



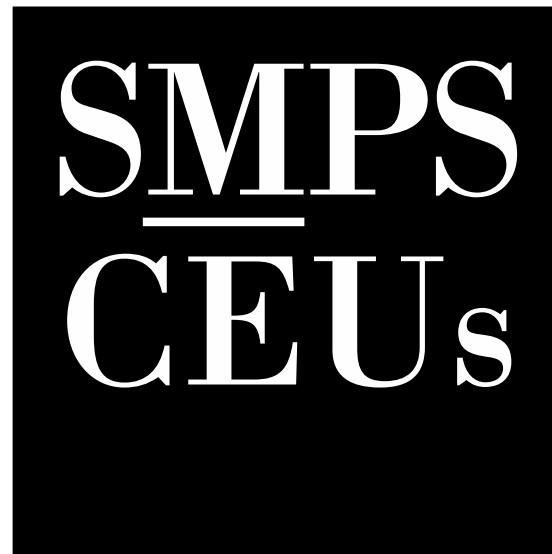
# Build a Data-Driven Marketing Plan

Presented by Sylvia Montgomery, CPSM and Candis Roussel



# SMPS CEUs

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# Today's Presenters



**Sylvia Montgomery, CPSM**

Senior Partner, Hinge Marketing

[smontgomery@hingemarketing.com](mailto:smontgomery@hingemarketing.com)

**Connect with me on LinkedIn:**

[in/sylviamontgomery](https://www.linkedin.com/in/sylviamontgomery)

**Connect on Twitter:**

[@BrandStrong](https://twitter.com/BrandStrong)



**Candis Roussel**

Account Director, Hinge Marketing

[croussel@hingemarketing.com](mailto:croussel@hingemarketing.com)

**Connect with me on LinkedIn:**

[in/csroussel](https://www.linkedin.com/in/csroussel)

# Agenda

- How to establish a foundation for your marketing plan
- The most effective online and offline marketing tactics
- Metrics that matter
- Skills needed to deliver on a balanced plan
- How to find the right marketing planning rhythm for your firm
- Top challenges encountered when preparing your plan



# How to establish a foundation for your marketing plan



# Goal Setting

- > What kind of firm do you want to have?
- > What kind of firm do you need to have?
- > What is your ideal level of growth?
- > Where will business come from?
- > What types of clients do you want?



# Strengths Can Be Growth Areas

- What industry verticals are already strengths?
- What kind of services are you good at delivering?
- Where do you offer the most value and enjoy the greatest success?
- Are your target audiences in high-growth industries and what kind of growth opportunities exist?

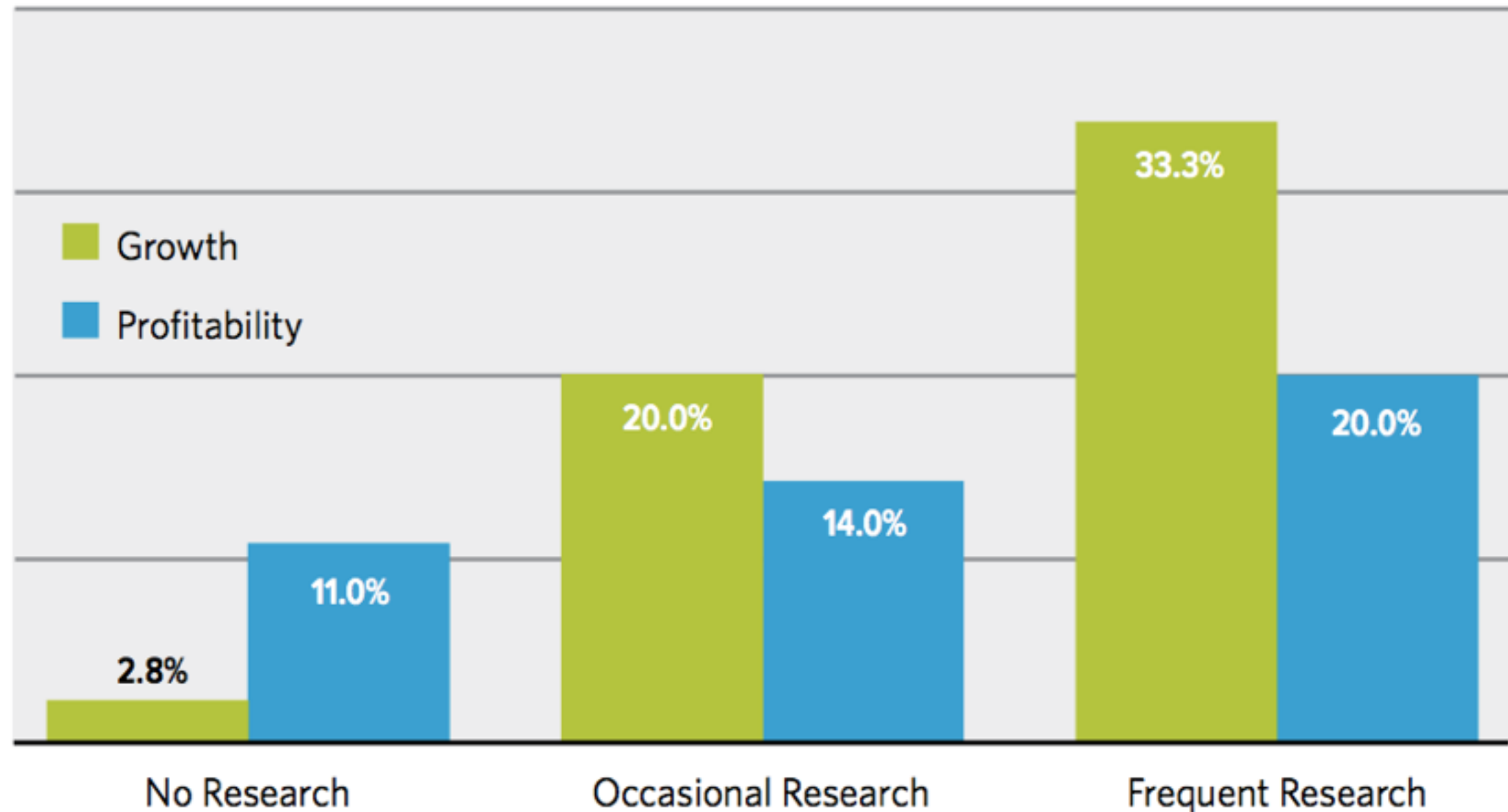
# Current Capabilities

- What services are you prepared to offer today?
- Do your clients know all the services you offer?
- What areas do you already excel in?
- Which ones no longer make sense?





# Impact of Research on Growth and Profitability



# Benefits of Research

- Better understanding of your target audiences
- Identification of a true competitive advantage
- Alignment of YOUR voice to THEIR key issues
- Focused efforts

# Outcomes from Research

- Clear targets
- Differentiators
- Positioning and expertise issues
- Techniques you will use and how often
- Tracking methods

Research reduces risk.



