

# Building Your Marketing Strategy

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## **THINK STRATEGICALLY**

- 4 Rethink your marketing strategy
- 5 Forget what you know about marketing
- 6 What makes an effective marketing strategy?

## **PREPARE FOR SUCCESS**

- 8 Setting goals and alignment
- 9 Setting a budget
- 10 Internal resources
- 12 External partnerships
- 13 Timeframe

## **PUT YOUR STRATEGY INTO ACTION**

- 15 Develop a Strong Brand
- 17 Common components of a marketing strategy
- 18 Does your digital presence support your goal?
- 21 Sales Enablement
- 23 Event Marketing
- 24 Content Marketing, Inbound, PR, and SEO
- 26 Digital Advertising
- 28 Account Based Marketing (ABM)
- 29 Other tactics to keep in mind

## **GET HELP**

- 31 Root23 Agency can help





# THINK STRATEGICALLY

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The opportunity in our industry is exploding and so is the competition. As a Trusted Advisor, it's time to level up your marketing efforts to match and support your journey into new markets.

Great marketing strategies are built around your unique brand, budget, and capabilities. I'm going to help demystify marketing, cut through the buzzwords, and cookie-cutter advice from marketing gurus to teach you how to develop a custom marketing approach that moves the needle.

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## Rethink your marketing strategy

**Now is the time to rethink your marketing strategy.**

Being a Trusted advisor is about how you are perceived. There was a time in the channel where partners could sling telecom based on relationships. I'll bet you present well, but does your brand look as good as your pitch? Do you look like a world class organization? It's not like that anymore.

The game has completely changed. Your competition is more sophisticated and they're making huge investments in their brand and marketing strategy. Are you keeping pace or being left behind?

It's about the little things. Your attention to detail in your brand reflects your attention to detail in your services. Maybe you can walk into Fortune 1000 company and deliver a great pitch, but what happens when you leave and they check out your website or collateral material? **How do you get in the door in the first place?**

By now, you understand the urgency to be able to respond to the seismic shifts in our industry. This ebook is meant to make sure that, from a marketing perspective, you're prepared to do the right things to look the part. I'll introduce you to the breadth of topics that fall under marketing strategy and leave you with a few important nuggets of information for each.





## Forget what you know about marketing

**Start by forgetting what you know about marketing. One size doesn't fit all, the cookie-cutter approach can be a waste of time and money.**

When I talk to partners, I often find they have preconceived ideas about what their marketing strategy should be. Maybe they heard it from a panel at Channel Partners, from a marketing guru on LinkedIn, or read about it in a Forbes article. Without a proper context, this information only serves to tell us what is **possible**, not what is **appropriate**. I've seen too many small businesses spending money in ways that check the boxes but don't move the needle.







## What makes an effective marketing strategy?

**An effective marketing strategy comes from a deep understanding of your brand and your market. It's defined by your company's culture and strategy.**

Your marketing strategy and brand strategy should build on your unique selling proposition and competitive advantage that meets customer needs in a way that nobody else in the marketplace can. It also depends greatly on your unique circumstances.

When selling complex solutions, I'll bet you include in your sales process a step for discovery or needs assessment. Would you ever walk into a potential deal and try to sell a solution before you ask any questions about their needs, what they hope to achieve, or budget? I frequently run across partners who are already sold on the idea that they need to employ certain tactics to market their business. They've spoken to an agency that is trying to sell them a package of x number of blog posts, x number of social media posts, and x number of infographics.

This lines up with what they've heard they need to be doing and it appeals to them because they are checking off the boxes and doing it with a modest investment.

Usually the most expensive part of your marketing is the investment you make in discovering what makes you unique, distilling that down to a message that will resonate, and then developing a plan that communicates that message to your addressable market. That's your brand strategy.

It's way less expensive to start with your assumptions and then follow a checklist that someone developed as a one-size-fits-all approach. But there's nothing strategic about being positioned in the market like the rest of the competition. You want to stand out.

You can build a powerful marketing strategy on the foundation you built with a great brand strategy.





PREPARE FOR SUCCESS



## Setting goals and alignment

Let's talk about goals. Without dragging us into the weeds, I'm going to give you a starting point that will set you in the right direction. Most of the partners I speak with are trying to accomplish one of two things...

