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Quick Guide to Strategy & Planning

9 tactics to meet your business objectives and use your time efficiently

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Author
Bobbi Dempsey, Editor, *Quick Guide to Strategy & Planning*

Contributors
Adam T. Sutton, Senior Reporter
David Kirkpatrick, Reporter

Editor
Daniel Burstein, Director of Editorial Content

Production Editor
Brad Bortone, Senior Research Editor

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TACTICS YOU CAN LEARN OVER LUNCH

Welcome to *Quick Guide to Strategy & Planning* – a resource from MarketingSherpa featuring bite-sized tips for busy marketers.

In this report, we give you ideas for creating a roadmap that will guide your efforts and help you achieve your goals while making the best use of your time and resources.

As a marketer, you may wear lots of hats and juggle many different types of tasks, but there is one thing all of your projects have in common: they all require planning and a carefully thought-out strategy (at least, if you want to have a good chance of success). Jumping into something new without a plan and trying to make it up as you go along is a surefire way to waste your valuable time and effort – and your company's resources.

By investing some time at the start to come up with a good plan, you can work efficiently and will have a clear path to follow so you know exactly what you need to do. Plus, it will be much easier to earn the support of others on your team, and above.

In this report, we'll show you:

- How to find out what your customers want
- Tips for getting buy-in from executives and other teams
- Ways to best include social media in your plan
- How to research competitors

We know you're in a hurry, so let's get started. We're eager to share these tips on how you can become a whiz at strategy and planning.

Bobbi Dempsey
Editor, *Quick Guide to Strategy & Planning*

About *Quick Guide to Strategy & Planning*

MarketingSherpa's *Quick Guide to Strategy & Planning* is designed with you, the busy marketer, in mind. We provide quick, simple tips you can use right away.

For each *Quick Guide*, we scour the vast MECLABS library of marketing research, from MarketingSherpa case studies and Benchmark Reports, to MarketingExperiments optimization tests and analysis. We highlight tips to help improve your marketing performance right now … or at least by the time you're done with lunch.

Phase 1. Learn about your audience

Tactic #1. Gain insight from customer behavior

In the MarketingSherpa blog post, "MarketingSherpa Email Summit 2013: Using buyer behavior in email campaigns," David Kirkpatrick, Senior Reporter, MECLABS, summarized some tips from Loren McDonald, VP of Industry Relations, Silverpop, in his presentation, "Let Buyer Behavior Be Your Guide! Delivering Communications that Convert," at MarketingSherpa Email Summit 2013.

McDonald said marketers can use insights about customer behavior to personalize email campaigns and other communications in a way that best connects with their audience. To illustrate this approach, he offered a number of case study examples, including a look at a wedding invitation email series from Paper Style. In this example, Paper Style changed its approach to email marketing. Previously, it used a "batch and blast" approach with no targeting, which resulted in reduced response rates.

In implementing the behavior-based approach, Paper Style's team analyzed website behavior from visitors, purchase patterns of its customers, mapped the wedding process to understand when typical behaviors happened and finally used this information to create a wedding timeline.

This analysis also uncovered two separate audiences – brides, and friends of the bride who are helping with the wedding planning. To segment those two audiences, Paper Style used website and/or email click behavior to drop prospects into either the "your wedding" or "friend's wedding" email nurturing tracks.

Each track received a separate email series with content specific to each group. Brides' email included information on invitations, bridal party gifts and thank-you notes. The bride's friends' track email included details on planning bachelorette parties as well as gifts for the bride and groom.

The result of analyzing its customers and developing email nurturing tracks based on behavior from its prospects led to impressive results for Paper Style: 244% boost in open rate, 161% increase in clickthrough and, most importantly, revenue per mailing increased 330%.

Here are the basic goals and guidelines Paper Style used when devising the strategy that helped achieve those results. Obviously, your specific roadmap may differ depending on exactly what you're trying to achieve, but this can serve as a helpful example to get you started. Most likely, your strategy will include steps that are very similar to some of these.

1. Map lifecycle + behavior + programs: Mapping the lifecycle includes determining marketing programs to grow the list, drive conversion, grow customer value, ensure loyalty and win back lost customers.

2. Don't boil the ocean: This means don't try everything at once – solve your biggest problems first, and start with one or two programs, such as onboarding and cart abandonment.

3. Demonstrate the ROI to management: This is self-explanatory, and we will discuss getting executive/internal buy-in later in this guide.

4. Understand the data flows and integrations: Chart the data created by email campaigns. For example, create a flow chart representing every point where a prospect can abandon a purchase.

5. Leverage multichannel data: Grab data from channels including website visits, email, CRM software, location, offline interactions, mobile, social and Web forms.

