

Digital Marketing Plan

Introduction

Welcome! This is a tactical digital marketing plan that contains recommended marketing channels for WorthIt Metrics Inc., a fictional SaaS company that provides financial analytics tools used by fund managers to target investors, manage portfolios and enhance investment returns. We decided to create this plan and offer it as a free resource for SaaS companies looking for ways to boost revenue. In it, we hope you'll find strategies you can adopt for your SaaS company.

Your digital marketing needs to be fluid and adapt to changing technology. Likewise, marketing tactics must be flexible to adapt to changing market conditions and customer behaviours. That's why we've designed this plan to be dynamic: it provides a clear course based on WorthIt's online sales and growth objectives, while remaining flexible enough to adapt to changing market conditions.

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WHO IS THIS FOR?

If you're a medium-sized SaaS company with \$1-5 million in revenue looking to kickstart some fresh sales and marketing initiatives (that work), this guide is for you. If you're not quite there, this marketing guide will still be useful but you likely won't have the budget to execute some of the tactics discussed in this plan.

The tactics and tools we offer in this sample plan are based on our agency's work with B2B SaaS companies such as Google's Wildfire, Intuit's QuickBooks and Thomson Reuter's WestlawNext. If your product is consumer focused most of the tactics in this plan will still apply.

The strategies presented in this plan can be executed by your in-house marketing team, consultants or other practitioners in the field. Or, you can take this plan to your agency to see how their current marketing efforts stack up.

WHAT YOU'LL LEARN.

- A deeper understanding of the buyer
- Ideas for how to establish a brand presence
- How to generate traffic, leads and customers

ABOUT THE AUTHORS.

This guide was a collaborative effort from the One Net Marketing team. We brought together analysts, search and display advertising experts, conversion optimizers, SEO's and engineers. Then our copy team tied it all together with a bow, as copywriters do.

One Net Marketing is a digital-grown agency, specializing in helping SaaS, tech and mobile brands acquire new customers and long-term customer love. We do this via the AARRR model, a proven method for acquiring new trials, decreasing churn rates and unlocking higher ARPU (for more details about this, visit our website). Translation: we try to help your company make money - the right way, which is not always the quickest way.

Some of our B2B SaaS clients include Google's Wildfire, Google's DoubleClick, Thomson Reuters, Intuit, RealNetworks, Sprint, Impact Radius, AppLovin, Zirx, eBillity, GetSatisfaction and WealthFront.

WE'VE DIVIDED THIS PLAN INTO FIVE SECTIONS:

- 01 Marketing Goals
- 02 Understanding the Buyer
- 03 Direct Response Advertising
- 04 Inbound Marketing
- 05 Rollout

01 MARKETING GOALS

If a goal without a plan is only a dream, then what's a plan without a goal? Pointless! So, begin by doing research and establishing clear goals for your marketing campaign.

For the sake of our example company, let's say that research determines businesses similar to WorthIt Metrics Inc. have a unique addressable market of \$23B globally. Therefore, begin by targeting the following sales revenue:

SALES GOALS

	2014	2015	2016
All Sales	\$680K	\$2.5M	\$6.3M
Sales from Digital Marketing	\$170k	\$938K	\$3.15M
% Sales from Digital Marketing	25%	37.5%	50%

WorthIt Metrics has an average subscription price of \$15,000 / year and a projected lifetime value of 3 years per customer. This equates to a lifetime value of \$45,000 per customer. We can project our customer acquisition goals for the next three years accordingly:

CUSTOMER ACQUISITION GOALS

	2014	2015	2016
Sales from Digital Marketing	\$170k	\$938K	\$3.15M
Customers	3.8	20.84	70

Now, assuming this is your business, not our fake one, you should determine how much website traffic is required to generate the number of customers listed above. To calculate this, you'll need to understand conversion rates and close rates:

Since WorthIt Metrics does not have any benchmark statistics on conversion rates or close rates, we will apply industry averages (shown right).

Using the industry average for conversion and close rates (5% and 15%, respectively) we can approximate how much traffic we need to send to the site to generate the number of customers as listed in the table above.

To calculate the required traffic to generate a single customer, we simply solve for X:

$$X * \text{Conversion Rate} * \text{Close Rates} = 1 \text{ Customer}$$

$$X = 133.33$$

If the conversion rate and close rate assumptions hold true, we'll need about 133 unique visitors to worthitmetricsinc.com to generate one new paying customer. We can extrapolate this to get our gross traffic targets for the next three years.

UNIQUE TRAFFIC NEEDED

	2014	2015	2016
Customers	5.6	31.27	105
Unique Visitors	744	4,158	13,965
Monthly Unique Visitors	62	347	1,163

What if you're a SaaS company with a free trial or freemium model? You'll be looking for a trial conversion rate as opposed to a close rate.

We'll use the above traffic requirements as our baseline targets.

One Net's marketing team installs and maintains analytics and reporting to measure the performance of all digital marketing campaigns against the sales objectives listed above. Get in touch to learn more: start@onenetmarketing.com

CONVERSION RATE is defined as the number of people who visit the website divided by the number of people who complete a demo request from your homepage. WorthIt Metrics defines a lead as a form completion to schedule a demo request. For B2B software, the average lead conversion rate is ~5%.

CLOSE RATE is the percentage of leads that convert to sales. Most B2B SaaS companies with an organized sales team and a lead nurturing program maintain close rates of ~15%.

02 UNDERSTANDING THE BUYER



All good marketing starts with an understanding of who the buyer is.

While we have a rough idea of what a paying customer looks like for WorthIt Metrics Inc., we haven't yet established their purchasing behaviour, nor do we have specific demographics of decision makers in the target industry (like investor relations, for example). That's why we - and you - need to develop a buyer persona.

The more you understand your prospects, the more targeted and cost effective your marketing and advertising efforts become. The more you understand your customer, the better you can optimize your site for conversions. The sales cycle also becomes more efficient as you send higher qualified prospects into the sales pipeline.

WHAT YOU KNOW NOW.

Start with what you do know about your customer.

In the case of our fictitious company WorthIt Metrics, we've decided that their buyers likely fall into one of the following 3 Investor Relations roles:

1. IR Director 2. IR Manager 3. Analyst / Assistant

While each of the roles above may interact with - and benefit from - WorthIt Metric's software, we need to locate, understand and target the decision makers as well as those who help influence the purchase decision. It is important to note that decision makers may not even work on the investor relations team - the final decision maker could be a CFO or another stakeholder from the corporate finance team.

WHAT YOU NEED TO KNOW.

To effectively target the right prospects (buyers), you will need to understand the decision maker.

Once you establish this information, you're able to develop a clear persona of who buys products like yours, and, more importantly, what factors they evaluate before making a purchase decision.

BUILDING THE BUYER PERSONA.

To create a buyer persona, conduct some initial research using the following exercises:

- Surveys and customer interviews: conduct surveys, interview current customers. If needed, send a survey to relevant people on LinkedIn with a good incentive (such as a \$300 Amazon Gift Card). Survey freemium users who do not convert to paying customers to understand their hesitations and concerns. This helps paint a portrait of the existing customers and will be invaluable for shaping the marketing content for the investor relations community. More on this in the content marketing section.
- Look for companies advertising their stock. Many publicly traded companies are actively advertising their stock. These are the companies that have an immediate need for an investor targeting solution. Profile and contact these companies (buyers) to get a better understanding of their investor targeting needs. For example, ChinaTelecom is promoting their "investor relations" in IR Magazine. chinatelecom-h.com/en/global/home.php.
- Build on what you know: you probably have a rough idea of the type of customer you want to market to. As you begin to traffic your site, study analytics and on-site behaviour to get a better sense of which sites are sending visitors your way (Google, IR blogs, social media, etc.).

Your goal is to build a buyer persona that looks like this:

BUYER PERSONA PROFILE

	PERSONA NAME:
	<input type="radio"/> DECISION MAKER <input type="radio"/> INFLUENCER
	JOB TITLE(S):
	AGE:
	EDUCATION:
	INDUSTRY OR SEGMENT:
	REPORTS TO:
	POSITIONS RESPONSIBLE FOR:
	CAREER YEARS IN THIS ROLE:
	CURRENT COMPANY YEARS IN THIS ROLE:
	PREFERRED SOCIAL MEDIA CHANNEL:
	PREFERRED PUBLICATIONS:
	COMMON PAIN POINTS:
	MAIN HESITATIONS TO TRY / BUY:

Need help developing your buyer personas? One Net can get you started today.

onenetmarketing.com/services

03 INBOUND MARKETING



Inbound marketing is a tactic to position your product to prospects already looking for a solution to a specific pain point.

In a digital context, prospects use search engines, social media and blogs to locate solutions to real-world problems. That's where inbound marketing comes in. Inbound marketing positions your site and content to be found by prospects that are actively seeking a solution to a real-world problem. As luck would have it...you happen to have that solution!

In the case of WorthIt Metrics, the prospect may perform keyword searches on Google for “firm solutions” and “investor relations software”. They use LinkedIn and Twitter to seek referrals from industry peers and trusted friends. They read informative blogs, participate in investor relations forums and subscribe to newsletters related to their industry or job function.

Inbound marketing consists of 4 main channels:

- Search Engine Optimization
- Social Media
- Content Marketing
- Email Marketing

Each channel works together to help prospects find your content and site. Once you define your Buyer's Persona, all that's left is catching their attention and reeling them in. Now, read on to learn how to engage your inbound marketing channels to drive traffic and generate leads for the sales team.