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### **Sales Support:**

Appear credible and competent to support their direct sales efforts



### **Demand Generation:**

Creating brand awareness and lead generation

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Your marketing strategy should align with those goals. There's no reason to invest in a marketing tactic that you can't support, can't afford to do long enough for it to produce results, or doesn't align with what you hope to accomplish in the first place. Spend your money where it will have the most impact. You should consider which tactics will be most effective toward achieving your goal given the constraints you have. Those constraints are important to understand. Budget. In-house capabilities vs partnerships. Time to ROI. They will shape your strategy, so let's take a little bit of a closer look at them.







## Setting a budget

	Overall Spend as a % of Revenue		
Startup	Min \$50k Year 1		
SMB - New Markets	8-12%		
SMB - Established	7-8%		
Large Enterprise - New Markets	4-6%		
Large Enterprise - Established	3-4%		

	Basic	Standard	Advanced
Website	\$5k - \$10k	\$15k - \$35k	\$60k +
Branding	\$10k - \$15k	\$15k - \$20k	\$30k - \$100k
Demand Gen	\$3k - \$10k	\$10k - \$20k	\$50k +
Retainer	\$2.5k - \$5k	\$8k - \$12k	\$15k - \$20k

Marketing costs more than you think. This misconception is driven by common marketing anecdotes that feature people using inexpensive freelancers and small, cookie-cutter agencies that are providing the same service over and over and without the strategy component. These vendors invest the time to create the offering once and then resell it over and over. It's a great way to make money as an agency — but not a great way for you, as the customer, to approach your marketing.

A tailored marketing solution that is strategic in nature and well-executed— which, let's be honest, is what you want— can be more expensive than those services by an order of magnitude. What you spend is also a function of where you are in your lifecycle. Above are some numbers that can give you an idea of how to develop a budget. This doesn't include your internal human resources.

These are just ballpark numbers. There are so many variables that it's difficult to predict where you fit on this chart and what the actual spend will be. But, this will give you an idea of the kind of money you should be prepared to allocate. You should set your budget and know how you will fund these projects before you even start talking to your marketing team or agency.





## Internal resources

**Build your in-house team around your strategy.**

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It's not a one-person job

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Start with a marketing coordinator or manager

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Don't expect to find a unicorn

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Make hiring decisions a function of your strategy



Having a full marketing team in-house is a luxury reserved mostly for larger enterprises because there are a number of specializations that you need to execute your marketing strategy. Content writers, developers, designers, marketing managers, coordinators, project managers, social media managers, and so on. Each of these resources can cost from \$45k to \$100k+ a year.

If you're doing the marketing plan yourself, the priority is to hire a marketing coordinator or marketing manager. This person will be responsible for keeping daily activities aligned with the marketing strategy, coordinating with internal stakeholders and external resources like freelancers or marketing agencies, and managing the execution of deliverables.

Alternatively, you could start by hiring a marketing director accomplish it within your budget.

Where most SMBs make their mistake is in hiring a “marketing girl” or “marketing guy” whom they expect to do all of the marketing activities by themselves this is unrealistic—finding one person that's competent in all of the disciplines is like finding a unicorn.



## Internal Resources



Your next hiring priority will be a function of your marketing strategy. However, it is possible to find specialists that span a few related disciplines with the ability to perform a specific function.

For example, if you are going to be heavy on content marketing, you may want to hire a writer that is somewhat competent in the Adobe Creative Suite so they can also produce the branded art that accompanies your content.

Or, if your strategy is heavy on digital advertising, you may find a social media manager that knows SMM (Social Media Marketing) and SEM (Search Engine Marketing).







## External partnerships

**Agencies and freelancers can be your team or fill skill gaps.**

Whoever you hire, chances are you are going to still have some skill gaps. This is where you would look outside of your organization to third parties. Your best options are to find freelancers or an agency. The benefit to a freelancer is that they are usually less expensive. However, the benefits of working with an agency are manifold.

