Marketing planning document for the launch of The Client’s new Template Management solution, covering the legal sector and taking a look beyond.

The Product -
Go To Market
Plan

Draft Copy Do Not Disseminate

A Genius Consulting Plan
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Positioning the Product

Who Are The Client?

When addressing this in our marketing we need to look at the 3 elements that people look at when they look at a new company, *the people, the pedigree and the promise.*

**People** wise, all three of you are very marketable people (good personalities, professional appearance etc.) so we have some good raw materials to work with, however outside your personal circles you are virtually invisible. As you rightly observed when we met – people buy people – if you’re not in the shop window, you’re cheating yourselves out of leads. More on this later...

**Pedigree** and credibility go hand in hand and having to show yours off and polish it can be galling, frustrating, difficult or a combination thereof. Sadly it is an essential part of marketing a small business so get ready to discover your inner show pony!

**Promise** should be a succinct summary of all the important things people need to know about a company, product or service. Moreover it has to be possible to keep the promise in the long term otherwise it becomes a meaningless short term sales blurb that will ultimately harm your reputation and erode your credibility.

With this in mind it makes sense to base your company promise around your core values which I have listed below based on our conversation (may need revision):

Core values:

- Honesty/Integrity
- Friendliness/Openness
- Professionalism
- Meaningful Working Relationships
- Quality Products
- Exceptional Customer Service & Support

Defining the Value of The Product

We need to perform a similar exercise for The Product:

- Simple
- Flexible
- Adaptable
- Economic (time saving, cost saving, profit making)
Differentiating The Product from the Competition

Taking for granted that ours is a stronger offering than the competition and that as a result our WOM reputation will be stronger, the main way we can differentiate is by making this fact as transparent and easy to access as possible. For this section I looked at the Competitor, Competitor & Competitor BS:

**What they do well that we must do better:**

Competitor & Competitor: Testimonials and case studies from clients with photos and detailed info, website navigation and content is pretty good

Competitor: profiling the people behind the company via the blog and LinkedIn

Competitor: Online brand building, link building, they have far more directory mentions than the other two and there are no similar named companies taking their space

**What they don’t do well that we can do better:**

Competitor: Social media (not very established) and PR; both of these channels suffer the same problem, they are all me, me, me with little engagement/pickup, same problem with e-newsletter

Competitor: Social media – lots of presence including a blog but as with Competitor most of it is too self-centred/self-promoting although there are a few “ok-ish” blog posts

Competitor: Website (structure, content)

**What they don’t do at all that we will want to:**

Competitor & Competitor: Online brand building (search for them and it’s easier to find the Competitor fold up bicycle than any third party company info and for Competitor their people are invisible)

Competitor: Social media, PR

Reputation Building

Here we look at how we build our reputations (both as professionals, for the product itself and the promise we defined above) and create awareness of that reputation.

- What existing credibility do you have as individuals? Ditto product/promise.
- Who will vouch for your claims? Through what mediums are they prepared to do so?
- What activities will build the reputation of you/your product/your service? How can we capture the response to that?
- Make a map of every possible place we could put this information (include online, offline and physical places)
- Who could help us spread the information to places we can’t reach?
Reputation Management

Believe it or not, shouting (or getting other people to shout) about how ace you are, is the easy bit. The tough bit is making sure no one has a bad word to say about you and the reality of your business’ every day working practices reflect the core values that form the nuts and bolts of your brand promise.

Reputation monitoring tools:

There are stacks of these about but here are a few samples that will help – I don’t believe you should pay for this sort of service so all of these are free:

- Social media: [http://www.socialmention.com/](http://www.socialmention.com/) (Also/or Addictomatic, How sociable?, Board Reader etc.)
- The internet generally: [http://www.google.com/alerts](http://www.google.com/alerts)
- Complete online: [http://www.reputationrhino.com/rhino360](http://www.reputationrhino.com/rhino360)
- The good old telephone

If you get positive comments and mentions, thank the person publicly and reach out to them to develop that relationship. If they feel you’ve got time for them and appreciate it, they’re more likely to do it again.

