




# BetterSMB MARKETING

Winter 2018 Volume 2 • Number 4

BridgeTower Media series of guides for small and midsize businesses



## SOLD ON BIG DATA

SALES STAFFS LEARN  
IT PAYS OFF TO HARNESS  
BIG DATA AND AUTOMATION

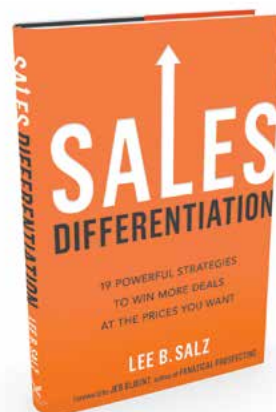
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### BOOK REVIEW:

You don't  
have to  
lower your  
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make a sale.

See Page 18

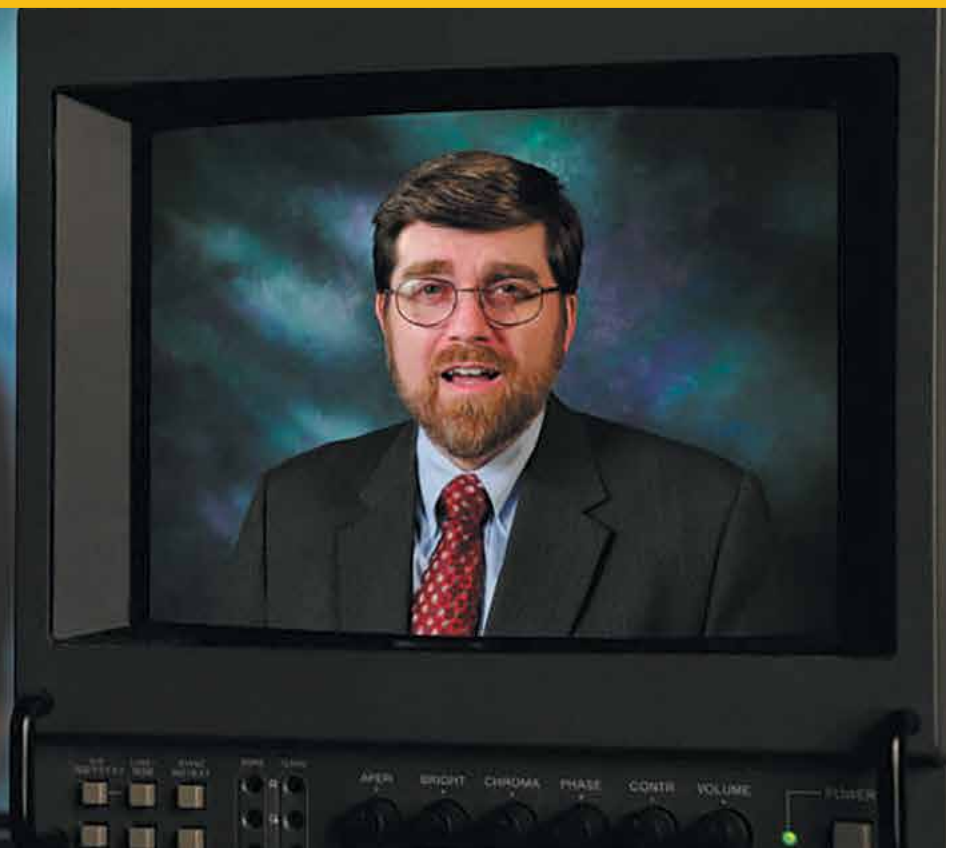


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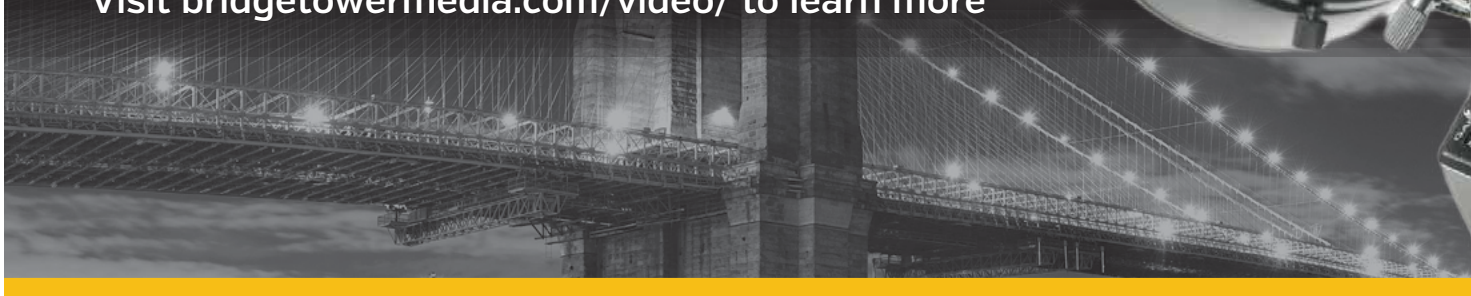
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# Sales, marketing technologies could give your business a much-needed boost



**Adam Reinebach**  
President and CEO  
BridgeTower Media

For some of us, making a sale is the greatest feeling. You’ve found someone who needs your company’s product or service. You’ve convinced them that your solution is right for them. Now they’re going to write a check, and your business will gain much-needed income. Maybe your sale contributes significantly to company revenues, or maybe it’s a tiny drop in a bucket of other sales. Regardless of its impact on the big picture, making a sale is almost always a positive experience.

Not everyone in business works in sales, but without sales, most businesses wouldn’t be businesses at all. That’s why this issue of BetterSMB is all about sales and marketing. You’ll find a number of articles about technologies that you can use to give your company’s sales professionals more information they can use when they’re trying to close a sale.

Read the article on page 4 for a glimpse of how efficiently your sales and marketing operations could be. There’s a quote there from Rick Middlemass, vice president of the National Association of Sales Professionals about how companies use automation to fill a salesperson’s schedule with appointments with people ready to buy:

“When people are getting to a certain point of qualification and it really makes sense to get them on the phone and talk to them live, the handoff from marketing to sales is in a highly automated way.” Interconnected sales technologies enable this level of automation, eliminating much of the drudgery of manual data entry, Middlemass explains.

Sales technologies have made amazing leaps in progress in recent decades. How you put them to work in your business could make a difference for your employees, for your business and for your bottom line.



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# Technology empowers sales professionals

## Customer relationship management, big data and marketing automation deemed essential for modern sales teams

By Jason Whong

*BetterSMB*

Powerful technology that can make sense of ever-increasing bits of data can make the difference between a successful, happy sales team and one that can frustrate themselves with inefficient sales processes from decades ago. And if it hasn't changed the way your business makes a sale, a day is coming when it will.

That's what Rick Middlemass, vice president of the National Association of Sales Professionals, and Sinan Kanatsiz, chairman and founder of the Internet Marketing Association, have to say about technologies like customer relationship management software, which can keep track of sales leads; big data, which are large sets of information, and marketing automation, which can make it easier for companies to find customers ready to buy.

Sales has come a long way from times when salespeople made 100 calls a day just seeking out basic information about their clients, Middlemass said in an interview for this article. Now, CRM software can share

information with marketing automation software, which qualifies the sales leads based on their interaction with emails and what webpages they may have visited, giving salespeople a better picture about the needs of buyers.

"When people are getting to a certain point of qualification and it really makes sense to get them on the phone and talk to them live, the handoff from marketing to sales is in a highly automated way," Middlemass said. When the buyer says they're ready for a conversation, the technology can "automatically look at the sales person's calendar and the salesperson can have a full day of calls that has a pretty high level of qualification for those prospects without anyone having to do anything manually. ...I think that's something that's come a long way."

There's a word Middlemass uses to describe what it's like to sell the old-fashioned way: painful. Actually, "Very painful."



**Middlemass**

"When people are getting to a certain point of qualification and it really makes sense to get them on the phone and talk to them live, the handoff from marketing to sales is in a highly automated way."

*Rick Middlemass, vice president of the National Association of Sales Professionals*



“Every, day every call, every email, you’re missing information,” Middlemass said. Worse, if a salesperson leaves, and their notes are not stored someplace where other salespeople can find it, they’ll miss out on that information too.

“Without the CRM, ... you’re doing a lot of flying blind,” Middlemass said. “A lot of effort is going to waste because you don’t have the data from that effort.”

Without a CRM, companies may have a hard time attracting or retaining employees who used the technology in previous sales jobs, Middlemass said. “If you’re taking a step back in time in terms of the software and the tools that you had at a previous company it’s going to be frustrating,” he said.

