

# STRATEGIC MARKETING FOR THE SME

HOW TO GROW FASTER BY MARKETING  
STRATEGICALLY INSTEAD OF SELLING  
TACTICALLY IN THE AGE OF THE CUSTOMER

BY JIM SAGAR

Co-founder and CEO





# SUMMARY

TODAY, MANY CEOs, OWNERS AND EXECUTIVES OF SMALL TO MIDSIZE ENTERPRISES (SMES) ARE STRUGGLING WITH GROWING THEIR COMPANY.

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There's concern about how the market is changing. People no longer trust company-sponsored advertisements. Digital media presents a dizzying array of choices for reaching customers who are becoming harder to influence.

Today is a new paradigm—the Age of the Customer. Those who “get it” are growing faster than ever. Never before have so many companies gone from startup to a billion-dollar valuation so quickly.

But those who don't are struggling...and are in danger of being left behind.

The solution isn't a new marketing tactic or social media channel or to “sell harder.” The solution is to understand how to communicate strategically with your market, to connect with people emotionally and to influence their behavior.

## IT'S ABOUT MARKETING STRATEGICALLY INSTEAD OF SELLING TACTICALLY.

This guide explains why the typical SME struggles to grow in today's marketplace and presents a Strategic Marketing Roadmap that will enable you and your team to create an emotional connection with your market, stay relevant, and thrive.



## WHO IT'S FOR

This guide is designed for the CEO, owner and key executives of a small to midsize enterprise (SME for short) and is a 20-minute read.

The Strategic Marketing Roadmap and content can be used by your team throughout the year.



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# ABOUT THE AUTHOR



**Jim Sagar** is an entrepreneur and strategic marketer focused on teaching marketers and mid-market company executives how to design and execute effective marketing programs.

He currently serves as the CEO and co-founder of Qlutch Marketing Inc., the owner of Qlutch.com and MarketingMO.com. He is also a venture partner for growth at Venture51, an early-stage venture capital firm, and previously served as a co-founder and board of directors member of Medelis, a pharmaceutical services company founded in 2003 and sold in 2016.

In addition to *Strategic Marketing for the SME*, he is the co-author of two business books with a focus on aligning marketing to business strategy. He holds degrees in Economics and Communications from the University of Michigan.

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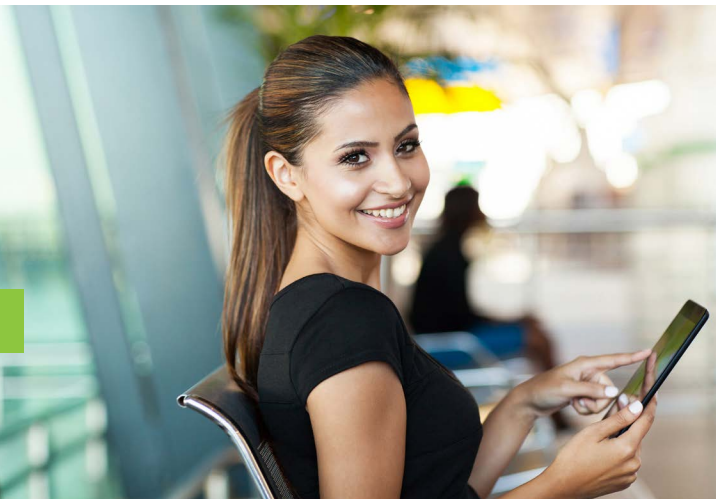
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# STRATEGIC MARKETING— A MYSTERY IN THE SME

CUSTOMERS ARE THE  
LIFEBLOOD OF A BUSINESS.  
EVERY SUCCESSFUL ENTREPRENEUR  
UNDERSTANDS HOW TO ACQUIRE  
AND MAINTAIN A CUSTOMER.

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In startups and early-stage companies, the founders often handle these activities. They're passionate. They care. They want the customers. They need the customers. Without them, their business fails.

Yet as companies grow, the process of acquiring and maintaining customers becomes more complicated. More people are hired and participate in the process. Messages change. Products and services evolve. The customer base evolves. New competitors emerge. The sales team evolves.

And at some point, the growth stops and SMEs get stuck. (When we use the term “SME,” we’re typically referring to companies with revenues of \$1 million to \$100 million).

Fortune 500 companies and consumer product marketers almost always devote significant resources to marketing their product or service. They typically spend a far greater percentage of their budget than SMEs on things like:

- Market research
- Competitive positioning
- Brand strategy
- Market trends
- Buyer psychology
- Behavioral economics
- Distribution



From my and my colleagues' experience working with over 1,000 SMEs in the United States, Canada, Australia and the U.K., we found that the #1 difference between Fortune 500 companies and SMEs is in how they acquire and maintain customers:

- The Fortune 500 *lead with strategic marketing* instead of tactical sales
- SMEs *lead with tactical sales* instead of strategic marketing

The sales function is the endpoint of the marketing process—where a customer makes a purchase or non-purchase decision. Leading with tactical sales creates an imbalance in the entire marketing function—you're putting tactics before strategy in the customer acquisition process.

It's backward. And it prevents many SMEs from growing and realizing the vision of their founder.



## “MARKETING” REDEFINED

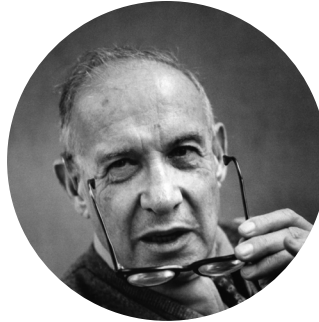
The first step in correcting this imbalance is to redefine how you view the term “marketing.”

In many SMEs, the word “marketing” has a negative connotation.

It’s treated as an expense instead of an investment. It’s used as a stopgap to generate leads when the sales team starts missing its numbers. It’s typically owned by the VP of Sales (who is trained in sales, not marketing). And when times get tough, it’s one of the first budgets to get cut (when it should be increased!).

Marketing is rarely valued by executives in the typical SME.

Yet executives in Fortune 500 companies, along with influential business consultants, have the opposite view of the marketing function.



The late **Peter Drucker**, considered the father of business consulting, long ago made a very profound observation:

BECAUSE THE PURPOSE OF BUSINESS IS TO CREATE A CUSTOMER, THE BUSINESS ENTERPRISE HAS TWO— AND ONLY TWO— BASIC FUNCTIONS: MARKETING AND INNOVATION.

MARKETING AND INNOVATION PRODUCE RESULTS; ALL THE REST ARE COSTS.

MARKETING IS THE DISTINGUISHING, UNIQUE FUNCTION OF THE BUSINESS.

So why is it so common for many stakeholders of SMEs to devalue the marketing function?

It’s difficult to value what you don’t understand. And most SMEs don’t understand strategic marketing because there’s little to no strategic marketing experience within the company. The people trained in strategic marketing work at big companies and agencies.

So when the CEO and other SME stakeholders plan for growth, they almost always default to what they know best (tactical sales) instead of what is needed most (strategic marketing).



## STRATEGIC MARKETING—AN EXAMPLE

Since strategic marketing is a mystery for most SMEs, it's helpful to see an example of a well-executed marketing strategy.



RACKSPACE IS A MANAGED HOSTING COMPANY FOUNDED IN 1998 BY THREE COLLEGE STUDENTS.