High growth firms are

3X

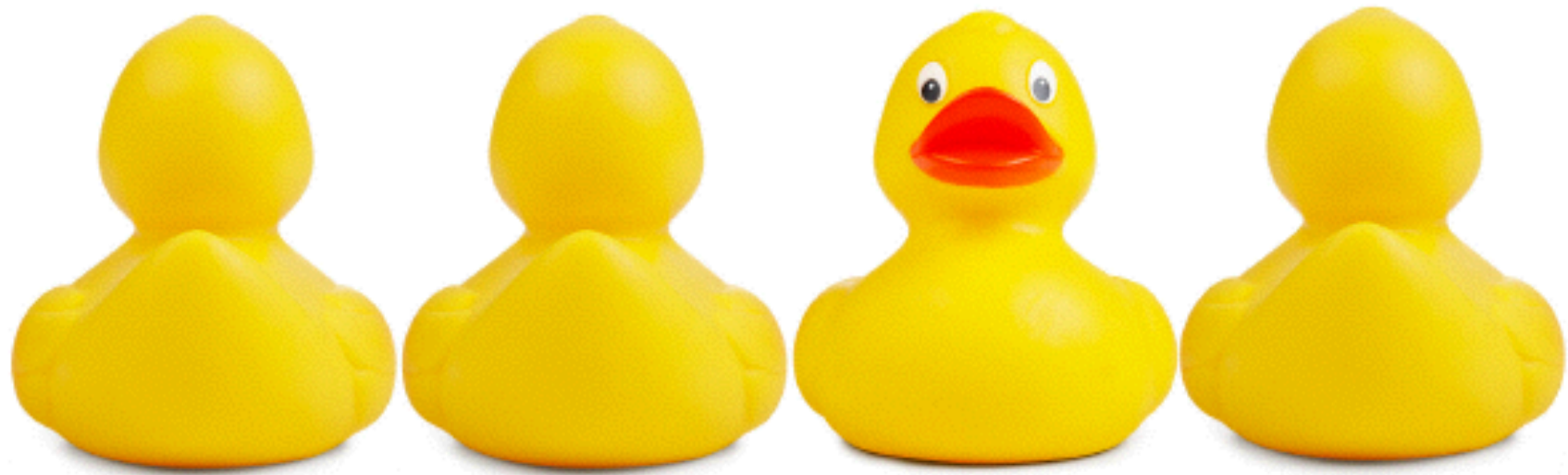
more likely to have a  
**strong differentiator.**

Source: *Spiraling Up: How to Create a High Growth, High Value Professional Services Firm*

# The Making of Good Differentiators



What is a differentiator?



A differentiator is something that makes your firm *meaningfully better than* other firms for target clients.

# Differentiators must be

☒ True

☒ Relevant

☒ Provable

# Examples of Weak Differentiators

- > We have great people
- > We have a proprietary process
- > We put the client first
- > We always strive for excellence
- > We have a passion for service
- > We are a trusted advisor





# Examples of Strong Differentiators

- > We work exclusively in litigation support
- > We specialize in the restaurant industry
- > We are a top 100 government contracting firm
- > We specialize in restructuring and turnarounds
- > We work exclusively with Fortune 50 firms

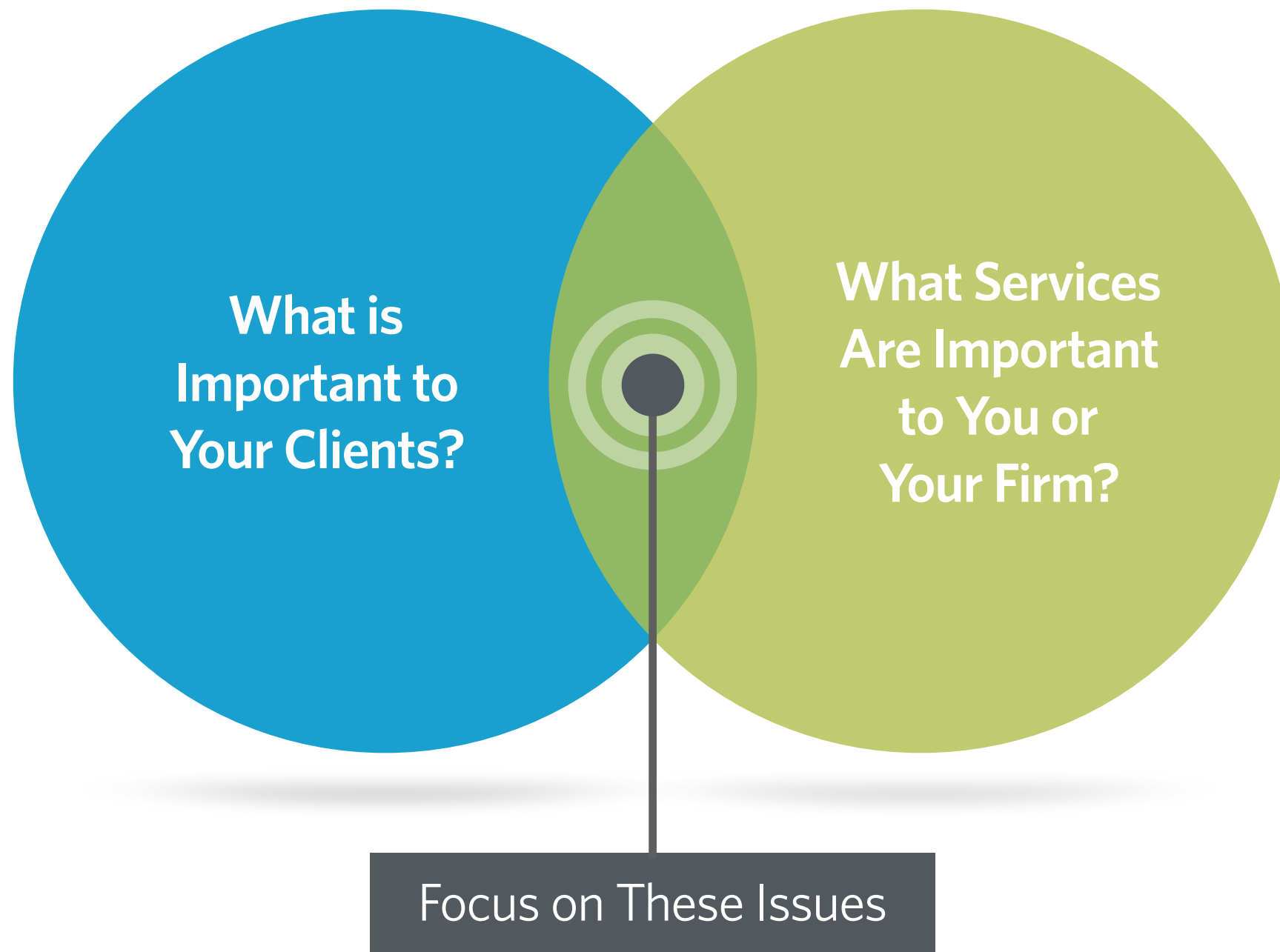


# Competitive Advantage

- > Most firms take a similar approach to the marketplace
- > Buyers have trouble distinguishing between service provider options
- > Positioning sets firms apart and helps buyers recognize and prefer them — ultimately providing a stronger competitive advantage