Every business should have some sort of customer relationship management software that is tied in to its website, said Sinan Kanatsiz, chairman and founder of the Internet Marketing Association. “Whether you’re a small business, a small dental shop, or a multinational enterprise, you should always keep records of the people you do business with and or prospects that are in your database. And even people that you’re not doing business with anymore, because those are all touch points to help communicate and market your products and services.”

The biggest obstacle to success with a CRM is user input, Kanatsiz said. “Most people who install a CRM, it’s like going to 24-hour fitness: You’ve got a gym membership. You never use it. They get the CRM, they don’t input the data.”

Manual data entry can lead to fatigue among salespeople, but increasingly-available opportunities for automation can handle that task.

“So let’s say you and I just had a phone call,” Kanatsiz said. “Our phones should know that we just had a phone call and logged that data in the CRM and then that gets shared with the workforce. So that way we’re not actually manually entering it.”

Kanatsiz recommends working with a CRM solution or platform provider that has access and partnerships with other technology platforms. “That way you’re not having to plug in a bunch of, you know, Christmas lights, into one socket and then overload and you know bust your circuit breaker. It’s better just to have one that’s a comprehensive solution that is already pre-authorized to these other platforms and then you can actually build your CRM ecosystem all in one dashboard rather than having to have multiple dashboards open.”

Much of what salespeople used to do over the past 20 years can now be automated, Middlemass said. Marketing automation software can keep track of how users interact with email and with websites to generate sales leads. As users interact, the software can determine their levels of interest and trigger action from a salesperson.

“That significantly helps us save the time of the salesperson, because there’s a lot of self-qualification, versus the salesperson having to reach out to everybody and do the

qualification themselves,” Middlemass said.

Even beyond tools that qualify leads, other menial tasks can be automated to make sales more efficient.

One example of a menial task that salespeople can now automate is scheduling meetings by letting qualified sales leads schedule directly onto a salesperson’s calendar, without human involvement. “How much time have salespeople spent in the last hundred years going back and forth to find a meeting time?” to set up the interview for this report, Middlemass replied to BetterSMB’s email with a link that could be used to book time on his calendar.

Another avenue for automation is automated telephone dialing. For a salesperson who makes thousands of calls over a period of a few weeks, that can save hours of time and increase productivity, he said.

Having a CRM that integrates with marketing automation software empowers businesses to make better choices about how they market to potential customers, Kanatsiz said. Sometimes they may have an initiative that targets a cluster of leads rather than the whole lead database.

“It’d be more appropriate for me to send a more specific email to this dataset than if I just blasted my entire database — shotgunned my database — which is probably not going to be relevant,” Kanatsiz said. “So that’s why you’re seeing such a nice collaboration between these

that people are opting out of around the world,” Kanatsiz said. “That’s going to destroy a good chunk of email marketing. I’m thinking like maybe like somewhere between 8 and 13 percent is what our indexes are showing.”



**Kanatsiz**

Plugging large datasets into a CRM can give businesses a sales advantage. One trend in big data is letting AI analyze big data more quickly than humans can.

“Every company that has a CRM is tied into that somehow. Obviously

the bigger the data the more you can predict outcomes,” Kanatsiz said. If you’re dealing with shallow levels of data, then you’re not going to actually be able to predict much.”

But automation can play an even larger role in marketing, Kanatsiz said.

“We’re actually building something right now where we can auto-populate content calendars based on predictive content and instead of our content writers actually writing the content, the content has already been written in their voice with their persona and they’re going to actually edit the content, and find ways to actually create unique content based on edited content,” Kanatsiz said. “So this is where the world is going.”

Middlemass sees a future in which artificial



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(email service providers) and CRM providers.”

Email software providers such as Apple and Gmail have made it simpler for their users to opt out of marketing emails, which often required jumping through virtual hoops. Kanatsiz sees that as a challenge for email marketing, especially in cases when users may perceive untargeted, less relevant messages as an annoyance.

“You can actually unsubscribe just by hitting the word unsubscribe at the top of the email, which is now causing a mass exodus of emails

intelligence software can improve sales by providing insights into mental states of buyers.

“The confusing part about buying and selling is that people buy for emotional reasons and justify with logic,” Middlemass said in an interview for this article. “So the more that the ... AI can understand where people are at emotionally, and really just serve hungry buyers up to salespeople at exactly the right time — for their situation, for their feelings, for their problems, for their life — The more the more effective sales is going to be.”



# How to develop a data-driven sales and marketing strategy

By Amanda Anderson

W-Systems

Could you tell me in 30 seconds how many of your customers or prospects use a specific product? If the answer is no, then you may not be executing a data driven sales and marketing strategy.

Often marketing teams define too broad of a target audience for sales to prospect into. They'll say 'we target companies between 500 and 5,000 employees with a revenue greater than \$15M, in Finance, Healthcare, and Manufacturing industries'. This is fine for a high-level description of your market. But for sales and marketing to be successful, more detail is needed.

Below are the three things that will help you develop a data driven sales and marketing strategy.

## 1. Data-driven segmentation

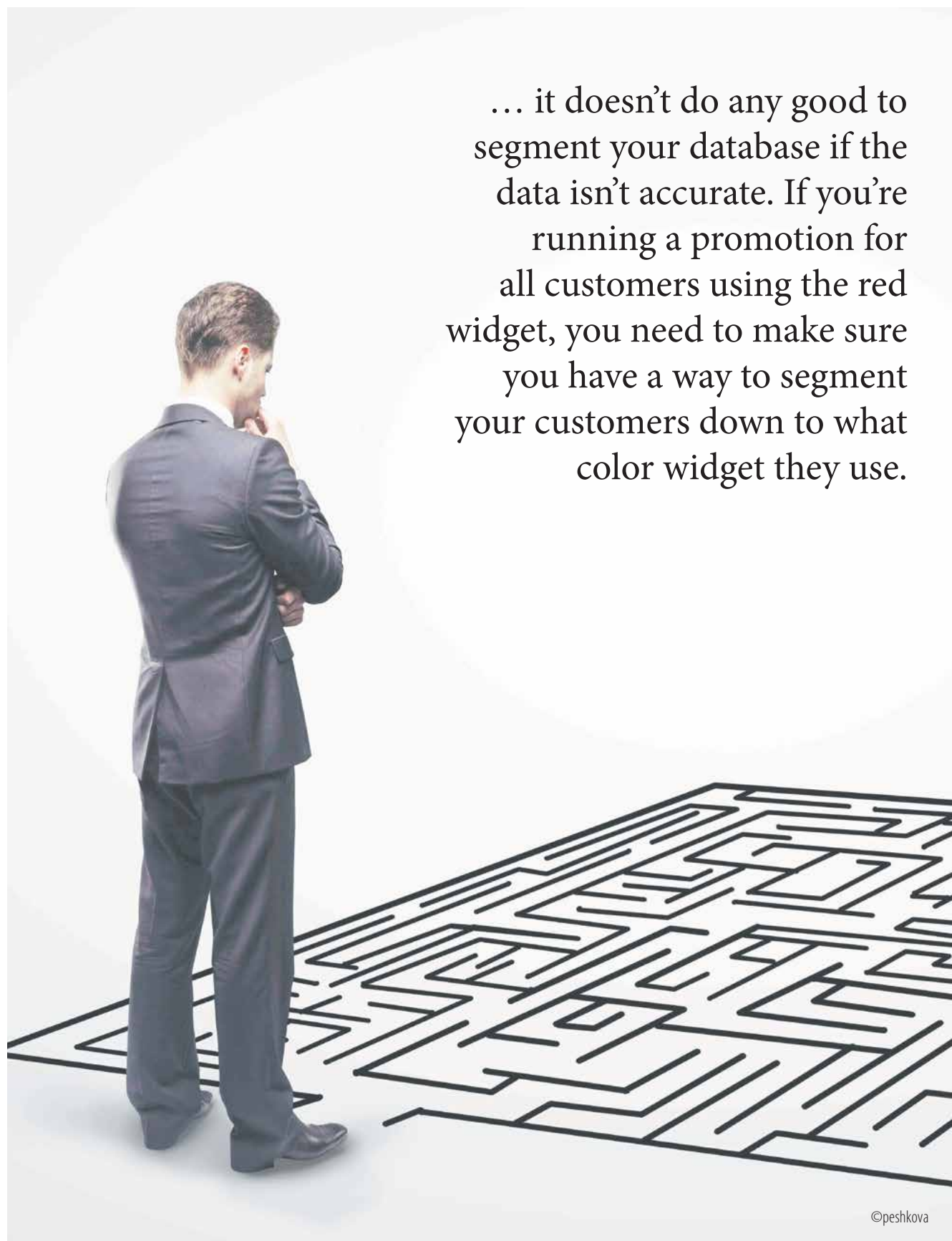
I emphasize "data-driven" because it doesn't do any good to segment your database if the data isn't accurate. If you're running a promotion for all customers using the red widget, you need to make sure you have a way to segment your customers down to what color widget they use. You also want to make sure your data is accurate to avoid these two scenarios: 1) If someone stopped using the red widget last week and now upgraded to the green widget, you wouldn't want to still send promotions about the red one. 2) If a sales rep doesn't specify what color widget is in the CRM, and that field was blank, then they'll never get any promotions based on specific widget color.