Handling tips for when it doesn’t go to plan:

Someone’s said something negative (and unfounded) about you online:

Acknowledge that they have a concern, inform them briefly as to why their stand point is incorrect (stick to the facts, don’t get emotional or accusatory) and express your willingness to have them get in touch via phone to discuss it as you don’t think a public social network is an appropriate forum to correct any individual misconceptions they might have.

A customer has asked an awkward question or made a complaint online:

Acknowledge that they have a concern, apologise immediately and encourage them to get in touch via phone to resolve it with you personally as you don’t want to disclose any personal details of theirs on a public social network.

Someone says something negative to your face when you are in a group setting/asks awkward questions/makes a complaint:

There’s a huge temptation here to try and handle this whilst you’ve still got an audience, many people feel the need to answer back and justify themselves to the room. Your best bet is to stay calm, keep smiling and invite that person away from the group setting to discuss it.

Anyone who does that in a public setting is either not thinking or more likely hoping you’ll rise to the bait so they can have an undignified slanging match with them in front of the whole room. People with genuine complaints tend to approach you one to one; people who try and air your dirty linen in public have a grudge or are deliberately trying to damage you – take a deep breath and walk away.
Chinese whispers:

“So and so said they were talking to someone the other day who said they didn’t think you guys were up to much”. As with the previous example this is usually just rumour mongering and malicious nonsense so not worth pursuing; the only exception should be if it is consistent poison from one source which you’ll want to address, or a customer who might have a genuine complaint.

Target Market Segmentation & Messaging

The IT Crowd vs. The Legal Eagles

Legal: What’s in it for me? And quickly! These guys are time poor, often not very technical and more often than not are only interested in listening to you if the time is billable. Our message needs to be very punchy and commercial e.g. 100 extra billable hours from every lawyer every year. Their call to action had to be simply to make the IT guy call us, we can’t ask for much more than them getting their PA to pass the command.

IT: You can get away with a lot more technical speak here, you’re on your home turf so speak to them as you would a former boss, assume comprehension and don’t patronise. A big mistake with technical copy is just listing features, even if I know what they do, I’m not necessarily going to make the mental leap each time as to how this will benefit me so spell it out. The convenience/freeing someone’s time to pursue other projects angle will be one that we need to include as well as a lot of stress on customer service and support. It is worth having a short sound bite or strap line that sums up the business benefit/de-techs the value proposition though, as the IT guys may well end up using that to explain to the Partners.

In-House vs. Law Firms

There’s less commercial imperative in-house as their hours aren’t billable, however many teams are over stretched and the efficiency and convenience angle will carry more weight. In-house teams are more likely to be subject to changes resulting from office infrastructure and location moves and M&A activity too so the sustainability and migration element of our story will be stronger than in law firms where it happens less frequently.

We’ll need to target GCs and department heads on the legal side as well as the usual suspects on the IT side and consider doing a very cheap/free placement into a couple of big companies to get the case studies/proof that we can deliver in-house.
**Magic Circle vs. The Also Rans**

Magic circle clients will provide the kind of credibility we are looking for to break into all the other company types and of course the other firms within that group. They’re usually phenomenally arrogant companies and unless you have a personal contact in the firm the gatekeepers are often ferocious and the initial pitch is around why they should even give you the time of day as opposed to what you might actually want.

Getting marketing messages in front of the right contact is massively challenging because they often have to go through 8 rounds of PAs before they get anywhere near the individual concerned. They’re suckers for free speaking opportunities though as they don’t believe they should ever have to pay to speak at anything (the events world often disagrees) so that is a good “in” if we end up doing events.

**Messaging All The Way Down the Funnel**

The temptation is that once you have someone connect to you, you start selling. Regardless of the channel, unless someone has asked a question about your offering you should not immediately start sending them stuff trying to sell to them (yet).