SEARCH ENGINE OPTIMIZATION

Search Engine Optimization (SEO) entails optimizing a website for a specific keyword(s) so it ranks high on search results page on Google, Yahoo, Bing and other major search engines.

SEO is a proven way to increase traffic to your website and one of the most cost-effective online marketing channels. This is particularly true for B2B marketing, as buyers will diligently research different options and tend to evaluate potential vendors from their websites — before taking the next step of scheduling a product demo or calling sales.

But don't be mis-sold. SEO is a complex undertaking that takes months to implement.

That's right, it's not as simple as peppering your site content with keywords or making a few 'simple tweaks' to a website's code. Google's ranking algorithm has over 200 factors that are used to determine how your site is ranked. There is no guarantee that an 'optimized site' will rank on the first page of the search results and you cannot pay to have your site ranked higher than your competition. In short, Google works diligently to preserve the quality of their search results.

For more on the basics of SEO, visit: moz.com/beginners-guide-to-seo

The good news is Google openly published SEO best practice guidelines, which you can follow to give your company a better chance of ranking high on your target keywords.

In summary, SEO is not a quick-traffic strategy. It takes good content, sound SEO practices and time to establish trust with Google. It's a long-term investment. Increasing your website rankings for specific keywords related to your product and creating content that users "like" will generate traffic and leads for years to come.

SEO is split into two main focus areas:

- On-page SEO: relates to the optimization of your sites content and code for target keywords
- Off-page SEO: relates to the optimization of links pointing to your site

Once you have useful content on your site optimized for your targeted keywords, off-page SEO becomes easier as other sites and blogs will link to your useful content. This is why social media is so critical – it allows you to create sharable content and generate links and clicks back to your site.

When optimizing a website, we pay attention to 3 major search engines: Google, Yahoo and Bing. Together, these three engines comprise 96% of the search engine market. Google is by far the industry leader with 67% market share. Because of this, the majority of SEO efforts are focused on Google.

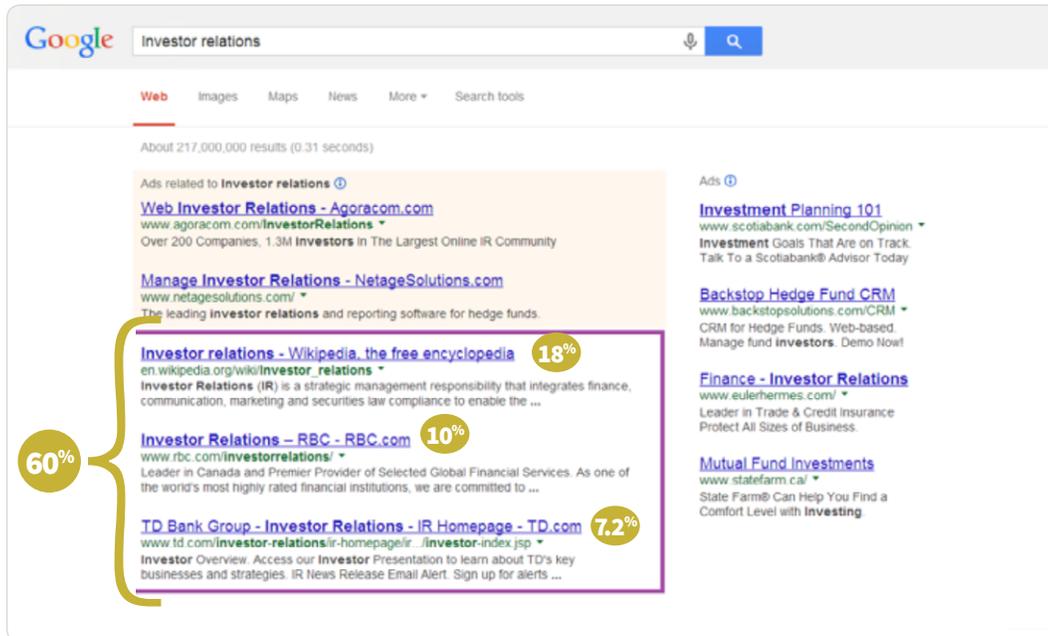
Once a site is optimized for Google it tends to rank well for Bing and Yahoo - as well as second tier search engines such as Ask.com and AOL.com.

IN THE WORLD OF SEO:

Approximately 30% of your ranking is determined by your content (on-page SEO). The remaining 70% is determined by the number and quality of other sites linking to your website (off-page SEO).

All SEO starts with on-page SEO.

SEO KEYWORDS



On-page SEO starts with keyword research.

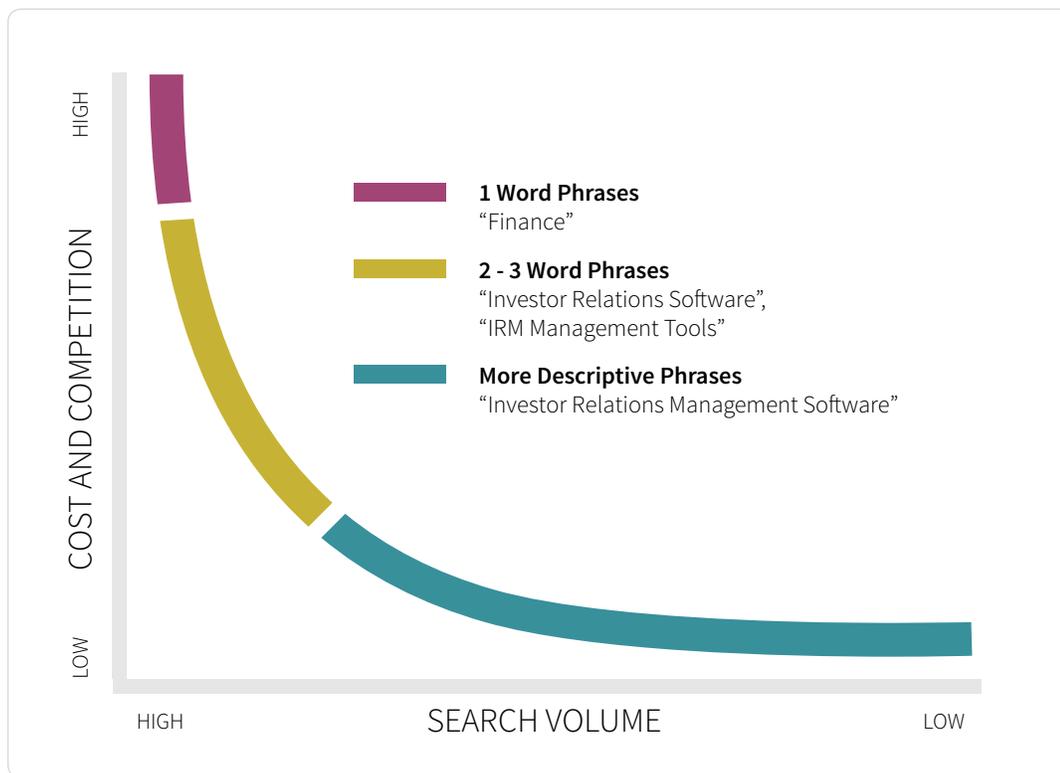
When selecting keywords to target for on-site SEO, ensure the keyword(s) have a substantial number of monthly search volumes. Also make sure that the competition for each keyword is low or moderate, as it's difficult to displace larger established sites from the search results page.

For example, the keyword "Investor relations" has 144,000 searches per year on Google and another 10,440 per year on Bing and Yahoo. While the number of monthly searches (volume) is high, we would not want to optimize the WorthIt Metrics website for this keyword. Sites like Wikipedia, RBC.com and TD.com are nearly impossible to out-rank or displace in a search results page. These sites have hundreds of pages, a long-standing domain history and thousands of other related site links pointing to them.

Consider long-tail keywords.

The keyword "Investor relations" is very broad. Because of this, the chance that the user is actually looking for investor relations software is slim. For all you know, the user is looking for investor relations news or investor relations conferences. The vagueness of this keyword makes it a poor choice to target for purposes of SEO. Instead, focus on long-tail keywords that have relatively good search volume and low to moderate competition.

Long-tail keywords are keywords that are very specific to your product and to a buying action. Typically, long-tail keywords are comprised of 3-4 words. For example: "Investor relations Software Tools" or "Compare Investor relations Databases".



Because long-tail keywords have less competition, they require less content to optimize compared to broad keywords. Long tail keywords are also typically used toward the later stages of the buying cycle and tend to generate higher conversion rates.

The following long-tail keywords could be used for on-page SEO efforts:

SEO KEYWORDS

	Monthly Searches on Google	Monthly Searches Bing / Yahoo	Competition
Investor relations management solutions	280	70	Moderate
Investor relations software	160	5	Low
Investor relations management software	120	5	Low
Investor relations tools	80	2.5	Low
Investor relations management software	40	2.5	Low
TOTAL	680	85	

This is an example of a preliminary keyword list for WorthIt Metrics. We can refine and expand this list over time as we study our analytics and determine which keywords have the highest conversion rates. We will also discover new keywords over time, which can be added to list of SEO keywords.

You may have noticed that branded keywords such as “WorthIt Metrics” and “WorthIt Metrics Inc” have been excluded from the list above. This is because our branded keywords will naturally rank in top spot for search results - as the term WorthIt Metrics is used in the domain name and frequently throughout the site. As such, we don’t need to focus our SEO efforts on branded keywords.

