AD
Together, we win.

Marketing Network Meetings
Katrina Olson Schedule
Monday, 10/29/18, 1:30-4 p.m.

1:30-2 p.m. **M02C – Marketing Strategy + Tools, Platforms & Automation**
Karmen Wilhelm, Van Meter, Inc., kwilhelm@vanmeterinc.com
Julie Sferes, Horizon Solutions LLC, jsferes@hs-e.com

2-2:30 p.m. **M05C – New Product Launches/Measurement or Marketing Planning/Executing**
Gary Pelc, VP of Sales and Marketing, gpelc@leffelectric.com

2:30-3 p.m. **M07C – Marketing Planning & Strategy**
Kerry M. Regan, Marketing Manager, kerry.regan@frostsupply.com

3-3:30 p.m. **M04C – Tools, Platforms & Automation**
Dan Dobski, Dir. of Sales & Marketing, ddobski@connexiones.com

3:30-4 p.m. **M01C – Topic 4: Marketing Tools, Platforms & Automation**
Cara Backman, Dir. of Marketing/Marketing Mgr., cara.backman@feinc.com

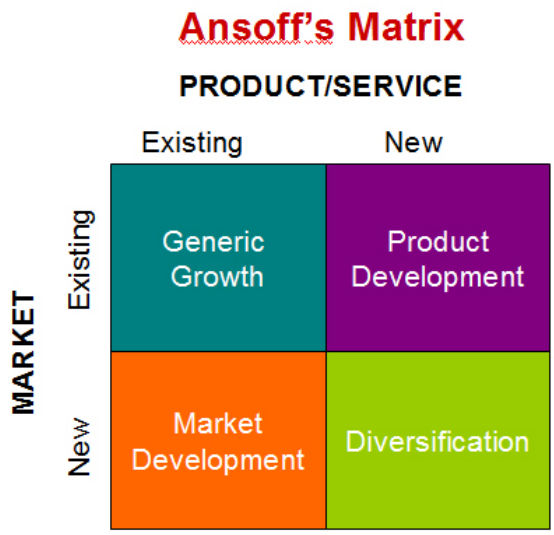
Marketing is changing daily and there are more tools and platforms at marketing's disposal than ever. Let's discuss the following:

- How many of you are familiar with the buzz term "Digital Transformation"?
- What major tools and platforms is your marketing team currently integrating into your digital transformation? (For example, CRM, marketing automation platforms, custom built applications)
- How are you using these tools to provide a better customer experience through individualized content, lead nurturing, etc.?
- How are these tools and platforms being used to automate processes in your business?
- Have any of you been using new marketing platforms or automated marketing tools and been able to measure direct impacts on the business? Examples of successes?

I. Marketing Strategy

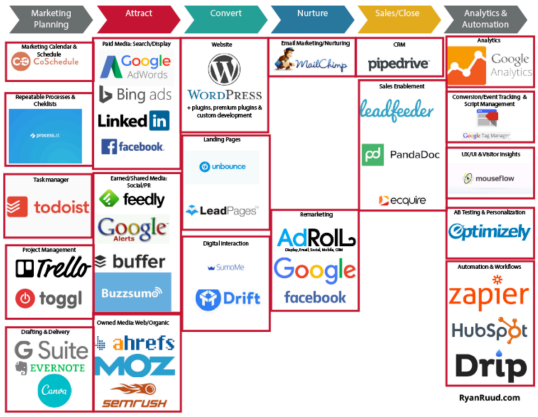
The marketing plan and strategy should flow from a sound corporate or business plan and strategy. And the corporate/business plan s should be more than a sales number or percentage of growth it should consist of goals and strategies for achieving that growth.

When the C-Suite provides clear vision/direction, marketing can effectively develop its plan as a functional set of working documents that maps out research-based goals, with strategies and tactics for achieving those goals, and a sufficient budget for implementing them.



II. Tools, Platforms & Automation

Every martech stack is different. Tools are selected based on the size and needs of the business, the number of departments, the staff, and capabilities of the company. For example, a mid-sized electrical distributor's marketing technology stack might include the following:



1. A **website/content management system** like WordPress, Joomla, or Drupal to create a website, blog, or other content, usually organized around products and services. The content management system can also integrate with a marketing automation platform to gather customer information and generate leads.