6. Incorporate other company technology investments/data: Also grab internal data, such as customer recommendations, online reviews and CRM interactions.

7. Use tracks or series, not one-offs: Create email series responsive to customer behaviors.

8. Leverage existing content assets: McDonald said most marketers have more content than they realize. He mentioned one baking goods company had an offline catalog, a recipe blog, photographs, activity on Pinterest and Instagram and a video channel.

9. Use/marry the data: McDonald pointed out behaviors taken as individual acts can lead to a misleading picture of the prospect. His formula is "demographics + preferences + behaviors = more accurate picture."

10. Make your automation human: McDonald offered an example of an Air New Zealand email confirming an upcoming flight "from" the actual lead flight attendant on the upcoming flight with a picture of the person. This data was obtained by combining the recipient's flight information with the flight attendant schedule in Air New Zealand's system.

For more about customer insight, check out this video on the MarketingSherpa blog: "How The Boston Globe used customer insight to create new strategy."

Tactic #2. Listen via social media to learn what your customers want and need

In the MarketingExperinents blog post, "Value Proposition: How to use social media to discover why customers buy from you," Daniel Burstein, Director of Editorial Content, MECLABS, shared some tips on how to listen to your customers via social media.

The great part about social media is you can be what message board aficionados derisively call a "lurker." You can passively observe the way your potential customers talk about your categories and products behind your back.

Before social media, most of this information was secret. In the past, someone could have bragged about a new way to use your product, and thus a new value that you never thought of, over beer at a barbecue. A dissatisfied customer complaining that your competitor doesn't serve a niche that you fill so well, but rarely communicate, would never have been aware of your company. Social media has brought all of these conversations out into the open.

Here are a few ideas about how to listen for value proposition triggers using social media:

1. Set up searches for your brand and product names on Twitter – doing the same for your competitors – as well as searches about key hashtags and words customers might use to describe a problem your product solves or category your product is in. You can do this manually in Twitter, but more easily in free programs like TweetDeck or HootSuite. And, of course, paid programs like Radian6 offer even more advanced options.
2. You might also want to note, try a few variations if your company or product name is commonly misspelled. There are no copy editors on Twitter. For example, the search query I have set up in Tweetdeck for MarketingExperiments is – “Marketing Experiments OR MktgExperiments OR MarketingExperiments” (@MktgExperiments is our Twitter handle, which explains the abbreviation).
3. Join LinkedIn Groups and/or Facebook Groups that your ideal customers might use. How can you find these groups? Start by asking current customers what groups in which they are members. And, don’t forget to join your competitors’ groups or “Like” their pages to see what their customers are saying. Really, the same could be said for old-school forums or message boards, but I don’t think they really count as social media.
4. Don’t overlook Google Alerts and Talkwater Alerts. You can set up alerts using the same type of keywords as you did for Twitter in step one. Pay special attention to the “Type” field. Blogs, video and discussions can be especially helpful. But, the real-time search will likely be of limited value since Google dropped Twitter from that search – which is why the first bullet point is important.

Phase 2. Establish goals and evaluate your internal support

Tactic #3. Get your leaders on board

Long before you ever have the chance to try and sell to your customers, you may need to do some internal selling in order to get the green light. In other words, it isn’t just your customers that you need to convince – so it isn’t just insight about customers that you need to gather. Considering the persona of your CEO or other executive(s) will help you pitch your plan to them in a way that’s most likely to get their approval.

In the MarketingShepra blog post, “Gaining Business Leader Buy-In: 7 CEO Personas,” Burstein lists the different types of leader personalities, as described by Kristin Zhivago, President, Zhivago Management Partners, during her presentation at Optimization Summit 2012.

Sales CEOs
Example: Steve Ballmer, CEO, Microsoft
Key characteristics: Competitive, controlling, easily influenced
Best tools: Stories backed by stats, keep him excited

Technical CEOs
Example: Tony Hsieh, CEO, Zappos

Key characteristics: Logical, inclusive, very process-oriented
Best tools: Empirical evidence, supported by stats

Finance CEOs
Example: Meg Whitman, CEO, HP
Key characteristics: Can be elitist/exclusionary, doesn't excite easily
Best tools: Gather as much statistical data as you can, at every touch point

Legal CEOs
Example: Frank Blake, CEO, The Home Depot
Key characteristics: Can see both sides, weak on processes
Best tools: Empirical evidence, numbers, numbers, numbers

Marketing CEOs
Example: Steve Jobs, CEO, Apple
Key characteristics: Visionary, customer DRIVEN
Best tools: Likes stories, but back with facts, keep moving!
"Steve Jobs wasn't a CEO," Kristin said. "He was a customer terrorist."