SEO TRAFFIC PROJECTIONS

To project clicks from SEO, we need to know how many impressions we can generate.

An ‘impression’ is a listing on a search results page, which is different than a ‘click’.

In the image on page 8, Wikipedia, RBC.com and TD.com each received one impression from the keyword search “Investor relations”. The additional pages shown in the image above are paid ads and are unrelated to SEO (more about this in the Paid Search Advertising section below).

60% of all clicks on organic search result listings go to the top 3 listings.

Listing number one gets about 18% of the clicks. Listings two, three and four get 10%, 7.2% and 4.8% of the clicks, respectively.

Assuming WorthIt Metrics can rank in the top 4 for the targeted keywords above, here are the monthly traffic projections for SEO:

SEO KEYWORDS

	Searches	CTR	Clicks
Investor relations management SOLUTIONS	350	7.2%	25
investor relations software	165	7.2%	12
Investor relations management SOFTWARE	125	7.2%	9
investor relations tools	82.5	7.2%	6
investor relations management software	42.5	7.2%	3
TOTAL	680	85	55

If we can improve our rank to 1st for these keywords our traffic improves substantially:

SEO KEYWORDS

	Searches	CTR	Clicks
Investor relations management SOLUTIONS	350	18%	63
investor relations software	165	18%	30
Investor relations management SOFTWARE	125	18%	23
investor relations tools	82.5	18%	15
investor relations management software	42.5	18%	8
TOTAL	680		139

SOCIAL MEDIA

In 2013, 39% of B2B companies that generated leads from social media also drove revenue from social media. <http://marketingland.com/social-media-driving-revenue-for-one-third-of-b2c-companies-one-fifth-of-b2b-firms-report-64256>

Social Media is an excellent channel for B2B companies looking to acquire leads and referrals. Social media also helps improve SEO – one of Google’s 200 ranking factors is the number of social shares your site generates.

- 65% of B2B companies participating in social media have generated leads from LinkedIn
- 55% have generated leads from their blog
- 43% have generated leads from Facebook
- 40% have generated leads from Twitter

Social media also helps generate links back to your site, which helps off-page SEO.

Social media sites like LinkedIn and Twitter are used by investor relations professionals to find recommendations and ideas that can help them perform better at their job. Social media aligns perfectly with a marketing strategy that shares industry data (content) to establish trust within the tight-knit investor relations community.

Social media can be leveraged in 2 ways to drive traffic and leads to worthitmetricsinc.com:

- *Direct referrals*: clicks from our social media pages (outposts) to worthitmetricsinc.com
- *Social shares*: the distribution (sharing) of content from our site

Direct referrals will come from creating social media pages (outposts) on specified social media sites. Social shares will come from creating and publishing useful industry data (content) to the blog.

ADOPTING SOCIAL MEDIA

Effective social media cannot be outsourced.

Social media strategy and participation must be adopted internally to come across as genuine to prospective customers. If you truly want to excel at driving awareness and prospects via social media, you must embrace social media and integrate across all positions internally. Being social is now part of digital corporate culture.

When your employees and founders attend a trade show, you probably expect them to develop and foster relationships, right? Social media is no different – it's a place where everyone in the company can help extend the networking power of the company and brand.

Get everyone on board.

To be successful, ensure that everyone in the organization understands what it means to 'be social'; and, more importantly, how to navigate the social media landscape with unified goals and business objectives. Social media isn't just another communication tool to broadcast your message to the world. And it's definitely not 'free advertising'. It represents a big shift in how companies and consumers interact with each other. Understanding and working within this approach will determine whether or not social media produces a substantial ROI for your time.

The first step is building what we call a "social media culture". Let's go over some specifics about how to create a social media culture.

ESTABLISH THAT ONE BIG THING

What does your business stand for?

This might be the most important question to ask yourself. It's the core principle that will influence all social media messaging. It's the idea or principle behind your business that your customers will come to recognize, like, and recommend you for.

THE ONE BIG THING IS THE PRINCIPLE THAT INFORMS YOUR BUSINESS

It's not what you do, or the products you offer. It's who you are that sells. Like it or not, this is the realm of branding and it exists because it works. Having a consistent "theme" or social media identity can really help prospective customers find you and grow attached to you. If you apply this One Big Thing theory to your social media strategy, you'll avoid becoming 'just another company pushing one-way content on Twitter'. You won't be another newsfeed. After all, people don't buy from newsfeeds.

Examples of B2B software companies that use the "one big thing" methodology include:

MailChimp: Human, accessible communication

Moz: whitehat SEO that elevates the profession of SEO from a dark secret to open and transparent industry

Slack: selling organizational transformation (selling the innovation as opposed to the product)

HERE'S AN EXAMPLE OF THE ONE BIG THING FROM A DIFFERENT INDUSTRY:

A photographer wanted to create an online photography business.

This is an extremely crowded marketplace. Simply tweeting "10 photography tips" or "Top 2012 cameras to buy this year" wouldn't work - too much like everything everyone else was doing online. He needed to set his blog and social media accounts apart from the competition. His solution was to position his business around "photography as vision" and subsequently established the slogan—"Gear is good, but vision is better." The idea being, even the best camera gear in the world can't help you if you don't know about the importance of picking significant themes, aesthetic principles, and other artistic ideas. This is his "One Big Thing".

The brilliance of this social media positioning is that it speaks right to a major pain point experienced by his audience.

Most amateur photographers want to take great pictures, but they don't have the money to buy expensive gear. So, the idea that you can take great pictures with standard gear, and that being an artist is more important than having the latest digital camera, is something that resonated with his audience.

"Gear is good, but vision is better."

This simple premise now forms the bedrock of all of his social media marketing: it influences the type of photographs he showcases, the articles he writes, and the type of content he shares on social media. So "Ten most high-tech cameras of 2012" is definitely not something he tweets, but "Ten iconic and timeless photograph techniques that will work on any camera" is shared.

With this simple statement, he has earned a name for himself within his niche and earns six figures a year from selling photography e-books. The books, of course, are related to that idea of "gear is good, but vision is better."

The benefit of having "One Big Thing" is that it guides and influences your message across many different channels and online places. This allows you to maintain control over the brand while getting traffic and visitors from varied online sources.

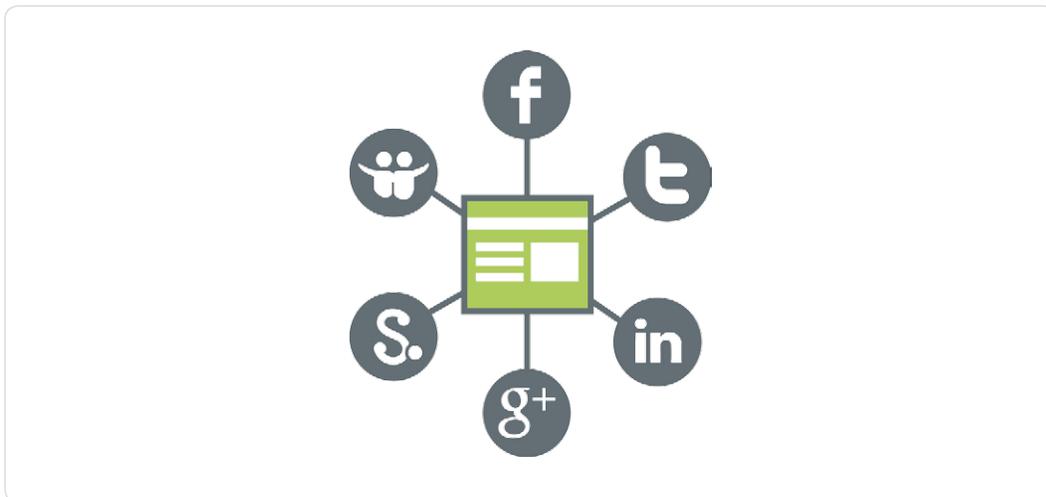
THERE'S NO "I" TEAM

Your business and marketing teams should work together to brainstorm and agree on your One Big Thing. Or, One Net can help you find your One Big Thing. Get in touch today to find out how: start@onenetmarketing.com

HUB AND OUTPOST MODEL

There's little to no value in tweeting, making updates on Facebook, or publishing blog posts that are misaligned and random; that's just noise. That's why it is essential that every social media post is on-brand with a clear and unified voice. That's where the hub & outpost model comes in handy.

The hub and outposts model is a powerful way to organize social media activities and communicate content related to your One Big Thing (from now on let's call it OBT for short).



Your hub is your home base, typically your blog. Your outposts are your social media pages. Various content sharing and social media activities are generated via your outposts with the goal of driving prospects back to the hub to “read more”.

Establish a blog on your website to serve as your hub. Through the WorthIt Metrics blog, we'll publish useful content for the investor relations community (*see content marketing section*), generate trust with prospects and drive leads to our sales team. We then use our social media ‘outposts’ to reach people through multiple online sources and drive them to our content - and our business. See where we're going with this? Social media isn't about making noise, it's about engaging your audience and driving interest (leads).

We've published a blog post. Now what?

Once you have published content on your blog, it is essential to spread that content across different social media sites; this tactic increases your social reach and also increases the number of places potential customers can find your brand online.

After you have published a post to your blog, wait a few days to make sure that search engines index your blog. Then, activate your outposts. Think about who your target customers are and how they behave (refer back to your Buyer Persona) when deciding which social media channels to employ. For example, at WorthIt Metrics, our target customer is likely to spend time on LinkedIn, but probably not Twitter or Pinterest.