2. An **e-commerce** platform like Aldrich Web Solutions, AperoTrax, Big Commerce, CDS, CIMM2, CPC, Cybermax, Drupal Commerce DX Web, Eclipse Web Commerce, Epicor B2B Seller, Epicor Eagle iNet e-Store, Epicor Solar, Evolution, Hybris, IBM WebSphere, Infor StoreFront, Inform, InSite, Magento, Modular Software on IBM I-Series, Nucleus 2, Oracle ATG, Product Tool Supply, Red Leaf, ROC, Schmitt ProfiTools, Second Phase, Shopify, Signature IT, Unilog, Volusion Web Alliance, Web Order Entry, Website Pipeline to facilitate online transactions and may include or integrate with inventory management and automated data collection.

3. A **CRM system** like Tour de Force, Salesforce, Sugar, or WebPresentedCRM. CRMs house and organize customer information and sales data generated from sales and marketing activities.

4. An **email** (e.g. Constant Contact or MailChimp) or **marketing automation** platform (e.g. Pardot, Marketo, or Hubspot). This toolset automates email and other marketing activities, sorts leads based on identified criteria, nurtures leads through the sales funnel, and updates the CRM.

5. **A Search Engine Optimization (SEO)** tool helps drive organic (unpaid) traffic to the website through keyword research, content analysis, links, citation building, keyword tracking, and other initiatives that may integrate with other technologies and strategies.

6. **Digital advertising technology** like Google AdWords can gain customers through search engine marketing, retargeting, display ads, social PPC (pay per click), and campaign tracking.

7. **Analytics and reporting** tools like Google Analytics and Kissmetrics track marketing efforts. Dashboards help marketers track the activity and demonstrate results achieved through technology.

Choose technologies by analyzing the company's KPIs, business goals, and marketing goals. Then evaluate how and if they fit the technology strategy and align with the customer journey. Conduct research to find the best solution for the company's needs and objectives. Once the martech stack is in place, share insights with sales, customer service, and other departments to improve the customer experience.

From my article, "Stack the Odds," tED magazine, May 2018: http://www.tedmagazine-digital.com/tedmagazine/may_2018/MobilePagedReplica.action?pm=2&folio=58#pg60

III. Other Marketing Tools

Project Management

- **Trello** – This highly visual tool uses task lists, editorial calendars and other features organized on boards, lists and cards. Users can add comments, upload file attachments, create checklists, add labels and due dates, and more. The basic version is free; monthly plans start at $9.99 per month.
- **Asana** – Founded in 2008 by a Facebook co-founder and ex-engineer, Asana helps teams track their work, share files and information, and assign tasks, also in a visual format. The basic version is free; monthly plans start at $9.99 per month.
- **Wrike** – Similar to Trello and Asana, Wrike simplifies planning, enables collaboration, and streamlines workflow. Capabilities vary with pricing, but even the free version allows you to manage tasks, share files, and integrate with popular cloud storage platforms. Paid plans start at $9.80 per user, per month.
- Additional options are **Microsoft Project** (delivered through Office 365) and **Nutcache** which combines project management, collaboration, invoicing, and time management with a project dashboard.

Group Communication & Collaboration Tools

Collaborative tools enable communication, file sharing, and delegation without multiple conference calls or emails.

- **Basecamp 3** – Basecamp brings everything together in an organized, centralized, and clear format. This 10-year-old platform helps users organize people, delegate tasks, and monitor progress. Basecamp offers a 30-day free trial; pricing starts at $99 per month.
- **Slack** – An acronym for Searchable Log of All Conversation and Knowledge, Slack calls itself a digital workspace. It facilitates communication and collaboration among team members using "channels" for conversations and includes a messaging platform. Slack's basic version is free; paid service starts at $6.67 per month, per active user.
- **Skype** – Skype is an instant messaging, online text messaging, and video chat service. It can also exchange digital documents like images, text, and video. Users can host video conference calls on mobile, computer, or tablet. It's free to download and easy to use. Paid service starts at $5 per month with Office 365 Business Essentials and includes Word, Excel, PowerPoint, OneNote, and Outlook plus instant messaging, meeting recording, and meetings for up to 250 people.
- Other tools for private communication and collaboration include **Yammer** (private communication), **Team Viewer** (screen sharing), **Google Hangouts** and **G Suite** by Google Cloud, **SAP Jam,** and **Jive.**

Web Conferencing

Web conferencing platforms are perfect for small group meetings where people need to interact. Choices range from audio only, to audio or video with file sharing, screen sharing, and technical support. These applications are appropriate for virtual committee meetings, team or management sessions, group brainstorming sessions, problem-solving discussions, group training, and anytime a group of people need to meet virtually.

