



# BUILDING A HIGH PERFORMANCE MARKETING PLAN

WITH MARKETING AUTOMATION

## CHAPTER ONE:

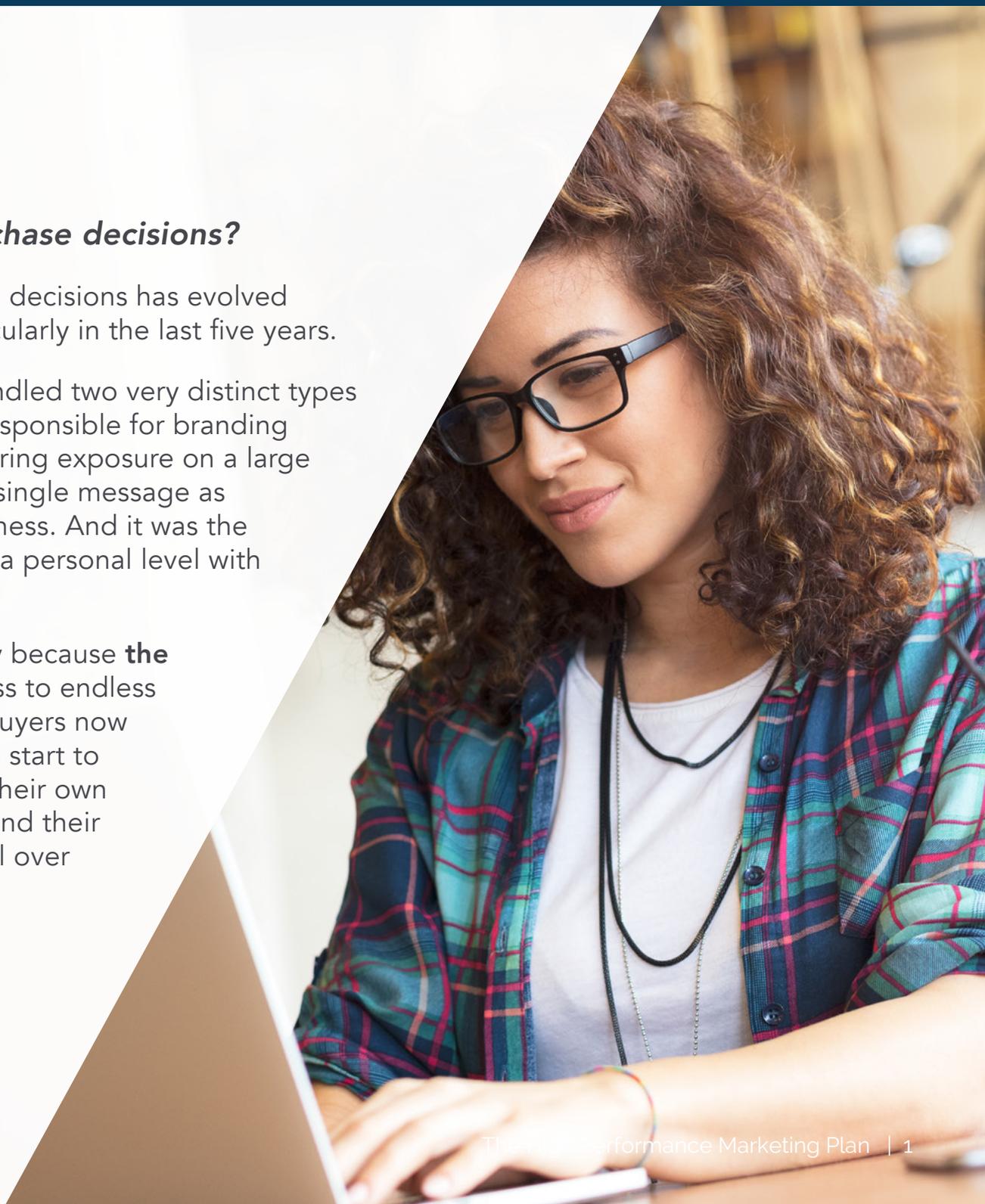
# Buyer Stages

### *How do your customers make purchase decisions?*

The way your customers make purchasing decisions has evolved significantly over the last 10 years – particularly in the last five years.