They started with a small amount of venture funding during the early days of the Internet. Rackspace's offering, at the simplest level, was renting out hard drive space on their computers to other companies to host their website files. And there were plenty of other companies doing the same thing. They had a commodity-like offering.



The Rackspace founders made a key strategic decision early on that had a dramatic impact on their company. Instead of talking about the size of their computers or the speed, or the uptime—the things that most of their competitors were talking about—the stakeholders decided to talk about something else.

They decided to focus their entire communication platform on the concept of *Fanatical Support*. They defined it, built it into their processes, promised what they'd deliver, managed their employees around it, and delivered it to the marketplace.

Rackspace stakeholders took a simple idea and used it to create a unique and unified brand experience through all touchpoints with their market.

That is strategic marketing, and it was a major driver of their growth to a \$1.6 billion public company in 2016. After 17 years in business, it's still a central focus of their communications platform:

**EVERY RACKSPACE EMPLOYEE (A.K.A. "RACKER") IS DEDICATED TO DELIVERING FANATICAL SUPPORT, NO MATTER HOW LARGE OR SMALL YOUR ORGANIZATION.**

**THE FANATICAL JACKET AWARD IS GIVEN TO RACKERS WHO'VE GONE ABOVE AND BEYOND—PUTTING THEIR EXPERTISE AND CREATIVITY TO WORK BUILDING THE FINEST "DO-IT-TOGETHER" MANAGED CLOUD EXPERIENCE FOR OUR CUSTOMERS.**

## HOW THE NON-STRATEGIC COMMUNICATE

To some, the concept of providing great customer support might not seem creative. When polled, many CEOs of SMEs think that their company provides great customer service<sup>1</sup>. But few of them choose to communicate it like Rackspace does.

And since they don't communicate it in a way that differentiates them and makes an emotional connection with their buyer, it doesn't become an essential part of their brand or a competitive advantage.

Most typical stakeholders of SMEs communicate in a more straightforward manner. They talk in a linear fashion, explaining what they have, how it's better, and why people should buy from them.

This sounds like rational and logical thinking. But the growing field of behavioral economics is showing that buyers don't make rational and logical decisions. People make emotional decisions driven by the biology of our brain and psychology (even when making business-to-business buying decisions).

Here's an example: >>>

1 Jaynie Smith, *Creating Competitive Advantage: Give Customers a Reason to Choose You Over Your Competitors* (Crown Publishing Group, 2006)



## RCA LYRA RD2201A

RCA created a very slick MP3 player in 1999. It came with a 32MB CF card. RCA promoted it by talking about its technical specs and performance. The Lyra was considered to be a good product and sold well in the late '90s.

## APPLE IPOD "1,000 SONGS IN YOUR POCKET"

A few years later, Apple came out with their own version of the MP3 player, the iPod, which did the same thing. But instead of trying to emphasize how and why the iPod was better than the Lyra, Apple chose to focus on making an emotional connection with their buyer. Apple knew that emphasizing features and technical specs wouldn't get people excited. But having 1,000 songs in your pocket? That got people excited.

STORAGE FOR 1GB OF MP3S



VS

1,000 SONGS IN YOUR POCKET



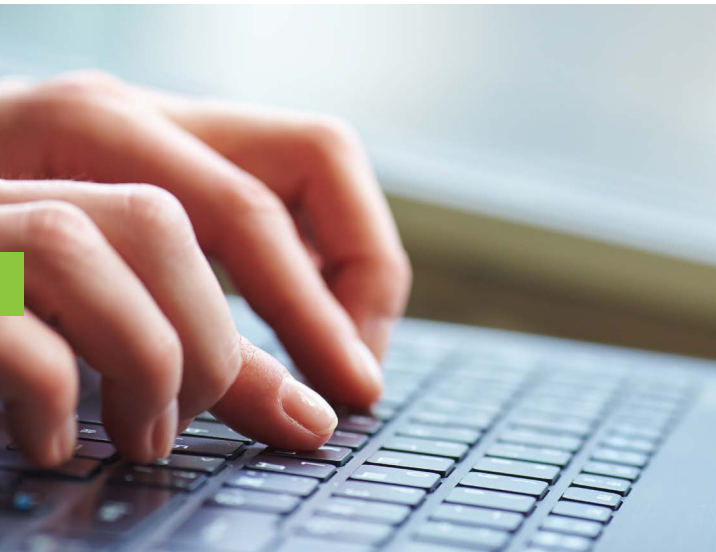
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# TODAY'S PARADIGM— THE AGE OF THE CUSTOMER

MAKING AN EMOTIONAL  
CONNECTION WITH YOUR BUYER  
IS MORE IMPORTANT TODAY THAN  
IT WAS WHEN THE IPOD CAME OUT.  
IT'S MORE IMPORTANT THAN IT  
WAS EVEN FIVE YEARS AGO.



Digital marketing, social media and mobile devices have dramatically changed how we connect with our audiences. They've created a tremendous opportunity, as well as a tremendous burden.

INSTEAD OF HAVING  
A HANDFUL OF CHANNELS  
TO CONSUME INFORMATION  
AND CHOOSING  
WHEN TO CONSUME IT  
(E.G., TV, RADIO, SALES  
REPS, PRINT ADVERTISING),  
PEOPLE TODAY ARE  
CONSTANTLY BOMBARDED  
WITH MESSAGES  
AND DATA ALMOST  
EVERY WAKING HOUR.

"EVERY TWO DAYS WE CREATE AS MUCH  
INFORMATION AS WE DID FROM THE  
DAWN OF CIVILIZATION UP UNTIL 2003."

—ERIC SCHMIDT  
FORMER CEO OF GOOGLE  
8/4/2010

Stop and think about that quote for a minute. Think about your parents and your grandparents and their ability to access information. Some have suggested that today we are exposed to more information in one week than our great-grandparents consumed *during their entire lifetime!*

On a daily basis, we're inundated with over 5,000 brand exposures. Only 12 engage us.

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AVERAGE NUMBER  
OF ADVERTISEMENT AND  
BRAND EXPOSURES PER DAY  
PER PERSON: **5,000+**

AVERAGE NUMBER  
OF “ADS ONLY” EXPOSURES  
PER DAY: **362**

AVERAGE NUMBER  
OF “ADS ONLY” THAT  
MADE AN IMPRESSION  
(ENGAGEMENT): **12<sup>2</sup>**

2 Sheree Johnson, New Research Sheds Light on Daily Ad Exposures, SJ Insights, <http://sjinsights.net/2014/09/29/new-research-sheds-light-on-daily-ad-exposures/>

All of this digital communication is having an effect on our attention span. Texting and Twitter have conditioned us to shorten our communication from lengthy sentences in emails to a maximum of 140 characters.

If 140 characters are too many, people use the single-phrase #hashtag.

Teenagers communicate via text using emojis (pictures) instead of words.



In 2000, Microsoft Advertising completed a study to determine that the average human attention span was 12 seconds. By 2013, it was only 8 seconds. And the attention span of a goldfish is 9 seconds.



All of this communication is overwhelming. As a defense mechanism against information overload, our mind screens and rejects most of the information offered to it. We create “ladders” in our mind (like buckets to organize things, with a ranking system in each one), quickly deciphering what something is, on which ladder it should be placed and where on the ladder it should be ranked. Nonessential information is filtered out. The more information we receive, the more gets screened and avoided.