Depending on the products and services you sell, it may make sense to create a custom module to track product purchase history. The Sugar Opportunities module is great for managing your pipeline of past, current, and future deals. But it isn't well suited for product history and order management. A separate, custom module with a relationship to Sugar's Accounts module can help track previous products purchased, current subscriptions, renewals, and upgrades. From here, you can run reports and segment your customers by current product line or previously used products depending on what you need for the campaign you are running.

UpCurve Cloud tracks its customers' subscriptions in Sugar. This enables our account managers to keep track of what products our customers previously used, what they're currently subscribed to, and their renewal date. Tracking this allows us to notify them of promotions or news specific to the products they are using.

## 2. Target persona

Once you've successfully segmented your customers and prospects by product line, geography, size, etc., you now need to define the buyer persona for each segment. A



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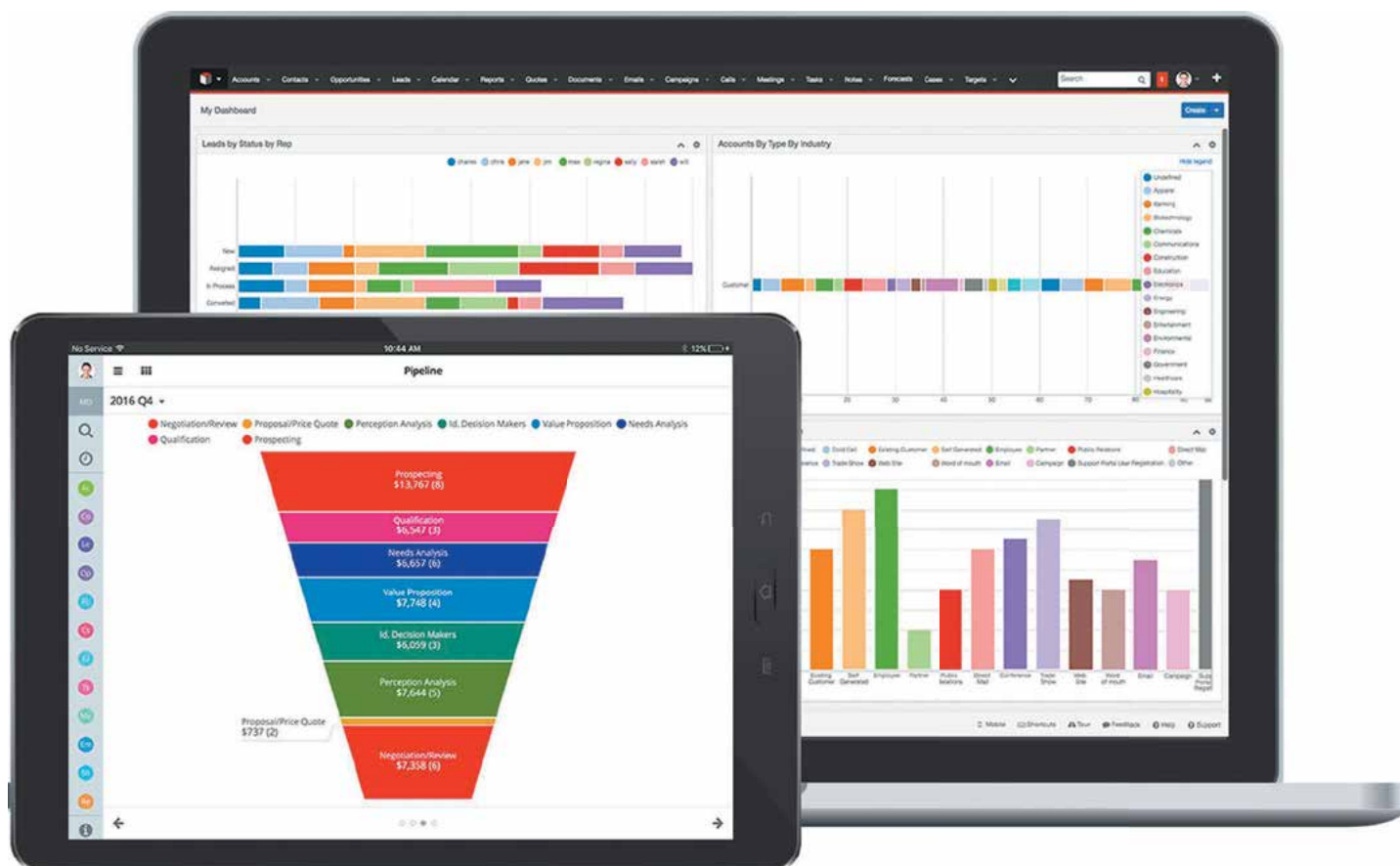
common mistake when defining a target audience is to assume the company is buying, when instead it's a person who is buying. Identifying the buyer persona helps to define the emotional aspect of a buying decision. What pain do they have; what are they most worried about; what value do they perceive you bring? Defining this for each segment will help you further refine your messaging, value proposition, and content. You can do this exercise internally and send surveys to customers to gather additional insight. Or you can seek an outside marketing firm to help provide a different perspective and challenge your thinking.

## 3. Supporting content and relevant campaigns

Once you have a narrow and defined target, you'll need content that is both relevant and has perceived value. Using the description of your target persona, you should have a good understanding of what your customers or prospects need from you. Be as specific as possible in your content and messaging. With the right data segmentation strategy, you can be very specific in the content you create and can be more certain that your message is applicable to the audience. This should lead to higher open and click-through rates as well as higher attendance for your events.

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# How to save money with your small business marketing

By Kristen McCormick

ThriveHive

Marketing your business is an investment of time, money, effort, and grit. It is important to invest in your activities so that you can get the most out of your spend. There are ways to minimize costs and maximize spend, so that you can make the most of your marketing. Here's how to get the greatest impact from your marketing budget, by using your budget more efficiently and reducing costs associated with marketing.

## How to use your marketing budget more efficiently

Your marketing budget is one of the most important components of a marketing plan. Your budget is often the deciding factor in how you market your business and can vary monthly. That's why it's important to pay attention to the cost of your marketing activities, as well as how much you are able to spend each month. Here are some ways to make more efficient use of your budget, no matter how big or small it is.

### Target the right people

Spending money on people who are not interested in your business is a waste of time and money. The best way to keep your budget down is by targeting the right people with your efforts. Find your target audience and focus your marketing resources on them. Customers from your target audience cost the least to acquire, as they are already interested in your products and services.

When you target a specific audience, you don't have to worry about coming up with multiple versions of the same content for different groups—which can be costly and time consuming.

### Look at customer patterns

The right customers for your business are not just the ones who are quickest to buy. They are the ones who are likely to stay with your business over time. Make sure to attract customers who are in for the long haul and not just people who only buy once, or who want only your most resource-heavy products and services.

This doesn't mean you shouldn't go out of your way to accommodate your customers and provide high quality service. It just means that you want to capitalize on your products and services that satisfy people most and which are not expensive to provide.



### Create a marketing plan

The next way to make the most of your marketing budget is to make a marketing plan. There are many ways to achieve the same goal, and there are many goals that will benefit your business. This makes it easy for you to go off track with your marketing activities or branch out too far. Usually, the more activities, goals, or methods you tackle at once, the less effective they will be. A marketing plan keeps you on track with the most specific objectives for specific goals. It enables you to stay on track with only the most effective activities, and to focus on maximizing the time and money you spend on them.

### Track and measure Your marketing

Your marketing plan will keep you on track with your marketing activities, but you still need a way to make sure your marketing activities are giving you results. Another way to make the most of your marketing budget is to track your marketing. There are two basic ways to track your marketing: tracked links and tracked phone numbers.

