



Take Your Marketing to New Heights

STRATEGY BUILDER [WORKBOOK](#)

Create Your Marketing Plan

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Overview

A Marketing Plan is about looking at the bigger picture. Instead of focusing on where you are 30 days from now, try planning out the whole year. Where do you want your marketing to go?

Step 1: Preparation

When it comes to marketing, there are a few basic things that need to be established to help you determine the tone of your campaign. Start by asking two questions about your business:

What do we do?

This paragraph should be an overview of company history, ideal client, and target marketing.

Who are we?

This paragraph should discuss your mission and company values.

Situation Analysis

The Situation Analysis is a evaluation of your MSP's marketing efforts. Here is where you consider your strengths and weaknesses, and how your marketing compares to your competition.

SWOT Analysis - Taking an honest look at your marketing. Ask yourself what you're doing, what you could be doing and what you SHOULD be doing. A SWOT Analysis is a good way to get a picture of where your marketing is.

- **Strengths** are things that make your offer most compelling to a prospect or customer.
- **Weaknesses** are things that most detract from your offer.
- **Opportunities** are external factors that represent why your company exists or should/could grow.
- **Threats** are external forces that could impact your success, such as competition, operational capacity, commoditization, etc.

<p>Strengths ex. positive word-of-mouth referrals</p>	<p>Weakness ex. lack of organized sales process</p>
<p>Opportunities ex. local economy attracting niche industries</p>	<p>Threats ex. Losing business to tech giants</p>

Competition

Developing a strategy to give your SMB a competitive advantage is a critical part of marketing success. It's important to think about who your top competitors are? What can you do to show your clients and prospects that demonstrates the value you offer, as well as why you are the right choice for their business.

Competitor	Their Strengths	Their Weakness	Competitive Advantage
Ex. Acme MSP	<ul style="list-style-type: none">• Regularly posts to Twitter• Has several case studies covering target industries• Uses videos to introduce their core solutions	<ul style="list-style-type: none">• Content is outdated• Lack of blogging• No video testimonials• No downloadable offerings	<ul style="list-style-type: none">• Consistently posts engaging social media• Use video marketing to improve lead conversions on landing pages• Showcases testimonials on site• Create relevant educational information for suspects
Competitor #1			
Competitor #2			
Competitor #3			

Target Audience

The vast majority of MSPs will tell you that they target small and medium-sized businesses in their area. But by analyzing your target, you'll have more insight into what your targets are looking for, giving you yet another advantage going into a sales meeting. The best way to go about this is to look at what type of companies do you have a successful relationship with?

Demographics

Current Clients

Evaluate what size business you've had a positive experience with. Are you willing to travel? What do they look to you for? Are there specific industries that you feel would be a good focus for niche marketing?

Size <i>ex. Small Businesses:</i> <i>Medium-Sized Businesses:</i> <i>Large Businesses:</i>	
Location/Service Area <i>ex. 1 hr or 95 miles</i>	
Need <i>ex. Superior Network Security</i> <i>24/7 Help Desk Support</i>	
Industry <i>ex. Biotechnology</i> <i>Aerospace Manufacturing</i> <i>Dentists</i> <i>Law</i>	

Services and Solutions

Now that you know who you work best with, it's important to look at how your services can relieve their issues. What IT pain points do they likely experiences? What are their IT related issues? What services can you offer them? Which services can help them meet their needs.

Common Pain Points	Our Solution Offering
Ex. High Risk of Hurricane Disaster	Data Backup and Recovery/Business Continuity

Your Ideal Client

In one or two sentences, compile the information above to determine your ideal client. Think about it like this. In a perfect world, my client would be:

Budget/Cost Analysis

How to determine your marketing budget? In general, your marketing budget should be 5%-10% of your yearly revenue.

$$\text{Revenue} \times .05 = \text{Your Budget}$$

SMART Goals

The idea of SMART goals is used in every industry. It's applied to business operations, sales, and marketing. The only way to know if you're successful is to set clear goals and track their progress from beginning to end.

Specific: Are your goals clearly defined?

Measurable: Goals should be measurable to ensure you are able to track the effectiveness.

Attainable: Your goals need to be relevant to your marketing demographic.

Realistic: Does your goal fit within your timeframe, budget, and have the best resources available.

Timely: You should have a deadline. Do you have a reasonable timeline to work towards the goals?

Increase in Revenue	ex. 6% increase in revenue
Service/Solution Sales Goal	ex. Add 6 new clients with full managed service agreements .
Marketing Improvements	ex. Reach 1,000 Likes on Facebook

Solution Features and Benefits

Okay, we've outlined your target market and your what they may look to you for. It's now time to consider just exactly what you want to tell them about your solutions, features, and benefits.

Service/Solution	Features/Selling Points	Why Choose YOU?
ex. Backup and Disaster Recovery	Hybrid—Server/Cloud, Site Testing	24/7 Support, Monthly Testing

Tactics and Strategies

Now that you have determined what you're going to be marketing and to whom, it's time to move on to the how. How are you going to reach them? How are you going to make sure they are receiving your message?

- Website
- Social Media Management
- Facebook
- Twitter
- LinkedIn
- Google+
- YouTube
- Any other social media account
- Content Marketing
- Search Engine Optimization
- Pay-Per-Click Campaigns
- Direct Mail Campaigns
- Educational Marketing Campaigns
- Testimonials
- Case Studies
- White Papers / ebook
- Blogs
- Newsletters
- Customer Service Surveys
- 1% kit
- Tech Feedback Cards
- 3-Month Follow-Up Cards
- Holiday Cards

Tracking Success

The only way to know for sure if your marketing initiatives are effective is to know where you started and measure your progress along the way. Here are a few key performance indicators (KPIs) that you should make use of to track your marketing efforts.

Sales Revenue: Sales revenue should always exceed expenses.

$$\text{Total Sales Revenue} = (\text{Price of goods or services}) \times (\text{Quantity Sold})$$

Cost-Per-Lead: This measurement is used to figure the average amount of money spent to acquire each sales lead.

$$(\text{\$ spend on Advertising/Marketing}) / (\text{Amount of Quality Leads Obtained}) = \text{CPL}$$

Customer Lifetime Value: Otherwise known as customer churn rate, this figure will let you know the average "life expectancy" of your clients.

$$(\text{Average Value of a Sale}) \times (\text{Number of Repeat Transactions}) \times (\text{Average Retention Time for a Typical Customer}) = \text{Customer Lifetime Value}$$

Resources

Part of planning your marketing is knowing who you're going to rely on to execute your plan. Do you have resources to devote to your marketing? Where are you going to get any promotional items you may need?

Marketers - Knowing which employees have the time and skill to devote to your marketing initiatives needs to be established. Even a well-planned marketing campaign can fail if there is not enough resources.

Person	Hours Available by Week	Skills/Abilities
ex. Jason Bond	20 hours a week	Social Media/Copywriting Familiar with IT Industry International Man of Mystery

Print Deliverables and Promotional Items - It's best before you begin to have an idea of which business you're going to rely on for your marketing collateral. Waiting until 5 days before an event only to find that you can't find a printer for your brochures is an unnecessary risk.

Company	Products/Services	Point of Contact	Contact Information
Best Printer Ever	Postcards Mugs	S. Printer	sprinter@bestprinterever.com

JoomConnect's marketing solutions and innovative platform integration can help your MSP develop a marketing strategy!

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