DAY 6: MARKETING TRANSFORMATION

The Butterfly Project

8 Days Of Transformation And Growth
Marketing Transformation: Using Digital To Generate More Leads

John Serrantino – HubSpot
Eric Keiles – Square 2
“Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat.”

- Sun Tzu
Session 3 Agenda

• The story of Thiel & Team
• Goals and objectives
• Picking the right tactics
• Metrics
• Establishing the goal line
• The power of HubSpot
• Conclude
A Story Of Digital Transformation
It’s All About How You Finish


SEE OUR WORK
Thiel & Team Data Set

• Nationwide interior design, architecture and procurement firm
• Help apartment complexes, hospitality (hotels) and golf clubs enhance their common/public spaces
• Most leads from referral or direct sales force
• Stuck at current revenue level
• Looking to break through to next plateau
• No dedicated internal marketing team
Goals And Objectives

- Add a consistent inbound digital lead generation channel to current lead flow
- Move “upstream” to sell into executive level and not only procurement
- Generate an active pipeline of sales opportunities in current and additional verticals (e.g., education)
- Create a greater awareness of all three service lines
- Fully automate the lead management process to benefit sales team using technology (e.g., HubSpot)
- Create a differentiated messaging to connect with prospects
- Create content that speaks to the capabilities of the company and establishes thought leadership
- Develop real-time and transparent reporting for pipeline to gain insight into performance
Action Plan

- Strategy
- Tactics
- Campaigns
- Technology
Strategic Tactics

Competitive Audits

• Competitor audits focused on comparing messaging and content to other competitive offerings
• Reverse-engineering of top competitor sites for SEO

✔ Deliverable: Review findings and competitive recommendations

Personas Development

• Segment by three divisions
• Review “Who’s our perfect target client?”
• Refine and create ideal customer profiles to align pains and needs with solutions and value

✔ Deliverable: Personas reference deck
Strategic Tactics

Differentiation And Messaging Strategy

• Review and enhancement of compelling and differentiated messaging to communicate to prospects and clients

• Create “the big story”

• Focus on all product lines and their individual stories to create awareness within the industry

✔ Deliverable: Suggested messaging to enhance current program performance

Content Audit And Strategy

• Perform gap analysis of what you have vs. what you need to drive lead generation

• Identify early, middle and late buyer journey needs

• Select kind of assets (e.g., video, whitepaper, infographic, etc.) reflecting personas

✔ Deliverable: Audit findings and content strategy recommendations
Strategic Tactics

Website UI/UX Audit, Analysis And Recommendations

• Review and map entire website
• Complete site map analysis
• Identify enhancements to increase performance
• Develop website enhancement strategy for enhanced buyer journey

✔ Deliverable: Website enhancement plan for better buyer journey

Technical Website Review

• Review website performance
• Audit functionality against current business processes
• Discuss “wish list” of functions
• Look at technology/software options and recommend based on audits

✔ Deliverable: Website technical enhancement strategy
Strategic Tactics

Website Homepage Re-concept

• Bring messaging and visuals together
• Tell the “big story”
• Identify enhancements to increase performance (e.g., conversion points, calls-to-action)
• Develop website enhancement strategy for enhanced buyer journey

✔ Deliverable: Website homepage enhancement mock-ups

SEO Audit And Strategy, Including Keyword Research

• Audit current SEO strategy on the website
• Inform content strategy and landing pages strategy
• Identify core keywords to be used in SEO, PPC and content development

✔ Deliverable: Audit findings and keyword recommendations
Action Plan

• Strategy
• **Tactics**
  • Campaigns
  • Technology
Foundational Tactics

**HubSpot Implementation**

- Complete strategy and setup to apply HubSpot to current website
- Configure HubSpot to align with current sales and marketing strategy
- Initiate use of key HubSpot tools to support lead generation
- Develop templates (e.g., email, landing pages, etc.)

✔ **Deliverable:** Fully configured and integrated HubSpot subscription

**HubSpot Training**

- Consult with team on which areas of focus are needed (sales and marketing)
- Develop syllabus and accompanying materials
- Schedule sessions and decide on attendees

✔ **Deliverable:** Three training sessions with unlimited follow-up by team members
Foundational Tactics

**HubSpot Implementation**

- Review existing email database for segmentation and persona targeting
- Create new templates
- Develop strategy for current customers and campaign strategy for lead generation
- Create one email campaign per month for current customers and prospects

✔ *Deliverable: Monthly emails to database (existing and past clients) via HubSpot*

**Nurture Strategy**

- Create at least two nurture tracks triggered by conversions
- Develop and map a nurture campaign based on segmentations
- Identify relevant content and additional content needs in conjunction with content strategy

✔ *Deliverable: Nurture strategy schematics that map the content, frequency, follow-up and actual workflows*
Foundational Tactics

Execution of Website Enhancements

• Implement homepage changes
• Augment website with landing pages
• Optimize pages based on UI/UX audits
• Add calls-to-actions and new conversion points when appropriate
• Add content and landing pages

✔ Deliverable: Enhanced performance website

Campaign Content Creation

• Develop and/or optimize content assets – includes early buyer journey, middle buyer journey and late buyer journey offers
• Repurpose content on all platforms (social, email, blog, etc.)