Use tracking links or URLs so that you can see which activities are working best. Create tracked phone lines so that you can know which advertisements or flyers are catching peoples' attention. With tracked marketing, you can identify what you are getting in return for what you spend on each activity; eliminate those which are not generating any revenue, and maximize those that are.

### Tips for lowering the cost of your marketing

There are many ways to promote your business, with or without money. However, activities aren't separated into free or paid. The cost of a marketing activity will vary depending on the approach you take. Here are some tips to help lower the cost of online and offline marketing activities.

#### Maintain Your contact list

The cost of many marketing activities, both online and off, is sometimes dependent upon how many people you are trying to reach. For example, email marketing programs tend to get more expensive with the number of contacts you have. Offline marketing strategies such as direct mail increase in paper, printing, and postage costs the more people you are trying to reach.

Take some time every month to update and clean out your contacts lists. Segment these leads into their likelihood of engaging with your business, in case you want to reserve certain activities for certain customers or leads. Remove contacts who have moved, unsubscribed, or are past the point of rekindling contact with, so that you aren't using resources on uninterested or (nonexistent!) people.

#### Get sponsors

Events are a great way to market your business, but can be costly. See if there are any larger companies that share your values or serve the same target audience (in a different way) that would be interested in spon-

soring you. If you are hosting a 5K, see if a sneaker company would be willing to cover some of the costs, or if a T-shirt company can provide event shirts at a discount.

#### Use local vendors

Local partnerships are a great way to lower the cost of your marketing activities. Team up with a complementary business nearby, and run a promotion together. In addition to splitting the cost in two, you double the audience you get in front of. This benefits both of your businesses, while strengthening your relationship with the community.

#### Reach out to micro-influencers

One last tip for reducing your marketing costs is to find micro-influencers to promote your small business. It used to be that only big businesses had the ability to leverage celebrity endorsements to market their business. Now, thanks to social media, local and industry celebrities are more influential, identifiable, and accessible than ever. You don't need to spend a fortune to get a powerful endorsement for your business. Offer your service for free to a micro-influencer, in exchange for a blog post mentioning or featuring your business.

Understanding the best way to allocate your resources is a gradual process that you will learn as your business grows. Pay careful attention to your finances along the way, and you will find there are many opportunities to save money and maximize your spend in your marketing.



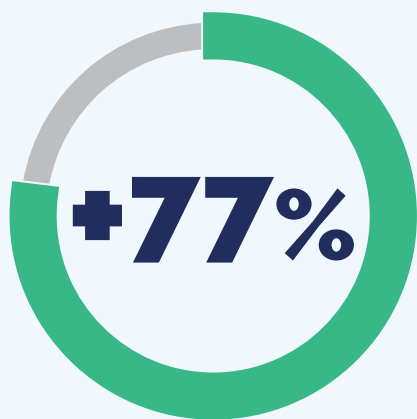


# Don't miss out.

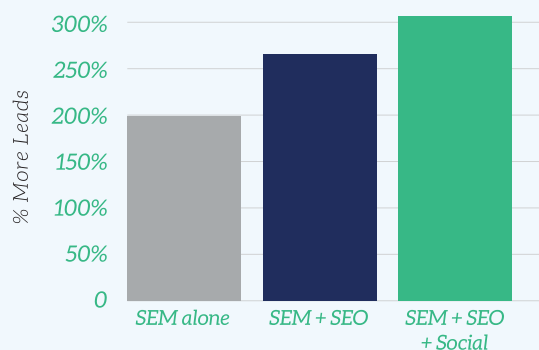
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# Ways to automate your marketing

ThriveHive

Owning a small business means that you end up wearing several hats to keep your shop up and running – owner, bookkeeper, clerk, IT support, maybe even janitor! Marketing is one of those vital components and without a team of several individuals in place to execute a full-scale strategy, it's likely you're not reaching your full potential in this department. Luckily, with all the advances in user-friendly technology, small business owners can now harness the same marketing power as their big business competitors by utilizing readily available marketing automation tools.

## What is Marketing automation?

Marketing automation is the use of technology to streamline, automate and measure marketing activities. Think tasks such as:

- Lead generation
- Email marketing
- Campaign management
- Customer retention
- Lead nurturing
- Cross-selling/Up selling
- Relationship building

And it doesn't stop there. Much of the software available for marketing automation includes customer relationship management software integration, marketing analytics, landing pages, social marketing, etc.

## What are the benefits of marketing automation?

The most obvious benefits are efficiency and time-savings. There are components to it that are in the realm of “set it and forget it” – but don't go in with the impression that it will completely run itself! (More on that later). Other benefits include metrics providing insight into which marketing programs are winners and which can be abandoned; sales pipeline tracking; simplified customer information acquisition; increased productivity; and uptick in revenue.

## Do-it-yourself marketing automation

You don't have to pay big bucks to see results from your marketing automation efforts. Here are some everyday tools you can use to automate your business and marketing operations.

### Hootsuite

With the majority of your customers spending an average of two hours per day on social media, it would be a huge misstep not to greet them when they get there! Hootsuite allows users to manage all of their



©Rawpixel

First and foremost, you still have to create a well thought-out marketing strategy before setting up any automated services. While these tools will assist you in the execution of your plan, they won't generate one for you.

social media pages through a single dashboard. Talk about efficiency. This means that you can schedule posts, search for content to repost, keep your content organized in online libraries, and even pull posts directly from your web browser without having to log in to multiple social media accounts. The service will also track messages and mentions along with analytics on post performance.

### WordPress

Have a blog? Remembering to consistently post entries can be easily overlooked. But, if you're hooked up with a WordPress account you can write your posts well ahead of time and automate them to post to your site on a set schedule. This particular platform also has hundreds of ways to customize your blog and is used by the likes of CNN and TechCrunch.

### IFTTT

If This Then That is a free app that

allows you to create applets. Applets are like a series of triggers you can create among your different applications, such as WordPress and social media. For example, you could use an IFTTT to trigger newly published blog posts to get posted to your social media accounts. IFTTT works with a number of applications—news, email, Google Sheets, and more, so you can use it to automate marketing and general business activities.

### Smart folders for email

Most email platforms (Gmail, Outlook, Apple Mail, for example) allow you to set conditions such that specific emails get filtered into specific inboxes. If potential customers, current customers, contest entrants, or other audience members are contacting you via email, you might be able to use smart inboxes to organize your incoming messages. For example if you told contest entrants to email you with a promo code in the subject line, you could set a rule for

all emails with that promo code to get routed to one central location.

Smart inbox folders can help you in organizing and tracking your various marketing activities, and can reduce chances of missing an email, emailing the wrong person, or having to dig through your history before responding.

## Considerations for automated marketing

As you can see, marketing automation can bring some real value to your business, but, there are a few things to be wary of once you get going. First and foremost, you still have to create a well thought-out marketing strategy before setting up any automated services. While these tools will assist you in the execution of your plan, they won't generate one for you.

Second, don't get trigger happy. Just because you can send emails and post to your social media pages without so much as a click of a mouse doesn't mean you should start spamming your customers or clogging up their newsfeeds. Be methodical and stick to a premeditated marketing strategy.

Third, don't rely on marketing automation too much. This seems a bit counterintuitive to what we've been telling you, but these tools can only do so much. The people and processes in place behind them are what will make you a success in the marketing automation world.





# How to hire a great salesperson: Identify them by their traits, drive

By April Chen

*Special to BetterSMB*

Sales is the livelihood of any company. It is absolutely essential to hire the right people to be on your sales team. Below administrators and executives, salespeople are the most critical hires an organization makes because they are responsible for ensuring a company's financial success.

Here's what Will Miller, chief strategy officer for Northrop Realty, a Long and Foster company, and Anthony Friedman, a team leader for the company, say are some specific characteristics that a great salesperson must possess.

In commission-based sales positions, such as those in the real estate business, a candidate must show drive, motivation and confidence as well as being unafraid of rejection, Miller said. "If you tend to take on other people's stress and let that get to you, it's a tough industry to be in—longevity-wise."

An effective salesperson needs

to be able to command a room and get the attention of potential buyers, Friedman said. who often is allowed to choose who is on his team because they are an extension of him. For him, loyalty is an important trait for team members. "The last thing I want to do is spend all this time giving someone my secrets to the trade and showing them my processes and how I have built my success, but then have them leave my team," Friedman said.