Traditional sales and marketing teams handled two very distinct types of activities. Historically, marketing was responsible for branding and awareness: providing air cover, procuring exposure on a large scale, and getting as many eyeballs on a single message as humanly possible to elevate brand awareness. And it was the job of the sales team to communicate on a personal level with customers and take down deals.

But those lines have changed significantly because **the buyer's journey has changed**. With access to endless amounts of information and choice, our buyers now have complete control of this course from start to finish. They're now empowered to make their own decisions and they interact with content and their peers in ways that give them more control over the entire buying process.



## CHAPTER ONE:

# Buyer Stages (continued)

*Because the journey has changed for the buyer, we as marketers need to change and adapt as well.*

Especially in the B2B world, we're seeing more stakeholders involved in the decision making process, taking more time to evaluate their options. In fact, SiriusDecisions recently found that **70 percent of the buying journey is now complete by the time a prospect is ready to engage with sales.** Buyers may be having fewer conversations with sales teams, but they're still taking more time to evaluate their options because they have so much access to information and choice. This means that vendor control over the buying process is over. Those days are done. We're no longer shaping all the messages that buyers see. Today's buyers don't simply look at a catalog or call up your salesperson to explore their options and learn about your product or service. Instead, they take matters into their own hands, often coming to you much later in the journey. Today, a huge part of the customer journey is invisible to that traditional sales view.