For WorthIt Metrics, we'd implement outposts on the following social media sites:



Twitter



LinkedIn



Facebook



Google+



Scribd



Slideshare

HOW TO LEVERAGE YOUR SOCIAL MEDIA OUTPOSTS

As we summarized above, social media creates awareness for your brand by sharing useful industry data (content) from your blog and linking out via social media outposts.

What kind of posts get the most attention?

Taking a strategic approach to planning a lineup of social media and blog topics will ensure that your efforts yield the most attention and payoff. More on how to do this in a moment.

For WorthIt Metrics, Inc., we'd focus on the following three topics designed to interest decision makers in our industry:

Trends. Decision-makers love trends. They are big-picture thinkers and reading about trends make them feel like they are keeping up with relevant changes. Trends are even more powerful when you can frame them within a specific industry. For example, "How to plan an investor roadshow that actually delivers results". Helpful content like this builds awareness, credibility, and brand-recognition.

Case studies. People are hard-wired to learn by example and so case studies can really resonate with our target market.

News stories related to Investor relations. People love news – especially financial news. When there's breaking news from the Investor relations industry, we'll share it across social media.

SOCIAL MEDIA LISTENING

Equally important to social media posting - perhaps even more so - is listening and engaging.

Listening to, responding to, and measuring social media will help you identify prospects that are looking for solutions. This is how you'll choose your own social media topics to generate traffic and leads.

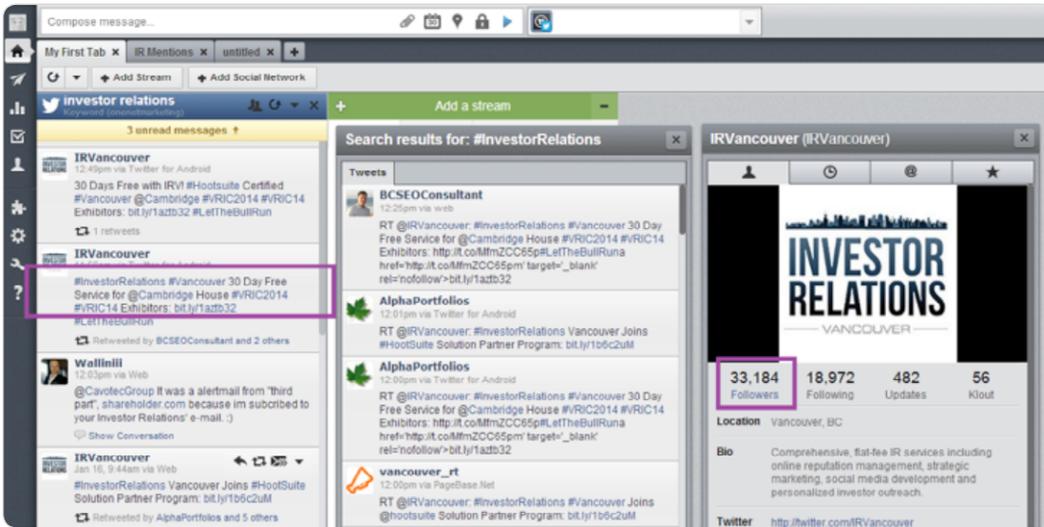
What's the #word on the #street?

Listening to, responding to, and measuring social media will help you identify prospects that are looking for solutions. This is how you'll choose your own social media topics to generate traffic and leads.

What's the #word on the #street?

Identify the keywords and #hashtags that professionals fitting your Buyer Persona are using across different social media sites.

An easy way to do this is via social media monitoring. Pick 10 keywords and #hashtags related to your industry and plug them into a social media monitoring tool such as Hootsuite. You'll then be able to locate conversations related to, say, "investor relations" - and follow active investor relations firms and professionals. You'll emerge with a portrait of topics, Facebook 'likes', words and even preferred platforms (which type of social media your users favor) that will help you to plan your social media campaigns.



In the example above, Investor Relations Vancouver has over 33,000 followers on Twitter. If we at WorthIt Metrics follow Investor Relations Vancouver and they follow us back, we gain access to 33,184 other followers to potentially see our Tweets and visit our site.

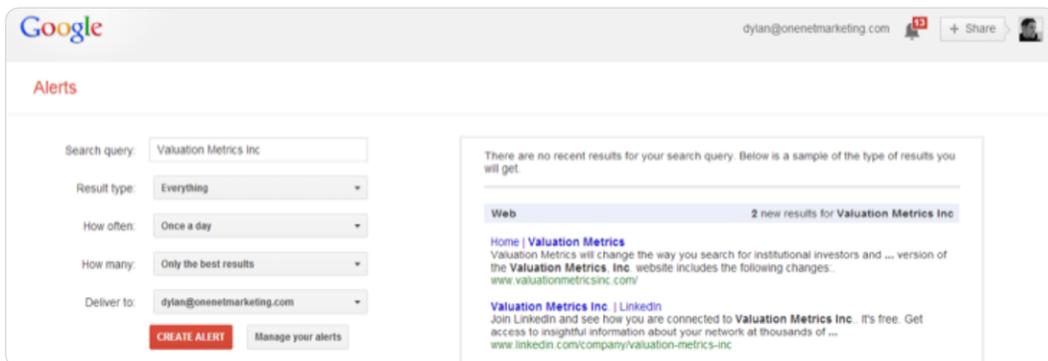
You can repeat this listening process to locate similar companies and professionals in your industry and gain a substantial list of followers to interact with. It's a great way to become a part of their community. You can locate followers on Facebook, LinkedIn, Google+ and Scribd in a similar fashion.

Research Tools: Social media monitoring tools like Hootsuite or TweetDeck .

Google alerts: Get notified when Worthwhile Metrics is mentioned in a blog, press release or news article: google.com/alerts

Search.twitter.com: Twitter's internal search engine locates conversations related to WorthIt Metrics and investor relations #hashtags

Social alerts: you can use socialmention.com to get notified via email and RSS when WorthIt Metrics is mentioned in social media. Socialmention.com reports activity from all major social media sites.



Use a spreadsheet to track weekly mentions of your company or product in social media conversations. Think big; use high-end competitors as benchmarks (for WorthIt Metrics, we'll pick Thomson Reuters and iPreo) and pay attention to how many times your company is mentioned versus the competition.

If your competitor's name comes up more often than your own, you need to become more active and publish more useful content to your social media outposts.

CONTENT MARKETING

At WorthIt Metrics, we know that the investor relations community is small, which means that networking and referrals play a substantial role in vendor review and selection. But WorthIt Metrics is the new kid on the block, offering a new technology without an established brand to back it up. Herein lies the challenge.

WorthIt Metrics needs to reach a small tribe: the connected network of investor relations professionals who either influence or make technology purchase decisions. But how do we access this tight community as an unknown - and inherently an untrusted - brand?

WORTHIT METRICS: ACCESSING THE IR COMMUNITY

To reach decision makers and influencers (our Buyer Personas) within a tight knit investor relations community, we can't bang down the gate with advertising alone. We must build organic awareness from within, while simultaneously informing the market from the outside.

Building awareness from within is achieved by creating useful content and tools that help investor relations professionals streamline their processes and achieve better results in their day-to-day jobs. Free webinars, blog posts, and white papers are excellent ways for new providers to establish trust in small, established markets (communities).

We'd rather see 20 VPs of investor relations attend a webinar or reading a content piece on our blog than get 20,000 impressions on an ad in an industry magazine. Why? Because if they're reading our content, we're establishing their trust...and hopefully, piquing interest for our product.

Our goal should be to relentlessly focus on 100 dream clients, find out the names and titles of the people we need to reach in those IR departments, and then build research, tools, content, and anything else we think will interest them.

REMEMBER THAT NOBODY LIKES YOU.

That was a joke, but there's a little bit of truth to it. It's always good to keep in mind that vendors are the unwelcome party guests of any community, whether they exist online or off.

Vendors are always selling. They are always talking about their product and their features. They do this through purchased access – intrusive advertisements, cold calls and other unsolicited tactics. Avoid becoming an intrusive vendor by conveying a genuine interest in your target audience (beyond just what they can do for you) and offering content that will benefit them.

Look at the example on the left for ideas.

MARKET CONTENT VS. PRODUCT CONTENT

So, in our example case, the goal is to build rapport and influence with a small group of investor relations professionals. There are two ways to do this:

Push product content: Product content tells the world about your product features or your intent to solve a very specific problem. "Our product does XYZ. Our features can help you target new investors." Vendors tend to lead with product content. They want to gain access to communities of their customers and talk about their product. This makes them outsiders. Anything they say is biased since they are only trying to sell their product, not serve the broader community.

Push market content: Market content is about the broader problems that the community and industry are facing, therefore it has much broader appeal. Where product content is all about you, market content is about your customers. Customers tend to resist product content – especially when it's introduced early on in the sales process. The exception would be prospects who are absolutely starving for a solution - but this is a rare scenario.

Consider this situation: WorthIt Metric's sales team sends investor relations professionals a community-serving research paper such as *"10 top analysts share how they evaluate the quality of sell-side research reports,"* or WorthIt sends an unsolicited email asking them to attend a product demo. Just imagine you're that investor relations professional or that prospect – which would you prefer?