Experience isn't always a qualifier: sometimes, both Friedman and Miller have been known to hire someone for real estate sales who has none. "Even if someone has no experience, if I feel they are going to be excited to show up to work every day and I can see the passion in them—then they are willing to take a risk on," Friedman said.

Miller said a good candidate should ask questions and should be able to establish rapport during the interview process. Friedman said if a person comes in with false impressions of the job, this isn't the type of candidate you want. There are

## Paying a salesperson

Across America, the median annual wage for sales and related occupations was \$27,020 in May 2017. That was lower than the median annual wage for all occupations, of \$37,690. In the category, the lowest 2017 median pay was for cashiers, at \$21,030. The highest was for sales engineers, at \$98,720. Real estate brokers and sales agents garnered an average of \$47,880 in 2017. Employment in the sector was projected to grow by 3 percent from 2016 to 2026, slower than the average for all jobs.

*Source: Bureau of Labor Statistics*

evenings and weekends involved and the sales industry is not always a job with set hours.

Part of Miller's job includes interacting with salespeople who are trying to sell his company on

products, such as advertisements to promote home sales. That gives him some perspective about the experience of being sold to by other salespeople. He's found that his buying experience is best when he believes there's a positive partnership between the companies. One challenge that he feels can hamper a good business-to-business relationship is a possible lack of continuity from dealing with multiple salespeople.

Real estate salespeople must get along with competitors when establishing a contract with two different companies. Sometimes, salespeople have to work closely with their companies' biggest competition. But somehow, the two representatives have to be able to come to an agreement to close the sale. A good salesperson can't be a bully and push too hard, because that could endanger the sale, Friedman said.

A great salesperson also has to have thick skin and be unafraid of rejection when making sales calls. He or she must be able to laugh it off and move forward, Miller said.

# Choices abound in open-source customer relationship management solutions

Your business could leverage CRM software developed by a community

By Chris Barylick  
*Special to BetterSMB*

Sometimes a name carries a stigma with it. In the case of open-source software development — a paradigm in which the software's original source code is freely available and can be redistributed and modified — images of hobbyists writing code from their garages might spring to mind.

Over the years, open-source projects proved their worth. Efforts such as Mozilla's Firefox web browser proved what a shared project owned by no single party could be capable of. Many of your favorite websites are powered by Apache's web server software. Premium electronics routinely ship with notices about the open-source software they contain.

Now, in late 2018, a number of open-source customer relationship management software efforts have begun to bear fruit, the companies and the developers behind them choosing the best code and features contributed by their developer communities to bring new CRM tools to market.

Projects such as SugarCRM, Vtiger and SplendidCRM are giving businesses less expensive options for keeping track of and qualifying their sales leads.

Businesses that use CRM software can store all kinds of information about their customers. Think of it like an address book on steroids. In addition to basic contact information, information about your relationship, including how often you've contacted them, and what sorts of products and services they may be interested in, can be stored in a CRM. That lets businesses make smarter sales calls and send more relevant marketing messages.

Companies have sprung up around open-source CRM solutions by offering services for the project, including managing and selling services around the CRM in the cloud. That makes rolling out a CRM easier for businesses that don't have the resources to



Kanumuru

deploy it on their own. Businesses can compare the offerings of services built around open-source software to other proprietary solutions and determine what works best for them.

In addition to quick, nimble development, cloud architectures and readily available tools such as Google's resources have also helped open-source CRM companies. "You can really take advantage of the fact that innovation is happening faster," said Sreenivas Kanumuru, CEO of Vtiger ([www.vtiger.com](http://www.vtiger.com)), an open-source CRM firm established in 2004. "The same is true with the consumer cloud and the enterprise cloud, so when you're using it, you don't know that Google has updated some email software and some new feature has rolled out and all that is happening without any involvement from you. We are able to deploy updates every week, every month, and new features are getting rolled out without any distraction or any work from the customer's side."

Along with these resources, Kanumuru pointed out that open-source CRM development allows

Vtiger to use a consolidated product to get sales, marketing, and customer service personnel working together under the same umbrella. "With Vtiger, our approach has to provide one product and bring in sales, marketing, and customer service into the one product," said Kanumuru. "Whereas, if you look at Zoho or Salesforce, Salesforce has a sales cloud and a service cloud and then there's some other cloud, a marketing cloud, and all that. Your customer record is there in the sales cloud and your customer record is in the marketing cloud and it repeats. As with Vtiger, it's just one product, if you want to use it for sales, we just turn on the sales features, we can turn on sales and marketing if you want to use it for both features, if you want to use it for all three wings of the customer teams, you can use all three, you just use one customer record and everything gets linked to that."

Not all CRM solutions are the same, but many businesses may find that an open-source CRM meets their needs.



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# Lawyers: don't get left behind! Time is ripe for targeted marketing strategy

By Susan Letterman White  
*BridgeTower Media Newswires*

Client development and networking, when done well, keep a steady stream of clients coming in the door with the right frame of mind to be effective partners during the working relationship and remain effective brand advocates when the legal work is complete.

In today's world, doing this well means embracing change with innovative thinking to engage the right clients at the right times, resulting in more authentic connections and more clients. Doing this well means creating a personalized experience relevant to each potential client's specific wants, needs, expectations, preferences, interests and concerns at key moments.

There can be no doubt that the practice of law is also the business of law, and with this mindset shift, effective marketing and business development have entered the age of the customer. Firms are regularly increasing their marketing and business development budget, and lawyers are spending more time on the discipline. They are reading, listening to, and being trained on all related topics.

It's time to stop thinking that clients are somehow different from customers, and lawyers are somehow different from everyone else who has something to sell. Health care providers, architects and consultants have begun to shift their business model to a focus on developing broader and deeper relationships with customers and growing organically in areas in which the organizations are already strong. Lawyers are just beginning to catch on and catch up.

Lawyers today are paying attention to business intelligence. They are tracking news about their clients and industry trends. They are exploring different tactics to differentiate themselves from their competition. To that end, they are speaking and writing to promote their expertise and using social media for wide distribution of their messages.

Don't get left behind. The time is now for developing and implementing a comprehensive marketing and business development strategy with a focus on the customer, and that means keeping client development

The most predictable characteristic of clients, even those with the same legal problem, is the variability in their thinking, emotions and behavior at any moment.

and networking an active part of your daily, weekly, monthly and annual business planning.

The most predictable characteristic of clients, even those with the same legal problem, is the variability in their thinking, emotions and behavior at any moment. Their variability seems to be a consequence of who they are, what they are thinking, how they are feeling, what they are doing, and their moment-to-moment, ever-changing context of where they are, what is happening around and to them, what they care about most in that moment, and who else is close enough to influence their actions.

The bad news is when you combine client variability with the fact that, for many lawyers, the number of competitors has increased at the same time as the demand for lawyers in certain practice areas has fallen. It's clear that, before you start the process of gathering analytics on clients, you should make sure that the size of your target market is sufficiently large.

The good news is that if your target market is sufficiently large, then a unique brand should act as the transitional object it is meant to be and change the right clients into your clients.

Think of clients, prospective clients, referral sources, your colleagues, and anyone you work for or hope to work for as a customer, and develop a plan to expand your customer base and increase their satisfaction. Do your research before

settling on your target market.

Marketing research is the investigatory process to determine whether your target market is sufficiently large for your unique brand or whether to adjust your brand to the existing market. The robustness of a target market, the group of potential clients you would like to serve, is a measure of the number of interested buyers and their level of interest. Is your target market, people, already part of your network or closely connected to it? What do you really know about how they think?

Ask yourself these questions about your target market:

- Who are they? What are their habits? Ages? Where do they live and work?
- What do they want, need, expect and prefer? What are their interests and concerns?

Then ask yourself:

- What are you trying to sell that they would want to buy?
- Where could you reach them?
- How would they be most receptive

to a first impression of your brand?

Your marketing research plan informs your decision about what to sell and the robustness of the target market that is interested in buying it. Even the most proficient client-development and networking experts will face difficulty trying to sell something that few people want to buy.

**Susan Letterman White works with lawyers and law firms to improve leadership, organizational and team performance, and marketing and business development. She is an adjunct professor at Northeastern University. She practiced employment law for more than 20 years.**



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# Sales and marketing software companies compete with industry giant

They want you to know: Salesforce isn't the only solution

By Chris Barylick

Special to BetterSMB

In almost every industry, there's a competitor that almost no one wants to tangle with. It's been around forever, has become the 800-pound gorilla in its field, and has gobbled up more of the market than anyone thought possible.