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### **Benefit to Freelancers**

Cost

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### **Benefits to Agencies**

Strategic holistic approach

Multiple services with one relationship to manage

Depth and stability

Quality control and brand alignment

Build institutional knowledge

Guide you toward new opportunities

Whether working with an agency or freelancer, managing this relationship falls to your marketing coordinator, marketing manager, or director. Their role, aside from being the day-to-day contact, is to work with your internal stakeholders and resources to define project requirements and budget, communicate that effectively to the third party, and manage the project from the client side. This is critical to having a smooth agency relationship.

A full-service creative agency like Root23 can take your marketing strategy from cradle to grave, developing brand strategy, a marketing plan, and executing.





## Timeframe

**Your timeframe has a significant influence on your strategy.**

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How long you can sustain your budget?

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How quickly you need to see traction?

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How long do certain tactics take to produce results?

Your strategy will be heavily influenced by your budget in combination with your timeframe. What I mean by your timeframe is how long you can sustain your budget, how quickly you need to see traction, and how long certain tactics take to produce results.

For example, if your goal is lead generation and you are hiring sales reps that need leads ASAP, then you probably don't have the time to wait for an inbound content marketing strategy. In that case, you may use digital advertising and social media because it could produce results in weeks as opposed to the months or longer that an inbound campaign could take. If your goal is overall brand awareness to support direct selling efforts, and your key market differentiator lies in your unique institutional knowledge, then you would probably want to look at content marketing over a 12-18 month period.







PUT YOUR STRATEGY  
INTO ACTION



## Develop a strong brand

**Your brand is your roadmap. Your true North when making strategic and tactical decisions.**

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Market Position

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Brand Promise

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Target Markets

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Key Insights

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Core Values

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Value Proposition

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Key Interaction Points

Your marketing journey should start with developing your brand. It's critical to success. Your brand will dictate much about your strategy and will also serve as your roadmap, your true North when making strategic and tactical decisions.

### **Elements of a brand strategy include:**

#### **Market Position**

Identify a clear, unique, and advantageous space that you occupy in the market. Let me reiterate **unique** and **advantageous**.

#### **Brand Promise**

The supporting framework defines what customers can expect from your brand. It's the promise you make to your customers that you will deliver on day in and day out for them.

#### **Target Markets**

Define characteristics that motivate potential customers and map their likelihood of adopting. Your target market and the personas within will greatly influence your strategy and tactics. You need to understand buyer behaviors so you know how to reach them. That is what defines your marketing mix.



## Develop a Strong Brand

### Key Insight

The critical insight and concept that drives engagement. This is your true differentiator. Don't tell me it's white glove service, agnostic approach, or your huge portfolio of providers. Almost every partner I speak to tells me at least one of those when I ask what differentiates them.

### Core Values

It's the framework that your employees operate within to ensure they deliver on your brand promise and differentiators.

### Value Proposition

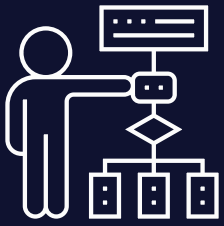
This is how you explain your key insights in a way that answers the age-old question: "What's in it for me?"

### Key Interaction Points

Identify the relevant points for you to effectively reach and track customers along the marketing and sales journeys.

Whether it's deciding on your marketing mix, tactics, messaging, or any other aspect... you should consider every decision through the lens of your brand. **If it's not aligned, don't do it.**





## Common components of a marketing strategy

**Deciding what is right for you.**

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Digital Presence (Website and Social)

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Sales Enablement

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Event Marketing

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Content Marketing, inbound, PR, and SEO

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Advertising and SMM

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Account Based Marketing (ABM)

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Other...

Next, I'm going to walk through some of the more common strategic approaches and give you an idea of when they are appropriate. You're likely going to employ more than one of these in your marketing mix at any given time.





Does your digital presence support your goal?

### Digital Presence (Website and Social) Three Types of Sites

#### Brochureware

**Good for:** Sales Support

**Bad for:** Demand Gen

#### Lead Gen

**Good for:** Leads-Gen

**Bad for:** Sales Support

#### Content-Driven

**Good for:** Both

**Bad for:** Small Budgets

**Align social media platforms and content with your brand and audience.**

This is the only one that is table stakes. You're going to need a website and social media presence no matter what. But the way you use them will vary depending on your strategy. There are three primary types of websites that you should think about, with the fourth being e-commerce which doesn't usually apply in our industry.