Operations CEOs
Example: Jeff Bezos, CEO, Amazon
Key characteristics: Always thinking "process first"
Best tools: Systems that work, no movement without a method

Serial entrepreneurs
Example: Reid Hoffman, CEO, LinkedIn
Key characteristics: Behavior will be influenced by background, always moving
Best tools: Aggressive proaction

How to talk to your CEO in a way that he will listen

Once you have a better understanding about what type of business leader you are dealing with based on these CEO personas, you will be better able to present your recommendations and results in a way that will be easiest for him to relate and accept. As a marketer, relevant communication like this should come naturally to you.
For thoughts about legal issues and pushback you may encounter, check out the blog post: "Who's Running Your Marketing Department, You or Legal?" And, for tips on making sure Sales and Marketing are working together, read the MarketingSherpa article, "Sales-Marketing Alignment: 8 tactics from a marketer who has worn both hats."

Tactic #4. Establish a basic plan and goals

At this point, you should have some useful information that will help you figure out your first steps in connecting with your audience. While you may not necessarily have a detailed plan, you can at least start to come up with an initial (general) strategy and identify your goals. The information below serves as an example of how you might proceed.

In the MarketingSherpa article, "Optimization Summit 2012 Event Recap: 5 takeaways about test planning, executive buy-in and optimizing nonprofit marketing," one of the key takeaways from the Optimization Summit was:

Plan, set goals and form a hypothesis to maximize your optimization efforts

In one of the many sessions featuring insight and wisdom from MECLABS researchers, Adam Lapp, Associate Director of Optimization and Strategy, and Tony Doty, Senior Research Manager, posed three questions:

- Where to test?
- What to test?
- What to ask?

To determine where to test, there are a series of steps to take:

1. Identify key pages in your website funnel

This means identifying the key pages according to traffic and business impact, determining the primary goals of these key pages, analyzing the traffic sources for the pages, and understanding visitors' experiences on these pages.

2. Map primary conversion funnels

This begins with funnel messaging – what messages are prospects provided at different stages in the website funnel? Marketers should analyze funnel performance to find out where leaks might be happening between the original landing page through to the checkout process, or buying page.

3. Estimate conversion impact of each leak

At this stage, it's important to consider the basic elements of the leaking step in the website funnel – motivation, clarity of the value proposition, incentive, friction and anxiety.

4. Estimate IT impact of fixing each leak

How long will it take to develop and set up each test?

Once you have determined where to test – leaks in conversion through the website pipeline in this example – the next question to answer is "What to test?"

For this, Lapp and Doty went back to those basic elements listed in step three above, and provided some questions to ask when determining what to test:

- **Motivation**: Where are the visitors coming from? What do we know about them? Their needs? How are they engaging with the page? Most importantly, do the message and objective match the visitor's motivation?
- **Clarity of the Value Proposition**: Within the first several seconds, what values are communicated to the visitor? Is there enough perceived value to retain the visitor's attention? How are you differentiating from the competition? Is the value proposition supported by all the page elements, such as navigation, color and images?

- **Friction Elements**: What on the page causes difficulty, confusion or annoyance for the visitor? Are the page, process or form fields too long? Is the eye-path disorganized, or is there a clear thought sequence guiding the visitor to the objective? Are there too many things going on at once, or is the page simple with clear objectives?

- **Incentive to Take Action**: An effective test plan will optimize for other elements first, then seek additional improvement – that is, squeeze the last few percentage points of conversion increase – with the incentive. Is the incentive relevant to the visitor's motivations and page offering? What is the return on investment for the incentive? Does it have enough appeal to overcome negative forces of friction on the page?

- **Anxiety Elements**: What fears or concerns might the visitor experience? Are your corrective measures (e.g., guarantee, security seal, testimonial) placed in close proximity to the concern? Do your corrective measures specifically address the visitor's anxiety? How irrational is the visitor's fear or concern?

When it comes to "What to ask?," this is where a testing hypothesis and research question are created. The hypothesis consists of two basic parts: the "assumption," or statement about a website variable you believe to be true, and the "argument," which is the test you set up to prove, or disprove, your assumption.

MarketingExperiments defines research question as, "A behavioral question expressed in a factorial split so it must begin with 'which.'" This means, "What is the best price for product X?" does not form a research question. But, "Which of these three price points produces the most revenue for product X?" is an example of a research question.

A subtle difference, but the second example offers testable elements that can be answered by A/B testing, and not just a broad-based question on price.

Speaking of A/B testing, we've included that among the tactics for the testing section later in this report, but doing some initial A/B tests at this point can help you achieve a better grasp of your customers' motivations and preferences.