In the sales and marketing world, this is Salesforce, and given its current bottom line, the immense towers it's built in cities like San Francisco and other locations, and its sheer presence after 19 years in the business, it might be enough to make potential competitors look over their business plans, shrug, and wonder aloud about selling seeds by mail for a living. And yet, competitors persist.

Competing with a dominant rival is all a matter of perspective. David Charest, the director of content marketing with Constant Contact ([www.constantcontact.com](http://www.constantcontact.com)) a company that competes with Salesforce's Marketing Cloud offering, says his company focuses

on what it does best in the SMB field.

"With small businesses, earning that trust is critical and we do not take our relationships for granted," said Charest. "We capture the voice of the customer through a variety of channels, from transactional data to customer support, to surveys and focus groups, as well as events and webinars. Consistent interaction with our customers is a key to success on our marketing platforms, whether it's our new broadcast ad campaign, blog, or social channels.

"Technology advancements are coming fast and furious, particularly in the area of data and the customer insights we can glean from them to gain a competitive advantage," said Charest, who's been with Constant Contact for more than seven years. He added that even if Constant Contact does have to go up against giants like Salesforce on a day-to-day basis, digital tools have helped level the playing field. "The opportunity to communicate just the right message, to just the right customer or prospect, at just the right time rep-

resents a seismic shift in marketing."

Daniel Caplin, President of WhatCounts ([www.whatcounts.com](http://www.whatcounts.com)), a Georgia-based marketing software competitor, is also upbeat about competing with giants.

"We are extensions of our client's marketing organization, and align with them to produce measurable results through the email channel and beyond," said Caplin. "It's our ability to be flexible, help our customers work with our software in the ways that best fit their unique business flows, which allow us to successfully compete and thrive against any of the large enterprise suites like Salesforce, Oracle, IBM, Adobe, etc."

Perhaps most key to Constant Contact's strategy, according to Charest, is to combine the technologies available to a firm and keep it personal from there. That includes ensuring compatibility with Salesforce.

"We work with partners like Cazoomi and Zapier to offer an integration that allows customers to

automatically add leads and contacts from Salesforce to Constant Contact, creating a powerful marketing contact list for any sized business," said Charest, who added that "a personalized communications flow lends an authentic voice to a business' communications, and that authenticity breeds customer loyalty and fires up the referral engine."

Caplin said businesses need to focus on engaging with their customers.

"There is a lot more noise and competition for engagement. There are many more channels by which to engage a customer or prospect," he said. "Be it email, SMS, social, chat, direct mail, display ... the message and engagement need to reflect the medium and the best format for the end user to engage."

Focusing on customer communication can give businesses a boost in sales. Thanks to a competitive marketplace, there are many tools available to businesses that want to engage with customers.

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# Research leads retail interior trends

By Janice Stevenor Dale  
*BridgeTower Media Newswires*

New research is yielding data that helps us determine how retailers can best meet shoppers' emotional and behavioral needs.

Preferences change over time, and retail interior design needs to change all the time too. Market changes, such as a growth in the Hispanic shopper population, can prompt adjustments; so can attitudes about consumption. The goal of retail space designers is to create environments that motivate people to return after an initial purchase.

Successfully adjusting to retail trends requires research. One great source is Paco Underhill's bestseller *Why We Buy: The Science of Shopping*. It offers observational research as well as demographic, competitive/market, and financial data, with a goal to defining the qualities of an environment that is meaningful to shoppers.

These days, researchers look closely at the interplay of online information, social media and physical stores. Store fixtures have become increasingly modular and changeable to reflect information gathered from social media. The repetition of design elements across platforms from the physical to the virtual increases continuity, branding and customer comfort.

The app *Retail Diva* inspires shoppers through daily bites of integrated marketing insight. The following articles on consumer

behavior are interesting and valuable resources for people integrating e-commerce web sites:

"E-Scapes: The Electronic Physical Environment and Service Tangibility," (Koerning)

"E-Satisfaction and E-Loyalty: A Contingency Framework," (Anderson and Srinivasan)

"Empirical Testing of a Model of Online Store Atmospherics and Shopper Responses," (Eroglu, Machleit and Davis)

Meanwhile, retailers are under pressure to maintain their in-store sales, even while reducing their display budgets. As a result, even high-end brands employ whimsical environments that use graphics and other design elements to save money. They have renewed their focus on attention to detail, creativity and ingenuity.

Another big change the design world is seeing in retail right now is gender-related. Traditionally, research has long shown that women make most purchasing decisions, even in areas such as electronics. But research by Moseman, Boyer & Bourbon finds that the influence of gender on retail design is changing, and stores are paying more attention to male shoppers. Some stores are adapting by employing gender-neutral design, and by focusing on brand rather than gender.

Brand evolution within credit unions is a good example. We have seen more credit unions displaying items such as cars and boats in promotional materials for loans.

Credit unions also may include "a business center to research online investments, stock, real estate, etc." cites the 2004 Strategic Environmental Report by ASID, a transition that some insurance companies recently.

With an aging population, it is important that environments are legible. This translates to clarity of store positioning and circulation paths, with resting zones featuring chairs that don't impede shoppers and contribute to shopping couples. These zones provide for greater time spent in the retail environment and communicate important social values. With marketplaces that have an integral relationship with nature, a natural environment should also be reflected. Commitment to the environment should be genuine and consistent.

Clearly a thing of the past is the cookie-cutter approach to store design, where no connection to the local culture is visible. The amount of goods shown on display responds to local tradition, brand norm, and material/finish practices. An "understandable and deliberate attempt to respond to local (consumer) culture" is encouraged.

Consumers generally respond more positively to cooler colors. This news reinforces the use of low energy LED lighting, associated with the daylight/blue end of the color spectrum. Babin, Hardesty & Suter found that "for fashion-oriented stores, blue interiors are associated with more favorable evaluations, marginally greater excitement, high store patron-

age intentions, and higher purchase intentions than orange interiors." Consumers responded more favorably to blue interiors when they were brightly lit as opposed to softly lit.

Beyond the light quality of a space, other visual and multi-sensory stimuli demonstrate a positive effect on shopper's emotions and purchase behavior. Multisensory cues are those that complement vision in a store atmosphere, such as the addition of scent in an otherwise odorless store environment, or music in an originally rather quiet retail setting.

This layered atmosphere has been observed "to exert a superior impact on cognition, emotion and behavior." Consistency between the sort of music heard by shoppers and the products sold is key. An example within a florist shop: flowers are regularly linked to romance. Love songs and romantic music conditions were found to lead to an increase in sales. Retail managers would be wise to focus on designing store atmosphere through multi-sensory congruent cues to "ensure a stronger appeal to the five human senses."

Of course, all concepts need to be tested with consumers. Retail design is evolving and new data emerging that informs our work to transform retail into highly successful spaces.

**Janice Stevenor Dale, FIIDA, CID, NCDIQ is President of J S D A Inc., an award-winning design firm in Boise, actively preserving landmark structures since 1987.**



# 5 cheaper marketing tips to help grow your small business

## Kabbage

When people think of marketing, they typically think of tactics such as flyers, social media or commercials. When you own a small business, your time and your budget are very limited, so it's important to have a marketing strategy that will give you the greatest return on investment without breaking the bank.

The best way to do this is to use some out-of-the-box thinking. Need help getting started? Check out these five tips.

### Going green

Becoming eco-friendlier doesn't require a pricey grand gesture such as switching to a form of alternative energy (though there are tax incentives and programs to help with that). There are plenty of budget-friendly alternatives available to help reduce your carbon footprint, such as using recycled materials for your products, working with other green vendors and suppliers, going paperless or using recycled materials for packaging.

You can also make energy-efficient changes to your business location, such as using LED light bulbs and aerators on your water faucets. Consider also donating a portion of your proceeds to an eco-friendly cause, such as water or rainforest conservation.

People like to use businesses that have the same values as them. It will also make them feel like they are expanding their own efforts to help the planet by using a green business — and they'll tell their like-minded friends about you, too.

### Community service

People like to work with businesses that work with them. Consider participating in some form of community service. You can organize a local park clean-up, collect pet supplies for the local animal shelter or sponsor a local youth sports team. Or allow employees to use work time to volunteer at a local non-profit. Depending on your budget, you could also offer to donate a portion of your proceeds from a specific sales period to a local cause.

If time is an issue, consider volunteering to sit on the board of a local non-profit organization. Not only is this a great way to get involved in the community, but it's also a good way to network, as these boards typically consist of other business people. People will see their purchases as an investment in the community and will be more likely to work with you when they are in need of the goods or services you provide.