This has created today’s paradigm:

- People research online before buying
- People no longer trust company sponsored advertisements
- We’re connected to the Internet 24/7 via our mobile devices

Share:   

Owning a clear spot on a ladder (which represents a category) in your customer's mind is more important today than ever before. Today is the Age of the Customer. The people control your brand.

In B2B, this means that brands are being evaluated and screened before the sales people ever get a chance to influence a prospect. In some industries, buyers control up to 70% of the buying process—control that sales teams used to have. The conversation and brand interactions are happening without your sales team.

Buyers today have access to almost all of the information they need at their fingertips. Since they have so many choices, most default to the brands that create an emotional connection.

**If your company understands this and is successfully making that emotional connection, you're probably experiencing:**

- Rapid growth
- Inquiries where the potential buyer has already decided that you're one of the leaders in the category
- Inquiries with specific buying questions—about the use of your offering
- Sales cycles that are led by the buyer
- People sharing their experience with your brand, both online and offline

**If you're falling behind, you're probably experiencing:**

- Flat sales, or slow growth that requires substantial effort
- A small percentage of sales from new inbound leads
- Sales cycles that are led by the sales team, who have to force buyers through to the next step
- Substantial educational efforts during the sales cycle
- Prospects focusing on your price, treating you like a commodity
- Few people talking about your brand, either online or offline

This will only become more prevalent in the coming years. If you're falling behind, your brand will be at risk in the near future.

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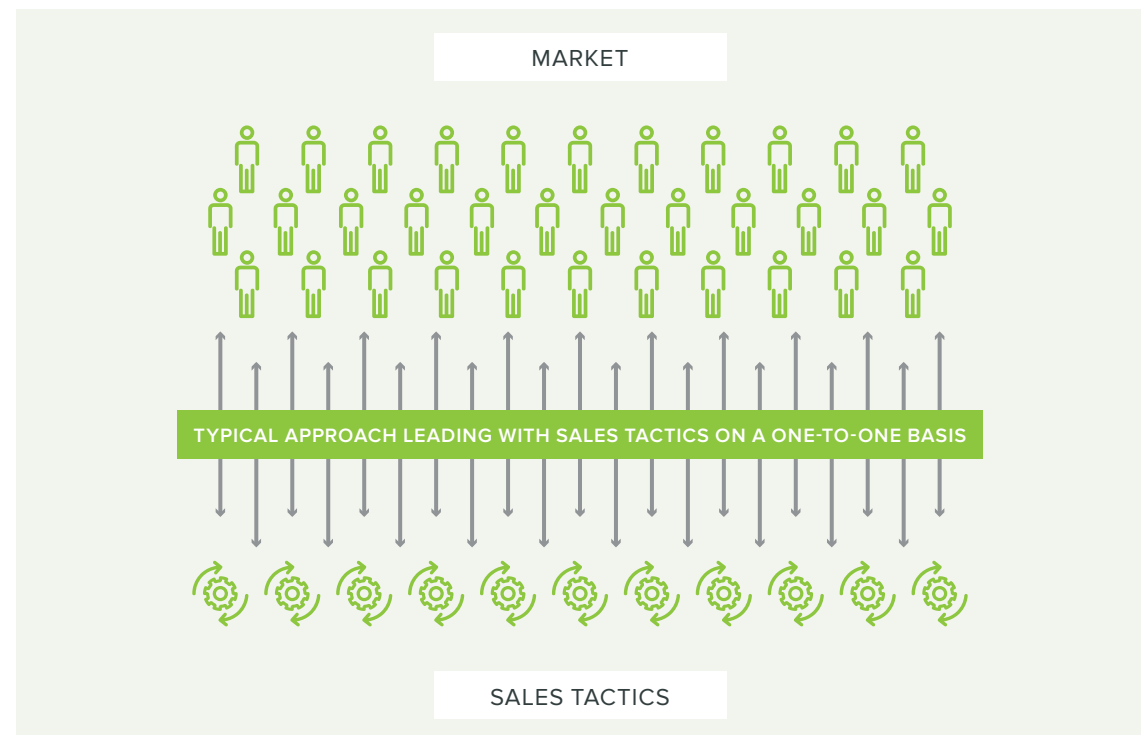




# HOW MOST SMES APPROACH THE MARKETING FUNCTION

SINCE THE PURPOSE OF THIS  
GUIDE IS TO SHOW SME  
STAKEHOLDERS HOW TO MARKET  
STRATEGICALLY INSTEAD OF  
GROWING THROUGH TACTICAL SALES,  
LET'S START BY EXAMINING HOW  
THE TYPICAL SME APPROACHES  
THE PROCESS OF ACQUIRING AND  
MAINTAINING A CUSTOMER.

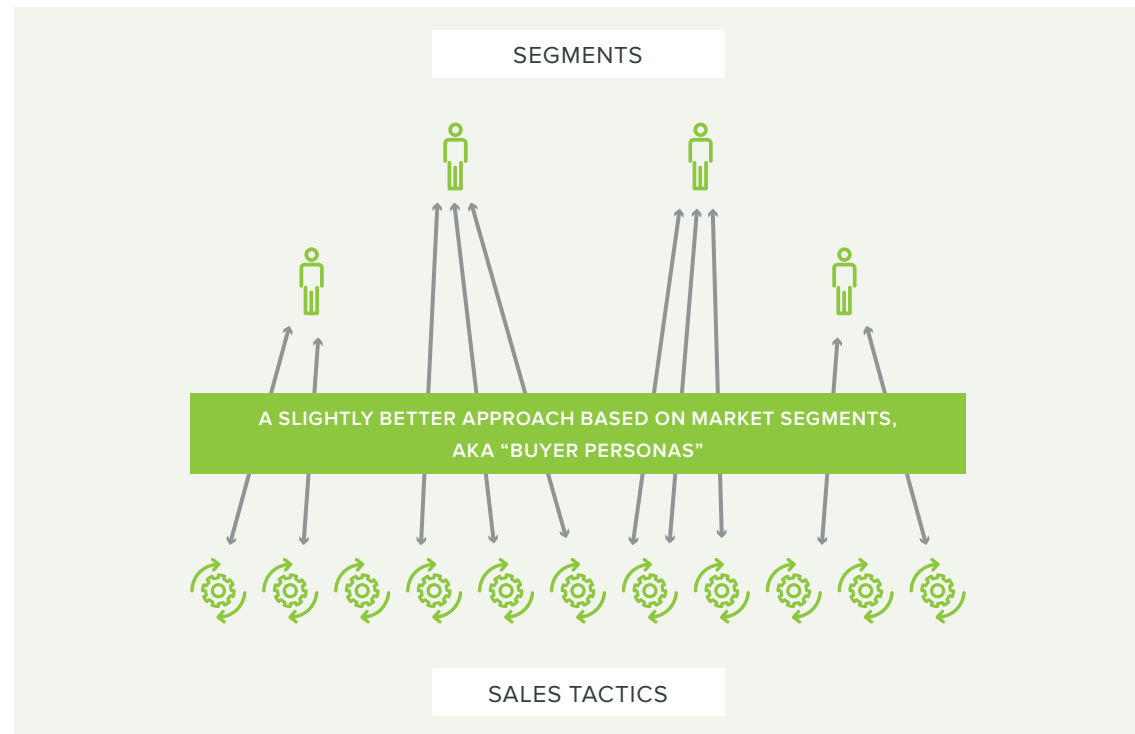
In the graphic below, potential customers in the marketplace  
are at the top and the sales tactics are on the bottom.



