desire | RFP                       |
| Tues, Sept. 11  | Twitter  | SEO        | 5 Main Components of a Request for Proposal          | Leads           | Middle/Interest and Desire | RFP                       |
| Wed, Sept. 12   | Blog     | SEO        | How to Limit Shadow IT in a Remote Work Environment  | Prospects       | Top/Awareness              | Shadow IT                 |
| Wed, Sept. 12   | LinkedIn | SEO        | How to Limit Shadow IT in a Remote Work Environment  | Prospects       | Top/Awareness              | Shadow IT                 |
| Thurs, Sept. 13 | Email    | SEO        | Maximize Your QBR Meetings                           | Customers       | Post/Awareness             | Quarterly business review |
| Thurs, Sept. 13 | Facebook | SEO        | Maximize Your QBR Meetings                           | Customers       | Post/Awareness             | Quarterly business review |
| Fri, Sept. 14   | LinkedIn | SEO        | 7 Items Every Service Level Agreement Should Include | Prospects       | Top/Awareness              | SLA                       |
| Fri, Sept. 14   | Twitter  | SEO        | 7 Items Every Service Level Agreement Should Include | Prospects       | Top/Awareness              | SLA                       |



Download the [Content Marketing Calendar Template](#) (Figure 22) to schedule content marketing pieces.



**Figure 22:** Content Marketing Calendar Template

| Publish Date | Channel | SEO or PPC | Title | Target Audience | Sales Funnel Stage | Keywords |
|--------------|---------|------------|-------|-----------------|--------------------|----------|
|              |         |            |       |                 |                    |          |
|              |         |            |       |                 |                    |          |
|              |         |            |       |                 |                    |          |
|              |         |            |       |                 |                    |          |
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|              |         |            |       |                 |                    |          |
|              |         |            |       |                 |                    |          |
|              |         |            |       |                 |                    |          |

A content marketing calendar can be adapted to capture all digital marketing efforts if you choose.

## Social Media Marketing

Social media marketing is using social networks like LinkedIn, Twitter and YouTube to share content, engage followers, drive traffic to your website, and improve company/brand awareness, among other marketing goals. Similar to website marketing, social media marketing efforts may be paid, organic, or both.

| Social Media Marketing at a Glance |   |
|------------------------------------|---|
| Best Uses                          | <ul style="list-style-type: none"><li>✓ Increase customer engagement</li><li>✓ Drive website traffic</li><li>✓ Generate leads</li><li>✓ Keep leads warm</li><li>✓ Improve company/brand awareness</li></ul> |
| Skill to Complete                  | <br>Intermediate   |
| Time                               | <br>4-6 hours a week to create and distribute content  |
| Cost                               | \$75-\$150/hour if you hire a freelancer  |

Digital marketers leverage social media to:

- Meet prospects, leads and customers where they are—on social networks.
  - In 2019 and 2020, internet users worldwide spent an average of [2 hours, 25 minutes](#) on social media each day.
- Give target audiences what they want—information to help them make smart IT decisions for their business.
  - Information includes statistics, trends, infographics, videos, and quizzes.

- Engage users, followers and fans.
  - Engagement could be measured by the number of likes, shares, and comments a post receives.
- Get others to talk about your company/brand on social networks.
  - Many social networks allow users to recommend or review your business.
- Keep your MSP top of mind in a long B2B sales funnel.
  - As we mentioned in [step 5](#) of the toolkit, a complex B2B purchase may take 16.3 months on average to complete, according to a [2018 Gartner study](#).
  - MSPs may use social media marketing—paid and organic—to keep their solutions and services top of mind with buyers.
- Build targeted prospecting lists.
  - LinkedIn allows marketers to target members based on specific demographics and use LinkedIn’s messaging app to contact them.

What B2B social media marketing is:

- ✓ Conversational, authentic to your company/brand voice.
- ✓ Helpful, original content.
- ✓ Interactive.
- ✓ Relationship building.