### Promotional packets

Be ready with promotional packets when a customer needs more information about your goods or services. Include customer testimonials and a brief history of your business as well as your mission, values and details about your goods and services. Depending on how much you know about the potential customers, you can also include information specific to them to illustrate how your good or service will make their lives easier.

You can also include promotional products such as magnets, decals or stickers; these are expressions of your brand that are also useful and practical, making recipients more likely to hold on to them. It

Becoming eco-friendlier doesn't require a pricey grand gesture ... Whatever you do, make sure people know about it by including it in your marketing materials, including your website and social media.



helps if the product is closely related to your brand in some way, or at least visually reminiscent of it. StickerYou has the die-cut technology to create prime stickers, decals or magnets in unique shapes and sizes relevant to your brand, allowing the recipient to make a connection between it and your business.

How you package your information is just as important as the contents. While paper clips and staples are an inexpensive route, consider using something more professional and durable, such as a binder. They are especially the best option if you are putting your information packet in the mail. The hardcover of the binder will protect the contents and ensure potential clients receive them in one piece. Binders are also useful when it comes to your efforts to go green because you can reuse them and some are made from recycled materials.

Instead of sending plain binders, step up your game and send binders with a custom design to best illustrate your business and your brand. More than 60 high-quality binders are available at Company-Folders, including leather-like, clear view and easel binders, available in a variety of stocks and imprint methods. You can select the options best for you based on the use of the binders and the message you are trying to convey.

Based on your budget, you can also include an assortment of accessories such as sell sheets or index tabs. In some cases, this will be the first representation of your brand that clients receive, so make sure it shows you are professional.

### Guerilla marketing

Like guerilla warfare, guerilla marketing is all about the element of surprise. The idea is to get your business in people's face when and where they least expect it. Consider using some sidewalk chalk to create murals advertising your business along popular public walking areas such as trails or boardwalks; have someone dress up as a business mascot or wear a sandwich board advertising your company at a

community event; or create some sort of outdoor art piece promoting an upcoming event or sale.

The goal is to design an innovative, engaging piece that stands out and leaves an impression on people. Look for opportunities to add your own unique spin to classic guerilla techniques. For example, instead of a mural, use your sidewalk chalk to write clues for a scavenger hunt that leads people to your business and wins them a small promotional prize.

### Guest speaking

Another way to get out in the community is to become a guest speaker. This will help establish yourself as a thought leader in your field, which will make people more likely to turn to you for goods or services. It will also give people a chance to put a face to the name they have been seeing sponsoring local teams or on their direct mail. Ultimately, it helps form a connection with potential clients.

Offer to speak at local community group meetings about topics in your industry from which you feel people will benefit. For example, if you're an accountant, you can talk about common mistakes people make on their taxes, the most common write-offs people miss, or how to organize information to make the process go smoother for a tax preparer. If you're a hairstylist, consider talking about common at-home treatment mistakes people make or quick, easy tips people can use to make their salon look last longer at home. You can also host informational events at your business and invite the public to attend. Keep the speech conversational and limit it to three key points so people will remember them.

As you implement these tips and techniques, remember to keep the fundamentals of customer service in mind. The best (and cheapest) marketing you can have is the recommendation of others. As a small business owner, you have to be willing to go the extra mile for your customers; it's all about building a strong relationship that they can trust in.



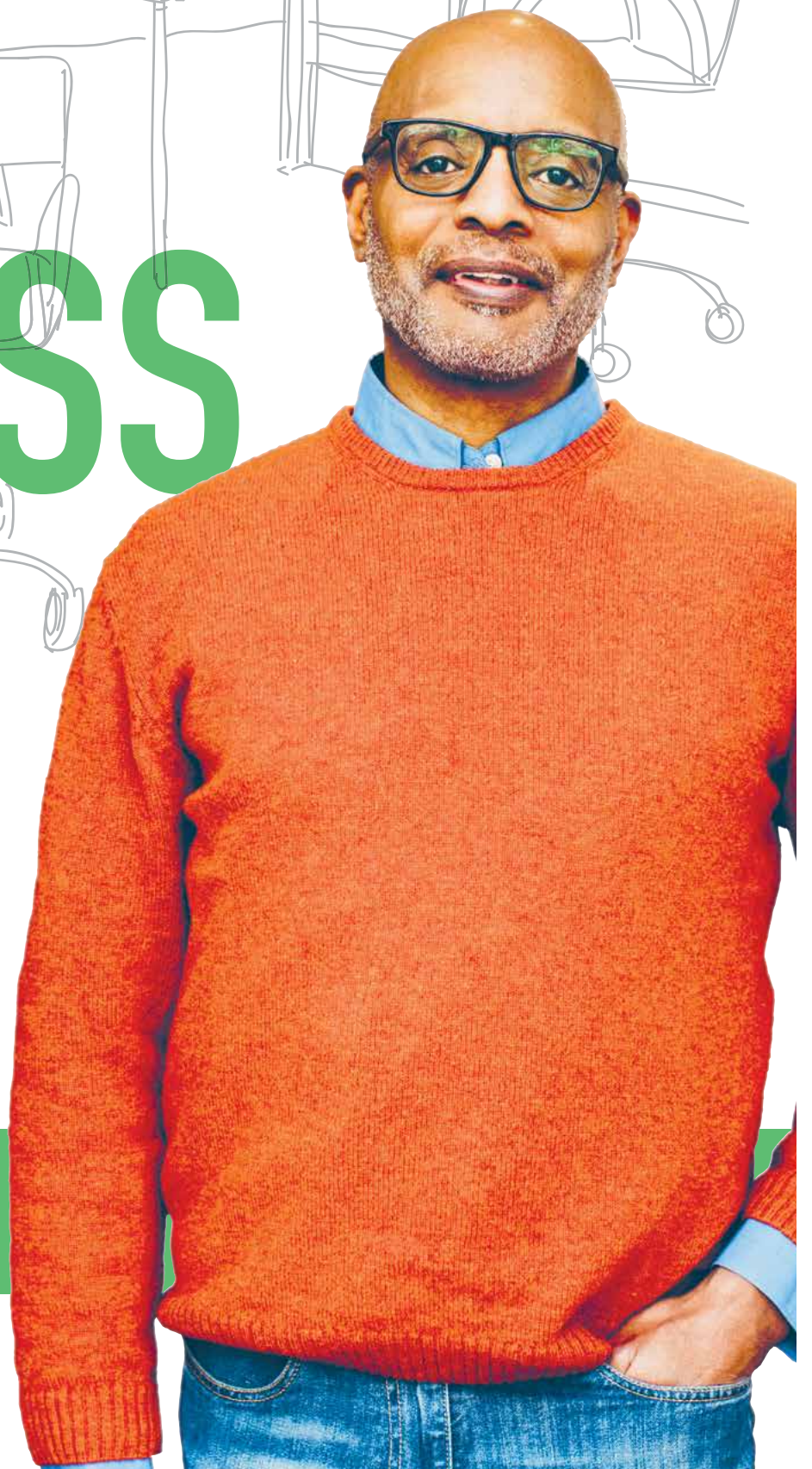
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## Book review:

You don't have to lower your prices to make a sale. This book explains why.

By Jason Whong

There's more to dealmaking than just making a sale. Getting the price that you want can keep your business profitable and can keep your company, as well as your industry, away from a race to the bottom. But how do you sell at a higher price point than competitors when buyers tend to see what you're selling as a commodity?

Differentiating your product or service is the answer, according to Lee B. Salz, CEO of Sales Architects, a sales force development consulting firm. By finding out what your prospects need, and tailoring your sales pitches to those needs, you can experience sales success, because buyers will pay more when they think they're getting a meaningful value for that price, Salz writes.

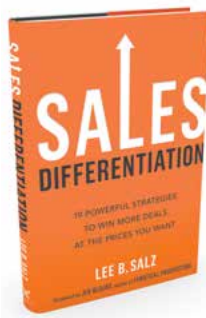
Salz breaks it down for readers in two parts, aimed at showing readers step-by-step how to differentiate for sales success.

Part I, What You Sell, is a primer on how to differentiate your product or service. It's not merely about saying that what you're selling is better or best, which, while superlative, is

### Sales Differentiation

19 Powerful Strategies To Win More Deals At The Prices You Want

- By Lee B. Salz
- HarperCollins Leadership. 208 pages. \$25.



also meaningless coming from you. It's rather about communicating your offering's difference in a way that means something to the buyer, convincing them that your product is best.