Most SMEs focus on connecting with individuals in their market on a one-to-one basis. Sales reps make new connections, generate new conversations and attempt to persuade people to become a customer.

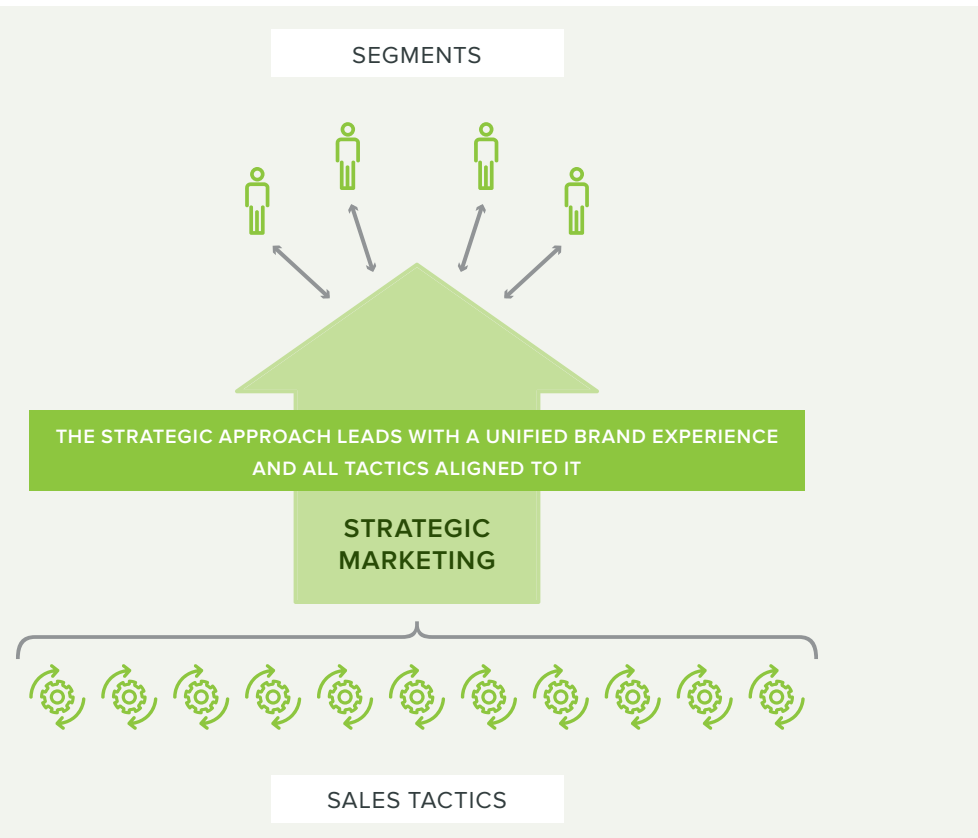
When done well, this can be an effective method for growth, albeit a slow one; since it's incremental, it's difficult to achieve rapid growth. If the sales operation isn't efficient, customer acquisition costs increase and margins decrease.

Some SMEs take an incrementally better approach by focusing on communicating with their buyer personas (market segments) instead of on a one-to-one basis. This is represented in the second graphic. It's smart to structure communication to appeal to buyer personas.



THE TRUE STRATEGIC APPROACH FOCUSES ON LEADING WITH A UNIFIED BRAND EXPERIENCE, WITH ALL TACTICS ALIGNED TO IT. THIS IS RARE IN THE SME.

So what does this unified brand experience look like? How do you design it? And how do you execute it with the typical resource constraints of the small to midsize enterprise?





# IV.

## A STRATEGIC MARKETING ROADMAP

DELIVERING A CONSISTENT  
AND REPEATABLE BRAND EXPERIENCE  
AT ALL MARKET TOUCHPOINTS  
REQUIRES A SIGNIFICANT  
AMOUNT OF PLANNING.

---



To simplify, it is helpful to have a roadmap.

THERE ARE NUMEROUS  
STRATEGY WORKFLOWS THAT  
FORTUNE 500 COMPANIES  
AND BIG AGENCIES USE,  
BUT MOST SMES HAVE  
LIMITED BANDWIDTH AND  
NEED SOMETHING MORE  
TANGIBLE AND DETAILED  
TO JUSTIFY THE EFFORT.

On the next page is the Strategic Marketing Roadmap that we've developed that organizes all of the key elements of a long-term marketing strategy. It is designed to deliver a unified brand experience to the marketplace that makes an emotional connection with your buyers.

It is important to note that after reviewing the Roadmap, many of the elements may look familiar to you. They should.

The *components* of strategic marketing are not new. You've heard of some—or many—of these components before. Some have been used by Fortune 500 companies for 50 years.

What is new is that our Roadmap shows you *how they fit together*, and *how to apply these* to your small to midsize enterprise. This is what we've compiled from our 20 years of experience.

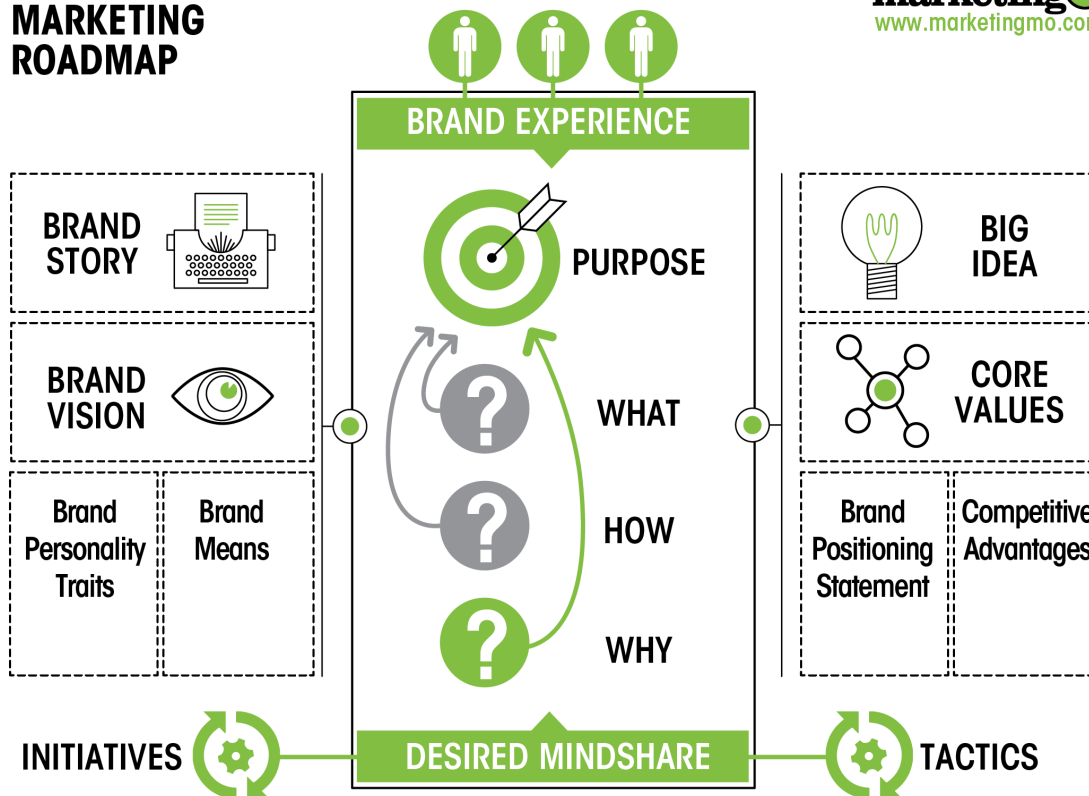
To some, this roadmap may look intimidating. As I mentioned earlier, strategic marketing is one of the least understood business functions in the typical SME. Don't expect to master it overnight.