#### 1. **Brochureware**

This is designed primarily to reinforce your direct sales messaging. It explains who you are, what you do how you do it, and what makes you different. This is the most basic type of website. It could be a one-page landing page for startups or a 100-page monster that goes into great depth. But ultimately, it's just talking about you, your products, and your services.

**Good for:** Sales Support

**Bad for:** Demand Gen







## Does Your Digital Presence Support Your Goal

### 2. **Lead Generation**

This is a site that is designed to support your digital advertising and other inbound and outbound lead gen activity. It's designed from top to bottom to be optimized to support those strategies and has well-defined user journeys that drive conversions.

**Good for:** Leads-Gen

**Bad for:** Sales Support

### 3. **Content-Driven**

This is a site that is built to house a lot of content including a mix of media like blogs, videos, white papers, case studies, and so on. It will be very large and needs to be smartly designed in a way that allows you to deliver a variety of content as you create it on an ongoing basis. It also usually includes several landing pages and sometimes even microsite experiences. This kind of site serves to establish credibility as thought leaders and subject matter experts. It also supports a variety of inbound and outbound strategies including SEO. Content can also include webinars and events, meaning this kind of site is also built to support an event marketing strategy.

**Good for:** Both

**Bad for:** Small Budgets

### **Social Media Presence**

When it comes to social media, what networks you focus on and the content you post is a product of where your customers spend time and a demonstration of where you play and how you approach your marketing mix. Your social media activity and content should support your brand, your strategy, and add value to the conversation. Your engagements should reinforce your key insights and validate your differentiators.



## Does Your Digital Presence Support Your Goal

For example, if your differentiation lies in your technical expertise, then you may find yourself on Reddit in subreddits (which are like forums) for IT managers and influencers catering to the broader community for advice on solving a specific problem. You may want to be active in that community and also, at the same time, run ads targeting that community.

That's different from posting pictures of your last vendor-sponsored fishing trip to LinkedIn or posting an infographic to Facebook, which is one of those things that people do because they think that's what they are supposed to do. Of course, if your company culture is a key part of your brand strategy, then that fishing trip picture makes sense. And if your brand strategy is primary research and knowledge transfer, that infographic makes sense.

The type of content you create will also dictate the platforms.





## Sales Enablement Support the Sales Journey

**Your sales journey is filled with key interaction points. Create branded assets that concisely substantiate and validate your sales message.**

### Examples:

One-pagers

Brochures

Case studies

Network maps

Vendor comparison charts

**Sales  
Support**



**Demand  
Generation**



**Investment**



**Timeframe**



Next up is Sales Enablement. This will seem like common sense when I explain it, but it's often overlooked. Your customers follow a sales journey that you may formally have mapped out or, informally, that your reps may just intuitively follow. This journey consists of steps in a process. Usually, it's something like initial contact, scheduled meeting, discovery, needs assessment, solution design, vendor comparison, consideration, negotiation, and close. Something like that. Each one of those steps is an interaction point.





## Sales Enablement - Support the Sales Journey

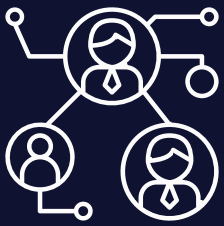


Each of those interaction points will have some kind of transfer of knowledge, or require some kind of proof point to validate what the sales rep is saying. Examples may be a one-pager that explains who you are and what you do. A process doc that shows how you work. Case studies to show your competence. Network maps to demonstrate the solution design. Vendor comparison charts. And so on.

Each of these interaction points should have a formal document that is clear, concise, and well-designed, because at each interaction point, you are demonstrating and validating not only what the sales rep is saying, but also your brand.

To extrapolate one step further, your website should also be built to validate that sales journey in some way, and you want to make sure that your marketing messaging also echoes the sales reps' messaging.