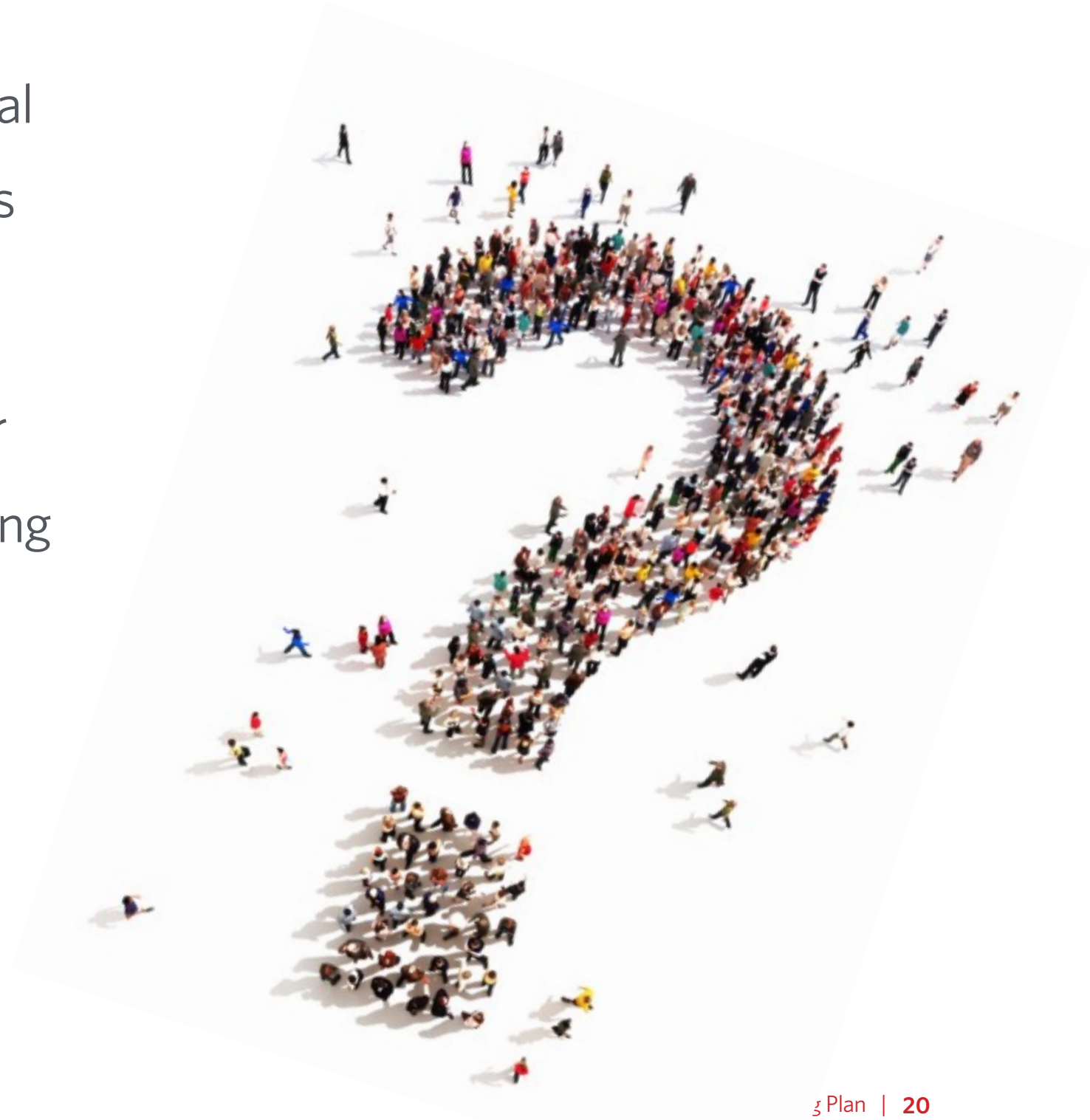


# Positioning Your Firm in the Marketplace



# Research Will Help You Select Your Issues

- > What are the organizational priorities that your services help address?
- > What approaches are your target audiences considering to address their priority issues?



# Turning Your Positioning into Content

## Positioning

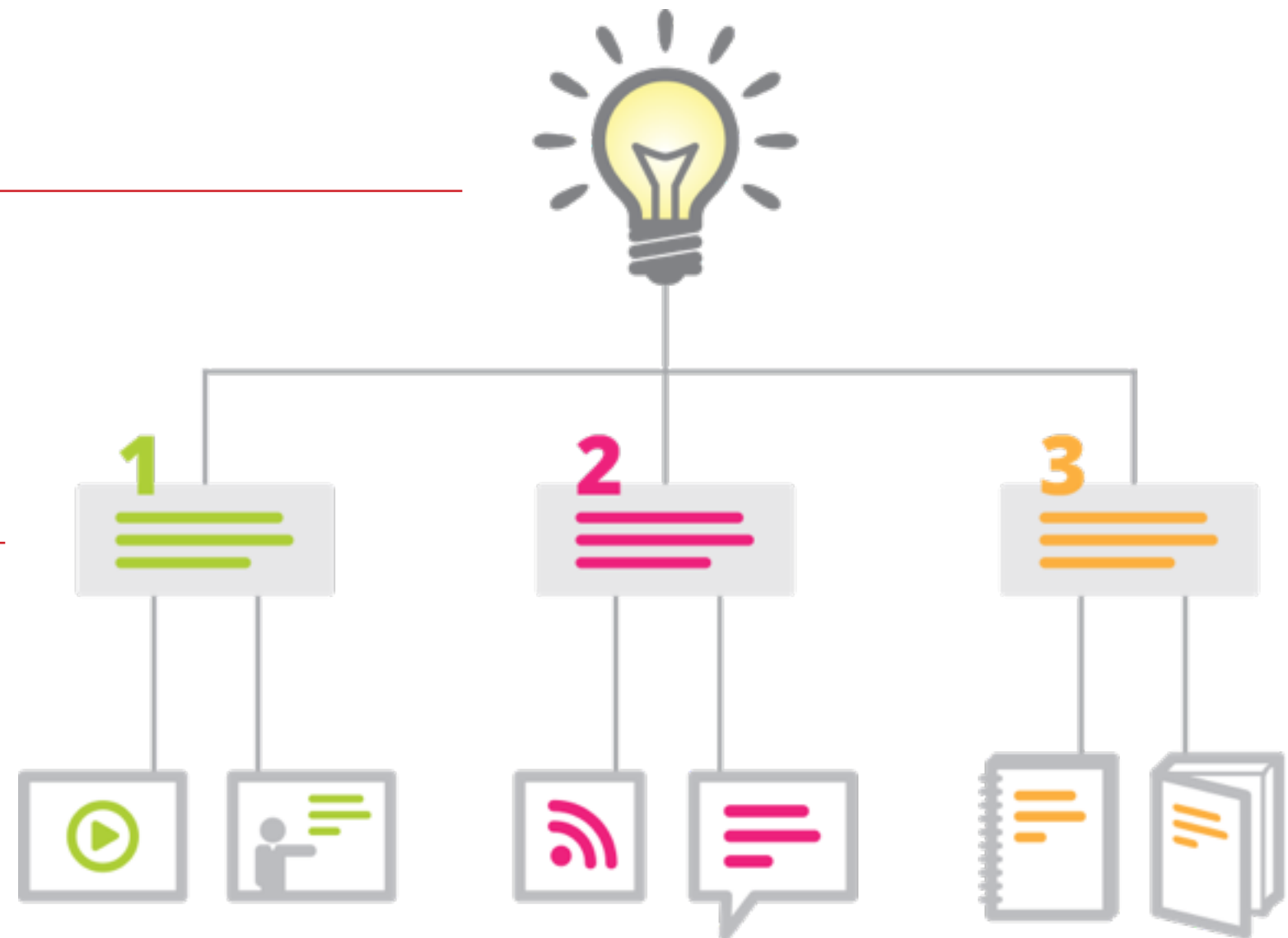
*The big idea people associate with you.*

## Issues

*The themes you write and speak about.*

## Topics

*The titles of your blog posts, webinars, speeches, etc.*



# Criteria for Selecting an Issue

- Relevant to client and service you provide
- No consensus on the solution
- Not something that is likely to go away in the short-term
- Not already “owned” by another firm
- You can offer a valuable perspective
- Broad enough for multiple topics

# Examples of Issues

- Ensuring the security of financial data
- Building a better board
- Demand for transparency in highly regulated hedge fund market
- Why change transformation fails