## STRATEGIC MARKETING ROADMAP

BUYER PERSONAS & THEIR INSPIRATION

**marketing** MO  
www.marketingmo.com



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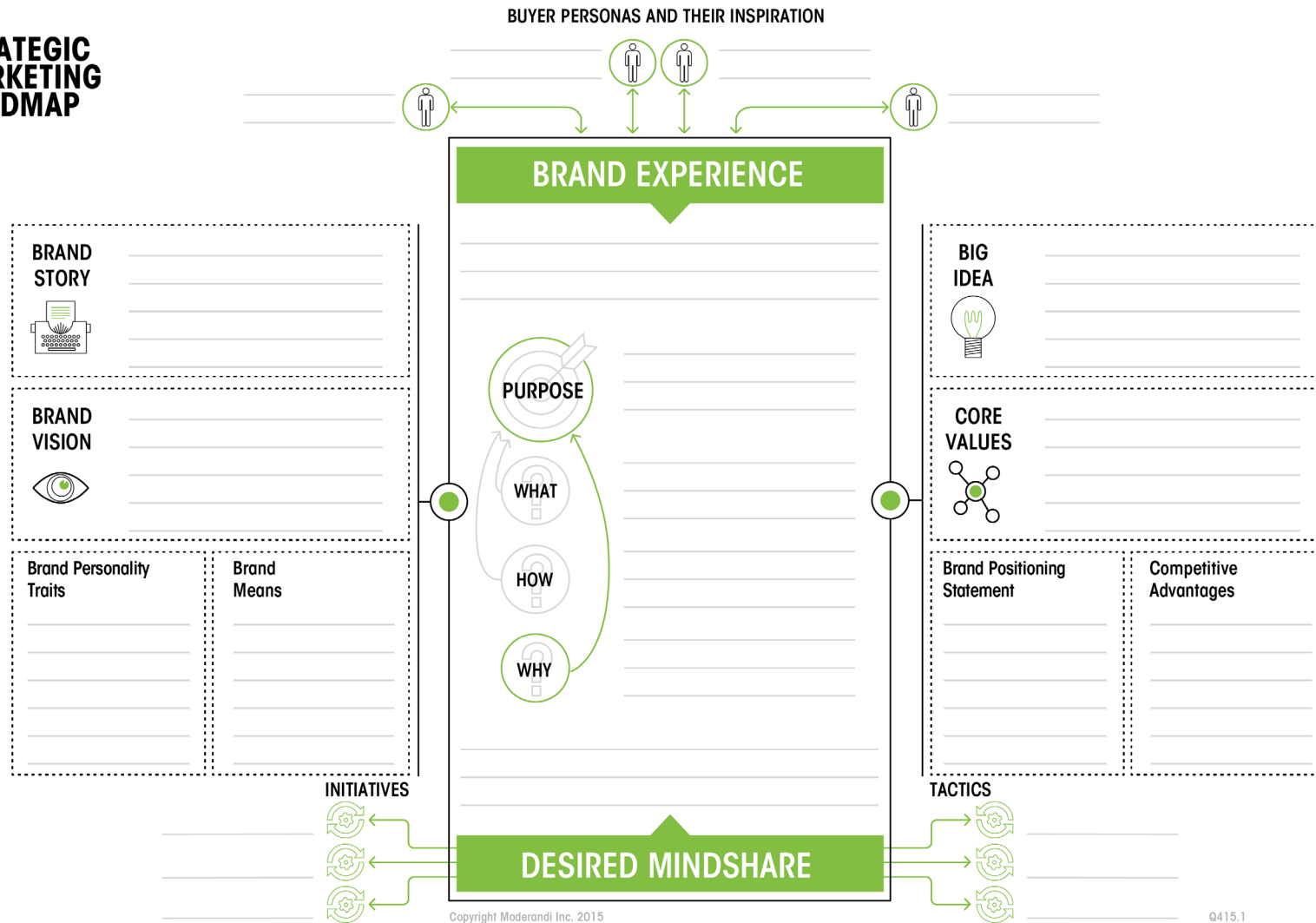
And understand that strategic marketing is not necessarily about finding the catchiest slogan or the most creative idea. While creative people do play a role in delivering this brand experience to the marketplace, defining the core elements of what the brand stands for is the responsibility of the stakeholders of the SME—the owners, key executives and the CEO. And in most instances, the CEO must champion it.

Strategic marketing is a self-discovery exercise. To do it, first understand how to build the strategy. Then take things one step at a time. Don't try to do everything at once.

## THE CREATIVE PART COMES AFTER THE ROADMAP IS COMPLETE.

The sequence that follows is how we generally approach the Roadmap with client companies, starting with the most powerful and timeless elements and building from there.

# STRATEGIC MARKETING ROADMAP



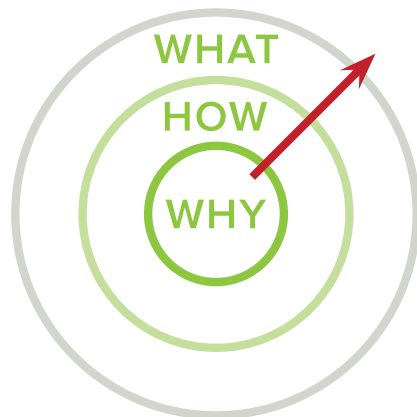
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# 1. Inspire

IF YOU'RE AN EXPERIENCED MARKETER, YOU MAY DECIDE TO COMPLETE SPECIFIC ELEMENTS OF THE ROADMAP BASED ON YOUR NEEDS. THAT'S FINE.

IF YOU'RE STARTING FROM SCRATCH, WE ADDRESS THESE 4 ELEMENTS FIRST, WHICH FOCUS ON INSPIRING YOUR MARKET AND YOUR OWN PEOPLE.



## WHY, HOW, WHAT COMMUNICATION

Strategic marketing starts with the vision. One of the most popular TED talks of all time is *How Great Leaders Inspire Action*, by Simon Sinek. We highly recommend watching his video and hearing the message directly from him, but here is a brief overview.

Simon talks about a specific communication flow that most businesspeople use—starting with “What,” moving on to “How,” and leaving the “Why” for last (and often not mentioning it). And because businesspeople use this flow, we tend to use it in our marketing messages.

### WHAT

EVERY ORGANIZATION ON THE PLANET KNOWS **WHAT** THEY DO. THESE ARE PRODUCTS THEY SELL OR THE SERVICES THEY OFFER.