## Event Marketing

**A powerful opportunity to engage face to face, demonstrate expertise, and add value.**

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Has a place in most strategies

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Service providers are funding these events

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Great way to open the door to new opportunities

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Have a follow up plan



**Demand  
Generation**



**Investment**



**Timeframe**

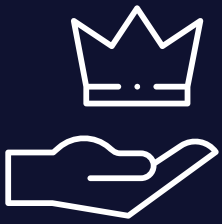


One of the more popular strategies that has been getting traction across the channel is event marketing. Specifically, inviting IT decision-makers to thought leadership events/networking events. This is powerful for several reasons, most of which you can already guess... Face-to-face engagement is always more influential and is a genuine way to demonstrate expertise and create value.

Here's an often-overlooked benefit you may not have considered yourself: this is something you can do for a low budget (at least, the part that hits your budget). Many service providers are willing to fund these events, providing a low-to-no-cost marketing method to you in exchange for your participation. Frankly, I don't see why this **wouldn't** be a part of your strategy. Your only open questions are: just who are you targeting, when in the buyer's journey do you try to get them, how do you drive attendance, and what is the subject matter?







## Content Marketing, Inbound, PR, and SEO

**There are different ways to use these tactics in your marketing strategy. Before you invest, know how you will utilize them.**

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Expensive and long tail for lead gen

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Must be unique and valuable for credibility

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Unique, not syndicated

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Actually valuable, talking an interesting angle

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Aligned with your brand strategy

**Sales  
Support**



**Demand  
Generation**



**Investment**



**Timeframe**



Content is king! That's what you've probably heard over the years. But content marketing is not always the right solution. Content marketing, inbound marketing, PR, and SEO are all really part of the same strategy, which is to create valuable content that is consumable by your target audience and findable by search engines to drive traffic to your site. Once on the site, you hope they follow your user journey until they ultimately convert. That's a simplification but how long can I possibly make this book?

Here's the thing, content is expensive, especially good content. It's also competitive, tons of content exists out there in our space. It also takes time to begin working its magic. And, of course, you need a site that is designed to capture and convert that audience.



## Content Marketing, Inbound, PR, and SEO



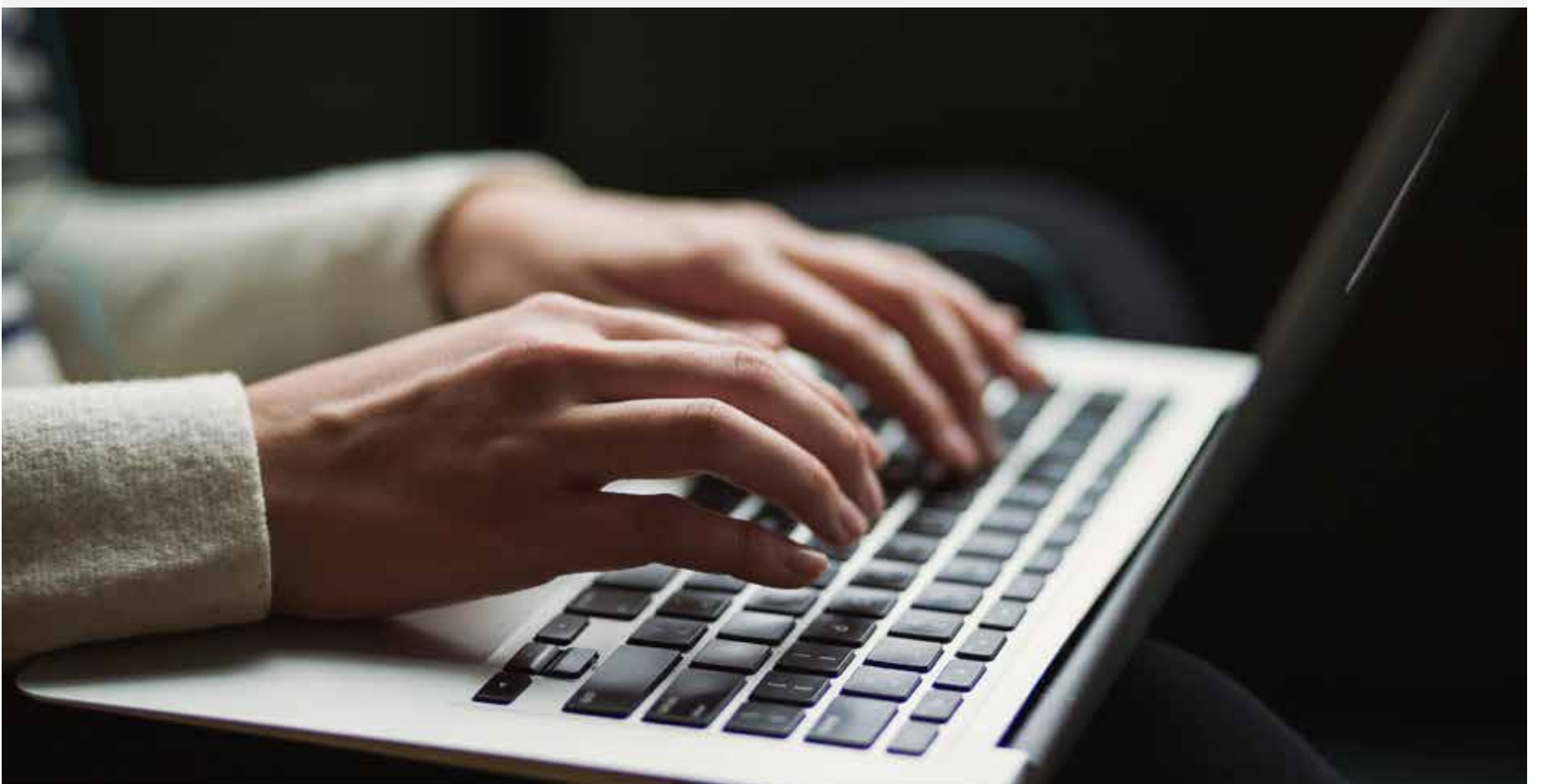
It's a fit if you've got the time and budget. It's not if you don't, yet that's the primary advice that I hear when I go to sessions about marketing, read blogs about marketing, and see service offerings from agencies that target the channel.