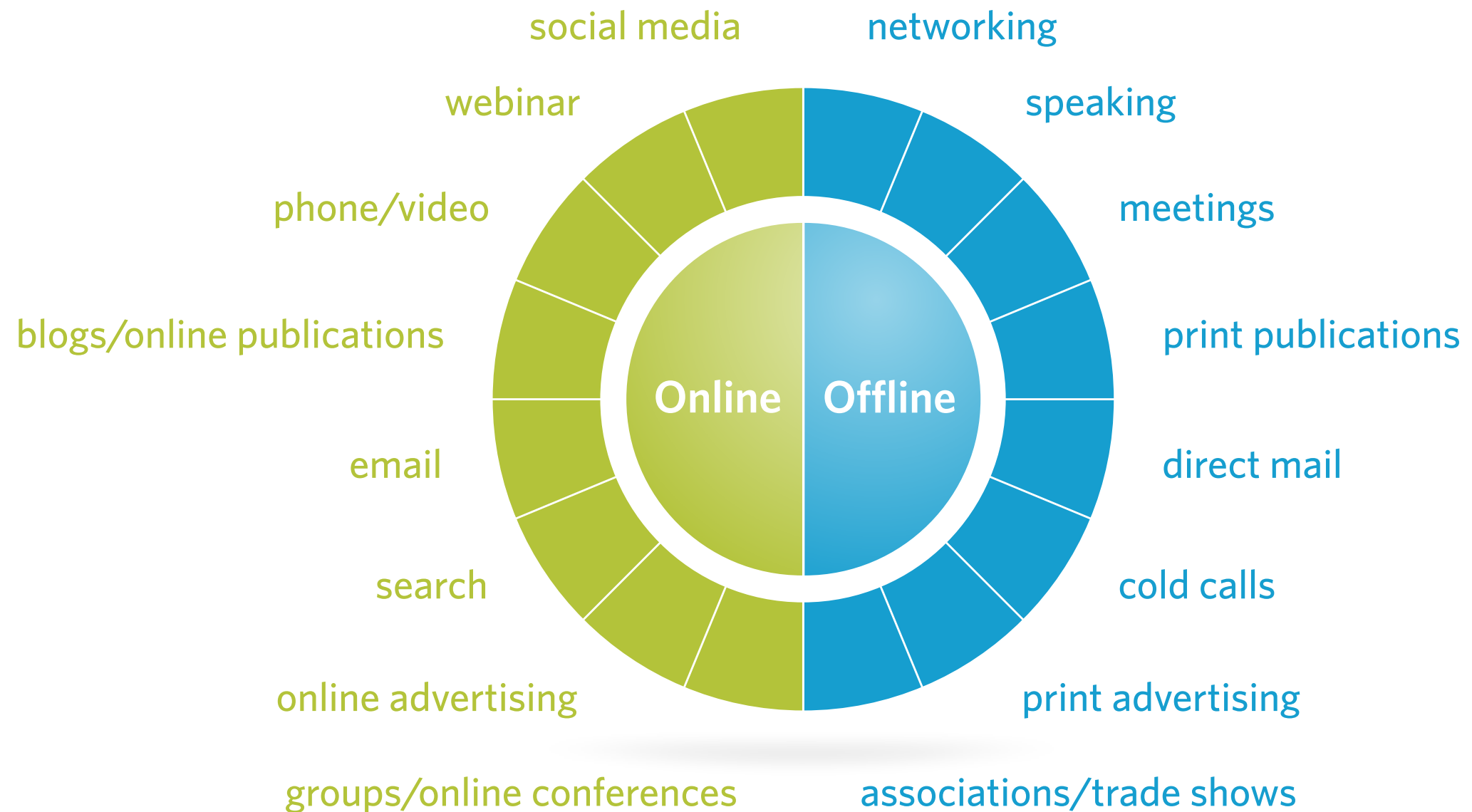


# The most effective online and offline tactics





# A Balanced Approach to Marketing



# Case Stories

## Uses

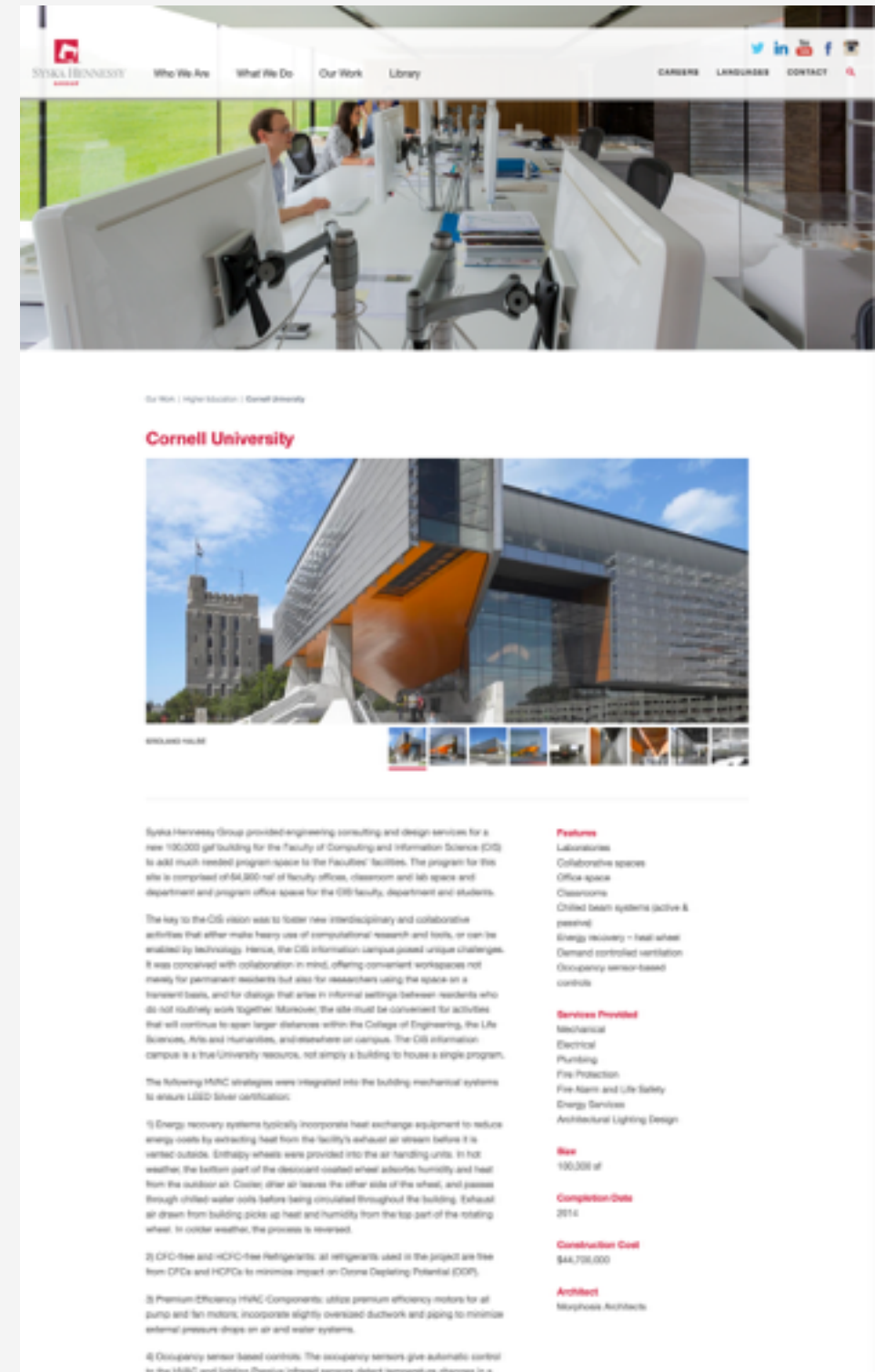
- Builds credibility and trust
- Speaks to your expertise
- Tangible evidence of prior success
- Humanizes your firm and services — prospects can relate

