New Marketing Processes

April 2017

Updated Marketing Process

Habits are hard to break and processes when introduced can be jarring. Why is marketing establishing a marketing process? It comes down to just a few reasons. When working with a structured marketing team, processes create organization and standards help to manage expectations.

This new process and this presentation will help with the following:

1) how to request work
2) project goals and objectives
3) metrics, KPIs and reporting, outcome
4) turn times and project expectations
5) feedback, project corrections and approvals

Marketing Process

Project Launch

| Project Goals & Timeline | Launch Strategy Developed & Approved | Launch Tactics Developed | Launch Tactics Approved | Deployment | Reporting |

Content/Copy Development & Approval Process

| Content or Copy Strategy Session | Ideation | DRAFT *WordDoc | Requestor *Tracked Feedback | Updates as Necessary | Final Draft Approval |

Marketing Process Con't

To get project request completed correctly and on time, all projects will begin with a marketing request form (MRF). The MRF will help define the scope of work, goals, objectives and expected outcomes and KPIs for measuring results.

If your requests are brought up during our regularly scheduled meetings, there is no requirement to fill out the MRF. However, please be prepared to provide the basic information on the form in terms of strategy (outcome) and timing.

Most requests will be accompanied with one or more of the following:

1) **a creative brief**
2) **a marketing timeline**
3) **a one page strategy**

Depending on the request, we will deliver the appropriate deliverable. This means most projects will take a minimum of 2 to 3 weeks to execute at full staff, so please plan accordingly.

Project Goals & Timeline → Launch Strategy Developed & Approved → Launch Tactics Developed → Launch Tactics Approved → Deployment → Reporting

Marketing Process Con't

Upon receipt of the marketing request:

- You will receive a time and date stamped automated message.
- Marketing will conduct a meeting to discuss the project.
- Marketing will respond to the request within 72 hours or less if we have further questions or clarification is needed

We are doing this to avoid multiple rounds of project work, confusion about project scope and to streamline all of the requests that are coming into the department. We want to be as productive as possible and avoid missed deadlines or the opportunity to serve sales with their revenue generating needs.

We do not like missing deadlines - ☺. Deadlines are the lifeblood of a marketing team right behind KPIs/metrics.

This is an attempt to get organized. It is a work in progress as we discover additional ways to optimize our processes, or receive feedback, in which case we will advise all with updates.

Any requestor who emails or requests project in conversation will be referred to this process.

Marketing Process Con't

Content & copy draft changes:

- **WordDoc** - We use WordDoc so rounds (version count) of feedback and changes can be tracked. On slide 13, we will have more details on content feedback

- **We need your help** - We cannot accept reposting of content changes in an email or hand written markups. In this format, your changes will be returned to you or we will move forward as a department with the project if we are on deadline. These types of edits are challenging, are not part of our process, nor are they best practices.

- **Final draft stage** - Final draft approval is not the stage for major content changes – minimal changes, of course – but not major changes. This delays projects and we will miss deadlines or delay other projects.

Content or Copy Strategy Session → Ideation → DRAFT *WordDoc → Requestor *Tracked Feedback → Updates as Necessary → Final Draft Approval

Marketing Process Con't

Marketing response time:

- **Approvals** – we will include our target deadline needed for your response.

- **Time allotted for approvals** – we will make every attempt to give you ample time to approve.
  - If you are too busy:

    - We will seek out another designated person to edit so we can continue on

    - Or you can reorganize the project timeline

Marketing Process Con't

This is an approval list by channel:

Cachet:
David Taub – Sales
Hanan Succar - Ops

Quantum:
Brandi Utria & David Taub

PTM:
Summer Poletti - Sales
Anthony Gonzales - Ops

SBS:
Matt Whiteley, Jeanette Duran – Sales
Jeanette Duran, Ian Harris - Ops

Time Rack:
Matt Whiteley – Sales
DeAnna Martindale - Ops

FBG:
Brandi Utria - Sales

Please provide additions or changes.

Writing Your Project Request

Writing up your project requests:

- Clearly state your need – a broad statement of your request

- Think about the outcome you hope to obtain

    - **For collateral** - "get collateral out to these "X" targets"

    - **For conferences** - "to use at a conference for more exposure for 'X'"

    - **For a strategic response** - as in the form example, "*I'd like a new flyer for product X that captures the imagination of prospects and infers the ease in which their business lives will become by using our product*" - think super hero!