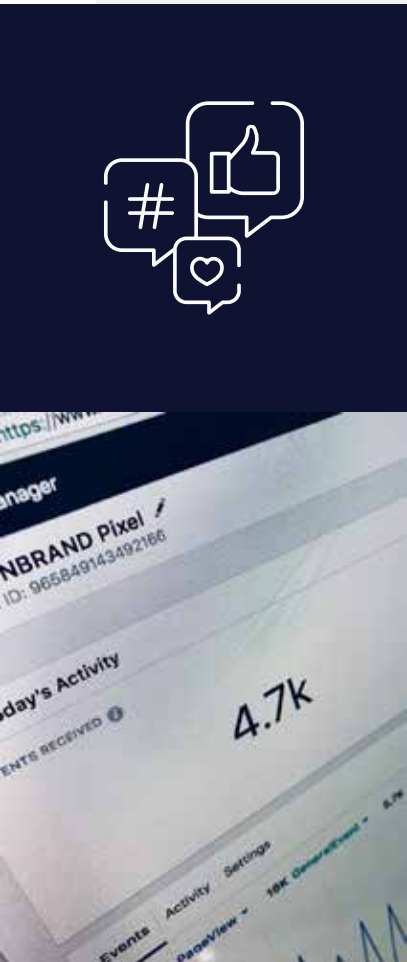
Content can be valuable even if you're not creating it to generate leads. It can demonstrate expertise and reinforce your brand. However, for it to serve that purpose it should be

- **Unique**
- **Valuable**
- **Aligned with your brand strategy**

This means that most of the content services that you find out there and can subscribe to probably won't move the needle towards generating leads or creating credibility and demonstrating expertise.

Content is a great thing but you really should consider how you are using it before you invest. Don't just sign up for a service unless it serves your strategy.





## Digital Advertising

**Digital advertising spans PPC, display ads, paid search ads, and social media advertising.**

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Ads that require bidding like PSA can require a large budget

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Social platforms offer diverse ad vehicles

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All are highly targeted and capable of creating quick results

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Retargeting can improve results of other types of marketing

<b>Sales Support</b> 	<b>Demand Generation</b> 	<b>Investment</b> 	<b>Timeframe</b> 
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This is a big subject. I'm going to keep it pretty narrow for the sake of time. I'll start with Adwords. Adwords and other PPC advertising can be the right strategy when you're trying to create qualified leads in a short time but you have a big budget to work with. You can pay to have your ad appear at the top of the search results pages for certain keywords. The problem is, you have to place a bid and in our industry, you're going to end up with two scenarios pretty frequently.

