



Session #1

Creating Your Sales Playbook

Marketing Plan and Strategy

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“It is the people that market themselves better that win.”

~ James Kernan ~

SALES STATISTICS

48% OF SALES PEOPLE NEVER FOLLOW UP WITH A PROSPECT

25% OF SALES PEOPLE MAKE A SECOND CONTACT AND STOP

12% OF SALES PEOPLE ONLY MAKE THREE CONTACTS AND STOP

ONLY 10% OF SALES PEOPLE MAKE MORE THAN THREE CONTACTS

2% OF SALES ARE MADE ON THE FIRST CONTACT

3% OF SALES ARE MADE ON THE SECOND CONTACT

5% OF SALES ARE MADE ON THE THIRD CONTACT

10% OF SALES ARE MADE ON THE FOURTH CONTACT

80% OF SALES ARE MADE ON THE FIFTH TO TWELFTH CONTACT

Creating Your Sales Playbook

Marketing Plan and Strategy

Creating Your Strategic Marketing Plan

Step 1: Determine your Target Market.

- What your strengths are right now.
- The vertical market(s) you are already successfully servicing.
- The most profitable products and services you are currently selling.
- The strongest vertical markets in your city or market area (biotech, military, medical, etc.)
- Evaluate your technical skill set and make sure you can support what you are marketing; this can be done internally or through outsourced partners.
- Define a set of core products and services you will focus on delivering to your niche; they should align with your core competencies and must be profitable!

Step 2: Do your homework.

- Identify the key vendors and manufacturers servicing your vertical niche.
 - Ask those key vendors and manufacturers about best practices of their top resellers and be prepared to put their advice into your own marketing plan!
 - Research your competition and make sure you know their strengths and weaknesses; the 4 best ways to get this information are:
 1. Interview some of their staff, potentially for hire.
 2. Go to their web site and review them.
 3. Ask your customers what they like or dislike about any of your competitors, and see if they will be willing to share.
 4. Ask your vendor and manufacturer partners what they are doing well and what they aren't doing well.
- If you are targeting government agencies, call your local SBA office to request leads and help for FREE! The SBA will give you a list of all the SBLOs, (Small Business Liaison Offices) who will give you names, addresses, and contact information of government buyers.

- SCORE (www.score.org) Service Corps of Retired Executives; provide free business consulting to small business owners.
- Contact your local Chamber of Commerce and ask for a welcome package – New businesses in the community would get a welcome package with lots of helpful information to get your business rolling.

Step 3: Develop your USP (unique selling proposition)

- Put your USP into a written document (one page business plan exercise)
- Train your entire team to “sing the same song.”
 - After you create your message, practice delivering it.
 - Role play with your technicians and sales people.
 - Make the sales people do the pitch in front of the team. You will be shocked at what you find.
 - Allow your sales team to work with their strengths when presenting, but use ONE MESSAGE.
 - Go on sales meetings with your reps to ensure they are delivering your presentation correctly.

Step 4: Develop key marketing pieces.

- Key marketing pieces you will need to include:
 - Your USP
 - Web site
 - Brochure (Company Overview)
 - Company Presentation
 - New Customer Kit (Wow Package)
 - Logo
 - Customer Testimonies (Video)
 - Internet/Digital Marketing Strategy
 - Business cards, letterhead, envelopes
 - Signature on all e-mails, companywide
 - Social Media Accounts – LinkedIn and Facebook
 - Impact Video

Step 5: Implement a CRM package.

- There are many to choose from. When deciding on a CRM package, ask yourself:
 - What do you want to do with it?
 - Will you have remote salespeople who will need access?
 - Does anyone on your team have experience with a CRM package?
 - Who will be your internal champion?
- Make sure everyone uses the CRM package, ESPECIALLY YOU! How can you hold everyone accountable for using it if you don't?

- Hold regular trainings for new and existing employees. Your champion should have this responsibility to deliver and teach new features.
- Leverage your existing investment:
 - PSA platforms will work
 - HubSpot, SalesForce, Zoho, Microsoft CRM
 - Integrate with your other tools and processes
 - Marketing, Quoting, Sales Order, Purchasing, Accounting

Step 6: Write your evolving marketing plan.