This is important, it allows us to strategize about other tactics to support your effort – blogs by topic, target accounts, monitoring inquiries; or the design - creating a specific look and feel, value proposition, copy points.

Project Objectives & Reporting

Writing project objectives:

- Please attempt to quantify your outcome. Data is a big part of what we do in terms of reporting and this starts with your objectives.

  - **Acquisition effort** – growing prospects - explain more about the target audience or conversions you hope to achieve – "10% conversions" or "5 new deals in 90 days" etc.

  - **Retention effort** – current clients - this may be for an upsell opportunity where audience segmenting by product is helpful – include your target upsell metric "5 new product users"

    - **Operations** – For operations updates, are you hoping to reduce calls? If so, what is your current call rate? Are you hoping to receive resolve with first response   ? Be specific or explain your desired outcome.

  - **Reporting** – please let us know if you want a report or reporting obtained.

Marketing Turn Times

Marketing Request Turn Times

Task	Turn Time	Examples
Email	2 weeks	Promotional and product announcements, event notification
Collateral	4 weeks	Creation or edits of flyers, brochures, postcards, etc
Events	5 weeks	Addition of events not on event calendar
Webinar	4 weeks	Product webinar, training and promotion
Promotional Items	4 weeks	New or reorder of promo items
Website	3+ weeks	New pages, UI/UX changes, registration pages, adjustments
Video Production	6 weeks	Video production
Social Media	2 weeks	Social post
Graphics	3 weeks	Logo request, advertisements,
CRM	2 weeks	Campaign update, field updates
Printing	2 weeks	Business cards, collateral, etc
Miscellaneous	2 weeks +	Press Releases, editorial articles, reports, tsunami promotion

Turn times will be monitored and are subject to change

Marketing Turn Times – Con't

A note about Timelines:
- Timeline dates should be based on turn-times.

- Use '**Quick Turn Time**' as your date if you need something quickly as in days or a week.

- Use '**URGENT**' as your date if you need something right now. (May require executive approval)

- We will track this to ensure you are planning well. ☺

Marketing response time:

- Upon receipt of the request, you will receive an automated message that is time and date stamped.

- Within 72 hours or less, marketing will confirm whether we have further questions or need to make adjustments in our ability to perform the task.

Providing Feedback

Providing feedback is key to achieving results. Feedback in its nature is collaborative. With our expertise and our vendor partners, we will transform what you want to do with what strategically needs to be done.

Here are our suggestions and best practices:

1. **Round one is just that, the first draft** & we likely want to hear from you to validate we are on the right track

2. **Discussing what things don't work is not as helpful** as discussing what things do work

3. **Broad descriptive words like 'friendly or bubbly' are subjective** and not very helpful – ultimately, they are taken with a grain of salt

4. **Leave personal taste at the door** – we work with an array of professional vendors – expertise is includes the department and our vendor experts. i.e. "I really don't like blue" or "I prefer 'x'"

Providing Feedback – Con't

5. **Ask questions** – "Can you explain X to me..."

6. **Be the problem maker, not the solver** – instead of offering to help find photos or request for things to be moved or made larger, simply state "I'm worried people won't see that copy/button, would you recommend making it more prominent..." "Can we look at additional photo selections?" or "Why have you selected these particular photos?"

    a) When it comes to content, we are looking for product or subject accuracy. Bullet points will suffice to build out content. Grammatical and typo findings are always appreciated – however, leave the rewrites to us. We are being particular here because much of our content, if not 100% of it, includes an SEO strategy that needs to occur naturally without 'word stuffing' keywords.

Providing Feedback – Con't

7. **We work with individual requestors** – please include all of your team's creative points on the new marketing request form prior to submission - committees and opinions tend to delay the process and thus productivity.

8. **Referencing 'brand' is challenging** since brand standards are under development and 'brand' is not an all encompassing term

9. **Ask us for our professional expertise.** We can explain our work. Our collective marketing and vendor experience is available to transform projects into a strategic approach – we've got the chops and the expertise, that's why were here! ☺

Questions & Feedback

THANK YOU!

Please send any questions or process feedback to

marketingrequest@fbgholdings.com