What it isn’t:

- ✗ Over-the-top sales pitch.
- ✗ Opportunity to talk down to users or disparagingly about your competition.
- ✗ Platforms where you only reshare content other companies have created.
- ✗ A place only to sell solutions and services.

At its core, social media marketing is social; it’s about building relationships and earning trust and loyalty. Social media marketing is useful for educating prospects and leads throughout the sales funnel. A [2019 study by Gartner](#) found:

- 46% of B2B buyers use social media to learn about vendors, services and products that solve their problems.
- 40% use social media for comparison shopping.
- 35% use social media to find need-to-know information before committing to a purchase.

## Who Uses Social Media

As you may guess, user demographics by social network vary. Findings from a [2021 Pew Research Center study](#) (Figure 23) of U.S. adults and social networks include:

- 51% of respondents who are college graduates and earn more than \$75,000/year have used LinkedIn.
- More than 90% of respondents between the ages of 18 and 49 have used YouTube.
- 71% of respondents between the ages of 18 and 29 have used Instagram.

**Figure 23:** % of U.S. Adults Who Have Ever Used a Social Network

|                 | LinkedIn | Facebook | Instagram | Twitter | YouTube |
|-----------------|----------|----------|-----------|---------|---------|
| Men             | 31%      | 61%      | 36%       | 25%     | 82%     |
| Women           | 26%      | 77%      | 44%       | 22%     | 80%     |
| Ages 18-29      | 30%      | 70%      | 71%       | 42%     | 95%     |
| 30-49           | 36%      | 77%      | 48%       | 27%     | 91%     |
| 50-64           | 33%      | 73%      | 29%       | 18%     | 83%     |
| 65+             | 11%      | 50%      | 13%       | 7%      | 49%     |
| \$50K-\$74,999  | 21%      | 61%      | 39%       | 22%     | 79%     |
| More than \$75K | 50%      | 70%      | 47%       | 34%     | 90%     |
| Some college    | 28%      | 71%      | 44%       | 26%     | 86%     |
| College grad    | 51%      | 73%      | 49%       | 33%     | 89%     |
| Urban           | 30%      | 70%      | 45%       | 27%     | 84%     |
| Suburban        | 33%      | 70%      | 41%       | 23%     | 81%     |
| Rural           | 15%      | 67%      | 25%       | 18%     | 74%     |

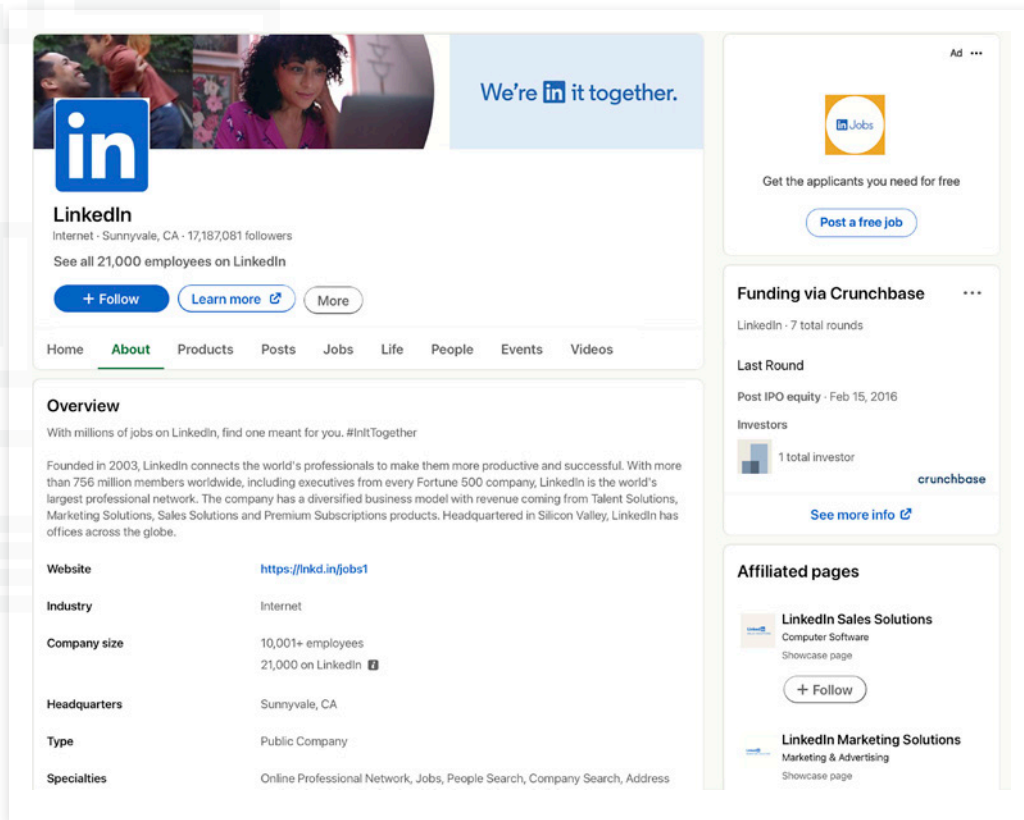
Source: Pew Research Center, [Social Media Fact Sheet](#).