- **GoToMeeting** – Features include web audio, screen sharing, one-click scheduling, a dial-in conference line and HD video conferencing. GoToMeeting offers a 14-day free trial; paid plans start at $19 per month for up to 10 participants.
- **Cisco WebEx** – Teams can work with others in a private and secure setting using a web browser, mobile device, or a video system with integrated audio, video, and content sharing. Plans start at $20 a month for up to eight participants.
- **Adobe Connect** – This multi-function platform works well for web meetings, eLearning, and webinars. It's highly customizable with robust features like high quality video, multimedia presentations, and interactive recordings that allow users to click on links, copy and paste text, and click

on links. Its open architecture integrates with existing learning management systems, customer relationship management (CRM) systems, and single sign-on systems—and it's globally accessible. Meetings start at $50 per month, webinars at $130 per month, and eLearning at $370 per month.

Other platforms to consider include: **Intercall, Zoho, Onstream, ReadyTalk, AnyMeeting, JoinMe, ClickMeeting,** and **eVoice**. More robust platforms include drawing tools, recording ability, mobile apps, whiteboard, live support, and integration with directories like Outlook or Exchange. **Google Hangouts** is free and includes instant/text messaging or group chats for up to 100 people, video chat for up to 10 people, and Voice Over Internet Protocol (VOIP) for calls.

Social Media Dashboards

A social media dashboard is a program or website that allows companies to manage all profiles and platforms from a single user interface. This makes the social media manager's job easier by eliminating the need to log in individually to Facebook, Twitter, LinkedIn, Pinterest, etc. Following are some of the more widely used tools:

- **Buffer** – Schedule and manage social media posts nwhile customizing posts for different platforms. Buffer chooses the best times to share content and tracks links to reveal the highest-performing content.
- **CoSchedule** – Users can schedule seamlessly from inside a WordPress blog. It also includes an editorial calendar tool.
- **Hootsuite** – Schedule posts, monitor and track your social media mentions, and manage responses for three platforms at no charge.
- **Hubspot** – Monitor and publish to social accounts, plus get reporting data that shows which channels perform best, and what posts and channels actually drive leads and sales.
- **TweetDeck** – This free platform lets users schedule content and follow several Twitter conversations at once in an easy-to-follow, multi-columned layout.
- **MeetEdgar** – It automatically re-shares evergreen content that has been stored and arranged in categories. Users can publish content on a designated schedule, based on categories.
- **Sprout Social** – This social media management tool publishes, monitors and reports on social media activity with analytics, brand monitoring and follower management. Starts at $59 per month, per user.
- Other dashboards to consider are **Sendible, eClincher** and **MavSocial.**

Some are best suited for teams, individuals, and small businesses. Start with a free tool to get experience, then experiment with free trials offered by more sophisticated platforms.

Miscellaneous

- For file storage and sharing, try **DropBox, Box.com, Google Drive,** and **Microsoft OneDrive**.
- **Toggl** provides simple timekeeping with online time tracking and reporting services through their website, plus mobile and desktop applications.
- With **SurveyMonkey**, users design, conduct, and distribute surveys via email, mobile, chat, web, and social media—then filter, download, and analyze data.
- The **1Password** tool stores passwords, software licenses, and other sensitive information in a virtual secure vault, allowing users to log in to sites with a single click.
- Name shorteners like **TinyURL.com, Goo.gl,** and **Bitly.com** save characters and increase memorability.
- **CoSchedule's Headline Analyzer** (https://coschedule.com/headline-analyzer) helps writers and content developers find a good "hook" by scoring different options.

From my article, "Do it Digitally: Apps and Platforms to Make Marketing's Job Easier," in tED magazine's November 2017 issue: http://www.tedmagazine-digital.com/tedmagazine/november_2017/MobilePagedReplica.action?pm=2&folio=50#pg52

https://blog.crello.com/100-free-tools-to-do-your-own-marketing-part-1/

https://blog.crello.com/100-free-tools-to-do-your-own-marketing-part-2/

IV. Digitization

The Challenges

While necessary, digitization presents a unique set of challenges as it changes the marketing landscape for every member of the distribution channel. Following are just a few of those changes.

Customers expect, but don't yet demand, 24-hour customer service. Fortunately, they aren't demanding that someone answer the phone around the clock, but customers want to access their account, search a help menu, find answers on the website, and get a response as soon as possible when business hours resume.