**78%**

**of buyers start their buying process with a web search.**



**50%**

**turn to social media and peer reviews when they're making a purchase decision.**

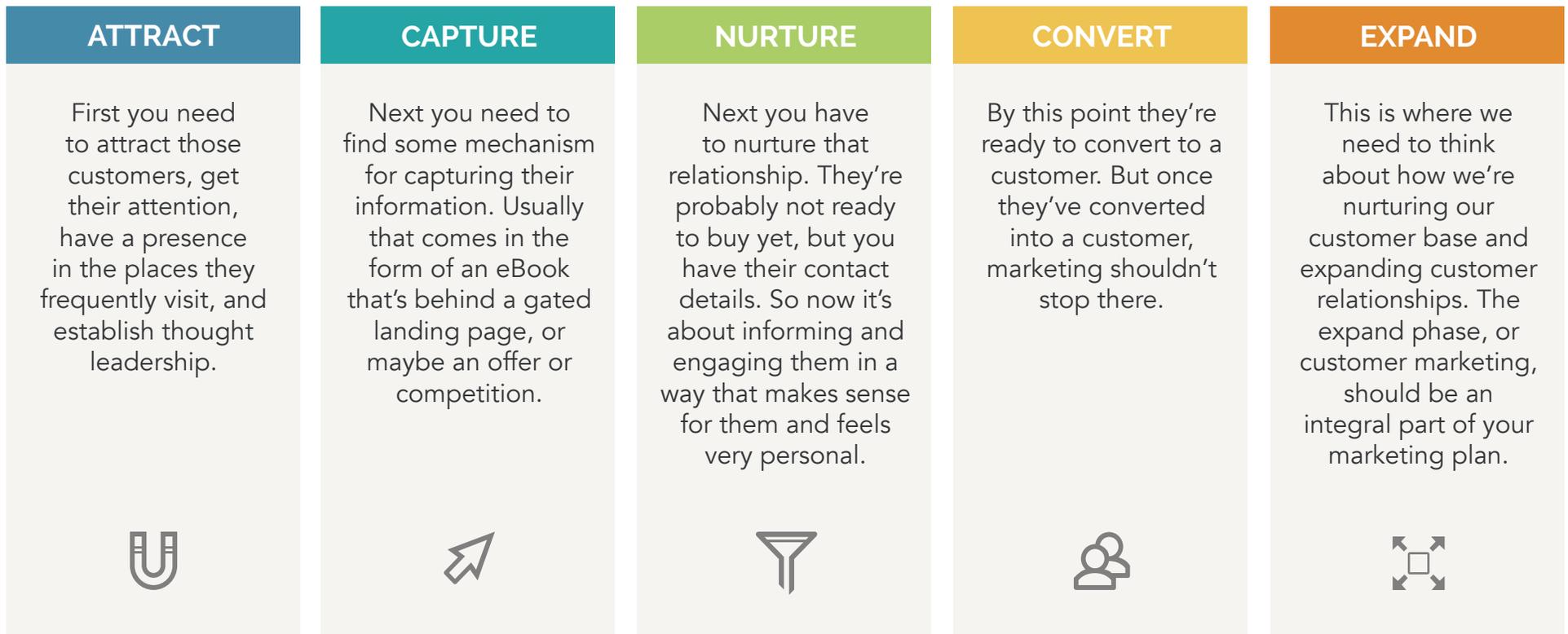


# A New Way of Marketing

*Keep customers and future customers at the center of your plans.*

What all this means is that we as marketers have a new challenge. We must start getting in front of buyers much sooner, and getting involved in that purchase journey a lot earlier.

So, we've broken down this journey into five distinct objectives that you can use to orient your marketing plan throughout the buyer's journey. It's all about keeping your customers at the center of your planning:



## CHAPTER TWO:

# Themes & Content

### *What messages do you want your target buyers to receive?*

The next major focus is themes. What messages do you want to get out to your target prospects? You're familiar with your buyers and the five stages to orient your plan around, so now it's the right time to talk about you. Talk about your company