

theservicecouncil™

Where Global Service Executives Sharpen Strategy



SERVICES MARKETING AND PROMOTIONAL GUIDELINES: A PRIMER

WRITTEN BY: BILL POLLOCK, PRESIDENT & CHIEF RESEARCH OFFICER

APRIL 2011

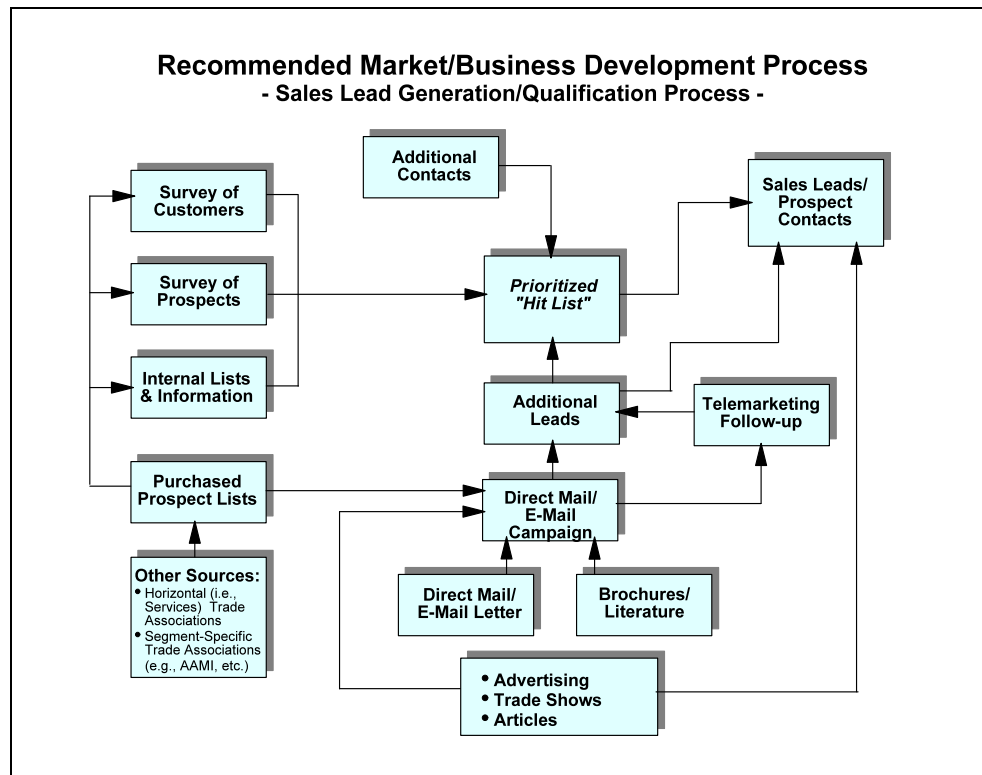
Services Marketing and Promotional Guidelines – A Primer

I. Guidelines for a Services Marketing and Promotional Program

The general recommended plan of action for formalizing the organization's marketing and sales development program should be focused on a prioritized list of targeted vertical and niche market and major user/purchaser segments. The following represent some of the key business development activities that should be conducted on a regular basis:

1. The development of a prioritized "*Hit List*" based on:
 - The existing and prospective customer contact databases, and other targeted market prospects.
 - Lists of major manufacturers/OEMs, high-tech "niche" vertical segments (i.e., manufacturing, medical/healthcare, communications, etc.), services organizations, retail/distribution, utilities, trades and other prospective users, segmented by category, location and size, and generally available via published industry sources (i.e., trade associations, publication buyers' guides, trade show attendance lists, etc.).
 - Commercial lists made available through list brokers and other segment-specific trade associations and publications (e.g., associations covering the various services industries, etc.).
2. A direct mail/e-mail campaign directed to the prioritized prospect list, with direct telemarketing follow-up.
 - The direct mail/e-mail program should be designed as a series of events rather than simply as a "*one shot*" mailout.
 - Accordingly, the number and types of enclosures/attachments/Weblinks should be selected on the basis of a "*phased*" contact approach for each subsequent mailout.
 - Telemarketing follow-up should be conducted on a targeted basis to prioritized prospects by company sales and business development personnel; general telemarketing calls (made by outsourced telemarketers) would be more analogous to a general direct mail roll-out.
3. A formalized approach to sales opening, proposal/presentation generation, proposal submission, prospect follow-up and sales close using a coordinated suite of sales and marketing tools/aids/materials.
 - Full suite of printed/electronic marketing and promotional collateral.
 - Visual sales presentation (e.g., PowerPoint, Keynote).
 - Formal proposal (standard format/template).

Services Marketing and Promotional Guidelines – A Primer



4. A focused advertising/promotional campaign targeted to specific trade magazines/journals, trade shows, conferences and speaking forums, etc.
 - Selected print ads, where deemed to be most cost-effective, or in combination with other promotional events (e.g., buyers guide listing, trade show magazine issue, new product introduction, etc.).
 - Placement of edited articles in other print forums (e.g., making an edited version available for local/regional business newspapers to carry; editing it for inclusion in a newsletter format, your own or a local business group's; making it available for one of your major clients to include in its customer-oriented newsletter, etc.).
 - Generation of additional articles, features, news/press releases and other print/electronic materials.
 - Speeches/presentations at national/international trade shows or regional/national business meetings (e.g., Chambers of Commerce), business groups; industry-specific groups (e.g., bank/financial, medical/healthcare, retail, utilities, trades, manufacturing); etc.
 - Telemarketing, conducted both on a general, informational basis (i.e., for the purpose of generating contacts and sending out literature) and a prioritized basis (by company sales and business development personnel in terms of following up on earlier mailouts or speeches, encounters at trade shows, etc.).

Services Marketing and Promotional Guidelines – A Primer

5. Participation in international, national and regional business and industry-specific trade shows and business expos
 - Trade show booths and presentations, both on a national and regional basis (e.g., major business-to-business expos, The Service Council™'s *Smarter Services*™ Executive Symposium, etc.)

For the most part, the overall marketing and promotional effort will be most effective if it is carried out on a direct basis, supported by the appropriate accompanying marketing collateral, and targeted to a prioritized prospect base utilizing a combination of:

- Direct mail/E-mail
- Telemarketing
- Advertising and promotion
- Trade show participation
- Articles, speeches and presentations
- News/press releases
- Company newsletter/e-newsletter
- Full suite of printed/electronic marketing collateral
- Other promotional materials, as needed (e.g., whitepapers, sales presentations, news clippings, etc.)

Services Marketing and Promotional Guidelines – A Primer

II. Summary of Available Marketing Tools

- By Type, Cost, Benefit and Cost-Effectiveness -

Type	Cost	Benefit	Cost Effectiveness	In Combination With
Published Article	Low	Medium	High	<ul style="list-style-type: none"> • Direct/E-Mail • Reprints • Handouts • PR
Speech/Presentation	Low	Medium/High	High	<ul style="list-style-type: none"> • PR • Direct/E-Mail • Handouts • Article
News/Press Release	Low	Medium	High	<ul style="list-style-type: none"> • Direct/E-Mail • Handouts • PR
Whitepaper	High	Medium	Medium	<ul style="list-style-type: none"> • Direct/E-Mail • Handouts • Article • PR
Magazine Advertisement	High	Medium	Low/Medium	<ul style="list-style-type: none"> • Handouts • PR
Direct Mail/E-Mail	Medium	Medium/High	Medium/High	<ul style="list-style-type: none"> • Article • Reprints • Handouts • PR
Trade Show Booth	High	Medium/High	Medium	<ul style="list-style-type: none"> • Article • Reprints • Handouts • PR • Direct/E-Mail (Future)
Telemarketing	High	Medium/High	Medium/High	<ul style="list-style-type: none"> • Follow-up with full sales kit • Direct/E-Mail (Future)