Traditional advertising is losing relevancy. Some people are still reading the newspaper, but nationally, total weekday circulation for U.S. daily newspapers (print and digital) fell 8% in 2016, as did Sunday circulation. Total Sunday circulation declined to 38 million—the lowest levels since 1945, according to a 2017 Pew Research Center study. This coincides with a decline in advertising revenue of 10%, with revenues for the industry at nearly a third of what they were 10 years ago. (http://www.pewresearch.org/fact-tank/2017/06/01/circulation-and-revenue-fall-for-newspaper-industry/).

Companies must give to get. Unless an ad offers a reward or benefit such as a free e-book, guide, checklist, or template, people tend to ignore it. It's called ad blindness, the conscious and subconscious ignoring of advertising messages. So be prepared to give something to get their attention.

The Rewards

Digital marketing is more affordable. In the past, the company with the biggest budget won. Today, although larger companies still have a slight advantage with paid advertising, digital and social media have leveled the playing field. Smaller businesses can now better compete with larger companies because what previously required printing, mailing services, and postage, marketers can now do with Facebook, Twitter, LinkedIn, and email.

The capabilities and sophistication levels of platforms like email marketing, for example, vary depending on cost; but even the smallest business can get started for little or no cost. Small businesses can reach highly targeted audiences with low-cost Facebook ads, for example. And it's free to publish articles on LinkedIn as part of your content marketing plan.

Digitization offers expanded capabilities and reach. When customer information is digitized, it's easier to access, share, and preserve. Digitization enables companies to integrate ERP and CRM systems which, when combined with marketing automation and email marketing platforms, can deliver personalized and customized messages to existing customers and prospect, generating more leads than would otherwise be possible.

Digitizing enhances and increases SEO. In this age of digitization, search engine optimization (SEO) often determines where a company ranks in online searches and how much traffic is driven to its site.

Social, mobile, and texting are, by definition, digital so any activity on these channels boosts SEO (especially quality content with relevant titles and meta descriptions). This includes maintaining blogs on the website or a separate blogging platform, posting videos on YouTube, publishing on LinkedIn, and participating in discussions on Facebook and other platforms.

Most companies go through several stages of transformation before reaching digital maturity. Knowing where your company stands can help you progress to the next level.

From my article, "The Digitization of Marketing," tED magazine, February 2018: http://www.tedmagazine-digital.com/tedmagazine/february_2018/MobilePagedReplica.action?pm=2&folio=56#pg58

V. More Stuff to Help You

tED magazine Marketing 101 column and "Marketing Momentum" on tedmag.com

You can find articles I've written about most (if not all) of the topics you're discussing in your Marketing Network groups. Go to tedmag.com, scroll to the bottom, and click on "Current Issue." In the upper left corner, click on "Issue Library"; look for the little bookshelf icon. In a specific issue, go to the index and click on "Marketing 101." Of course, on the site you can also search tool my name, Katrina Olson, "marketing" or a specific topic. Or just grab a stack of hard copies from your company library (or president's/CEO's desk). You'll also find links to the last year (or so) of articles on my Facebook page "Katrina Olson Marketing + Training."

Marketing Planning Master Course

Formerly eight (8) weeks long with "bonus" sessions on positioning, branding, CRMs, content marketing and other hot topics (reg. $795), I've streamlined this class to four (4) weeks, eliminated the "bonus" sessions, and now charge $495. I'm wrapping up a class this month, but am open to holding another in November/December. If interested, email me at katrina@katrinaolson.com or hand me your business card with a note about the class.

Free tools on KatrinaOlson.Com Website

Scroll down and you'll see a link to free marketing tools on katrinaolson.com (right of the glowing box) or click the "Free Tools" link on the top menu:

- Communications Brief Template
- Buyer Persona Template
- 4 Keys to Better Writing
- News Release Template
- News Release Checklist
- Crisis Cheat Sheet
- More to come in 2019!

Market Boldly Podcast

Join me on my (mostly) monthly podcast as I talk with industry marketing experts about topics that matter to you. Subscribe on iTunes or GooglePlay, follow me on LinkedIn or Twitter (@WordGal122), or just visit: katrinaolson.com/podcast to access past episodes.

Online, Live, Instructor-led Workshops

I also teach the following online classes which range in price from $89 to $149 for a two- to four-hour session:

- Content Marketing Jump Start
- Case Study Crash Course
- Winning at Marketing (Best of the Best entries and winners)
- Brand Discovery Workshop
- Marketing Crash Course
- Podcasting Workshop
- Journey Mapping How-To Workshop
- PR Crash Course
- Content Writing for Non-Writers

To receive notice about upcoming courses, workshops, or recent articles, just give me your business card with a note, or email me at katrina@katrinaolson.com.