and what type of messages and scenes are important, for not only product positioning, but also for framing what you want current and future customers to think and feel about your company.

There's so much happening before a buyer even talks to your sales team; for example, they're consuming and interacting with your content. And ultimately their decisions are formed by all this material that they're ingesting. So it's very important that we think about the messages that we're putting out into the world and how they're being received. You need to make sure buyers have the information they need to make the crucial decision that you want them to make – **which is to become your customer, not your competitor's customer.**

**Content isn't king;  
it is the kingdom.**

**LEE ODEN**  
TopRank

# The Four Tenets of Effective Campaign Themes

1

Based on Buyer Pain Points & Needs

2

Simple to Understand

3

Relevant During All Stages of the Buyer's Journey

4

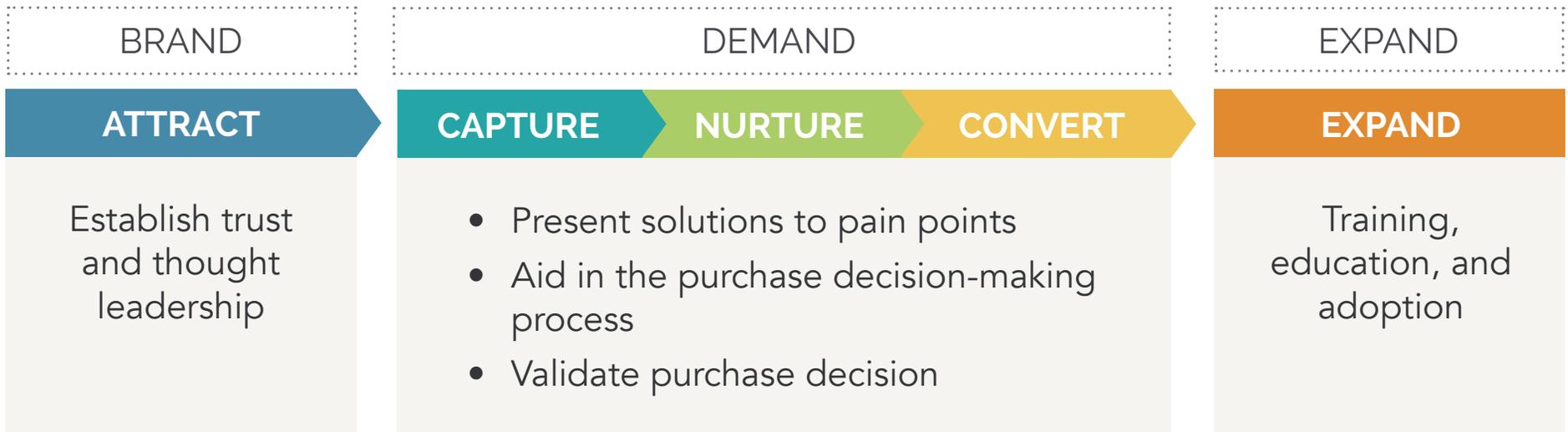
Enduring Enough to Stand the Test of Time