Once you've identified your product's differentiators, you should identify a target client who cares about what makes your product different. Keep in mind that not all differentiators you've identified will make a difference with every decision influencer, so you're responsible for positioning these differentiators in a way that matters to the buyer, and making sure they understand it.

So, how do you go about convincing buyers that your product is best? That's covered in Part II: How You Sell. Listen to your buyer, then position your product in a way that it solves their problems. Salz uses an example of his time at a company that offered IT training during the dot-com boom. Software companies wanted people to know how to use their products, but they didn't want to become software trainers themselves, so they wanted IT training firms to join their network of authorized trainers, using the software companies' course materials.

That's pretty close to the definition of a commodity product: it doesn't matter which authorized training partner a student signs up with, because they'll get the same training materials either way. Differentiating this kind of product could be a challenge.

Salz describes a strategy of making his company's training the least frustrating to purchase. Clients' corporate bureaucracies made signing up for the training cumbersome, and sometimes even impossible. Sometimes, clients' employees found

they were being trained on irrelevant topics. And sometimes, clients' employees who received training ended up leaving the company, taking their newfound skills with them.

To solve these pain points, Salz's team came up with a blanket purchase order for a year's worth of training to reduce bureaucratic hassle and to lock out competition. They added a policy in which the company issued full credit if students were dissatisfied for any reason, while setting up a team to make sure students were paired with appropriate courses. And they said if an employee left within six months of completing training, they would train the employee's replacement for only the cost of the books.

The result: The company became one of the largest, most profitable training companies for Microsoft, Novell and IBM/Lotus, according to Salz. They had innovated a commodity to address buyer challenges, and succeeded.

If you're stuck competing for price, "Sales Differentiation" may just provide the map you need win deals at higher prices.

## Book review:

Problem-solving getting you nowhere? 'Stop Decorating the Fish.'

By Jason Whong

Every business has problems that need solving. We come up with solutions, we implement them, and often find more problems to solve. Is this really progress?

"Stop Decorating The Fish," By Kristen Cox and Yishai Ashlag, uses a business fable to get you to think about whether you're solving the right problem in the first place.

Cox, executive director of the Governor's Office of Management and Budget for the state of Utah, and Ashlag, senior partner with Goldratt Consulting, weave a tale of government officials and scientists trying to save a declining population of fish in Busyville.

After learning that the number of fish that made it to their breeding grounds was down, they tried all manner of solutions to increase the number of fish that could swim upstream. They fitted a fish with fin extension, which they modified over time; they sprayed the fish with a chemical spray that could hide it from bears, and went so far as to remove bears from the area near the

**Stop Decorating the Fish**  
Which Problems To Ignore and Which Problems Really Matter

- By Kristen Cox and Yishai Ashlag
- North River Press. 106 pages. \$15.



stream, but nothing was working.

Because of the this book's storytelling approach, we won't spoil the ending. Let's just say that the scientists and government officials missed the real problem and had spent their time and resources trying to solve other problems that didn't make enough of an impact.

The book's goal is to help you identify the real problem and to avoid coming up with solutions that don't solve the real problem.

Cox and Ashlag refer to common tactics that organizations use in problem-solving as "the seductive 7," and they caution against relying on

those for quick gratification when the real problem goes unaddressed. Relying on those seven tactics can give the illusion of incremental accomplishment and can even create an impression of problem-solving without having a serious impact.

Core problems tend to stem from capacity or policy constraints, and tend to turn into vicious cycles, the authors say. Challenges tend to lead to pressure to find a solution, which leads to the creation of initiatives that don't address the core problem, which results in a busier, more complex organization that produces disappointing results, resulting in more challenges.

Cox and Ashlag also provide six case studies that look into ways organizations have heard the siren call of the seductive 7 while ignoring the core problem.

In one memorable example, a car wash machine business found that it couldn't sell as many new machines as it wanted to, because it ran out of clients to add. Some clients were replacing old machines, while others waited longer.

The company invested in technology (one element of "the seductive 7") to make a better car wash machine, but this didn't result in significantly more car wash machine sales.

That's when company management began to study why some places weren't buying. They found that when the car wash was run by someone who owned it, it offered a better customer experience and offered the owner a better return on investment, so they were more likely to replace an old machine. But when the car wash not owned by the operator, it was left up to employees who didn't necessarily want to spend time at the car wash, resulting in a negative experience and less car wash business, and a lower likelihood of machine replacement.

The company devised a strategy of making operating a car wash easier, and reversed its fortunes.

Written succinctly, and accompanied by delightful illustrations, "Stop Decorating the Fish" is a book you can read in an afternoon. How long it takes you to apply the book's central lesson is up to you.



# Think your business is too small for CRM and marketing automation? Think Again.

By Denize Hazime

*UpCurve Cloud*

Many small business owners believe that their business is too small for customer relationship management solutions and marketing automation software used by larger organizations – this is a common myth that hinders the progress of far too many small businesses. The reality is that businesses of every size can benefit from the many features offered by CRM and marketing automation technology.

## **Data is the key to success in the digital age**

There's a lot that businesses can learn from customer data, with information quickly becoming a competitive advantage in almost any sector. Imagine having information on what, when, and how your customers wanted to purchase your products and services, and what motivated them to purchase in the first place – this information becomes easily accessible to any business equipped with a modern CRM solution. No matter what size your business is, there's no doubt that you can benefit a great deal by better understanding the motivations and factors influencing and driving your customers.

Customer Relationship Management solutions such as SugarCRM and Small Business Solutions by Salesforce are designed with ease of use in mind, giving your business instant access to customer conversations and reports that can provide insight to your employees and help them better sell to your clients. Having more data will give you unique insight into customer's behavioral patterns and help your team strategize and tailor the selling experience for each customer – there's much more to CRM than just emails and phone numbers. Management tools like Prodoscore also exist to give managers insight into the overall productivity of their team members, allowing to see where each employee thrives and where they may be able to improve. But also increasing adoption of these CRM solutions.

## **Your customers deserve the best experience possible**

Data isn't the only positive aspect of moving your small business to CRM and marketing automation



solutions – these platforms can give your customers a more positive and involved experience, bringing them closer to your business. CRM and marketing automation solutions can free up your employees from running email marketing campaigns, sending newsletters, and creating landing pages that can all lead to the creation of new leads and increase customer loyalty, allowing them to be more productive and focus on the selling experience. Many CRM and marketing automation platforms are integrated, allowing for increased functionality and thus time and cost savings.

By making the move to these platforms, your business will be better equipped to create a unique buying experience for new and existing clients, making it more likely that they'll return in the future and even encourage new leads through their level of satisfaction. The Corporate Executive Board reports that the vast majority of customers will purchase from a company again after experiencing low-effort service. By saving time and costs with CRM and marketing automation, your sales team can focus on creating long-lasting customer relationships.

## **A more efficient way of generating leads and closing sales**

Your sales team deserves a sales and lead generation process that

**No business is too small for a CRM or marketing automation solution – the digital age has turned customer data into a valuable and insightful too that can give your business a competitive edge and increase sales and productivity.**

works easily and efficiently for them. Making the jump to modern solutions can help your employees recognize patterns that will help them turn leads into clients, work together with other team members, increase their closing rates, and always remember to follow up with clients to ensure complete customer satisfaction.

CRM and marketing automation solutions like Sugar CRM and Salesforce's Small Business Solutions offers affordable and easy-to-use services that help your employees sell more effectively by integrating seamlessly with company email and productivity suites like GMail and G Suite, allowing them to access and log customer information and new

leads at the touch of a button, make calls from their email inbox, and more accurately be able to figure out how to sell to each unique client.

Ensuring adoption of these tools by your entire sales team is critical for the successful implementation of CRM and marketing automation – without complete adoption, your sales team will not be on the same page. Using management tools like Prodoscore is also vital to the success and improvement of your team – Prodoscore allows management to view the overall productivity and effectiveness of your team through unique individual “productivity scores”. This can help management determine areas of improvement, and get a better idea of what areas their employees succeed in.

No business is too small for a CRM or marketing automation solution – the digital age has turned customer data into a valuable and insightful too that can give your business a competitive edge and increase sales and productivity. These platforms can increase customer loyalty, free up your employees from running time-consuming email and landing page marketing campaigns, and help your team better recognize patterns that will help them to close sales more efficiently.

CRM, marketing automation, and management tools like Prodoscore can transform your small business.



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