## Access

- Open

## Important Considerations

- Use numbers, facts and specifics — not fluff
- Put in easy-to-read format



# Research Reports

## Uses

- › Great way to demonstrate your expertise
- › Can be offered as an incentive to turn visitors into leads
- › Great source for blog posts, articles, talks, etc.
- › Very shareable—great for public relations and social media
- › Some research deepens your understanding of the marketplace

## Access

- › Requires registration

## Important Considerations

- › Primary research is often required
- › Great opportunity to partner with a trade association
- › Can be one-time or recurring study
- › Should be of interest to your target audience
- › Emphasize interpretation and analysis, not just reporting



# Offers

## Uses

- > Expose new prospects to other relevant content
- > Move prospects through the funnel
- > Convert opportunities into clients

## Access

- > Open

## Important Considerations

- > Make sure offers are appropriate at each stage of the funnel
- > Include offers in each piece of content to expand engagement



# Tools to Communicate Your Brand



- ★ Website
- > Marketing materials
- > Firm overview video
- > Case studies
- ★ Expertise Marketing
- > Identity
- > Social media profiles
- > Email campaign
- ★ Social Media

# Metrics that matter





# Domains to Sample

- > Visibility
- > Expertise
- > Impact



# Selecting a Metric

- Continuously available
- Low component of judgment (objective)
- Accepted as relevant
- Easy to monitor





# Key Considerations

<b>Frequency</b>	Weekly, monthly, quarterly
<b>Display</b>	Graphic
<b>Comparisons</b>	Month to month, quarter to quarter, year over year
<b>Adjustments</b>	One variable at a time if possible
<b>Testing</b>	Always consider A/B tests

# Visibility Metrics

## Website traffic

- > Direct
- > Organic search
- > Referral
- > Social media

## Social media followers

- > By platform

## Email list size (mailable names)

# Expertise Metrics

## Content

- > Premium content downloads
- > Blog Traffic

## PR

- > Guest posts/articles
- > Earned media coverage

## Online endorsements

- > Social shares
- > Inbound links (organic)

## Speaking engagements

# Impact Metrics

## Inbound leads

- > Form fills
- > Phone/email

## Opportunities (CRM)

## Proposals

- > Number
- > Cumulative value \$

## Wins

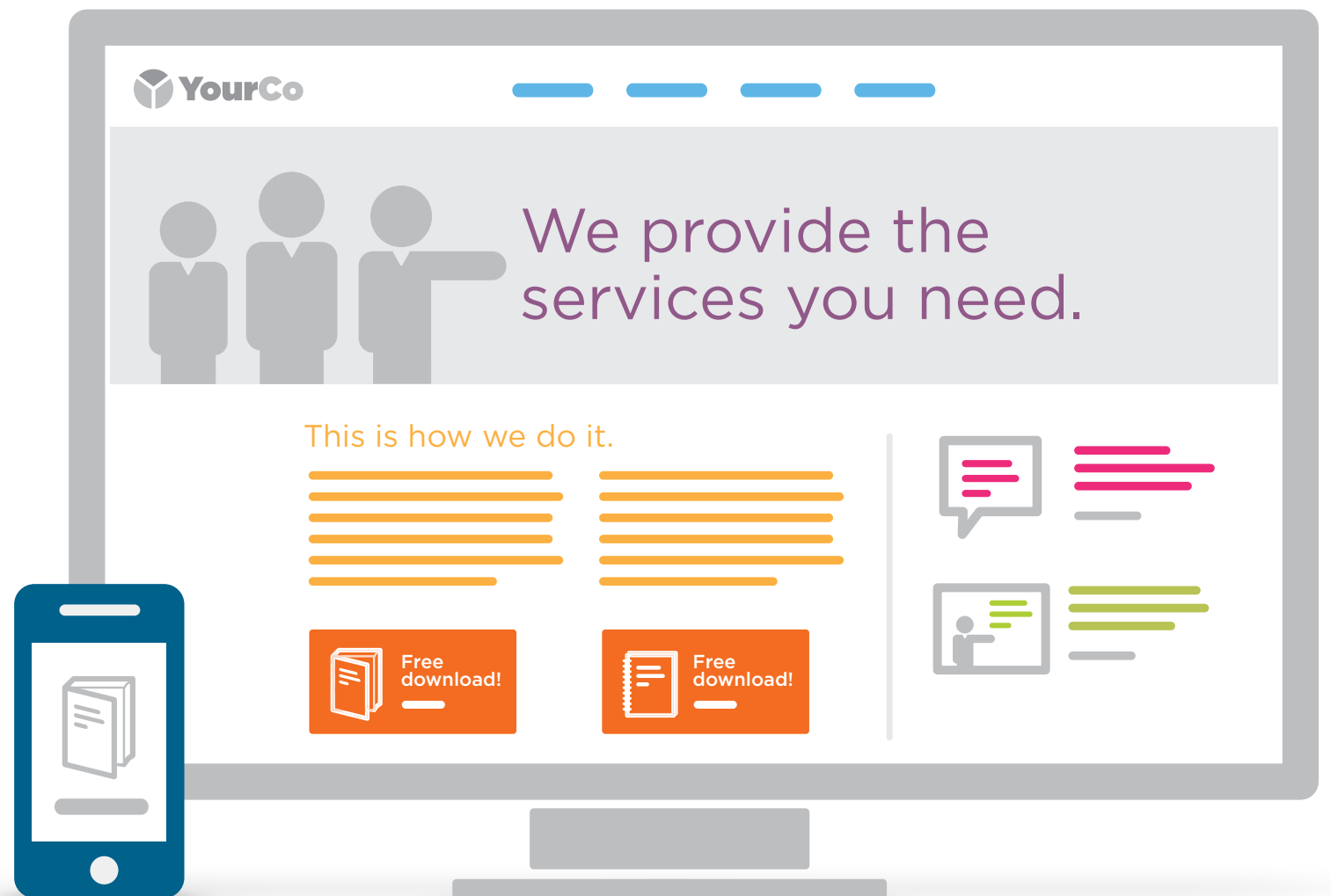
- > New client
- > Existing clients
- > Number
- > Cumulative value \$