Themes are an important aspect of messaging where marketers commonly miss the mark. We have started the conversation about mapping content to the buyer's journey, but sometimes we miss the themes. **You need highly focused themes to tie together all of the content that you're producing. These themes should be based on your company's vision, your position in the market, and what you know about your buyers, including their pain points and needs.** Your themes should be very simple to understand, not complex, and make obvious in a line or two the key message you're trying to convey. These themes unite content across the entire buyer's journey.

For example, if someone early in the journey is reading a blog, they should see a theme that connects that content to the content they're going to see later on when they talk to a salesperson, or the case study that they're going to see in the final stages of the decision-making process. Last but not least, your themes should be enduring, not something with a very short shelf life. You should be able to use the same themes for at least a year so they have a chance to resonate in the market. And, as a rule of thumb, stick to one to three core themes. (If you're a larger company sometimes it's okay to have more than one message.) **Make each theme very consistent and concise.**

# Map Your Content to Customer Lifecycle Stages

Once you've taken those customer life cycle stages that we went over in the last section and organized your program around them, map all the content that you have in your content library to these stages, or at least broadly to three categories – brand building, demand generation, and customer (or expand) marketing. This will help you see any gaps in your content library. If you're just getting started and are planning new content, make sure you align it around these stages and think holistically about your materials. **Remember to invest in brand content, demand content, and expand content.**



# Map Your Content to Customer Lifecycle Stages (continued)

Content at these different stages of the buyer's journey has different purposes. **Early on in the attract phase, it's really all about establishing trust and thought leadership.** This is the time to discuss things like press releases or blog posts with a guest poster who is prominent in your industry. It's also a key time to make efforts that increase your brand's recognition and digital engagement. This might include amplifying social media and other inbound activities or focusing on increased web traffic.

**In the demand phase, present solutions to prospects' pain points so that you can increase quality lead volume.** Your buyers have most likely identified some sort of pain point and they're investigating potential solutions to their problems. You want to be the one who gives them the answers they seek, educating and building trust to nurture those relationships. Marketing content like eBooks, webinars, and even infographics come into play here. Ultimately, you want to aid potential customers in the decision making process. So, as they are trying to figure out what to buy and why and when, you should be providing the answers to those questions

in your content. You're also validating their purchase decision or confirming why you should be the choice. Content like case studies and analyst reports are crucial during the demand generation process. Successful execution during the demand phase will help you prioritize the right leads, engage at the right time, and enable a more seamless lead hand-off to sales.

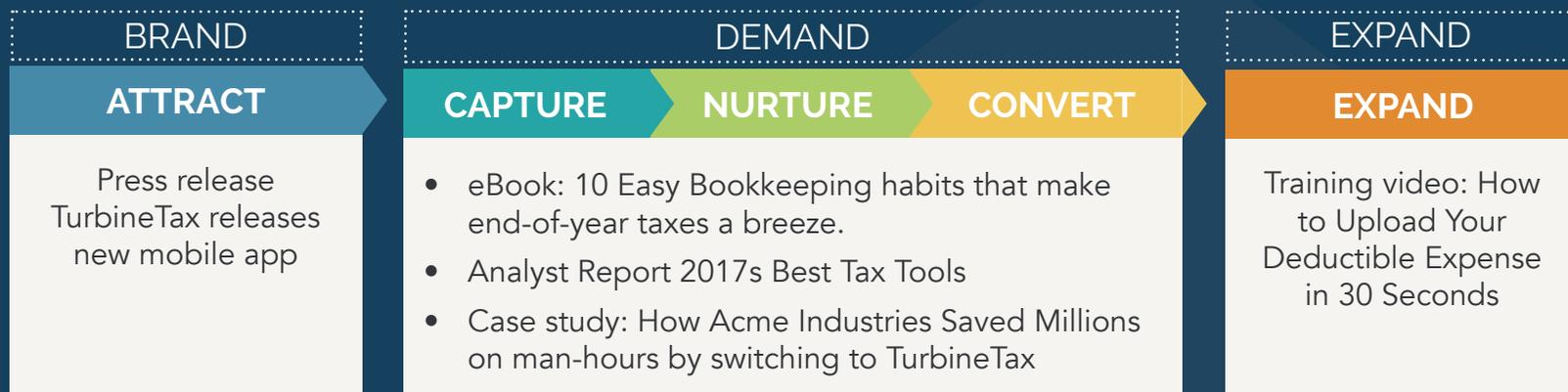
Last but not least, in the **expand phase, the customer marketing stage, think about onboarding, training, education, and adoption.** How can you capitalize on upsell and cross-sell opportunities and turn customers into healthy customers, repeat customers, and ultimately customers who are going to refer other business to you?