## LinkedIn

With hundreds of million users worldwide, LinkedIn is the largest social network for companies and business professionals. If your MSP doesn't have a company page on LinkedIn, it's free to create one—and required if you intend to interact as a business with LinkedIn members.

Figure 24 is the company page for LinkedIn.

Figure 24: LinkedIn Company Page



The screenshot shows the LinkedIn company page for LinkedIn. At the top, there is a banner with the LinkedIn logo and the tagline "We're in it together." Below the banner, the company name "LinkedIn" is displayed, along with its location "Internet · Sunnyvale, CA" and "17,187,081 followers". A link to "See all 21,000 employees on LinkedIn" is provided. Navigation buttons for "Follow", "Learn more", and "More" are visible. A menu bar includes "Home", "About", "Products", "Posts", "Jobs", "Life", "People", "Events", and "Videos". The "Overview" section contains a description of the company, founded in 2003, connecting professionals worldwide. A table lists key company information:

|              |   |
|--------------|---|
| Website      | <a href="https://lnkd.in/jobs1">https://lnkd.in/jobs1</a>                 |
| Industry     | Internet  |
| Company size | 10,001+ employees<br>21,000 on LinkedIn                                   |
| Headquarters | Sunnyvale, CA   |
| Type         | Public Company  |
| Specialties  | Online Professional Network, Jobs, People Search, Company Search, Address |

On the right side, there are several promotional cards: an advertisement for "Jobs" with a "Post a free job" button; a "Funding via Crunchbase" section showing LinkedIn's 7 total rounds, with the last round being a post-IPO equity round in February 2016, involving 1 total investor; and "Affiliated pages" for "LinkedIn Sales Solutions" and "LinkedIn Marketing Solutions", both with "Follow" buttons.

Source: <https://www.linkedin.com/company/linkedin/>.

To get the most out of your company page:

- Use a photo in the header to get the reader's attention and stand out from competitors.
- Write a catchy headline that incorporates keywords.
  - The headline appears below your company name, location and number of followers.
  - You are limited to 120 characters.
- Customize your LinkedIn company page URL.
- In the About section, explain how you solve customer problems in the first two sentences.
  - The first two sentences are all that LinkedIn displays before requiring users to click to "see more."
  - For the remaining copy in the About section, use short paragraphs (1-2 sentences each) and bulleted lists where possible.

## How to Leverage LinkedIn

LinkedIn is an ideal network for:

- Sharing your business IT expertise.
- Creating prospecting lists using Sales Navigator—LinkedIn's social selling platform that is fee/subscription based.
- Uploading a .csv of your contacts so that you can connect with them on LinkedIn.
- Asking customers to recommend your MSP on LinkedIn.
- Publishing a newsletter natively in LinkedIn and asking members to subscribe.
- Asking those in your network (1<sup>st</sup> degree connections) to introduce you to those outside your network (2<sup>nd</sup> degree connections and up).
- Retargeting—displaying online ads to prospects, leads and customers based on their browsing history/internet behavior.