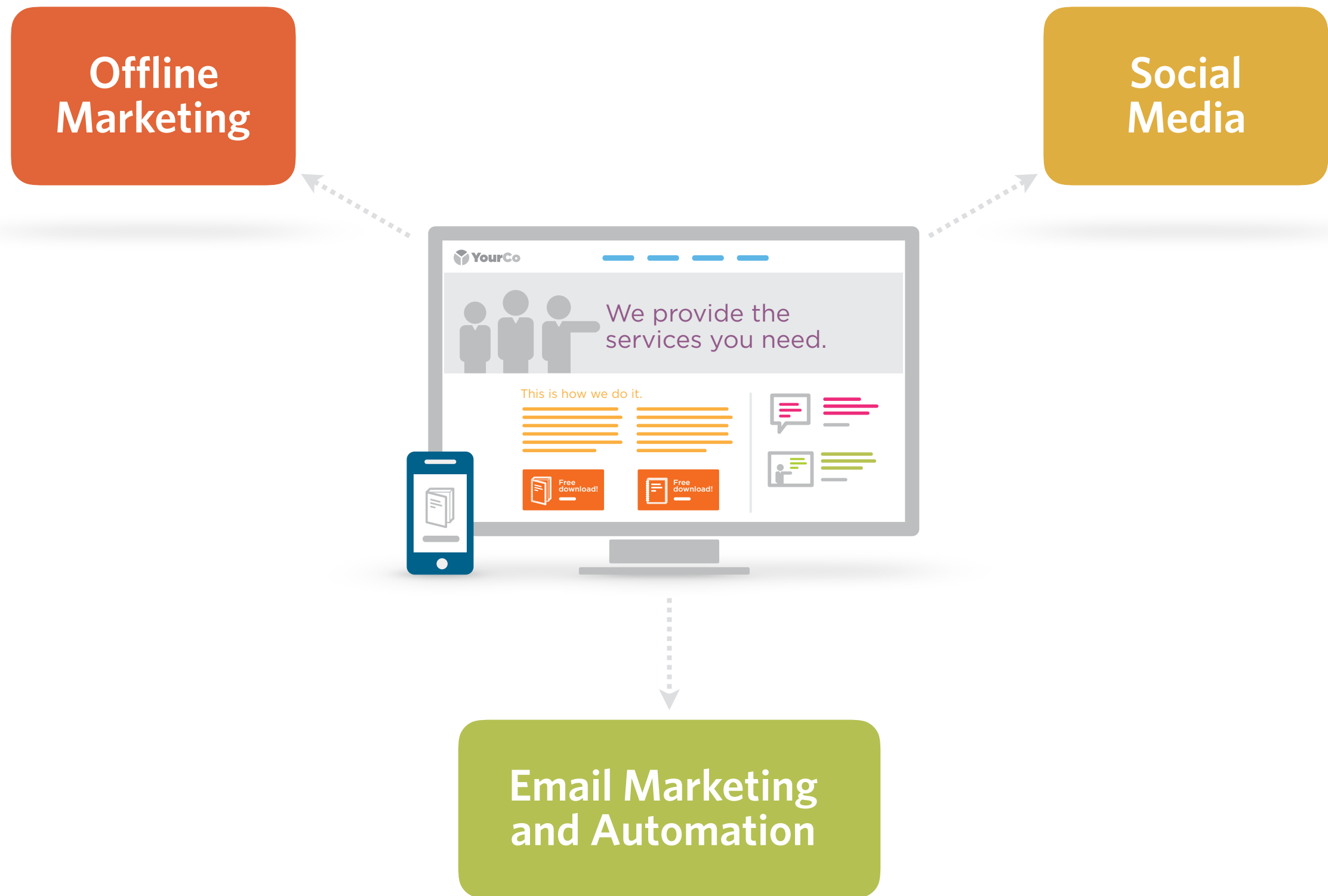
## Firm growth

## Firm profitability

# High-Performance Website — Your Hub

- A** Educational Content
- B** SEO
- C** Blog
- D** Links
- E** Offers
- F** Clear Messaging
- G** Mobile Friendly





# A/B Testing

Testing is the only way to learn what works and what doesn't:

**RESEARCH STUDIES**

## 2015 Professional Services Marketing Priorities


**How will firms prioritize in 2015?**

Big questions are on the horizon: what are the most urgent business challenges for professional services firms? And how will firms prioritize their marketing efforts?

The Hinge Research Institute surveyed over 500 professional services firms to find the answers. Now we've released the results in a free research report: **2015 Professional Services Marketing Priorities**.

In this report, we provide detailed data on:

- > The top business challenges facing professional services firms



**2015 Professional Services Marketing Priorities Report**

17 charts  
21 pages  
Cost: FREE

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**14.5% Conversion Rate**

## Is Your Two-Factor Authentication (TFA) FEDRAMP-compliant?

12/09/2015 | By: Sese Bennett, CISM, CISSP, Senior Manager, Information Security



As cyber threats become more prevalent, the need to add multiple layers of security authentication has emerged. For most organizations, one of those layers include effectively verifying that “you are who you say you are” when you access a system on the network. This is where Two-Factor Authentication comes into play.

Like any other security control, the effectiveness of Two-Factor Authentication depends on how well it is implemented. From a FedRAMP perspective, Two-Factor Authentication is required to provide enhanced identification and authentication to systems in three different scenarios:

The first scenario involves providing identification and Two-Factor Authentication for network access to privileged accounts. This scenario is probably the most well-known for implementing Two-Factor Authentication. In this scenario, when a remote user who has a privileged account such as administrator, domain administrator, application administrator, root, etc. connects to your environment, they are required to use Two-Factor Authentication to authenticate themselves before access is provided. This should not be confused with a Virtual Private Network (VPN) connection which uses encryption to establish a virtual session from the remote location back to the backend network. When VPN is used in conjunction with Two-Factor Authentication, it provides a strong two-layered approach to securing the connectivity and ensuring the identity of the user.

### SEE ALSO: Shore Up System Boundaries for a Smoother FEDRAMP ATO

The second scenario is very similar to the first except it is geared toward remote users who have to non-privileged accounts. In this scenario, a user with a “standard” user account attempts to connect to the environment from a remote location, they should be challenged with a Two-Factor Authentication prompt and required to authenticate successfully before they are granted access to network systems. Non-privileged account users also can benefit by using a VPN to secure the transmission tunnel between the remote location and the backend network.




# Landing Page

**FREE GUIDE**

## PRIVATE EQUITY IN TRANSITION:

COMPENSATION, COMPLIANCE AND TALENT CREATION

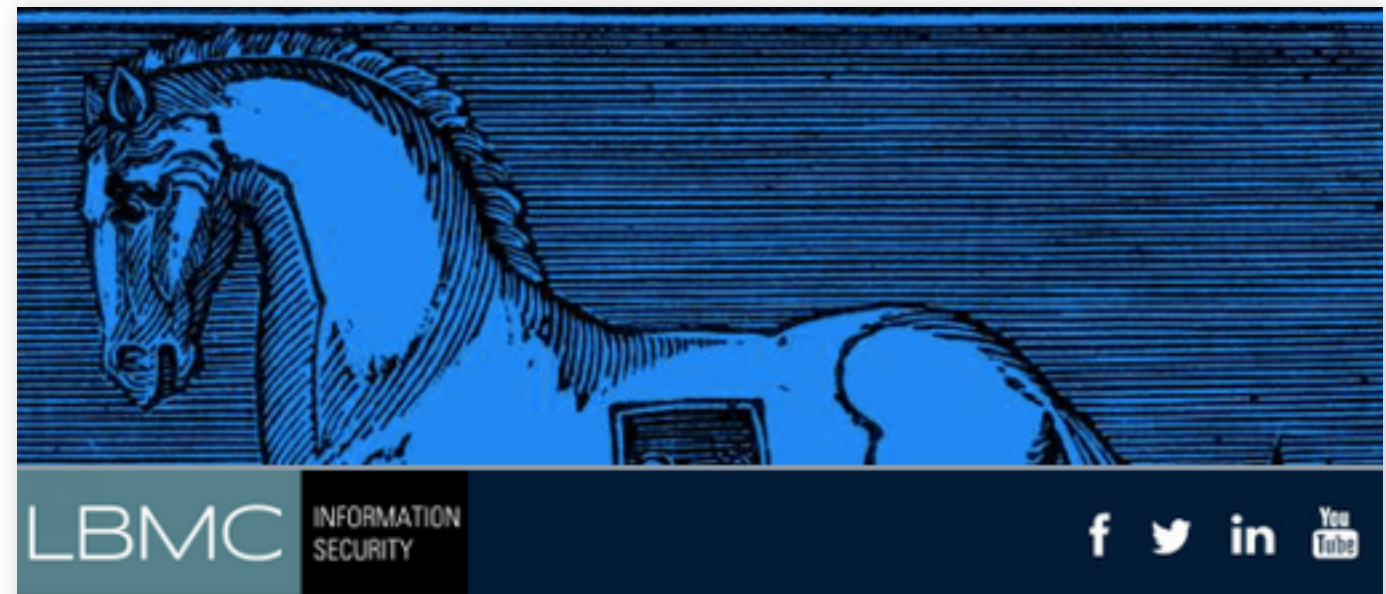


Today's private equity firms are being squeezed from two sides. First, the SEC is demanding greater transparency into operating partner compensation, funding, and organization. And tough new regulations are on the horizon. Second, firms are increasingly challenged to find the right talent to lead their portfolio companies.