It's preferable to sell with market content because it's easier to get prospects to make a small commitment (read a blog post, subscribe to a newsletter, download a free white paper) than get them to commit to a sales demo or review a terms sheet. Further, this content is sharable which will help a company like WorthIt Metrics gain entry into the tight-knit investor relations community. You'll attract more buyers and gain access to an audience if you are offering to teach something of value, rather than simply sell them your product. Push too hard and you'll break rapport. If you aim to educate, you'll build trust, which is critical for gaining access into an established market as a new brand.

CHECK YOUR BIAS AND DON'T KID YOURSELF

It's impossible to mask product content or conceal self-promotion. For example, many SaaS companies mistakenly publish "buyer's guides" to help their prospects evaluate their solution against other competing products. As a vendor, how can you possibly create an un-biased buyer's guide? Are you really going to list all the features that your competitor offers that your product doesn't include? Doubtful. Prospects will see through your "product content" to what it really is: a product pitch. This is exactly what you want to avoid, so find other ways to promote your product besides the 'humble brag' approach. There's a time and a place to toot your own horn, of course - just be transparent about it.

CONTENT FOR YOUR COMMUNITY

Great! So, you're convinced, and now you want to do content marketing. Content marketing requires... content production.

The content that you produce must be designed to educate and help your community – it's about creating marketing content, right? This will help to establish trust and will bring people back to the site where you can convert them into sales leads.

Here's how to leverage content to drive awareness, inspire trust and indirectly build interest in your product:

Build content assets for watering holes: once the surveys and audience research show us what information sources and resources your buyers prefer, create market-focused assets (content) and give it away for free to the community (for WorthIt Metrics, that's the investor relations community). This is the type of content that is shared willingly across social media.

Piggyback on credibility: partner with authors or well-known consultants and create one high-value piece of content (a webinar, a study, a research guide) that your sales team can use to soft-sell new prospects. For example, "How 10 top analysts evaluate the quality of sell-side research reports." or "Coffee talk with Mark Zuckerberg" or "Oprah's Favourite App (hint: it's ours)!". Those last two were exaggerations, but you get the picture.

Get a write-up published on blogs: write insightful content and get other blogs to publish it. For example, a guest post titled "Lessons from 20 years in IR" published to irwebreport.com. This will generate more brand awareness, trust and back-links to our site, and it's win-win - the blogger gets a free post to publish.

Duplicate success: If the above strategy worked well the first time, spin out similar content for other high-traffic blogs (such as the WSJ IR blog).

Build tools beyond product content: If a bicycle retailer gives away free branded tire pumps at a local race, where do you think those cyclists are going to go the next time they're inflating a tire and realize they need a tune-up? Likewise, if investor relations professionals spend a lot of time formatting investor reports or generating investor relations presentations, designing some custom Excel and PowerPoint templates and giving them away for free is an excellent tactic. When you help your prospects to solve daily challenges that in some way connect to your product, you stand a much better chance of popping into their mind when it comes time to make a purchasing decision.

HOW TO CREATE GREAT CONTENT

Content may be produced in-house or contracted to freelance writers with expertise in your industry. If you're unsure of what your particular content needs are, One Net Marketing can help! We're great at identifying the correct type of content to publish based on web analytics, social media monitoring, market research and, most importantly, buyer personas. Interested? Just email start@onenetmarketing.com

EMAIL MARKETING

Email is the backbone of any solid inbound marketing plan and is one of the most effective digital marketing channels for B2B companies. Email in the form of auto-responders and newsletters are an important parts of any solid lead generation strategy.

Once you have those precious email addresses, you're talking directly to your clients and prospects, delivering them strategic messaging to improve their experience with your product (for clients) or entice them to give you a try (for prospects). Unlike other forms of marketing where you're putting a broad message on blast and basically hoping it falls into the right hands, email marketing delivers your words right into your customer's lap – sometimes literally, if they're on a laptop. The point of this paragraph? Email is the holy grail of inbound marketing if you do it right.

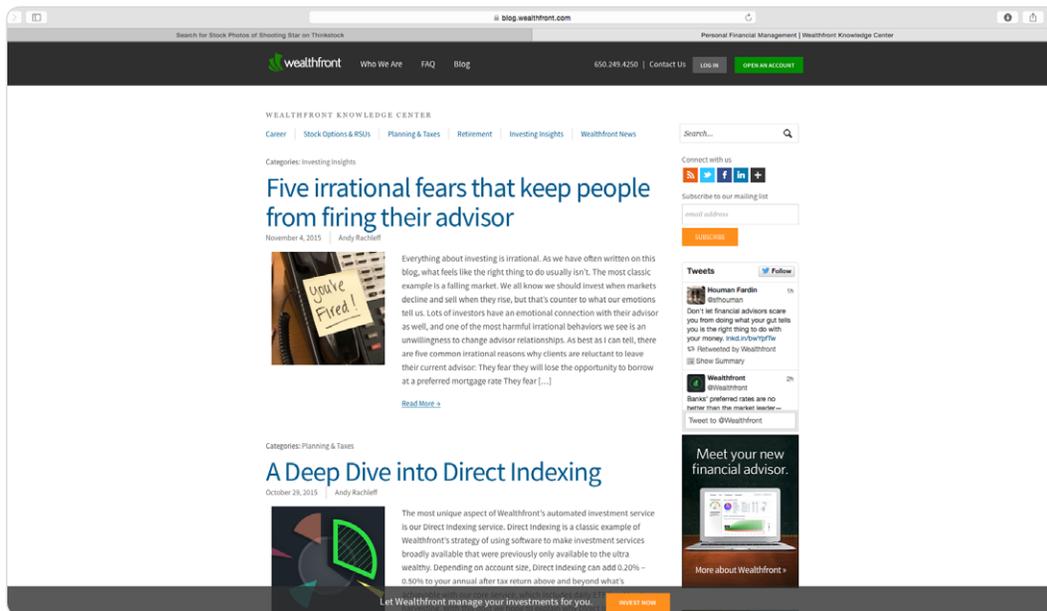
Like content marketing, email needs a careful strategy and a purpose attached to a larger goal.

Where to start.

Do you have your list?

You can't email anyone until you first build a list. So wrangle together all your email addresses from clients, leads, tradeshow guest books, contests and/or any other legitimate sources (not spam ones! Nobody likes that).

First, add a newsletter subscription to your blog. This will allow prospects to subscribe to your email list. Below is a mock-up showing how a newsletter signup can be integrated with your blog.



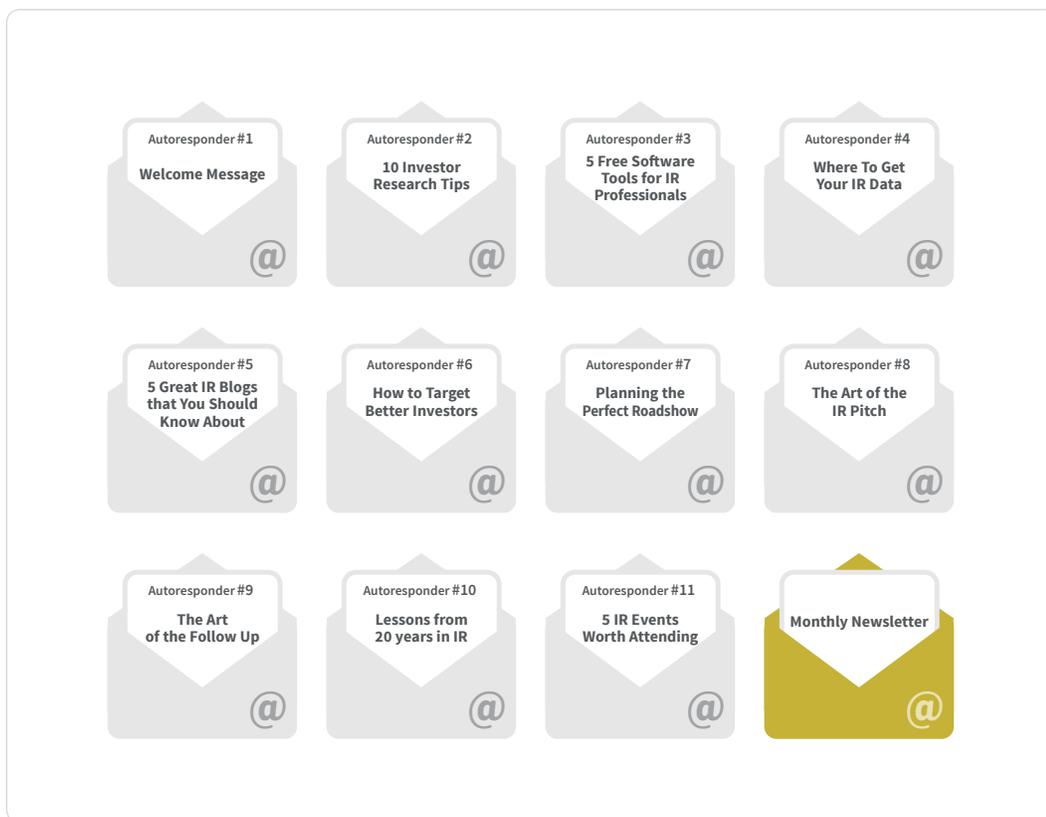
You can also capture newsletter subscribers from your Facebook page.

Once subscribed, you can send your prospects a series of auto-responder emails. Auto-responders are essentially set on a time delay. When a prospect subscribes to your email list from the blog, ensure

they're placed into an auto-responder sequence. You can use a service such as MailChimp to set up and deploy these auto-responder emails. To maintain top of mind, set the time intervals to 4-5 days between each auto-responder.