First, the keywords you want to target will be very competitive and so the big price per click will be too high for most budgets to be able to generate enough impressions and clicks to put into the top of the funnel for enough conversions to come out of the bottom of the funnel.



## Digital Advertising

The other is that you will target long-tail keywords, or phrases, that are more obscure and thus more cost-effective. Except, usually those long tail keywords don't generate enough searches to create the traffic you need for it to be effective.

A better option for smaller budgets is social media ads. First and foremost, most platforms don't give you much organic reach anymore, so when you are creating a post you should pay to boost or promote it. It can be a small budget but put a few dollars on every post.

Next, carve out some budget for one of the many ad vehicles available. Facebook and Twitter let you do display and text ads but LinkedIn does that and also lets you do InMail ads, or you can upload a list and target specific users. They have a range of products that you can experiment with.

The commonality between platforms is that they can be very highly targeted, therefore you are using your dollars more effectively.

Lastly, these platforms allow you to do retargeting. That's where someone visits a page on your site or landing page, they drop a cookie on the machine, and when they leave, your ads will start to appear wherever they go. It's a great way to increase conversions on any campaign that involves a gated digital asset.

For someone trying to generate leads, especially if they want them quickly, and has a budget under \$5k per month, you maybe better off spending it all on this kind of marketing than paying for a service that does blogging, social media, and infographics.







## Account Based Marketing (ABM)

**Treat your high-value target as a market of one and launch an integrated marketing campaign.**

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Target different decision maker roles within each organization

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Customize the message for each company

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Use a varied marketing mix

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Be creative

**Sales  
Support**



**Demand  
Generation**



**Investment**



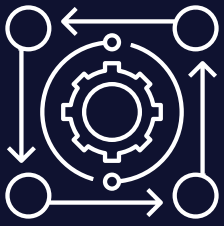
**Timeframe**



In Account Based Marketing (ABM), you make a shortlist of high-value targets with multiple decision-maker roles and treat them as a market of one. You create a strategy that leverages different marketing channels like email, social media, advertising, and even direct mail to target these companies with messaging that is crafted specifically for that company. It can be expensive and an intense effort, but it can also be supremely effective and paves an excellent way for getting into larger accounts.

Just to give you an example, albeit not one from our agency I heard about a campaign where they sent a social media message introducing themselves, an email saying they should expect a gift soon, then mailed a drone with no remote. The postcard inside the box said they get the remote when they meet. Ballsy for sure, but you get the idea.





## Other tactics to keep in mind

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Email marketing

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Tradeshow marketing

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PR

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Influencer marketing

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Direct mail

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Experiential marketing

These are some other tactics that still work and have a place in many marketing strategies, but this section was long enough so here are the high notes:

**Email marketing**

Still works but requires a strategy, active management, and good list hygiene.

**Tradeshow marketing**

Can be a great way to establish a presence in specific verticals and create new relationships.

**PR**

We mentioned it in the context of content marketing but PR has a strategy all its own.

**Influencer marketing**

A bit harder to execute in our space but possible.

**Direct mail**

This is so old that it's novel again. Done right, it can get a decision maker's attention.

**Experiential marketing**

Creating real-life experiences that create an emotional connection with customers.





GET HELP



## YOU DON'T HAVE TO GO ALONE. ROOT23 CAN HELP

As you can see, there's a lot that goes into developing a strategy, and it's highly dependent on your specific circumstances – from brand to budget.

What's at stake is the money you spend on marketing without a proper strategy and the opportunity cost of not getting it right the first time.

**You don't have to face this challenge alone.** Great marketing doesn't come out of a box. It comes from a deep understanding of your brand and the market. It's molded by your company's culture and strategy. It's identifiable by its creativity and execution.

The root of your marketing strategy lies in your company's DNA. When you're ready to stand out from the competition, **you're ready for Root23.**

**Let's do something great together!**



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