Tactic #5. Gather intelligence about your customers and competitors

This part of the process would also often include gathering some competitive intelligence. The MarketingSherpa article, "Gather Competitive Intelligence: 5 Tactics to Research Your Marketplace," shared tips from competitive intelligence consultant Ellen Naylor, CEO, Business Intelligence Source, about the types of customer and competitor information marketers can use to make better decisions about their product positioning and marketing strategy.

Tactic #1. Conduct win/loss analysis

Win/loss analysis requires interviewing new customers and those prospects you lost to competitors. The goal is to uncover the motivations behind their decisions. Naylor recommended reaching out to customers about six to eight weeks after they've made their purchase decision.

During interviews, ask customers what they were looking for in a product or service, and why they did or did not choose your company. If they went with a competitor, ask them why. These questions will help you uncover:

- Misunderstandings around your product/service
- Competitors' selling points over your products/services
- Features to tweak or add
- Marketing message ideas
- Problems with the sales approach

Be sure to contact your sales team before reaching out to any customers. Make sure you have their blessing, then ask which customers they'd recommend you contact and what to expect from the conversation.

Tactic #2. Talk to internal and external experts

People inside your company know a lot about your industry. Search your company for experts and invite them to meet for a cup of coffee. Ask them about market trends and competitors' habits. Express interest in this type of information, and ask them to send you anything relevant they may encounter. Industry relations people are generally good resources due to their high number of relevant contacts, Naylor said.

Also, look for industry experts outside your company and reach out. Experts who maintain blogs or are frequent speakers at industry events are usually happy to talk shop over the phone.

Tactic #3. Use trade shows as fact-finding missions

Trade shows are filled with industry experts, prospects and competitors eagerly chatting on expo floors. Attending shows with open eyes and ears can help you gather great information.

On the first day of a show, attendees are excited and exhibitor booths are crowded. Many will be talking, so picking up bits of information can be easy. You can also identify the most talkative people and the people with specific areas of expertise, such as marketing or technology. Fatigue begins on the second day and really takes hold by the third day. Booths are emptier and exhibitors may appear less enthused, which makes it a good time to have casual chats with them to help gather information.

Tip: Keep your ears and your eyes open. The conference's restaurants and break areas are good places to bump into people or catch snippets of relevant conversations. Be alert even when you're traveling to and from the show. Naylor has sat behind competitors on return flights.

Tactic #4. Build an information database

There is a wealth of information online. You should gather it and build a database that can be easily browsed or searched. This information will prove valuable insight when starting new projects, or for keeping abreast of the industry as a whole.

Monitor information published by:

- Regulatory agencies
- Industry publications
- Expert blogs
- Competitors' public relations departments

This information can be organized on a company intranet to provide access to other departments.

Tactic #5. Remain ethical and avoid deception

You may feel the urge to call competitors and pretend to be a customer to learn about their rates and programs. Stifle this urge, Naylor said, because it's unethical – it's essentially lying.

Additional unethical tactics include saying you are:

- From a different company
- A student working on a project
- A researcher gathering information

Also, hiring others to use deception can get your company into hot water. Make sure anyone you use to gather information is operating under the same ethical standards held by your company. For guidance, review this Code of Ethics from the Society of Competitive Intelligence Professionals, a leading competitive intelligence organization.

For tips on doing competitive analysis outside of your industry, check out the MarketingSherpa blog post, "Competitive Analysis: Stepping outside the industry and ahead of the competition."

Phase 3. Create an initial strategy and consider the resources needed for your plan

Tactic #6. Plan your customer interaction strategy

These days, virtually any type of marketing campaign – no matter what the main focus or goal – will have at least some sort of interaction with the customer. Often, this is through social media, so in this Quick Guide, we'll use that medium as an example for considerations you should take when planning customer interaction.

For example, trying to jump onto the latest social media bandwagon without proper planning can waste time and resources for your organization. Stretching your resources too thin with social media can also dilute your organization's message to your core audience.

The MarketingSherpa article, "Social Media Marketing: 4 tips for developing a winning social media strategy," shared tips for developing an efficient social media strategy. The advice was part of a MarketingSherpa webinar, "Stop Wasting Time and Money on Social Media," sponsored by Eloqua and featuring Matt Bailey, President, SiteLogic.

Tip #1. Decide if social media is right for your organization

A big part of discovering which channels are working for your organization, according to Bailey, is in asking two simple questions. "My marketing is always focused around the how, and the why," and, "How do I make money, and why do certain channels make more money than other channels?"

It is easy to get carried away with the latest social media frenzy, he said, but that is not necessarily in the best interest of your organization. Bailey cited news headlines with companies like Dell making $3.2 million in Twitter-related sales, which send companies scrambling to set up their own accounts without researching if the site will reach enough of their consumers, or provide enough of a profit to justify the extra time and effort.