# A Theoretical Example: TurbineTax

**Target Theme: TurbineTax Makes Complicated Taxes Easy to Manage & Easy to Understand**

Now let's apply this methodology to a theoretical example. Let's say that you're working for a company called TurbineTax, and you need to activate one of their primary themes: "Turbine Tax Makes Complicated Taxes Easy to Understand & Easy to Manage." So at the attract phase they might do a press release on a new mobile application that makes it very simple and convenient to do your taxes on the go. At the demand phase they may have an eBook on 10 easy bookkeeping habits to make end-of-year taxes a breeze. They may release an analyst report on 2017 best tax tools, or a case study on how one of their customers saved man hours by switching to TurbineTax. Then in the expand phase, they might offer training videos about how to do various task and upload documents very easily in their platform.

As you can see, all of these pieces of content have very different focuses and very different purposes. But they're all tied together and fit into the theme of simple management and ease of use. **This is a very basic version of a content plan or a content map.** Midsize or enterprise organizations may have hundreds and hundreds of pieces of content in their libraries. But a content plan a simple way to map out marketing material strategy, particularly new content that you want to develop and present to your executive team.



## CHAPTER THREE:

# Tactics & Opportunities

*What do you need to do to get in front of buyers in each stage?*

Now let's talk about tactics. What do you need to do now to get in front of buyers at each of these stages and activate all of that content in your marketing universe?

You've already oriented everything around the buying stages. Now you should take a look at each of these stages and ask: What is my primary objective in each of these stages, and what do we need to do to realize these goals? We've mapped out some of the common problems, opportunities, tactics that most marketers are trying to achieve.



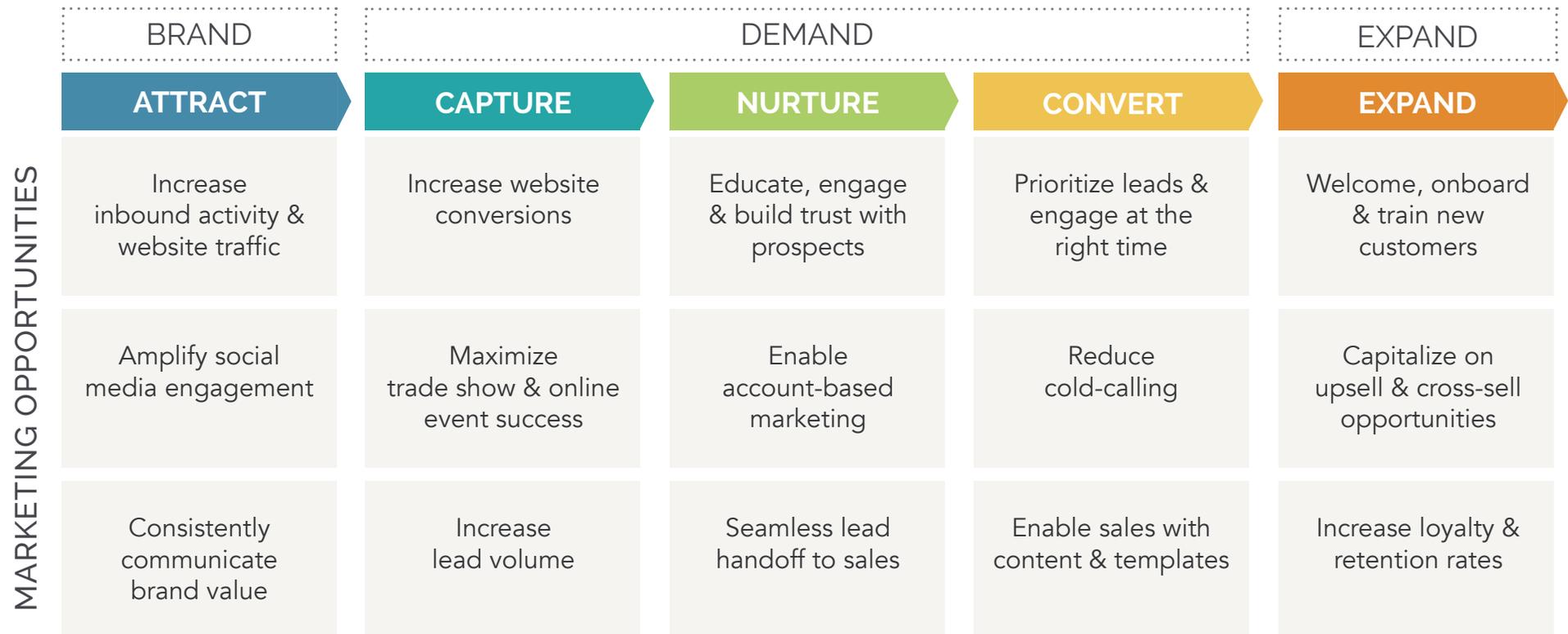
## CHAPTER THREE:

# Tactics & Opportunities



### *The Modern Buyer's Journey*

Marketers need to now address the entire buyer's journey - from branding, to demand generation, to customer expansion in order to fully address the needs of the modern buyer. This starts with mapping your opportunity as a marketer to each stage of the buyer's journey.

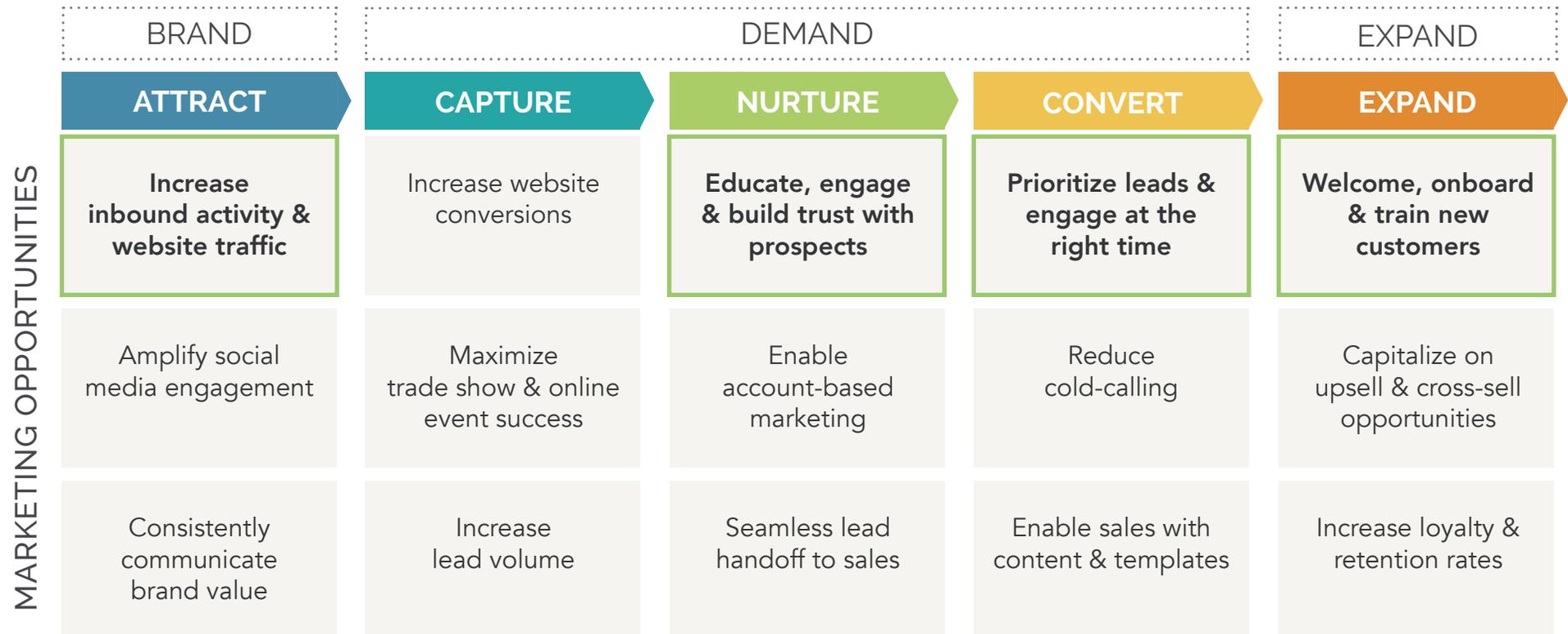


## CHAPTER THREE:

# Tactics & Opportunities

### *Mind Your Gaps!*

Now that we've built a framework for the opportunities at each stage of the buyer's journey, we can begin to pinpoint certain areas that need attention. During this process, we can identify and highlight gaps, opportunities, obstacles, and areas we want to focus on.



## CHAPTER FOUR:

# Marketing Tech Stack

### *What technical systems do you need to support your activities?*

There are more than 3,000 marketing technology vendors. That's a lot to choose from. So how exactly do you make sense of all that? It's important to start with backbone platforms. Begin with the basics.

#### Tools to Help You Get Started:



- [Mapping the Customer Journey Interactive Infographic](#)
- [Rethink Marketing Automation eBook](#)
- [Got CRM? Why You Need MA, Too](#)
- [Marketing Technology 101](#)
- [MA Readiness Assessment](#)
- [How to Pick the Right MA Tool Assessment](#)
- [The High Performance Marketing Department](#)

# Marketing Technology Landscape – The Four Key Components

1

## Backbone Platforms – Marketing Automation + CRM

Most midmarket companies and larger companies will have a marketing automation platform and a CRM, or will at least investigate getting both of those platforms in place. Smaller businesses may not be there yet, but they may be on the verge of using a marketing automation platform. Likely they'll still be using email (and growing out of their system over time).

2

## Channel Tech – Ad Platforms, Social, etc.

The next layer on top of the backbone platforms is channel technology. These are Ad platforms or social networks. Anything you're using in this area needs to be connected to your backbone platforms.

3

## Marketing Operations – Internal Process, Data, Reporting

Use marketing operations platforms to manage internal processes, data, and reporting.

4

## Marketing Experiences – Content + Personalization

Many content platforms will allow you to produce personalized content, videos, and many other interesting tactics and materials to engage your buyers and help you along the way.

# Marketing Automation as a Backbone Platform

Marketing automation is really about giving you the primary tools that you need to cover all your basic channels and get all your programs up and running. This is a list of common features you'll see in a marketing automation platform. **You should have the ability to do the following:**

- Webinar promotion, and connecting to your webinar platforms
- Reporting
- Segmentation
- Lead scoring
- Activity profiling
- Social posting
- Creation of web forms and landing pages
- Email creation
- Email nurturing

A marketing automation platform gives you many capabilities, but its main overall use is to consolidate all those smaller tools that businesses use into a single source of messaging and a single command center for marketing teams.

At the end of the day, it's all about understanding your customers. Every time a prospect interacts with you – whether it's visiting your website, or clicking on an email, registering for a webinar, or downloading an e-book – tells you something. It tells you something about who they are and what they want and need. It's important for you to track, measure, and analyze those interactions in order to understand them and to sell smarter. The driving idea behind your marketing technology should be to help you do that – to let you understand your customers and all those interactions in a single place. In short, your marketing technology should enable you to communicate with your audience in a way that makes sense.