The goal is to establish trust by sending useful information to prospects. Auto-responders are not hard-sell unsolicited emails. Each email should be carefully crafted to educate and inform the subscriber about the great content that you've produced. Again, market content...NOT product content.

Here is what a potential auto-responder series could look like:

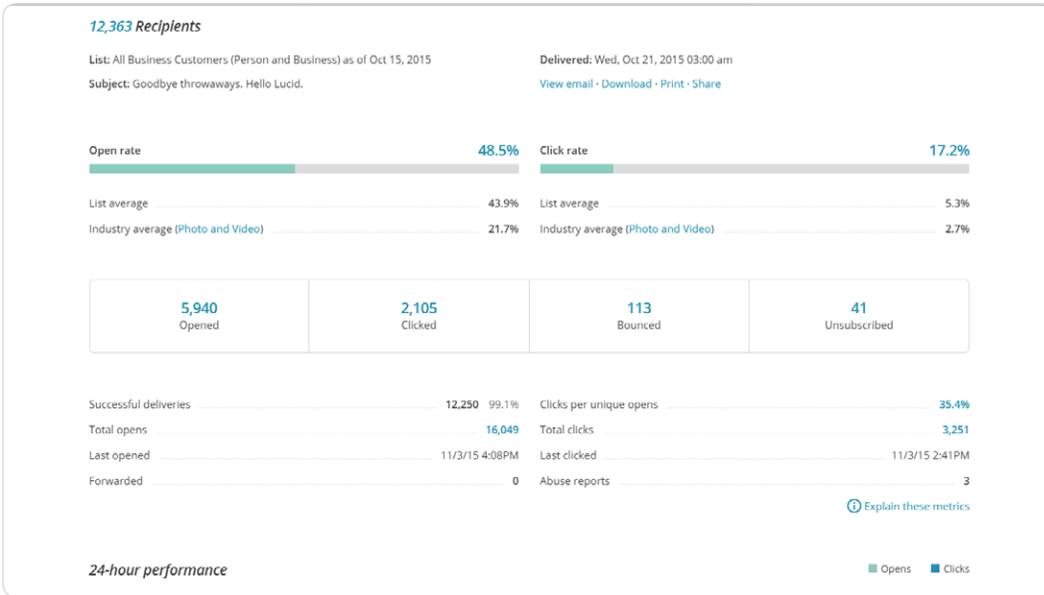


At the end of the auto-responder series, send the subscriber regular monthly newsletters (and cease the autoresponders). The newsletter should contain additional useful information for investor relations professionals, as well as company news and announcements.

For WorthIt Metrics, we'd take it one step further, creating a separate auto-responder sequence and newsletter for investment fund managers.

Soft sells can be injected into each auto-responder email. "Sign up for a free webinar" is an example of a soft sell that can be embedded into an auto-responder; however, the sale should never be the focal point of the email. Remember, product content will degrade rapport. If you do a good job establishing trust with the prospect, you won't need to use hard sell tactics. Prospects will take the next action to explore the WorthIt Metrics product in more detail.

Through MailChimp, you can track statistics related to each auto-responder such as open rates, click through rates and conversion rates – the number of people who requested a demo after receiving an auto-responder. This is an easy way to assess which topics were most popular, which send-times yielded the most ‘read’ rates, etc.



04 DIRECT RESPONSE ADVERTISING

DIRECT RESPONSE ADVERTISING

The previous section covered digital marketing initiatives under the category of inbound marketing, which is the act of positioning your website/product to prospects who are actively looking for a solution to real-world problems. Direct response advertising complements inbound marketing by pushing targeted messages (ads) to prospects as they engage with online content.

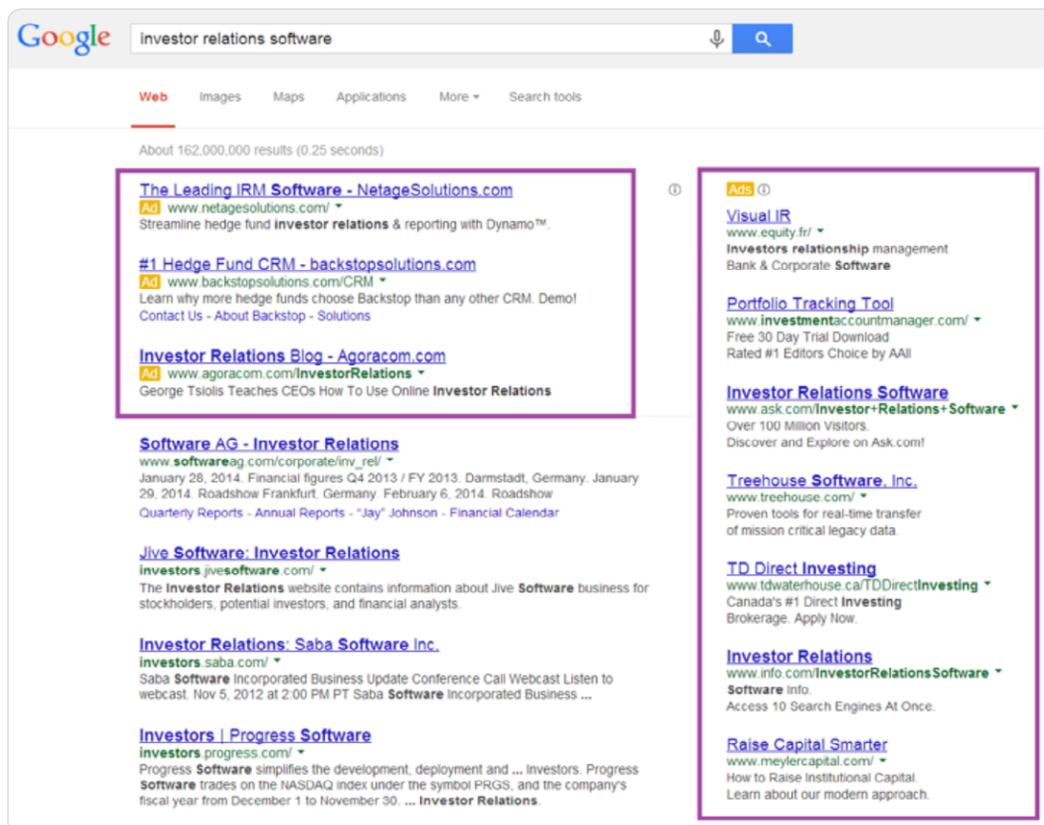
In a digital context, direct response marketing channels include:

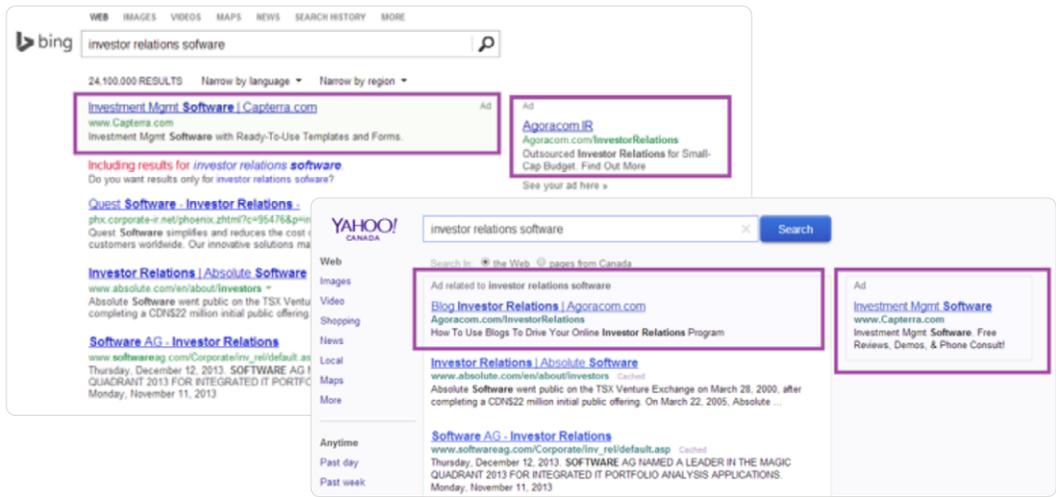
- Paid search advertising
- Display advertising
- Affiliate marketing

You may choose to engage with any or all of these direct response channels.

PAID SEARCH ADVERTISING

Paid search advertising is the placement of text ads on search engines such as Google, Bing and Yahoo. com. This is an extremely effective advertising channel because you can ascertain which keywords trigger your ads, enabling you to capture prospects that are in the later stages of the buying cycle.





For example, at WorthIt Metrics, we could set our ads to trigger on searches for keywords like “Investor Relations Database Options” or “Investor Targeting Software”. Text ads placed on Google, Bing and Yahoo.com are the most effective way to immediately drive traffic to a website and generate leads.

All major search engines run their ads using a real-time auction system. As an advertiser, you specify keywords that will make your ads show up when a user conducts a search. You then set a maximum bid called a CPC for each keyword.

When a prospect performs a keyword search, all advertisers bidding on the keyword enter into a real-time auction. The advertiser who has the most relevant ad and the highest CPC and quality score will win the auction and their text ad will be shown in the top ad spot. The second most relevant ad is shown in the second spot and so on. Similar to SEO, you’ll want to select long-tail keywords that have high volume and relatively low competition. If you haven’t read the SEO section, go and do that now. This will allow your ads to be shown more frequently and will reduce your CPC. Long tail keywords also increase conversion rates – especially when you target keywords that would be used in the later stages of the purchasing cycle.