### HOW

SOME ORGANIZATIONS KNOW **HOW** THEY DO IT. THESE ARE THE THINGS THAT MAKE THEM SPECIAL OR SET THEM APART FROM THEIR COMPETITION.

### WHY

VERY FEW ORGANIZATIONS KNOW **WHY** THEY DO WHAT THEY DO. **WHY** IS NOT ABOUT MAKING MONEY. THAT'S A RESULT. IT'S A PURPOSE, CAUSE OR BELIEF. IT'S THE VERY REASON YOUR ORGANIZATION EXISTS.



Simon has codified this into a graphic that he calls the *Golden Circle*. He also parallels this graphic with a cross-section of the human brain, showing that specific types of communication are filtered by specific parts of our brain (the parts that protect the portion of our brain that is responsible for emotions).

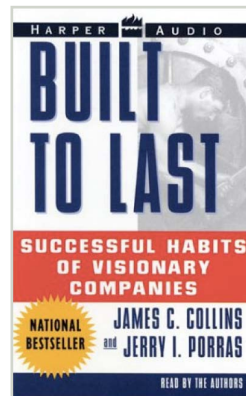
When leaders communicate by leading with the “Why,” they stimulate action and people follow. When brands communicate by leading with the “Why,” they stimulate action and people follow.

**THE GOAL IS NOT TO SELL  
PEOPLE WHAT YOU HAVE,  
THE GOAL IS TO SELL  
TO PEOPLE WHO BELIEVE  
WHAT YOU BELIEVE.**

This “Why, How, What” communication flow is at the center of the roadmap. It’s best to address this element first before moving on to “Purpose,” an element that can be challenging for many SMEs.

## PURPOSE

In their best-selling business book *Built to Last: Successful Habits of Visionary Companies*, Jim Collins and Jerry Porras concluded that “visionary” companies—those who operated from a defined core ideology—outperformed the market by a factor of 15, over a 70-year period.



The key element of that core ideology is purpose. Your purpose is your organization’s reason for being. An effective purpose reflects people’s idealistic motivations for doing the company’s work. It doesn’t just describe the organization’s output or target customers; it captures the soul of the organization.

**THIS IS THE MAIN DRIVER  
OF YOUR “WHY.” IT’S  
TIMELESS AND SHOULD  
INSPIRE YOUR MARKET  
AND YOUR TEAM.**

Your purpose serves as your guiding light, helping you to decide what to pursue, but also what *not* to pursue. It’s not tied to financial goals, your product or service, or your markets, and it should stand the test of time—up to 100 years.

Your “Why, How, What” communication flows directly into your “Purpose” on your Roadmap. They can be similar, or complementary.

As you’re thinking about your true purpose, think about your company’s founder (if it’s not you). What problem did he or she set out to solve? What difference did he or she really want to make?

## CORE VALUES

The second part of the core ideology from Collins' and Porras' work is core values. These are guiding principles that dictate behavior and action. Core values help people to know right from wrong; they can help companies to determine if they are on the right path and fulfilling their business goals.



Your company's values and beliefs define your existence and guide your organization. They're the essential tenets of your organization and they should:

- Require no external justification
- Be valued by your people
- Serve as a compass for strategic decisions

Your beliefs help to define what your company stands for. They're independent of the current business environment and should be able to stand the test of time, without change. To identify your beliefs, think about the values that are truly "central" to your organization.

WHILE CONSIDERING YOUR BELIEFS, REMEMBER THAT YOU CANNOT "SET" ORGANIZATIONAL VALUES, YOU CAN ONLY "DISCOVER" THEM. THE VALUES NEED TO ALREADY EXIST—IT'S YOUR JOB TO ILLUMINATE THEM. NOR CAN YOU "INSTALL" NEW CORE VALUES IN YOUR EMPLOYEES. CORE VALUES ARE NOT SOMETHING PEOPLE "BUY IN" TO. PEOPLE MUST BE PREDISPOSED TO HOLDING THEM.

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## BUYER PERSONAS AND THEIR INSPIRATION

Now let's shift from an internal view to an external view. Instead of thinking about your values, let's think about your audience.

**Who buys from you?**

**What do they look like?**

**Why are they attracted to you?**



Segmenting your market into like groups has been a common marketing practice taught in MBA schools for decades. Choosing a semi-fictional representation of your typical customer to represent a segment makes it more tangible for your team and easier to understand.

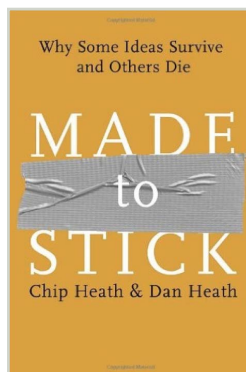
For each persona, get to know them and include what inspires them. What do they care about? What are their problems? What do they need to solve their problems? Who in their organization is impacted by the problem? What are their alternatives to buying from you? What will they get from you that they won't get from the alternative options? What's their primary motivation to purchase? What are their emotional triggers?

When you're valuable to a single persona, you're valuable to everyone like him or her.

## 2. Differentiate

DIFFERENTIATION CAN OCCUR FROM THE INSPIRATIONAL ELEMENTS OF YOUR ROADMAP, BUT IT CAN ALSO RESULT FROM COMMUNICATING YOUR BRAND'S STRENGTHS USING SPECIFIC TECHNIQUES TO CREATE A COMPETITIVE ADVANTAGE IN THE MIND OF THE BUYER.

---



### COMPETITIVE ADVANTAGES

We all wish that we had an iron-clad barrier to entry or a patent to prevent competition in our marketplace. At the SME level, that's rare; competition is everywhere.

Yet Jack Welch once said, "If you don't have a competitive advantage, don't compete."

So how do stakeholders of SMEs create a competitive advantage? The solution is to shift your focus from your competition to the mind of your buyer. How can you "win" the competitive battle in the mind of your customer? Winning that battle is almost as good as preventing your competition from selling in the marketplace.

Research has shown that there are specific ways you can communicate your strengths that will more clearly differentiate you in the mind of your customer. So think of your competitive advantages as differentiators that describe how you are definitively better than the other options available in the marketplace.

This communication style isn't natural for more businesspeople, though. As Chip and Dan Heath say in their book *Made to Stick*:

DATA SHARING DOESN'T CREATE AN EMOTIONAL CONNECTION WITH YOUR BUYER. DON'T COMMUNICATE THIS WAY WITH YOUR MARKET.

"BUSINESS MANAGERS SEEM TO BELIEVE THAT, ONCE THEY'VE CLOCKED THROUGH A POWERPOINT PRESENTATION SHOWCASING THEIR CONCLUSIONS, THEY'VE SUCCESSFULLY COMMUNICATED THEIR IDEAS," HEATH WRITES. "WHAT THEY'VE DONE IS SHARE DATA."

Share:



To identify your competitive advantages, think about what you do well and list these strengths. Then select the strengths that meet the following criteria:

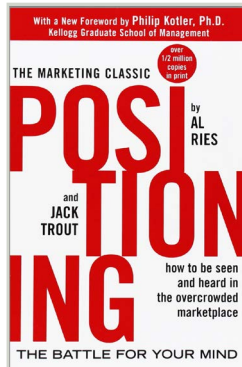
- Quantifiable (not arbitrary)
- Objective and credible (not subjective and vague)
- Not currently stated by your competitors
- Contrasting (showing black and white, before and after, with or without, etc.)
- Self-centered (focused on what's in it for your buyer)

Review your selected strengths and reword as needed to maximize impact with your buyer.