There are 7 keys to a successful plan:

1. **Plan annually** what you want to do over the entire year and then break it down into quarterly campaigns (**90day plan – see template**). Make your plan flexible so you can adjust to opportunities with partners, market trends, and new opportunities.
2. Make sure your plan includes annual trade shows for your niche, new product launches (partner with key vendors and manufacturers), open houses, customer appreciation events, and movie nights. **You need face to face opportunities to build relationships.**
3. **Map your plan to key vendors and manufacturers, and develop vendor-specific marketing campaigns** that demonstrate a win-win scenario in working with you.
 - Share your marketing plan with key vendors and manufacturers. Vendors LOVE when you have a plan! Tell them what YOU are going to do for them and they will want to be a part of it!
 - Communicate the ROI and RESULTS back to your vendors and manufacturers; it will encourage them to invest more into your company's marketing plan. Use 90 days as a window.
4. **Incorporate education-based marketing**, such as seminars, white papers (free reports), trend analysis, case studies, and government compliance reports.
 - **EDUCATE your niche** and make them AWARE of things that affect their business (government compliance is a good example).
5. **Send monthly newsletters via e-mail and direct mail along with your telemarketing efforts.** It will increase awareness, build your brand, and position you above your competition.

- Send it the same time every month so your prospects expect it to come.
Consistency is critical!!!
 - Timing is critical to selling; that is why you want to constantly promote your company to your target market!
6. **Create lead magnets to attract prospects – give content away, special offers and deals to get attention**
7. **Everybody sells – Have each employee assigned to business networking groups for referrals and leads.**

Step 7: Build your sales and marketing team.

When to add a marketing manager and what they should do:

- This is a very strategic hire; make sure you recruit a “task-master.”
- Their responsibilities should include:
 - Sales support (administrative duties).
 - Project management duties.
 - Taking notes during vendor meetings and holding vendors accountable for the commitments they make.
 - **Documenting and Executing** your marketing plan.
 - Designing of literature and web site.
 - Coordinating with printer, letter shop, graphic designers, and list brokers.
- Meet with them weekly to track progress on key projects and initiatives.
- Make them put an agenda together for each meeting that includes a review of the previous meeting’s action items and progress.
- Consider Non-Paid Internships to get started
- **Be sure to document your marketing plan, sales process and add to your sales playbook. SHARE this information with your entire business dev team! (See playbook template)**

Do Your Homework:

Check off each item as it is completed:

- Identify the key vendors and manufacturers servicing your target market.
- Ask those key vendors and manufacturers about best practices of their top resellers and be prepared to put their advice into your own marketing plan!
- Meet with (ideally) or talk on the phone to other non-competitive **SUCCESSFUL** and **LIKE-MINDED** companies to find out what they are doing to attract new clients, overcome objections, and service their clients.
- Research your competition and make sure you know their strengths and weaknesses; (SWOT) the 4 best ways to get this information are:
 - Interview some of their staff, potentially for hire.
 - Go to their web site and review them.
 - Ask your customers what they like or dislike about any of your competitors, and see if they will be willing to share.
 - Ask your vendor and manufacturer partners what they are doing well and what they aren't doing well.
- Research your target market:
 - What software, vendors, and products are they currently using?
 - Who do they buy from today and why?
 - What are their biggest frustrations with vendors they use?
 - Who are the decision makers?
 - Who influences the sale?
 - What are the biggest challenges they face in their business?
 - Are there any trends in their industry right now? (Compliance, heavy competition, regulation, a move to online services, etc.)
 - How do they typically use technology to operate their business?
 - What associations do they belong to?
 - Who already has a good relationship with these people (joint venture partners)?
- Complete the Vendor exercise
- Complete your Annual and/or 90day Marketing Plan w/ example campaigns
- Create and/or Purchase your Marketing Database
- Create your sales playbook – optional for larger teams
- Create your One Page business plan - optional