For example, a prospect might start researching investor relations software using the keyword “Investor Relations”. Over time the user narrows down their requirements and starts searching for keywords such as “Investor Relations Databases”, “Investor Relations CRM Tools” or “Compare Investor Relations Software”. These keywords would be considered ‘long tail’ and indicate that the prospect is towards the later stages of the buying cycle. These are the keywords that you should bid on with your paid search advertising campaigns.

The following long tail keywords could be used to start WorthIt's paid search marketing campaigns on Google:

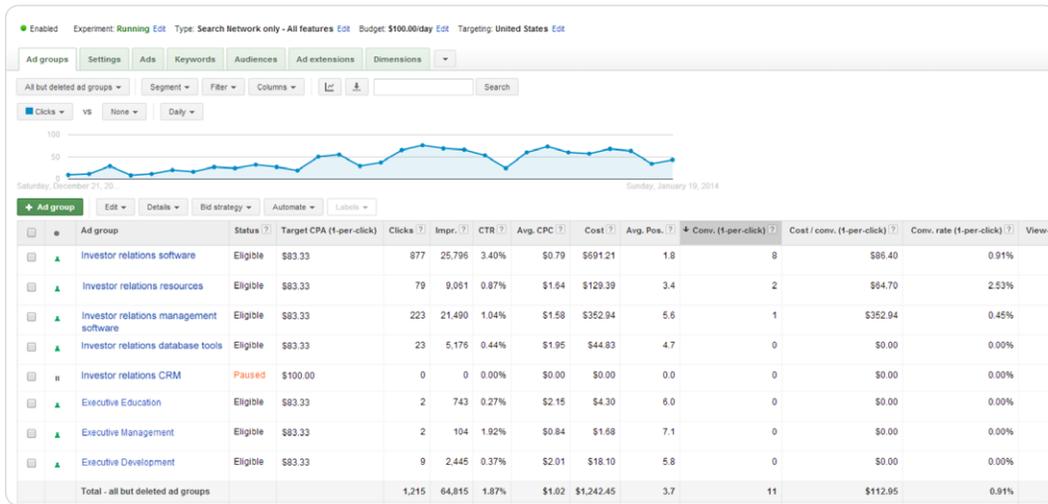
KEYWORDS

	Monthly Searches	Average CPC	Est. Cost / Month
Investor relations management solutions	280	\$2.82	\$19.74
Investor relations best practices	160	\$2.82	\$11.28
Investor relations services	120	\$2.82	\$8.46
Investor relations software	80	\$4.79	\$9.58
Irm software	80	\$2.82	\$5.64
Small cap investor relations	40	\$2.55	\$2.55
Investor relations service	40	\$1.12	\$1.12
Irm services	40	\$2.82	\$2.82
Investor relations tools	40	\$2.82	\$2.82
Investor relations management software	40	\$2.82	\$2.82
Investor relationship management	40	\$2.82	\$2.82
Investor relations management	40	\$2.82	\$2.82
Investor relations database	40	\$2.82	\$2.82
Investor relationship management software	40	\$2.82	\$2.82
Investor relations crm	40	\$2.82	\$2.82
Investor relation services	40	\$2.82	\$2.82
Investor relations strategy	40	\$2.82	\$2.82
Investor relations program	40	\$2.82	\$2.82
Investor relations solutions	40	\$2.82	\$2.82
Investor targeting	40	\$2.82	\$2.82
Investor relations blog	40	\$2.82	\$2.82
Investor relations management service	40	\$2.82	\$2.82
Investor relations plan	40	\$2.82	\$2.82
Investor relations management tools	40	\$2.82	\$2.82
Investor relations management blog	40	\$2.82	\$2.82
Investor relations management plan	40	\$2.82	\$2.82
Investor relations management program	40	\$2.82	\$2.82
Totals	1,600		\$114.77

Keywords can be added and refined over time as you measure conversion rates and discover new keywords that users are searching for.

Once you establish which keywords convert the best on Google, port your paid search campaigns over to Bing / Yahoo to get additional clicks.

Google Analytics can (and should) be used to measure conversion rates and ROI for the keywords that you bid on.



At One Net, we are Google Partners, which means we have the most up to date knowledge and expertise to make your next Google AdWords™ campaign a huge success. Learn more at onenetinc.com

PAID SEARCH TRAFFIC PROJECTIONS

To project clicks from paid search advertising you’ll need to know how many impressions you can generate. An impression is an ad listing on a search results page.

Once you establish your potential impressions for each keyword, it’s time to project clicks. On average, a listing on a search results page will get clicked on ~2.5% of the time. Therefore, use 2.5% as your anticipated click-through rate (CTR) for your paid search ads.

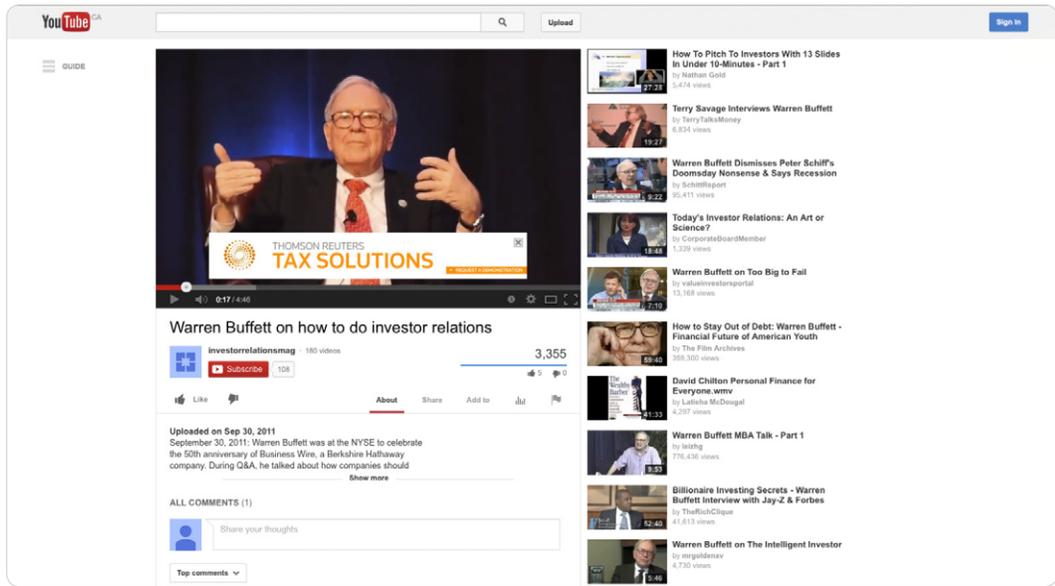
Assuming WorthIt Metrics has the necessary budget to pay the CPCs for the long-tail keywords that we want to bid on, here’s the monthly traffic we can likely generate from paid search ads:

TRAFFIC PROJECTIONS

	Total Impressions	CTR	Clicks
Google	10,844	2.5%	271
Bing / Yahoo	2,711	2.5%	68
Total	13,555	-	351

DISPLAY ADVERTISING

Display advertising is the process of creating and placing banner and video ads on websites and blogs. Display advertising is an effective channel for creating brand awareness and driving clicks to your website..



Similar to the Thomson Reuters ad below, you can create compelling banner ads and place them into website, blogs and videos related to your market.



REMARKETING

Have you ever visited, say, a discount vacation booking website, and later started noticing ads for that very site on other (sometimes totally unrelated) sites you visited? It's not your mind playing tricks on you, or the Internet reading your mind - it's remarketing! Remarketing is a display advertising technology that allows an advertiser to cookie users and serve ads to prospects that have already been to their site.

In the example above, the Thomson Reuters advert is displaying because we visited thomsonreuters.com prior to visiting irwebreport.com. Had we not visited thomsonreuters.com, we would have seen a completely different ad.

Remarketing is a powerful targeting capability that is unique to display advertising. It allows you to:

- Improve response rates by as much as 600% over traditional banner ad targeting
- Target prospects that have already shown an interest in your product
- Increase brand recall
- Accelerate the purchase cycle
- Offer incentives for freemium customers to convert to paying subscribers

Banner ads are purchased through ad networks such as Google AdWords, YouTube and DoubleClick. Similar to paid search ads, banner ads are sold by ad networks on a cost-per-click (CPC) basis. Click costs for banner ads are roughly 1/3 the cost of search ads.

One Net Marketing is a digital agency with extensive experience running remarketing campaigns. You can learn more about the mechanics and benefits of remarketing here: onenetmarketing.com/blog/adwords-remarketing-our-free-starter-guide-2

AD PLACEMENTS

The ad networks mentioned above give you access to the following sites to place your banner ads:

KEYWORDS

	Available Impressions	CPC	Clicks	Estimated Monthly Cost
forbes.com	1,821,429	\$1.75	1,821	\$3,230
bloomberg.com	535,714	\$7.5	536	\$4,071
marketwatch.com	535,714	\$7.5	536	\$4,071
thestreet.com	535,714	\$1.75	536	\$950
nasdaq.com	321,429	\$1.25	321	\$407
barchart.com	139,429	\$1.25	139	\$176
finviz.com	32,143	\$2.25	321	\$732
247wallst.com	32,143	\$1.25	321	\$407
benzinga.com	18,214	\$1.75	182	\$323
financialexpress.com	9,643	\$1.25	69	\$122
streetinsider.com	9,643	\$1.75	69	\$171
wallstreetoasis.com	32,143	\$1.75	321	\$570
investors.com	5,370	\$0.50	54	\$27
earningswhispers.com	9,643	\$1.75	96	\$171
earningswhispers.com	2,036	\$4.00	20	\$82
nasdaqomxnordic.com	139	\$4.00	1	\$6
Total	4,040,402	-	-	\$15,516

Like your paid search advertising, establish daily and monthly budgets, as well as a CPC cap for display ads. You may also select which site(s) you want your ads to appear on. You don't need to purchase all available inventory (impressions).