### 3. Position

NEXT, DEFINE WHAT YOU WISH TO BE KNOWN FOR, AND USE THIS AS A GUIDE FOR EVALUATING YOUR MARKETING COMMUNICATIONS.



#### DESIRED MINDSHARE

“POSITIONING IS ABOUT OWNING A SPACE IN THE MIND OF YOUR CUSTOMER.”

—JACK TROUT AND AL RIES

FROM *POSITIONING: THE BATTLE FOR YOUR MIND*  
1976

This classic quote is still very relevant today. The overwhelming amount of options available in most markets make it more challenging though, because your buyer’s mind screens and rejects most of the information offered to it as a defense against information overload.

The solution to communicating in a communication-saturated society is to oversimplify. What do you want the typical customer to think of, at the simplest and highest level, when they think of your brand? Focus on a single word or short phrase. What is the impression you want to leave?

Then think about what space in the mind of your customer you currently own. If this is different than what you wish to own, use your Roadmap to get there.

For an example, what brand of car do you think of when asked to name a “safe” car brand?

Most people think of Volvo. Volvo has long hung its hat on safety, and this focus continues to pay off.

Share:   

## 4. Define

NOW, COMPLETE THE DEFINITION  
OF YOUR BRAND STRATEGY  
BY DESCRIBING YOUR STORY,  
PERSONALITY AND MEANING.

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### BRAND STORY

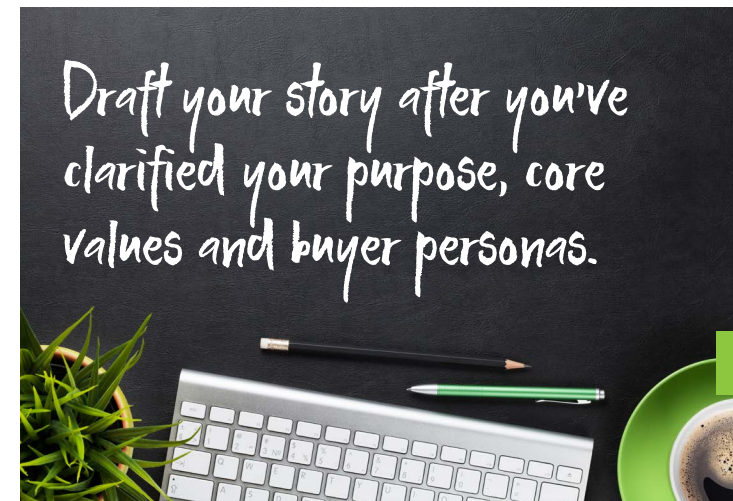
People have communicated using stories for thousands of years. Stories can create emotional responses to a brand.

**THERE'S NO "BUY" BUTTON  
IN THE BRAIN. BUT THERE'S  
A "STORY" BUTTON.**

Your brand story can be one of the most powerful elements of your Roadmap. It can showcase the imagination of your founders and highlight your purpose, while at the same time making an emotional connection with your market.

It can powerfully communicate many of your Roadmap elements in a short amount of time.

Think about your purpose, your core values and your "Why." Think about your company's founders and what they set out to accomplish. What's the true story you can tell? How can you shape it to be meaningful and emotional?



## BRAND PERSONALITY TRAITS

Your brand's personality and voice are what allow your business to make a personal connection with your audience. Just like humans have beliefs, goals, values and flaws, so too should organizations. People want to see the humanity behind a business.

THINK ABOUT YOUR  
FAVORITE BRAND.  
IF IT WERE A PERSON,  
HOW WOULD YOU  
DESCRIBE HIM OR HER?

WHAT ADJECTIVES  
WOULD YOU USE TO  
DESCRIBE YOUR BRAND?

Listing your brand's personality traits will guide your team throughout your interactions with your marketplace. All of your sales and marketing materials, messages and human interactions should represent these traits.

And your hiring department should screen for them.



## BRAND MEANS

Earlier, you listed a single phrase describing the mindshare you wish to own. To win that mindshare, you can't simply tell your market that you're the *(insert the mindshare you wish to own)* and expect them to believe it.

Your buyers have to arrive at that conclusion themselves. And that might take time.

It's helpful to expand on this to list the top three things that your brand should mean to your market. Don't focus on features of your product or service. Focus on the emotional benefits your customer feels (even if you're B2B).

Then, craft three compelling statements of what your brand should mean to your customers. What do you want people to say about your brand when they describe it to their friends or colleagues?

Your team will use these internally to gauge the effectiveness of your current and future brand communications.

## BRAND POSITIONING STATEMENT

**YOUR BRAND POSITIONING STATEMENT SHOULD SUCCINCTLY CAPTURE THE ESSENCE OF YOUR BRAND.**

It's typically about 25 words, but can be longer if needed.

Use it in written communications when describing your brand.

## BRAND EXPERIENCE

Your brand experience is at the top of your Roadmap because it encompasses all of the other elements of your strategy.

Your brand isn't your name, logo, slogan or product or service. It's the experience your market has with your brand. All of these elements can influence that experience.

Describe the experience your customer should have with your brand each time, at each interaction. Ensure that it's descriptive, clear and concise so your entire team can understand what you should be delivering.

You are branded by your market. Take ownership of your brand by optimizing the experience you wish to deliver. Ensure that every market-facing employee clearly understands it.



## 5. Audit

NOW THAT YOUR BRAND IS DEFINED, COMPARE YOUR ROADMAP ELEMENTS TO YOUR CURRENT BRANDING TO DETERMINE YOUR STRATEGIC INITIATIVES.



### INITIATIVES

If you've gotten this far, you've made great progress! But at this point, your Strategic Marketing Roadmap is nothing more than a document.

It only becomes valuable when you use it to reshape your communications with your market—and with your employees.

FOR SOME BRANDS,  
THIS ONLY REQUIRES  
MINOR ADJUSTMENTS.  
FOR OTHERS, IT REQUIRES  
A MAJOR OVERHAUL.

After you've completed the previous elements, list your brand touchpoints (every type of communication where your company interacts with your market). Review all of your messaging, sales and marketing materials, and human interaction at each touchpoint. For service companies and B2B brands, much of the brand experience is delivered through your people (and it's typically greater than 50%).

Does your creative represent what's on your Roadmap? Does your messaging match? Does your culture match?

Your initiatives should address the work that needs to be done to update your communications so that they effectively represent what you stand for.



## 6. Implement

FINALLY, DETERMINE YOUR BRAND VISION AND BIG IDEA THAT EMBODY WHAT YOUR BRAND STANDS FOR, AND THEN DETERMINE THE TACTICS TO USE FOR IMPLEMENTATION.

### BRAND VISION



“GOOD BUSINESS LEADERS CREATE A VISION, ARTICULATE THE VISION, PASSIONATELY OWN THE VISION, AND RELENTLESSLY DRIVE IT TO COMPLETION”

—JACK WELCH

The 3<sup>rd</sup> part of Collins’ and Porras’ core ideology is vision, or what they call a BHAG (Big, Hairy, Audacious Goal).