He cautioned marketers to see beyond the big number to the actual profit. When put in context, $3.2 million is only 0.01% of the company's total $61 billion revenue. Even though headlines make it appear to be a huge profit, it is actually a very small revenue source.

"So, the question you have to ask yourself as a business," he explained, "is how much time and money and resources … are you willing to put toward a revenue of 0.01%?"

Tip #2. Match the medium with the message

"Regardless of what social media you use, the focus should be on your message because your message will never change. The social media will always change," Bailey said.

Companies that are successful in using social media to express their corporate message have four things in common, according to Bailey:

- Narrative
- Development
- Interaction
- Planning

"The first part of a narrative is to know who you are," Bailey said. "Before you can present a clear message to the world, you have to know what makes your company unique … what makes you valuable to a customer."

The final part, planning, is usually a factor that separates the professionals from the amateurs in social media. According to Bailey, "The more you plan, the better your campaign is going to be."

Some social media is going to be better to present these elements more thoroughly than others, Bailey said.

"The basis of building a social media campaign is knowing which social media [network] is going to do the best job in communicating who you are to your audience. Trying to do all social media and treating it equally will just drain your resources," Bailey added.

Tip #3. Explore the aspects of every medium

Depending on how you use social media, and the channel you choose, your message can present one of the following to your consumers:

- Support
- Research
- Education
- Networking
- News

"How you use a medium will greatly determine the interaction that you can develop through that medium," he said.

Blogs

"I love blogs," Bailey said. "Blogs, to me, are one of the best ways of communicating information and also attracting a lot of search visitors."

Blogs are much more active and compelling in conveying information, and search engines can find them much more easily, according to Bailey.

Bailey suggested using blogs to:

- Increase search visibility
- Build for long-tail content
- Interact with a community and educate the market
- Build lists, conversions and reach
- Build brand value and equity

"It's ideal for communicating high-trust content … I love that ability of communicating clear information and providing a great network of resources. It's great when your goal is to build lists," he said.
As you can see in the MarketingSherpa article, "Marketing Research Chart: 84% of marketers consider blogs at least somewhat effective for inbound marketing," marketers ranked blogs as their most effective social media platform, followed by YouTube and Linkedin.

YouTube

Bailey advised using YouTube when you have to "see it to believe it," and when content is highly visual. A positive to using YouTube is its portability, where "you can grab a piece of code and put a YouTube video on your blog, on your website, or put it on Facebook," he said.

YouTube also influences search results, and videos generally have high search rankings, he said, adding, "It is easier to get a video to rank on the [first search engine results page for your keyword on] Google than it is to get a website."

Pinterest

Pinterest will work best for your organization if you have a highly visual product, according to Bailey. Its value is in reaching "a niche group of people," he said. Bailey gave the example of Cabo San Lucas for a travel agency – only people who have been there, or want to go there, will re-pin the content.

This quality, along with being highly visual, makes Pinterest ideal for those who wish to discover motivations of certain niche groups or narrow their focus.

LinkedIn

"Especially for B2B, it is one of the most powerful ways to create networks and reach people in the industry that you're targeting," Bailey said. He also pointed out LinkedIn is international, with 161 million members in more than 200 countries, and is the most affluent membership of any social media platform.

"You can so highly target an audience on LinkedIn, and the return on investment in a highly targeted campaign is one of the best you'll find," he said.

Twitter

People follow brands, according to Bailey, for four reasons:

- To give feedback
- Provide ideas
- Get insider information
- Get freebies and discounts

Bailey said what these reasons show him is people want to consult with brands through Twitter, and voice their own opinions, and be thanked for their feedback.

According to Bailey, Twitter should be used for:

- Immediacy
- Time-sensitive information
- Direct consumer contact with the brand, and experts
- Samples, discounts and freebies

Bailey said he loves Twitter as a platform because it is “the most effective way to get information out quickly. It has that immediate time element.”

Facebook

Most people are using Facebook for connection, self-expression and entertainment, Bailey said.

“It’s the perfect discussion medium … Its power is in the conversation it produces. It’s all about the conversation,” Bailey added.

Bailey cautioned just because someone is a fan of your brand on Facebook does not mean that they want to be marketed to.

Something to be aware of as you move forward with social media is almost all social media companies have written into their user agreement ownership of whatever is posted up on the site, Bailey explained.

“They own your content – and that’s why I love my blog, I own everything I put on my blog. Facebook, as they have in the past, could change tomorrow,” Bailey said.

Tip #4. Track growth and measure success

To properly develop a marketing strategy for social media, according to Bailey, you must understand three things:

- What do people want
- When do they want it

- Learn from what you did

Keyword research is important to determine what your audience is searching for, and what they want. “What words do people associate with your product or services, what do people want to know about?”