Services Marketing and Promotional Guidelines – A Primer

A. Direct Mail/E-Mail Program

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> To introduce the company, its service offerings and capabilities to new potential market prospects To inform and educate the relevant marketplace of the full range of products, services & support available through the company's products and services To serve as an ongoing reminder of the company's presence, capabilities, products, services and activities
Activities	<ul style="list-style-type: none"> Development of several "waves" of mailings, each with a specific target audience and a focused message (e.g., to introduce the company, to announce a major new customer contract, to announce a trade show exhibit, to notify of an upcoming seminar/published article or whitepaper, etc.) Targeted mailings to individual market segments (e.g., retail, bank/financial, medical/healthcare, etc.)
Benefits	<ul style="list-style-type: none"> Keeps the company fresh in the market's mind through a series of ongoing mailouts (in coordination with other promotional activities) Relatively low cost to produce and distribute Flexibility to communicate specific messages to specific segments; ability to be current and topical
In Combination With	<ul style="list-style-type: none"> Attachments/enclosures of various forms of corporate literature handouts, brochures, article reprints, ad copy, press releases, newsletters, etc.
Follow-Up	<ul style="list-style-type: none"> To be followed up with subsequent mailings/e-mailings, telemarketing, telephone calls, etc.
Frequency	<ul style="list-style-type: none"> Should be done on an ongoing basis Audiences should be staggered depending on subject matter and budgetary constraints

Services Marketing and Promotional Guidelines – A Primer

B. Telemarketing

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> • To generate business leads from a targeted and/or prequalified list of prospects • To inform selected prospects of upcoming promotions, pricing, events, activities, etc. • To supplement and/or follow-up with respect to direct mailings/e-mailings, speeches, presentations, trade shows, etc. • To keep the company fresh in the minds of targeted prospects
Activities	<ul style="list-style-type: none"> • General telemarketing utilizing a targeted list of prospects and either communicating a specific message, or asking whether they would like to receive information on the company's products, services, solutions or capabilities • Focused telephone calls to selected prospects to inform/inquire about specific activities
Benefits	<ul style="list-style-type: none"> • Generates informational/sales leads and qualifies prospects from an otherwise unqualified list • Supplements ongoing direct/e-mail and related campaigns • Allows for total currency and flexibility with respect to the company's products, services, news, events, etc,
In Combination With	<ul style="list-style-type: none"> • Direct/E-mail program, speeches, presentations, events, additions to capabilities/services, news releases, etc.
Follow-Up	<ul style="list-style-type: none"> • To be followed up with mailout of sales/promotion kit, articles, handouts, announcements, etc. • Addition of contact name to more targeted mailing list, based on specific areas of interest/inquiry
Frequency	<ul style="list-style-type: none"> • Ongoing basis for new prospect names/numbers; staggered basis for existing customers combined with regular courtesy calls (typically no more than once per quarter, per name)

Services Marketing and Promotional Guidelines – A Primer

C. Advertising and Promotion

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> • To generate leads and business prospects • To inform the market of the company's products, services, capabilities, business relationships and upcoming activities • To announce events, appearances, exhibits, etc. • Generally to keep the name of the company in the market's eye
Activities	<ul style="list-style-type: none"> • Print advertisements, buyers guide listing supplements, sponsorship of international, national and/or regional business meetings or conferences (e.g., The Service Council® Annual Symposium, segment-specific trade shows, etc.)
Benefits	<ul style="list-style-type: none"> • Exposure for the company on the basis of a specific targeted message to a specific audience • Usable as future reference materials, reprints, etc.
In Combination With	<ul style="list-style-type: none"> • Virtually all other forms of marketing and promotion including direct/e-mail, telemarketing, trade shows, articles, news releases, newsletters, speeches and presentations, etc.
Follow-Up	<ul style="list-style-type: none"> • Part of ongoing marketing and promotional program (e.g., <i>"look for our ad in the next issue of Services magazine"</i>, etc.)
Frequency	<ul style="list-style-type: none"> • On a regularly scheduled basis, generally tied to annual buyers guides or special event issues, in conjunction with news/press releases or published articles, etc.