## CHAPTER FIVE:

# Reports that “Wow”

*What do you need to report back to your boss?*



## THE KEYS TO SUCCESSFUL REPORTING PLANS

### **Establish Overall Funnel Metrics**

Define your goals in each of those five stages of the buyer’s journey. These could be things like how many customers you’re going to attract, or how many eyeballs you’re going to get, how many leads you’re going to generate, how many of those leads are going to convert into sales qualified opportunities, and then how many of those are going to convert into closed deals and customers. It’s crucial that you establish those basic funnel metrics

### **Develop Specific KPIs to Measure Progress for the “Gaps”**

You’ll now need to create precise KPIs to measure prospect progress for the gaps that you identified earlier. For all of those major holes that you found in your tactics section, have a specific KPI to allow you to track your progress toward filling and improving them. Establish overall metrics, but wherever you’ve located a gap or a big opportunity, put a definite goal in place there for yourself as well.

### **Get Buy-In from the Whole Team**

In order for you to be successful, you’ll need to get buy-in from the whole team, because goals and reports are essentially useless if you haven’t gotten everyone onboard. If, for example, you’re developing a KPI around website traffic (say you want to increase it by 10 percent), make sure that all the people who have a vested interest understand what you’re trying to achieve and agree that that’s the right metric for success. That way when you present that report to them and tell them the 10 percent goal was met, they don’t give you a blank look and say: “Wait ... what? Why didn’t we increase it by 20 percent?” Getting buy-in from the start can prevent such conflicts and misunderstandings.

## CHAPTER FIVE:

# Reports that “Wow” (continued)

### THE KEYS TO SUCCESSFUL REPORTING PLANS (CONTINUED)

#### Implement the Right Tech to Track Performance

Make sure you have the technology in place to actually track the performance. When you’re mapping out your technology stack it’s important to make sure that it’s very much in line with your goals on the reporting front as well.

#### Map Your Goals to Customer Lifecycle Stages

Here are a couple of guidelines for you to use when you’re establishing those KPIs. This is based on a survey of marketing professionals that we did with Demand Metric, in which we asked marketers what metrics they use to measure performance in each of these areas.



In brand, most people are looking at website traffic, social engagement, and brand search volume. In demand they’re looking at leads generated, opportunities generated, revenue generated, and ROI. Finally, in expand (customer marketing) they’re looking at things like retention rates, website traffic from customer base, net promoter scores (NPS), and revenue generated from customers from upsell and/or cross-sell opportunities.

## CHAPTER SIX:

# Your Big Idea

### *How do you make your mark and innovate?*

Last but not least, let's talk about your big idea. How do you make your mark in the planning process? Planning season is the perfect time to show your boss and your team what you're made of; it's a great opportunity to shine.



## CHAMPION A BIG IDEA

### **A New Channel or Tactic**

Start with championing a new channel or tactic that could open new doors for your business. For example, if your business is not yet engaged on social media, maybe that's the big idea that you'll advocate for in the plan.

### **Innovative Content**

Think beyond the eBook. Maybe you don't have a video program and you want to build that strategy up within the business. Maybe you'd like to dive into interactive content and you need to get buy-in.

### **New Ways of Reporting**

Try a different way of reporting or even motivating people to achieve KPIs.

### **A New Technology Solution**

Fresh, innovative technology can often be a game changer for organizations. If you find a piece of technology that you believe will help you in some clear way and will move your business forward, the planning process is a good time to get behind it and make your case.

*Pick one great idea out of your plan go full force with it. Be creative, be innovative, be bold. This will give you the opportunity to be an internal leader and to be an agent of change. From a career growth perspective, it's also a very good chance to move yourself into the limelight, toot your own horn, and promote your own marketing skills.*

# Conclusion

Overall, a high performance marketing plan is that addresses your customer's needs at every stage of the buyer's journey – even when they're not even considering purchasing! A successful plan is one that is adaptive, and meets your customers where they're at. After all, the modern buyer doesn't just have one path to reach the purchase point, there are literally millions of ways that your customer can find you, connect with you, and eventually purchase from you. Ultimately, the best marketing plans are ones that are entirely focused on what really matters, your customer.

Ready to dive deeper into mapping out your customer's journey?

Check out this [interactive infographic](#) to build brand, drive demand, and expand customer relationships.



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## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more