We've written this guide to help. To thrive in today's market, firms like yours need a good grasp of the new private equity compliance environment and its implications for your firm and the companies you finance — so you can find and incentivize the top leaders you need to grow your portfolio.

[Download the Guide](#)

# Educational Content



## Is Your Organization Prepared for a Breach?

*OPM. Anthem. Target.* The number of breaches and variety of threats continue to grow. And board members and the C-suite see the full impact a data breach has on company reputation.

Your organization's security needs are continually evolving — and so are regulatory requirements — making the job of managing data security even more challenging.

Senior executives understand they need a new game plan. That's why we wrote our new, free guide, *Breach: A Guide to Network Security Best Practices for Prevention, Detection and Response*.

[Download the Free Guide »](#)

# Offers



## It's time to protect your business.

**Get started for free today.**

Let's face facts: your organization is in the crosshairs. From retailers to tech companies to federal agencies, every sector of today's economy is feeling the heat from hackers.

Don't wait until it's too late to protect your data and your business. We're offering a **30 day free trial** so you can have peace of mind knowing that LBMC Security's top-tier managed security services are at work for you. Learn how we take the stress out of cyber security by providing around-the-clock intrusion detection and real-time monitoring.

[Start my free trial »](#)

Skills needed to deliver  
on a balanced plan



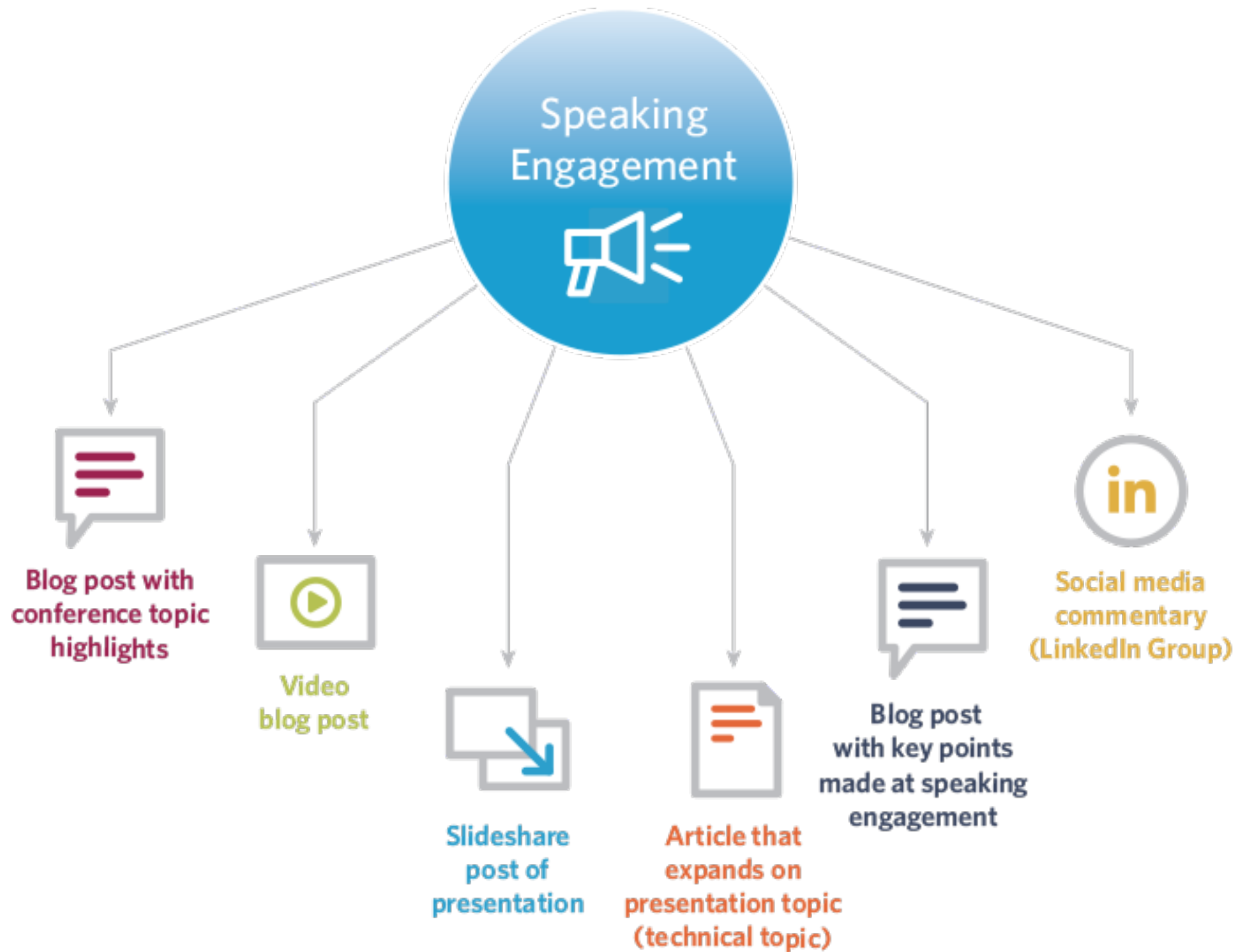
# Getting your content out there as much as possible.

By repurposing content you then have more options on the same topics in different formats, making you even more of an expert in that field.