Services Marketing and Promotional Guidelines – A Primer

D. Trade Show Participation

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> To gain exposure and generate qualified leads at a single point of time and place To be able to have the opportunity to exhibit and/or demonstrate your products, services and capabilities to customers and prospects who you might not otherwise have a chance to meet in person To gain the advantage of having a face-to-face meeting with interested parties
Activities	<ul style="list-style-type: none"> Trade show attendance and networking Trade show booth exhibition and distribution of marketing collateral Coordination of trade show appearance with in-area sales calls Making a case study presentation and/or sitting on a panel at the trade show
Benefits	<ul style="list-style-type: none"> High intensity physical presence and exposure Excellent vehicle for networking and making contacts Gaining an image of being a key industry player Opportunity to develop qualified leads in person
In Combination With	<ul style="list-style-type: none"> Pre-promotion via direct mail/e-mail and telemarketing, advertisement in sponsoring organization's trade magazine and show directory Additional exposure and credibility if also making a presentation or having an article published in the show issue of the magazine/newsletter Excellent venue for the distribution of marketing collateral, handouts, articles, press releases, etc.
Follow-Up	<ul style="list-style-type: none"> Direct follow-up on sales leads Addition of new prospect names/addresses into existing market/prospect list files
Frequency	<ul style="list-style-type: none"> One or more major shows per year; regional participation on a case-by-case basis

Services Marketing and Promotional Guidelines – A Primer

E. Articles, Speeches and Presentations

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> To gain exposure in the marketplace To position the company as a leading industry player To gain exposure in specific industry segments that might not otherwise have direct access to information on your company
Activities	<ul style="list-style-type: none"> Publishing articles in trade journals, business magazines and other venues Making speeches and/or presentations at key international, national, regional and selected segment-specific (e.g., retail, bank/financial, medical/healthcare) venues
Benefits	<ul style="list-style-type: none"> Limited cost for gaining exposure in targeted markets and segments Positions the company as a key player/vendor in targeted segments Establishes credibility of the company and its products/services/solutions through the publishing or other dissemination of information Provides a set of credible promotional handouts and reprints for use in corporate sales kits or at future shows
In Combination With	<ul style="list-style-type: none"> News/press releases, direct/e-mail, telemarketing to announce upcoming publishing dates or appearances As reprints, in direct/e-mail, in marketing sales kits, as handouts, etc.
Follow-Up	<ul style="list-style-type: none"> Distribution of reprints or hardcopy handouts at various marketing venues
Frequency	<ul style="list-style-type: none"> As often as possible, on an ongoing basis (i.e., most trade journals will not let you publish under a single organization's byline more than once per quarter)

Services Marketing and Promotional Guidelines – A Primer

F. News/Press Releases

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> • To promote specific newsworthy events and activities on a current basis (e.g., new products/services, partner relationships, offices, contracts, articles, speeches, presentations, awards, expansion, etc.) • To gain immediate exposure in major international, national and regional business journals and newspapers at virtually no cost
Activities	<ul style="list-style-type: none"> • Prepare a list of all regional/national/international services and segment-specific trade journals, business newspapers, trade associations, etc. • Prepare news/press releases on the company's "press release" e-letterhead and distribute to all names on the list, as well as to a selection of major customers and prospects, as relevant • Generate news/press releases on anything that even remotely would constitute a newsworthy item (Many times, a trade paper will print even "marginal" submitted entries in order to fill space)
Benefits	<ul style="list-style-type: none"> • Effective means for gaining free exposure in as many industry information sources as possible through a mass distribution effort • Keeps a steady stream of information flowing with respect to the organization • Conveys a timely message on a handpicked item of interest that you would like distributed to the market through a set of credible reference sources
In Combination With	<ul style="list-style-type: none"> • Any new activity including new products/services, new partner relationships, new contracts, area presentations or speeches, published articles, featured participation at trade shows, etc.
Follow-Up	<ul style="list-style-type: none"> • Include as handouts in selected direct/e-mail efforts; include as part of corporate sales kit, distribute at trade shows, etc.
Frequency	<ul style="list-style-type: none"> • As often as possible