From Collins and Porras:

THE POWER OF CREATING THIS VISION, OR BHAG, IS THAT IT GETS YOU OUT OF THE TRAP OF THINKING TOO SMALL. A GREAT VISION CHANGES THE TIME FRAME AND CREATES A SENSE OF URGENCY.

A REALLY GOOD BHAG PROBABLY HAS A MINIMUM LENGTH OF ABOUT A DECADE, AND MANY TAKE LONGER THAN THAT. TIME FRAMES EXTEND TO WHERE YOU ARE NO LONGER MANAGING FOR THE QUARTER BUT FOR THE QUARTER CENTURY.

ON THE OTHER HAND, BECAUSE IT’S SO BIG AND SO AUDACIOUS AND SO HAIRY IT INCREASES THE SENSE OF URGENCY. YOU LOOK AT IT AND SAY, ‘OH MY GOODNESS, IF WE’RE GOING TO BRING THE WORLD INTO THE JET AGE OR TRANSFORM EDUCATION OR PUT A COMPUTER ON EVERY DESK, THEN WE HAVE TO GET TO WORK TODAY WITH A LEVEL OF INTENSITY THAT IS UNRELENTING.’

BAD BHAGS ARE SET WITH BRAVADO; GOOD BHAGS ARE SET WITH UNDERSTANDING. INDEED, WHEN YOU COMBINE QUIET UNDERSTANDING OF THE THREE CIRCLES WITH THE AUDACITY OF A BHAG YOU GET A POWERFUL, ALMOST MAGICAL MIX.

## BIG IDEA

A “big idea” is advertising 101. It’s about creating a concept that is memorable and represents your brand. It’s what most ambitious marketing agencies and clients strive for when developing their communications platforms.

How does this translate into our world at the SME level? Most of us don’t have multi-million-dollar ad budgets. And most are business-to-business marketers, not consumer marketers.

But you don’t necessarily need an agency to come up with your big idea.

Not all businesspeople are creative, but given the right framework, you might be surprised at the quality of the ideas that can come from your team.

## CHANCES ARE, IT’S ALREADY VISIBLE WITHIN YOUR ORGANIZATION.

Hold a brainstorming session with your team to think about ideas that fit with the rest of the elements of your brand. After you have a list of good ideas, bring in the agency or creative people to refine the best idea and take it to the market.

Your Big Idea is near the top of your Roadmap because it can be one of the most powerful and most visible elements. However, it’s typically one of the last to complete (to ensure that it represents the rest of your strategy).

## TACTICS

The initiatives you listed previously should address the big steps needed to begin implementing your strategy. They should be things like “conduct our brand audit” and “revamp our digital communications” and “revisit our culture to determine misalignment with our brand.”

Tactics are specific activities you perform to execute your strategy. Since these are marketing related, it’s a good idea to have the people responsible for marketing and sales participate in determining these tactics. Examples of tactics include “use inbound marketing to educate buyer persona X” or “promote live quarterly educational seminars.”

Start by listing your top 10 tactics to take for the next 12 months to implement your strategic plan. Rank them, according to priority, contingencies and ability to execute.

Then focus on the top 3.

Like your initiatives, your tactics can change throughout the year.



# EXECUTION OF YOUR STRATEGY

COMPLETING THE PUZZLE OF YOUR STRATEGIC MARKETING ROADMAP IS DIFFERENT FOR EVERY COMPANY.



## IT'S A JOURNEY, NOT A DESTINATION.

Some of these elements will be very easy for you and your team to complete. Some will be challenging. I've never encountered an organization that didn't struggle to determine at least a few. I've had CEOs tell me exactly what their purpose was at the beginning of the exercise—but I've also had CEOs who had difficulty deciding on one even after lengthy introspection.

I've also had many tell me something along these lines:

"JIM, I REALLY LIKE WHAT WE'RE DOING HERE. BUT AT THE END OF THE DAY, THIS IS A BUSINESS. I'M HERE TO MAKE MONEY. SOME OF THESE STRATEGIC ELEMENTS ARE DIFFICULT TO GRASP AND DON'T APPLY TO US. WE'RE JUST A SERVICES COMPANY LIKE EVERYBODY ELSE."

You may have thought the very same thing while reading this book.

Not every company has an inspirational founding story like Rackspace. Or like Apple. Or like Walt Disney.

And you may not have even been with the company at its founding. Maybe you took over a struggling professional services company in a hyper-competitive market and fought tooth and nail to save it from going under. There are ten other companies in your market doing the exact same thing.

But every company I've worked with has some unique story to tell, or some element of personality, or some core values, or some vision. It's just difficult for people so close to it to see it.

That's why we designed the Roadmap.



Not everyone in your company will understand this process or be comfortable with the results. That's typical. Focus on the process, not the end result. If you do the work, your path will become clear.

What would Walt Disney be like today if they had just decided "We're just a theme park for kids, trying to make money" instead of "We want to make people happy"?



Share:   

## MEASUREMENT AND REFINEMENT

Measuring marketing results is always a good practice. But returns from strategic development take time. Do not try to measure ROI for the first year after the completion and execution of your roadmap. It will take time and resources. Consider it a strategic investment.

**HOWEVER, HAVE YOUR TEAM PROVIDE MEASUREMENTS OF YOUR EXISTING MARKETING AND SALES RESULTS BEFORE YOU BEGIN IMPLEMENTING YOUR ROADMAP. THIS PROVIDES A BENCHMARK.**

In years 2–5, if your strategy is sound and your execution good, you should start to see improvements across the board in your customer acquisition and retention metrics, and may experience:

- Sales increases
- Increased brand awareness
- Improved customer loyalty
- Shorter sales cycles

If you do a few of the elements well, you are probably ahead of your competition. If you do all of them well, you've given yourself a much better chance of winning your market.

Embrace the journey!





# ADDITIONAL RESOURCES

FOR SOME, THIS EBOOK AND THE STRATEGIC MARKETING ROADMAP PROVIDE ENOUGH STRUCTURE AND GUIDANCE TO BEGIN THEIR STRATEGIC MARKETING INITIATIVE.



## EXPANDED ROADMAP GUIDANCE

If you're seeking additional guidance, we have a more detailed program that addresses each element of the Roadmap with visuals, examples and supporting documentation.

The self-guided option allows you to use our tools, screencasts and presentations to complete your Roadmap with your team, at your own pace. You'll receive a detailed Strategic Marketing Report, with explanation, guidance and examples as you move through 6 modules:

1. **INSPIRE**
2. **DIFFERENTIATE**
3. **POSITION**
4. **DEFINE**
5. **AUDIT**
6. **IMPLEMENT**

After completing the modules and your Report, you can use your Roadmap as an internal document that summarizes your entire marketing strategy.

## YOU CAN LEARN MORE HERE:

>>> [marketingmo.com](https://marketingmo.com)

I also work directly with select SMEs on a monthly basis to provide personal guidance and facilitate strategic development.

[Contact me](#) to discuss your project.

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[marketingmo.com](http://marketingmo.com)

Glutch Marketing, Inc.  
7047 E. Greenway Pkwy., Ste. 250  
Scottsdale, Arizona 85254