I’ll use a drinks party analogy, when introduced to someone new do you a) launch into a monologue of your life story and finish by asking them to get you another drink and some canapés or b) ask them about themselves, try and make them laugh, throw in occasional interesting or amusing anecdotes relevant to what they are talking to you about and introduce them to other people you know at the party?

I hope you get my point. We’ve got to be on a value adding charm offensive with our prospects from the moment they connect. We’ve got to earn the right to sell to them, build a relationship with them so that selling process is successful.
Channel Strategy

Direct Marketing

Post:
Event invitations work well by post but it is costly to send reams of information by mail. That said most legal documents are printed so there’s a case for paper carrying more weight than electronic means. I propose we try 3 small mailings with a fantastic offer e.g. free benchmarking report on legal IT, a competition e.g. give away 10 of your smaller signature products and a free to attend event to get a benchmark optimum response rate and plan/measure any further campaigns against this.

We’d need to find a broker prepared to supply small quantities of names or build the list ourselves using LinkedIn and internet research.

Email:
As with post, we need to perform the same test (ideally on a different portion of the same list to take out that variable) but in a different order and with different tracking codes so we can distinguish the response from the postal mailings. We can look at bigger quantities with email as the send costs are so much cheaper and will use this channel to test the efficacy of different lists before committing to a 12 month licence of a list. We should send the same messages to your existing list and the rental list at the same time to benchmark one against the other. Ideally we’d always be renting lists that perform better than our database and so adding more responsive names to our list until they equalise in performance.

Phone:
One of the most important tools in our arsenal is personality and being a human face in the market. People need to see and hear you and one of the simplest ways to do that is a phone call.

All the test campaigns The Productd above give you the ideal opportunity to chase up non responders in a very relaxed, value add way. The objective during each of these calls is to build trust and complete the record for the prospect (no selling!) e.g. mobile numbers, email addresses that they check as opposed to their PA, personal connections on social networks, basically anything to really embed them into your network and make them feel positively disposed towards seeing/speaking to you again.

Inbound Marketing
We know that we do a great job and many of our competitors are not to be trusted, they’ll prove that quite happily by themselves but we need to make our website into a hub of trust and
reputation building multimedia collateral that we then share and spread via all our different channels and our network.

Ideas for content could be blog articles that have nothing to do with The Client and everything to do with what our market wants to read, survey results and papers showing what other people are doing and how they are tackling related IT issues, short video tutorials on coding tricks or shortcuts (outside the scope of your products obviously!).

Every piece of content should go out onto all our social networks, in our email newsletter, via email/direct messages to our combined network, in a press release etc. We should be securing guest spots to write content for other blogs and magazines, all of this will build credibility and reputation.

**Interactive Marketing**

**Social media:**

We need to get all of you better connected individually and optimise both yours and the company profiles across all major platforms. We also need to get you into a lot more groups and lists and interacting regularly to help facilitate this network growth. The easiest way to manage this process is to maintain a social media checklist/map that will contain all the must do items and we can check them off per profile as we go to make sure everything gets done and at the right frequency.

**Events:**

We should look at the Legal IT Business Show and Insight 2012 exhibition costs (I am more than happy to do the haggling on that to get best price as it is familiar turf) and should definitely attend for a recce (Legal IT want £500 a ticket for vendors but if we are a little clever about who we say we’re working for we should be able to get in free!) We can do more research into smaller networking events and should aim to get one person at least to one a fortnight. I also think we should attempt to do our own events, because they’re generally cheaper than exhibiting, you get to control the agenda (we speak free along with whoever else we want to court) and we can create them so that they are an exact reflection of the core brand values.

**Viral/WOM:**

People pass on things they think are interesting, funny or valuable. Our test items The Product in the direct marketing section are two of those, I am leaving funny out for now as I have no idea whether we have the scope or capacity to be amusing in this space. It is something we can try later on but probably a little risky and marginal in its use for a young brand.