Best practices for posting LinkedIn content are:

- Post two to five times during the work week:
  - Original post content is best.
  - Only reshare articles from reputable websites and sources.
- Schedule posts for Monday through Friday:
  - Before the workday starts.
  - During lunch hours.
  - Right after the workday is over.

- Experiment with short- and long-form content:
  - Posts should be 25 words or less.
  - Articles should be between 1,900 and 2,000 words.
- Try short videos (> 30 seconds) to boost member views and engagement.
- Use hashtags to help members find topic-specific posts.

## Twitter

Twitter is a short-form content social network for sharing news and trends, discussing ideas, improving company/brand awareness, and helping drive traffic to your website or blog.

Compared to other social networks, Twitter offers a lower user engagement rate per post: an average rate of [.04%](#), compared to 1.44% for Instagram and .24% for Facebook for software companies/brands. The lower engagement rate doesn't mean MSPs should forgo this social network, however.

Twitter is useful for:

- Engaging younger members of your target audience—those between the ages of 18 and 29.
- Sharing statistics, news and trends (Figure 25 is an example tweet or Twitter post) for top of the sales funnel content marketing activities.
- Including shortened, branded links to your website or blog where followers can access longer-form content.
- Observing how your competitors use Twitter since all of their posts and followers can be accessed on the platform.



Figure 25: Tweet Example from @CompTIA Connect



Source: <https://twitter.com/CompTIAConnect>

You have limited space on Twitter to share content (no more than 280 characters per post), so get to the point quickly or use images to convey part of your message. Include hashtags so that users can find and follow conversations:

- #managedIT
- #managedITservices
- #ITsupport
- #ITservices
- #cybersecurity

Twitter is a network that thrives on a lot of posts, so plan to send at least one tweet a day, Monday through Friday. (Some companies might post up to five tweets a day.) The best time is during lunch hours—11 a.m. to 1 p.m. If you use a social media marketing platform, experiment with days and times and different content types to see what resonates best with your target audience.

## YouTube

YouTube is the world's largest online platform for uploading, consuming and engaging with video. As shown earlier in Figure 23, YouTube is more popular than Facebook with users between the ages of 18 and 64. It's also the second most popular search engine.

YouTube is a destination social network for B2B consumers in search of company/brand information at the top and middle of the sales funnel.

According to [2020 Q4 research](#) from Hootsuite, 51% of B2B decision makers use the video platform to learn more about specific companies.

A primary challenge for decision makers is filtering through troves of digital information about managed IT. They want to find the best authority who understands their business tech needs. Make that search and filter process easy for them with videos.

Popular types of YouTube B2B videos—ones that generate views, likes and shares—include:

- Educational
  - Educational videos allow MSPs to share their managed IT expertise.
  - The more insight you share in these videos, the better your credibility and trust will be with B2B prospects and leads.

- Product review
  - Reviewing solutions, including “unboxing” videos where you unbox, install and rate products, connect you to younger YouTube audiences.
- How-to tutorial
  - Show, don’t tell.
  - How-to videos walk viewers step by step in implementing products, programs and systems.

Compared to other social networks, YouTube offers high user engagement rate per post. In 2019, Trust Insights evaluated 51,4402 videos with at least 100 views and determine the engagement rate per video was a [3.70%](#).

For many YouTube viewers, video is like you’re talking **directly** to them, so use this to your full advantage when interacting with your audience on this platform. Best practices for engaging viewers are:

- Keep your videos short (1-3 minutes), which helps ensure your audience watches them to the end.
- Respond positively and politely to viewer comments.
- Encourage viewers to comment, like and share your videos or subscribe to your YouTube channel.