After using keywords to answer those questions, “Then, I start my list of information I can write about and create,” Bailey said.

The second important aspect to be aware of is figuring out the timing of your audience, and when they want certain information.

“Just because a keyword has a high search volume doesn’t mean it’s going to be high all year long – there are trends you need to be aware of,” he said.

From there, according to Bailey, planning is easier and you can build out a chart of when people want certain information.

This is a strategy for long-term planning, such as knowing that a certain word or phrase will be more prevalent in the summer than winter. However, it can also be applied on a daily basis on a smaller scale.

“What is trending for that day … you take and apply that,” Bailey said. “If you can bridge that topic into your business, it’s a great way to get people that day.”

Experimentation is a necessary part of social media strategizing, and it can be very enlightening if the time is taken to examine trends throughout time. Using Google Insights, Bailey said he has been able to associate the keywords used in one month with the primary demographic who visited that month.

Doing this works threefold:

- Changing social media strategy with new information
- Focusing on getting the message to the right people at the right time
- Making sure the website backed up the strategy

“Your social media cannot be an independent part of your marketing,” he concluded. “It has got to be mixed in, and it’s got to be identified with specific user segments that are profitable to your company.”

Tactic #7. Consider other tactics to connect with customers and prospects

When formulating your plan, you want to consider all the ways in which you can connect with your customers and prospects to share your message. Of course, you want to continue to use methods that have worked for you before – but you should always explore any new or additional tactics that may help you broaden your reach and connect with your audience in a different way. This may be one that is more convenient or comfortable for them.

As an example, webinars have become increasingly popular with marketers.

Webinars can help your content marketing and audience-building efforts, and are great tools to use in the complex sales cycle, including nurturing and generating leads. Plus, much of the content you use in webinars can be repurposed for other formats, such as blog posts and website slideshows.

In the MarketingSherpa blog post, "New to B2B Webinars? Learn six steps for creating an effective webinar strategy," Justin Bridegan, Senior Marketing Manager, MECLABS, provided a great basic overview to planning a successful webinar. Using the MarketingSherpa Sample Webinar Plan will make things easier.

Step #1. Know your deadlines and deliverables

Early communication with the sponsors, clients and presenters is key. Marketers should email these essential people and introduce themselves to lay out a timetable for future meetings and deadlines. Once you know the important dates and information, such as webinar date, presenters and topic, work backwards from the date of the webinar and set up target dates for completion. Important dates to remember include:

- Landing page setup and review
- Launch calls
- Presentation deadlines
- Dry run-through

Step #2. Map out an effective marketing plan

Once you have confirmed the target dates and deliverables, you can begin to create a marketing plan. This should include your plans on promoting the event using emails, banner ads and social marketing, along with key dates and deadlines. The difference between a good plan and much better plan is in the details. The more specific you can be with target audience, goals and call-to-action, the more effective your plan will be. When this is completed, send it to all of the parties involved including your sponsors and presenters, if applicable, so they can see the plan and discuss specifics.

Step #3. Create relevant webinar copy for target audience

Relevancy is the key. If your audience feels the webinar subject and email copy is relevant to their needs, then you will be more successful in engaging prospects. Shy away from vague statements like "leading," "best" and "most." Be specific. For example, "Homepage Design: The five most common pitfalls and how to overcome them" subject titles and copy that are specific may be enticing to a smaller audience, but most of the time, this audience is highly interested and therefore a better lead. Always include a good call-to-action and use this line of thinking when creating copy, "If I am the ideal prospect, why should I attend your webinar?"

Step #4. Apply marketing promotions across all channels

Using a number of highly targeted email blasts from in-house and sponsors lists, along with banner ads, you can bring in a significant amount of attendees. However, social media is one of the most powerful tools in attracting

webinar attendees. When tweeting, make sure to establish the Twitter hashtag you plan to use to live tweet during the webinar.
Many companies do a number of webinars a month, and using every avenue possible to create buzz is crucial to a webinar's success. We've found the sweet spot for marketing is two weeks to the day before the event.

Step #5. Preparation precedes power – practice and execution of the webinar

No matter what webinar platform you use – GoToWebinar, WebEX, ON24 – it is imperative to learn the basics of these programs before you begin using them. Spend some time watching the "best practices" training presentations, and reading the FAQs and how-to sections many of these platforms offer. Knowing the tips and tricks of how each functions will be critical to avoiding "uh-oh" moments. Familiarize yourself with the important functions, like polls, registration questions, follow-up emails and reminders.
Also, familiarize yourself with Twitter. Establishing a Twitter hashtag, and having at least one person from your company live tweeting during the webinar is a great way to drive conversation and interaction and also gauge the sentiment of your audience in real-time.