For display, try by testing a small amount of inventory, then scale your ad-spend upwards if the traffic converts profitably.

DISPLAY ADVERTISING TRAFFIC PROJECTIONS

To estimate traffic from your display ad campaigns, you need to estimate a click-through rate (CTR). The financial service industry average CTR for a banner ad ranged from 0.1% – 1.0%.

Assuming the budget is available to advertise on the sites listed below, at WorthIt Metrics, we'd project the following monthly clicks from our display ad campaigns:

KEYWORDS

	Available Impressions	CPC	Clicks	Estimated Monthly Cost
forbes.com	1,821,429	\$1.75	1,821	\$3,230
bloomberg.com	535,714	\$7.5	536	\$4,071
marketwatch.com	535,714	\$7.5	536	\$4,071
thestreet.com	535,714	\$1.75	536	\$950
nasdaq.com	321,429	\$1.25	321	\$407
barchart.com	139,429	\$1.25	139	\$176
finviz.com	32,143	\$2.25	321	\$732
247wallst.com	32,143	\$1.25	321	\$407
benzinga.com	18,214	\$1.75	182	\$323
financialexpress.com	9,643	\$1.25	69	\$122
streetinsider.com	9,643	\$1.75	69	\$171
wallstreetoasis.com	32,143	\$1.75	321	\$570
investors.com	5,370	\$0.50	54	\$27
earningswhispers.com	9,643	\$1.75	96	\$171
earningswhispers.com	2,036	\$4.00	20	\$82
nasdaqomxnordic.com	139	\$4.00	1	\$6
Total	4,040,402	-	-	\$15,516

AFFILIATE MARKETING

Also known as a re-sell program, affiliate marketing allows third party companies to refer business to your site and receive a referral fee for doing so. Typically referral fees are between 5% and 15% of your subscription price. In the case of WorthIt Metrics, our subscription price is \$15,000/year. So, we might consider paying affiliates \$700 (5%) for each paying customers referred.

For example, we'll look at the Investor Relations industry again. Currently, there is a growing trend to outsource IR functions to consultants and agencies. These third party service providers are actively engaged with investors and are looking for better tools to help improve performance for their clients.

Re-selling WorthIt Metrics subscriptions as an affiliate would provide a welcome incremental revenue stream to these service providers. For example, this Vancouver-based investor relations firm, investorrelationsvancouver.com, could easily promote the WorthIt Metrics software to its client base and earn a percentage of subscription revenue generated.

If you're a SaaS company with a product to sell, it's actually quite simple to set up an affiliate program and track referrals. You can recruit and manage affiliates using a low-cost affiliate software solution like HasOffers.com.

You can also build out a section of your site to explain the affiliate program to potential affiliate partners.

For WorthIt, we've identified the following consultants and agencies that might be interested in re-selling our software via an affiliate program:

POTENTIAL AFFILIATES

Website	Available Impressions	CPC
URL	Category	\$1.75
Investor Relations Vancouver	investorrelationsvancouver.com	Outsourced IR
CHF Investor Relations	chfir.com	Outsourced IR
IR Services Inc	irservicesinc.com	Outsourced IR
Steel Rose Communications	steelrosecommunications.com	IR Communications Agency
CHF Investor Relations	chfir.com	Outsourced IR
Renmark Financial	renmarkfinancial.com	IR Communications Agency
247wallst.com	32,143	\$1.25
benzinga.com	18,214	\$1.75

The companies listed above should be recruited first. The list will be expanded as we discover more consultants and agencies providing outsourced IR services.

05 ROLLOUT



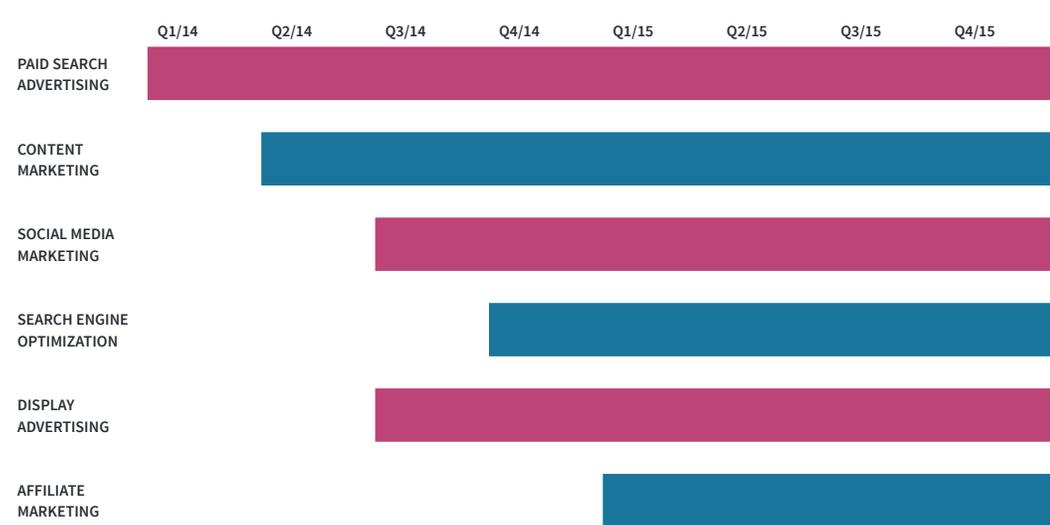
As summarized previously, you've got lots of options when it comes to digital marketing channels to reach your traffic goals.

You can't possibly tackle all marketing channels at once. Even if you could, it would be ineffective and a waste of money to do so. Digital marketing campaigns should be rolled out sequentially, because some marketing channels influence how we approach others. For example, paid search advertising allows you to generate immediate traffic and refine your keyword lists based on what keywords are driving conversions. You can then use these proven keywords in your SEO efforts. Similarly, proven text ads used in paid search can be used to develop ad creative for display (banner) campaigns. And if one keyword flops...well, at least you didn't roll it out across multiple channels. A penny saved is a penny earned!

So, start with paid search before you implement display and SEO.

The following roll out plan shows the sequencing of WorthIt's digital marketing channels for the next 12 months. We have also included anticipated costs for each channel including media costs and agency fees.

MARKETING CHANNEL ROLL OUT:



TRAFFIC & SALES PROJECTIONS BY CHANNEL

KEYWORDS

TRAFFIC	Q1/14	Q2/14	Q3/14	Q4/14	Q1/15	Q2/15	Q3/15	Q4/15
Paid Search	351	438	548	685	856	1,071	1,338	1,673
Content Marketing	0	150	187	234	292	366	457	572
Social Media	0	0	200	250	312	390	488	610
SEO	0	0	0	165	206	257	322	402
Display	0	0	1,500	2,000	3,000	3,500	4,000	4,500
Affiliate	0	0	0	0	75	112	168	253
Total	351	588	2,435	3,334	4,741	5,696	6,773	8,010
Leads								
(5% CR)	17	29	122	167	237	285	339	400
Customers								
(15% Close Rate)	2.5	4.5	18	25	35.5	43	51	60
Sales	\$118,462	\$198,450	\$821,812	\$1,125,225	1,600,087	\$1,922,400	\$2,285,887	\$2,703,375

Our digital marketing sales goals (defined in overview):

CUSTOMER ACQUISITION GOALS

	2014	2015	2016
Sales from Digital Marketing	\$170k	\$938K	\$3.15M
Customers	3.8	20.84	70

ESTIMATED COSTS BY CHANNEL:

KEYWORDS

Paid Search	\$1,404	\$1,755	\$2,193	\$2,742	\$3,427	\$4,284	\$5,355	\$6,694
Content Marketing	\$7,500	\$7,500	\$9,000	\$9,000	\$10,500	\$10,500	\$12,000	\$12,000
Social Media	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SEO	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Display	\$0	\$0	\$3,375	\$4,500	\$5,625	\$6,750	\$7,875	\$9,000
Affiliate	\$0	\$0	\$0	\$0	\$8,437	\$12,656	\$18,984	\$28,476
Agency Fees	\$15,000	\$15,000	\$22,500	\$22,500	\$30,000	\$30,000	\$37,500	\$37,500
Total	\$23,904	\$24,255	\$37,068	\$38,741	\$57,989	\$64,191	\$81,714	\$93,670

Concluding Notes

Believe it or not, there's something we love doing even more than writing fictitious marketing plans: writing real ones that generate measurable results!

Using a combination of inbound and direct response campaigns, we work within the AARRR model to deliver scalable digital marketing performance for SaaS and B2B technology companies across North America.

We offer vertical expertise that can quickly complement your existing efforts with branded content, long-tail SEO, intelligent media buys, pitch-perfect autoresponders and perfectly crafted landing pages.

Want to learn more about what we do?

Email Dylan, our CMO: dylan@onenetmarketing.com

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