Services Marketing and Promotional Guidelines – A Primer

G. Company Newsletter/E-Newsletter

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> To provide informational and self-promotional materials on the company and its products/services to a targeted set of prospects and other appropriate organizations on a regular basis To effectively manage the release of information to the targeted recipients To build a more credible and ongoing market presence To maintain ongoing communications with customers and prospects
Activities	<ul style="list-style-type: none"> Prepare and distribute (via e-mail) a regularly scheduled and standard formatted organization newsletter Solicit input, feedback and comments from customers and prospects, etc., for inclusion in the newsletter Occasionally feature material from guest writers, industry experts, customers, channel partners, etc.
Benefits	<ul style="list-style-type: none"> Relatively inexpensive way to communicate key messages to customers and prospects on a regular basis Provides mechanism for regularly disseminating information on services, relationships, pricing, etc. with customers and prospects without appearing to be too aggressive Provides forum and/or impetus for some customers/prospects to enter into dialogue with the company
In Combination With	<ul style="list-style-type: none"> Occasionally include survey or customer feedback form along with the newsletter mailout Include additional promotional pieces in mailout as necessary
Follow-Up	<ul style="list-style-type: none"> No direct follow-up; included as part of overall marketing and promotional campaign
Frequency	<ul style="list-style-type: none"> Quarterly

Services Marketing and Promotional Guidelines – A Primer

H. Full Suite of Printed/Electronic Marketing Collateral - Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> To utilize as sales and promotional tools as part of an ongoing marketing campaign To provide the organization with a coordinated and modular set of marketing and promotional tools that can be used in a variety of ways To provide the organization with a professional appearance, as well as the appearance of size and credibility
Activities	<ul style="list-style-type: none"> Design and create a full package of printed marketing materials including a corporate services brochure, corporate and professional profiles, case studies, handouts, articles, news/press releases, pricing sheets, information request forms, etc. Review, modify, expand, update and replace all printed matter on an ongoing basis
Benefits	<ul style="list-style-type: none"> Provides a more credible corporate image Materials can be used in multiple venues (e.g., mailouts/e-mailouts, trade shows, sales kits, etc.) Provides flexibility to customize individual materials, as well as the packaging and distribution of materials, to targeted customers/prospects on a regular, as needed, basis
In Combination With	<ul style="list-style-type: none"> All marketing and promotional efforts, including the Internet (e.g., downloadable documents requiring input of prospect-contact information, etc.)
Follow-Up	<ul style="list-style-type: none"> Used as part of the company's ongoing sales, marketing and promotional efforts
Frequency	<ul style="list-style-type: none"> Constantly being modified, expanded, updated and distributed

Services Marketing and Promotional Guidelines – A Primer

I. Other Promotional Materials

- Summary of Key Marketing and Promotional Factors -

Objective	<ul style="list-style-type: none"> To supplement existing marketing and promotional materials on an as needed or one-time use basis To support specific sales, marketing or promotional activities not covered otherwise by existing materials
Activities	<ul style="list-style-type: none"> Many possibilities including development of special events, offerings or other promotional activities Sponsorship of business or segment-specific marketing events (e.g., special conferences, webcasts, podcasts, or seminars, etc.)
Benefits	<ul style="list-style-type: none"> Provides the organization with additional market exposure through its involvement in special events or special promotions
In Combination With	<ul style="list-style-type: none"> News/press releases, special mailouts/e-mailouts, inclusion in company newsletter, telemarketing, etc.
Follow-Up	<ul style="list-style-type: none"> Publicize in subsequent series of marketing and promotional efforts
Frequency	<ul style="list-style-type: none"> As applicable