Bottom Line: Your preparation will give you the power you need to execute the webinar and the practice will give you the peace of mind.

Step #6. Follow up and review – continuing the conversation

Once the webinar has concluded, it's important to keep the conversation going. Sending a follow-up email containing the slide presentation and any special offer material you promised is only one part of the conversation.

The second important part is keeping them engaged with other webinars, articles, books, classes and events that apply to the topic of the webinar. It's also important to review how the webinar went. Spend an additional five to 10 minutes getting feedback from the speakers and monitoring the Twitter hashtag after the webinar concludes. This feedback will help you in making improvements in future webinars.

For many more webinar tips and tricks, check out the MarketingSherpa article, "Content Marketing: 21 ideas for planning, creating, and leveraging content from your webinars."

Phase 4. Test and Refine

Tactic #8. Understand the benefits (both internal and external) of testing

Of course, you never know for sure how any strategy will turn out until you try it. This is where testing comes in.

You had a hunch we were going to make you do some testing, didn't you? A/B testing is a way for you to assess your theories and gauge their potential effectiveness, or not, without investing time and resources into a full-blown campaign.

As noted in the MarketingExperiments article, "A/B Split Testing — How to use A/B Split Testing to Increase Conversion Rates, Challenge Assumptions and Solve Problems," testing provides you with an invaluable means to demonstrate to company heads and management the hard figures behind any suggested changes or improvements. Persuading management on the basis of subjective expertise alone is a tough road to follow. But, if you have hard test results on your side, the persuasion process becomes much easier.

In addition, the use of consistent testing will significantly increase the knowledge base of your Web group or company. You will learn more, and soon be able to determine a set of optimized practices that work best for your particular business.

Tactic #9. Take an efficient and targeted approach to testing

Obviously, the specifics of your testing process will depend on the particular element(s) or tactic(s) you want to improve. But, some of the takeaways from our recent Optimization Summit – as summed up in the MarkektingSherpa article, "Optimization Summit 2013 Wrap-up: Top 5 takeaways for testing websites, pay-per-click ads and email" – may serve as general tips to help you be more efficient in your testing process.

Takeaway #1. Think of value proposition as the center of everything you do

With the largest newsroom in the nation, *The Boston Globe* faced the herculean task of turning its staff into optimizers at a critical moment in print media history.

"It's really no surprise to anybody, our industry is completely disrupted ... we're at this point where we really need to re-engineer our business model," said Peter Doucette, Executive Director of Circulation, Sales and Marketing, *The Boston Globe*.

The Boston Globe has ensured its legacy as one of the oldest and most respected newspapers in the country for 141 years – this was a great foundation and history to build off of, Doucette said, "but what we've done historically no longer cuts it."

The newspaper has a history of being a digital pioneer by launching Boston.com with free content in the 90s. To complement its free digital property, the company launched BostonGlobe.com a year and a half ago to offer premium paid content. Doucette said the company wanted to continue to re-invent its brand and monetize customers.

"We were trying to take a different approach to the same fundamental challenge that is facing print media," he said. The mindset then became, "the flip side of every challenge is opportunity."

Going forward, *The Boston Globe* will continue making a new evolution in its long history to "think of value proposition as the center of everything we do," he said.

The starting point

With optimization, there is always an opportunity to make your site even more effective at driving subscriptions and incremental revenue.

"It's really about a starting point, and starting that evolution, and the way we figure out how to scale this is through testing and optimization," Doucette said.

Testing is a process that includes all staff, he added, "not just a start and then it's over." The team's radical business model redesign included four steps:

- Establish your "why"
- Determine your market
- Distill your value proposition
- Prep to test your value proposition

The team created this new digital subscription business, and created a distinct value proposition for their determined target audience, and began to, "really build testing plans, and optimization plans that are relevant for their respective flows."

Doucette said the team let the customer experience inform how they began, and currently approach testing. Understanding the customer life cycle became the foundation of all testing.

Takeaway #2. Develop a testing culture

A main facet, Doucette said, is to create test plans that adequately communicate what you are trying to accomplish, and when. Setting up collaboration and experimentation to shift the company culture is key, he added.

Begin by knocking down walls with those who deal closely with customers in order to integrate customer data points by making some phone calls or looking at online behavioral data. Testing has brought in almost $3.6 million for *The Boston Globe*, and the driving force behind that has been a culture change, he said.

Editorial headlines, especially, were the perfect place to test.

"It's an ecosystem that's built for testing," Doucette said. "Ultimately, we're squinting at the horizon to shorten our decision windows, and become a real decision leader."

The team began A/B testing article headlines live, empowering their own editors and writers to be a part of the process, not just the analytics marketers. Through testing, it became evident headlines that were less formal or more personalized usually performed better than those that strictly adhered to journalistic rules.