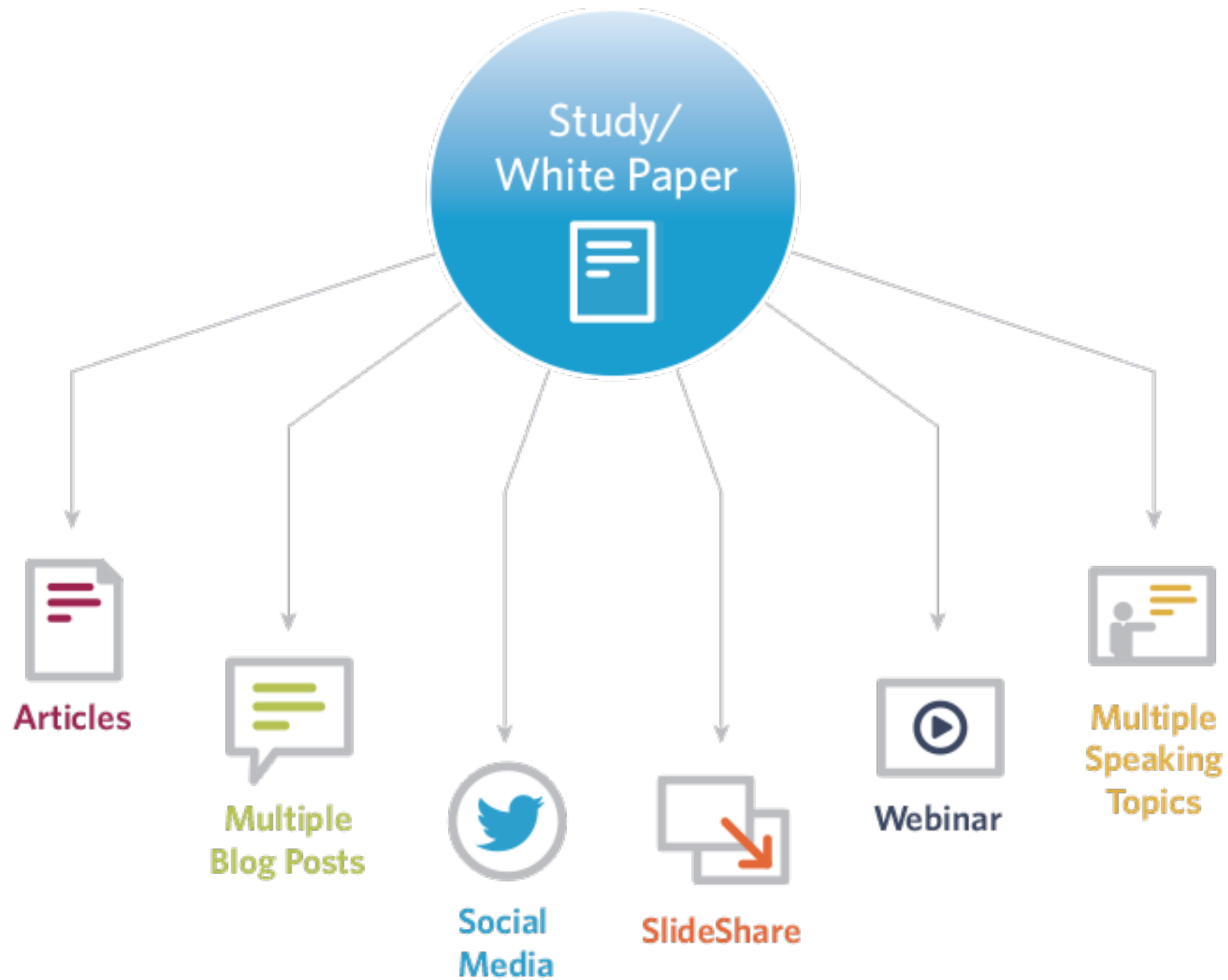




# Content Repurposing



# Content Repurposing



# Optimize Your Content for SEO

- > Keywords
- > Inbound links
- > Social mentions





# Who Should Write the Content?

- Subject matter expert (SME)
- Marketing person
- Professional writer
- Combination of these



# Finding Efficiencies

- Schedule and prioritize
- Create a content calendar for planning
- Repurpose content

How to find the right marketing planning  
rhythm for your firm



# Arriving at Your Marketing Plan

- Think long term — Act short term
- Limit your initiatives
- Put it in writing
- Monitor your marketing program continuously
- Reevaluate current initiatives and adjust
- Think agile

# Traits of Agile Marketing

- Strategic thinking at all levels
- Respect and balance analytical and creative sides
- Ability to coach fellow technical colleagues
- Ability to respond to matrixed audiences
- Effective multi-tasking — planning long term with flexibility for the current and timely

**Conceive | Execute | Implement | Review | Adjust**

# Questions Your Marketing Plan Should Answer

1. Is your messaging clear? Can a prospect describe what value your firm brings?
2. Does your website answer what you do and how your firm is different?
3. Are you offering valuable content that engages your audience and creates/nurtures new leads?
4. Who will capture information and monitor the effectiveness of your marketing program?

# Questions Your Marketing Plan Should Answer

5. Which marketing initiatives are most impactful, and which aren't working? Scrutinize offline and online.
6. How effective are your staff's networking efforts?
7. Can you clearly identify a marketing role for everyone in the firm or is marketing a function for a select few?
8. Do you know how your marketing dollars are being spent?

# Top challenges encountered when preparing your plan

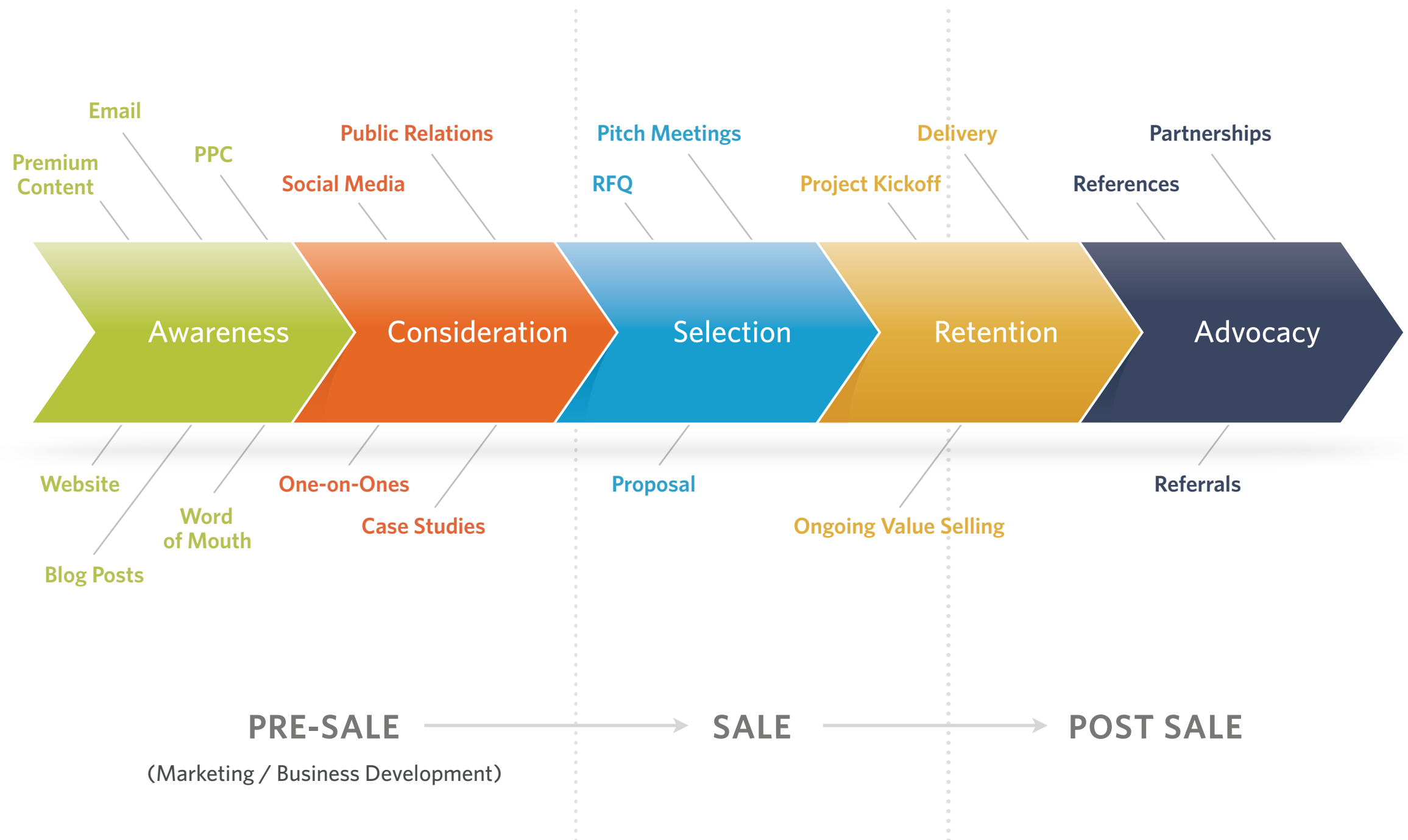




# Top challenges

- Developing a plan with no buy-in, especially from the C-Suite.
- Rolling out a plan without clear and actionable goals.
- Lack of measurable metrics.
- Having too much — misalignment between resources and initiatives.
- Unclear budget.

# Professional Services Client Experience Journey



# How Hinge Can Help

## Free Marketing Planning Review:

- > We'll review your current marketing approach and areas for improvement
- > Improving your mix of online and offline marketing activities
- > Skills needed to deliver on a balanced plan
- > Metrics that matter
- > And more!



**Respond to follow-up  
email or call:**

**703 391 8870**

For webinar registrants only!

# Thank you! Questions?

**Sylvia Montgomery, CPSM**

Senior Partner, Hinge Marketing

[smontgomery@hingemarketing.com](mailto:smontgomery@hingemarketing.com)

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Thank You