Services Marketing and Promotional Guidelines – A Primer

III. Guidelines for Marketing and Promotion

Critical to the ability of the company to maximize its exposure and credibility within its targeted marketplace will be the coordination of its overall marketing and promotional efforts. In order to be optimally successful, these efforts must be:

Planned

- All marketing and promotional efforts must be well planned in advance in terms of attainable goals and objectives, tasks to be conducted, timeframes for completion, desired results, contingency planning, costs and other key factors

Formalized

- The marketing effort must be formalized in terms of execution and not merely conducted on an *ad hoc* basis; that is, they must follow a specific process for development, planning, execution and monitoring

Targeted

- Each marketing activity must be targeted to a specific segment or segments in terms of message, means of communications and venue; even general marketing announcements should be targeted to the proper general audience

Focused

- The message that is communicated through each marketing activity must be clear, concise and well articulated in terms that the audience will easily understand

Continuous

- Marketing and promotional programs must be conducted on an ongoing basis, each new activity building upon the previous ones and supporting the next planned activities

Consistent

- The marketing messages should be consistent; there should be a "*familiarity*" developed between your organization and your prospects so that they feel comfortable in receiving a continuing and consistent set of communications from you

Flexible

- The marketing and promotional effort should be flexible in that a variety of promotional alternatives are readily available to follow-up, augment or otherwise support the ongoing program activities; direct/e-mail and telemarketing generally yield more flexibility than print ads or published articles

Services Marketing and Promotional Guidelines – A Primer

Monitored

- Whatever marketing and promotional activities are ultimately planned and executed, they must be monitored in terms of their success in meeting their stated goals and objectives

Improved

- Through the process of ongoing monitoring, continuing improvements can be built into the overall marketing and promotional effort; that is, each successive direct/e-mail or telemarketing effort, etc. can be improved through additional focus, better targeting, better communications, etc.

Services Marketing and Promotional Guidelines – A Primer

IV. Next Steps

Identify and Refine Prioritized Market Targets:

- General vs. segment-specific market approach

Expansion/Enhancement of Marketing Collateral Portfolio:

- To include expanded "*mix*" of general and segment-specific marketing and promotional literature

Development and Execution of Direct Mail/E-Mail/Telemarketing:

- Identification and prioritization of market targets
- Timeframe for execution, monitoring and follow-up
- Development of a series of targeted cover letters, enclosures or attachments
- Plan for initiating the telemarketing effort in conjunction with, and support of, the ongoing direct/e-mail effort
- Development of a means for tracking the success of the ongoing programs (in terms of lead generation and business development)

Development of Other Marketing Programs:

- Plan for regular mailouts/e-mailouts to customers and the general market (e.g., news releases, special announcements, etc.)
- Presentations for international/national/regional business forums (e.g., Services conferences, business exhibitions/seminars, etc.)
- Profiles in national/regional business newspapers/magazines (Use reprints as part of marketing collateral)

ABOUT THE SERVICE COUNCIL™

The Service Council™ is an exclusive community of Services Executives representing global, industry-leading, service-centric businesses. The mission of The Service Council™ is to provide a platform for innovation sharing, shaping and sharpening; where uncommon service-centric businesses can emulate the strategies deployed by Global Service Leaders.

The Service Council™ presents its annual *Smarter Services*™ Executive Symposium in April – May. The Symposium provides an invaluable opportunity to meet and network with Services, Customer Experience and Customer Management Executives in an environment conducive to advancing Executive relationships.

For more information on The Service Council™ visit www.theservicecouncil.com. For general inquiries please submit an email to info@theservicecouncil.com.