✔ Deliverable: Six high-impact content assets, such as infographics, free reports, whitepapers, e-books, tip guides or slide decks
Action Plan

• Strategy
• Tactics
• Campaigns
• Technology
Campaign Tactics

Demand Generation Campaign Development

• Develop strategic and tactical plan that focuses on how to find and engage target clients with selection and validation of tactics, channels and assets
• Paid media recommendations, messaging and assets required
• Leverage social media outreach

✔ Deliverable: Demand generation campaign strategy, assets, timeline and campaign performance metrics

Paid Campaigns Launch (PPC)

• Analyze targets, channels, budget, metrics and impact/ROI
• Develop offer or use existing offer
• Create performance expectations
• Set up campaign on Google, Facebook and/or LinkedIn

✔ Deliverables: Live PPC campaigns
Campaign Tactics

Campaign Landing Pages Development

- Develop buyer journey messages for landing pages (messaging and conversion)
- Iteration and updates based on data and feedback
- Build new approved landing pages, including design, images, copy and conversion points

✔ Deliverable: Campaign landing pages

Offers And Calls-To-Action Development

- Turn current content into website offers
- Set up conversion pages and auto email response
- Set up alerts to sales team when a conversion occurs
- Develop metrics around expected conversion rates

✔ Deliverable: New set of offers
Campaign Tactics

Analytics And Reporting

• Develop KPIs (key performance indicators)
• Select reports for sales, leadership and marketing
• Review additional software data feeds (e.g., Google Analytics)
• Develop dashboards through Databox, MAXG and HubSpot

✔ Deliverables: Live “six pack” of dashboards

Initiate Optimization Of Program

• Review and enhance initial campaign based on performance data
• Continue website enhancements
• Optimize paid campaigns based on data
• Identify and suggest future opportunities based on review

• Deliverable: Enhanced campaign performance
“That’s great, Eric. But I need results.”

- Everyone
Action Plan

• Strategy
• Tactics
• Campaigns
• Technology
Technology

HubSpot
Technology
Free HubSpot Consultation

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## Interactive Revenue Modeler

### Revenue Cycle Modeler

Instructions: Fill in the table numbers in the white/silver boxes.
All numbers should be monthly numbers and/or averages based on previous months.

<table>
<thead>
<tr>
<th>Conversion Rate</th>
<th>Units Converted/Month</th>
<th>Units Converted/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Visitors to Your Website/Month</td>
<td>1,000</td>
<td>12,000</td>
</tr>
<tr>
<td>1stazar Conversion Rate</td>
<td>1.00%</td>
<td>12.00%</td>
</tr>
<tr>
<td>Percentage of New Contacts That Are NQIs</td>
<td>20%</td>
<td>240%</td>
</tr>
<tr>
<td>Percentage of NQIs That Are SQIs</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Percentage of SQIs That Are MPSs</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Percentage of MPSs That Get Proposals</td>
<td>80%</td>
<td>80%</td>
</tr>
<tr>
<td>Close Rate On Proposals Submitted</td>
<td>10%</td>
<td>120%</td>
</tr>
<tr>
<td>Average Revenue Per New Customer Each Month</td>
<td>$20,000</td>
<td>$240,000</td>
</tr>
<tr>
<td>Revenue From New Customers, Each Month</td>
<td>$20,000</td>
<td>$240,000</td>
</tr>
<tr>
<td>Annual Revenue At This Monthly Rate</td>
<td>$240,000</td>
<td>$2,880,000</td>
</tr>
</tbody>
</table>

### Opportunity Calculator

<table>
<thead>
<tr>
<th>Opportunity Calculator</th>
<th>Number of New Contacts</th>
<th>Number of New NQIs</th>
<th>Number of New SQIs</th>
<th>Number of New MPSs</th>
<th>Number of New MPSs Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absorbing Qualified Lead</td>
<td>50</td>
<td>21</td>
<td>10</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Sales Opportunities</td>
<td>40</td>
<td>25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MPSs Assessed Sales Lead</td>
<td>3</td>
<td>13</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MPSs Submitted Each Month</td>
<td>3</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of New Customers Each Month</td>
<td>50</td>
<td>25</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Thank you for attending!

Tune in at 1 p.m. ET tomorrow for Sales Transformation: Using Digital To Close More New Customers Faster

A Live Interview With Jeff Thull

@square2marketing
@Square2
/company/square-2-marketing