Develop a SWAT team of testers

The question Ashish Braganza, Senior Manager, Global Business Intelligence, Lenovo, posed was "how do you get your organization to have a financially viable testing practice?"

"Getting that executive support is pretty critical," he concluded. "You are your own best cheerleader for your practice – you play the role of evangelizer."

For tips on getting buy-in for your test plan, see the MarketingExperiments blog post, "Cost of Delay: How to win approval for your test and test schedule."

There are so many business units, he added, you need to talk it up and create buzz around your optimization practice to get buy-in from coworkers as well as executives who hold the purse strings.

The best way to become a cheerleader is to assemble a team you want to brag about and rally others behind.

"Testing and optimization is not the cavalry ... it's the SWAT team," he said, listing his SPADE method to assemble the right group to cover all areas:

- Strategy: singular focus that aligns to goals
- Project management
- Analytics
- Design and content
- Engineering

He listed project management as especially critical, headed by a diplomatic team member with the people skills to take charge and gain consensus for launching a test.

"Find the one person on your team ... who can come to the table with solutions," he said.

This team needs to be able not only to conduct tests, but read the right takeaways from them – not just throw data at a problem.

"Launch a test and then it's analysis paralysis. Keep it simple, trying to find that upfront before you go into the test, and not afterwards," he added.

Takeaway #3. Listen to your audience – get out of the marketer's mindset

Testing forms a perfect feedback loop with the customer intelligence you did from the early tactics of this Quick Guide. This was emphasized by what could also be called the "I was wrong" takeaway from Optimization Summit 2013. Nearly every session leader remarked testing is a humbling pursuit. A marketer has to prepare to be totally and utterly baffled by the results, and only one rule is concrete when it comes to testing – your audience has the final vote.

“Don't trust your gut” was definitely one lesson learned from the 2012 presidential election campaign for Toby Fallsgraff, Email Director, Obama for America. An example of this was when marketers in the President Barack Obama office began betting on the outcome of tests – a fun game called the “Email Derby” to involve the office in testing soon turned out to be a lesson in humility for the staff.

:It turned out we were terrible. We were worse than [random] chance,” Amelia Showalter, Director of Digital Analytics, Obama for America, said.

Every email is an opportunity to learn more

Every email the Obama campaign sent might have three or four treatments, Showalter said, and sending upwards of 20 emails a week nationally adds up.

“If you use each one of those as an opportunity to test something, you can learn a lot quickly,” she said. Tests they would run in emails might be:

- Subject line and draft tests
- Full-list tests
- Background personalization tests

Consistently testing was important because “even the things that were paying off were [eventually] losing their luster,” Fallsgraff said. For instance, strategies that had been successful in the 2008 campaign no longer were, and successful tests they ran in the beginning of 2012 often lost their novelty.

Fallsgraff and Showalter attributed $2.2 million in additional revenue from sending the best treatment of an email compared to the worst. Even if they sent the average result, Fallsgraff said, “We'd be leaving $1.5 million on the table.”

Takeaway #4. Test value proposition in content to transform decision-making

Embracing the aha moment of testing was an important step for Jon Ciampi, VP, Marketing, Business Development & Corporate Development, CRC Health Group, and his team.

“We were putting all of this money into it, and I'm getting beat up every day,” he said, adding that best practices weren't enough – they needed to see the big picture from the customer’s point of view.

In a multi-factor split test for an addiction and mental health rehabilitation facility, Ciampi and his team were able to realize what was most important to their customers. They had been working under the assumption that luxury would draw their audience in, and developed content in that mindset. However, it was trust that emerged as the previously underutilized element that was trumping luxury with their customers.

“The whole marketing team went, ‘Woah! They want to know if this is safe, if they can trust us,’” he said.

Coming to this conclusion involved testing their "Free Assessment" page. The control was a short-form page template with an above the fold call-to-action, and the treatment was two times the length of the control including much more information and placed the call-to-action at the bottom of the page.

By utilizing a single-column, long-copy approach, the treatment was better able to guide the prospect's thought process, and ended up generating a 22% increase in total conversions. CRC Health was able to incorporate this new knowledge into other tests – including a multi-factor split test on a working cattle ranch for troubled teens.

For more help with test planning, see the MarketingSherpa blog post, "Test Planning: Create a universal test planner in 3 simple steps."

Useful Links and Resources:

MarketingSherpa Blog: Email Summit: Integrating mobile, social and email marketing channels

MarketingSherpa Article: Landing Page Optimization: How to start optimization testing and get executive support

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MECLABS

1300 Marsh Landing Parkway, Suite 106
Jacksonville Beach, FL 32250

meclabs.com