Social media resources from CompTIA:  
[Quick Start Guide to Social Media](#)  
[CompTIA Connect](#) YouTube channel



## 9 | Measure What Counts

As any business professional will tell you, metrics matter. They help MSPs understand how specific campaigns, tactics or ads are performing. Performance metrics help you determine which tactics or campaigns are cost effective and which ones need to be optimized or removed from your marketing game plan.

What should you track? Use the following as baseline metrics for your MSP.

### Return on Marketing Investment (ROMI)

The formula for calculating ROMI is:

$$\frac{(\text{Income from marketing} - \text{cost of goods} - \text{marketing expenditures})}{(\text{marketing expenditures})} * 100$$

If ROMI is < 100%, then this marketing investment needs careful scrutiny, finetuning or removal. If ROMI > 100%, you may consider investing more money to this tactic or campaign.

Ask these questions:

- For every dollar investment into marketing, how many additional dollars have been generated?
- What are your gross sales (GS) for the period of time you've been marketing?
- What is the GS profit/margin?
- Which solutions and services have you made you the most sales?
- What is the cost for marketing to generate sales?

### Leads

A full pipeline of leads is the lifeblood of solution/service providers.

Track leads by:

- Marketing source
- Industry
- Company

Ask yourself:

- How many leads come from a particular source/industry company size?
- How many leads result in a sale?
- How many leads result in no sale?
- How long does it take a lead from this source/industry/company size to close?

## Website Marketing, SEO and PPC

Your website is the foundation of your digital presence.

Track:

- Keyword rankings
- Organic rankings—company website
- Organic rankings—specific web pages
- Pay-per-click (PPC) campaigns
- Click-through rates (CTRs)
- Conversion rates
- Referral traffic sources

Ask:

- In search results, what page do we appear?
- Do I need to adjust keywords?
- How often am I creating content and ads?
- What is my lead conversion rate?
- What is my CTR on PPC campaigns?

## Email Marketing

Email marketing keeps leads warm and your business top of mind with customers.

Track:

- Open rates
- CTRs
- Bounce rates
- Unsubscribes

Use these questions:

- What percentage of readers opened the email?
- How many readers clicked through on specific links?
- Which content gets the most attention?
- Was the bounce rate or number of unsubscribes unusually high?

## Video Content Marketing

Video is the preferred type of content for most digital audiences.

Track:

- Watch times
- CTRs
- Engagement

Ask:

- How much time did viewers spend watching your video?
- How many viewers clicked the video CTA?
- How many likes, comments and shares did the video generate?

## Social Media Marketing

Social media marketing is an essential component of your digital marketing efforts.

Track:

- # of likes/shares/comments
- Content CTR
- Content sharing
- CTA CTR

Ask yourself:

- What content was shared most? How often? What time of day?
- What was my content CTR? Which content?
- What was my CTA CTR?

## Customer Satisfaction and Retention

Customer satisfaction surveys and retention rates help MSPs determine how satisfied or not customers are with their company, solutions and services.

Track:

- Satisfaction levels for their experience throughout the customer journey.
- Satisfaction levels for specific solutions and services.
- Net Promoter Score—the score that measures how likely your customer would be to recommend your MSP to a friend or colleague.
- Customer retention rate.

Metrics resources from CompTIA:  
[Customer Experience Trends in the Channel](#) research report



## About CompTIA

The Computing Technology Industry Association (CompTIA) is a leading voice and advocate for the \$5.2 trillion global information technology ecosystem; and the estimated 75 million industry and tech professionals who design, implement, manage, and safeguard the technology that powers the world's economy. Through education, training, certifications, advocacy, philanthropy, and market research, CompTIA is the hub for advancing the tech industry and its workforce. CompTIA is home to thousands of member technology companies and millions of professionals that provide the technology solutions and IT services that are powering the world's economy.

Login to the Member Portal to access more benefits and resources at [my.CompTIA.org](https://my.comptia.org).

Questions? Email [membership@CompTIA.org](mailto:membership@comp-tia.org).