We should ask everyone who gets in contact with these things to pass them on but the real power will come from bloggers e.g. Legal Technology Insider who have thousands of followers. We should map the top 10 and offer them something special every month (preview on the paper we are releasing, 1st test drive of new products or free product to review, speaking slot at our event etc.) to encourage them to promote what we are doing. We can do the same with editors of magazines.
**Brand & Reputation Building**

**Website:**

We need to rewrite the copy (as you mentioned) and reorganise the content a bit. This shouldn’t involve any massive rebuilding, just having a bit of a think about what goes where. We should begin a value add newsletter that can be subscribed to from the website or blog, the blog itself needs more value add content and the tags must be organised and filled in.

Legal IT has nearly 3 million searches in the UK alone each month, template management 18,000, legal template 2900 and legal document templates 320. We need to do some thorough keyword research and make sure we choose the right words to try and rank for. Once these are decided then the copy and blog will be written to include these 3-4 times in the piece and once at the beginning of the title. Links will be built by our link builder to support this. Last month we had just 100 visits to the site, I know we can do more!

**Elsewhere Online:**

We own our brand space which is great (first 2 pages of Google are all relevant links). We can build this out and improve on it by hiring a link builder to create more directory links for us (very cheap) and working on the quality links ourselves from our PR and partnering efforts.

Our social media map/action plan will take care of the rest of our online presence.

**PR & Advertising:**

We should obviously try and get as much free publicity as we can, either through securing coverage of our offers or writing guest editorial/blogs but it may be that some target publications won’t take us if we are not current advertisers. In this case we’ll try and secure a deal whereby we pay something towards an ad and get to have a product review or guest column for free as part of the package.

I’d like to try some job title targeted advertising on LinkedIn and some very niche keyword targeting on Adwords (both very small budgets) to test the response of these platforms. They’ve always been great for me and as with email and post we’ll know for sure after promoting the test.
Suggested Action Plan: Month 1

- Write company promise
- Write value proposition for The Product
- Create your “master profile” (all the info that could possibly make you look more credible, including 3rd party references, testimonials etc) and a map of all places it could be used
- Aim to have all this information complete by end week 2 and distributed or suggested to all the places identified by end week 3
- Create social media map/action plan
- Have all profiles polished and completed according to action plan by end week 1
- Complete connections/groups goals according to action plan weeks 2-4
- Set up reputation monitoring tools (end week 1)
- Plan reputation builder activities for month 1 by end week 1 and review progress weekly, aim to have attended at least 1 event each and secured 3 writing opportunities by the end of the month
- Map sales funnel to get ratio from initial engagement to lead to prospect to sale
- Decide on and add standard messages and contact points to your sales funnel so everyone is clear on what to do and when, add these actions to your database if possible so they can be ticked off when completed. This should include all the value add stuff above and calls to set up pitch meetings/actual initiation of the sales process.
- Source lists and tidy any maintained internally, set up a Mail Chimp account to send the emails and learn to use it (I have an instruction manual I wrote for the family that you’re welcome to use). Establish how postal pieces are going to be processed.
- Write the emails and letters for sending once a fortnight over 6 weeks
- Plan who will do the phone work and when, make sure they have time blocked in their diary and are aware of what to do/who to call/why
- Write a new value add blog post at least once a week
- Set up and promote benchmarking survey around the product area (write questions, put into survey monkey, promote with a promise of a copy of the report for all respondants)
- Make sure we have a writer for the report ready for 2 weeks time
- Scope out costs and write budget and proposed plan for events March-May
- Identify the 10 most influential bloggers in the space, make contact (multi-platform connection) and tell them how much you like their blog. This will warm them up for receiving our info in weeks 2-8.
- Website planning, keyword research and copy writing (in that order)
- Recruit a link builder to build 50-100 links a month (make sure they’re decent and not using link farms)
- Contact the editors of top publications to scope out the possibility of contributing/having products reviewed
- Set up LinkedIn and Google Adwords campaigns to support the 3 trial initiatives
New Markets to Explore

Pharmaceutical
Healthcare
Finance (banks, accountants, credit control, insurance)
Utilities
Mail order companies
Travel companies