



COMPANY NAME REDACTED FOR
CONFIDENTIALITY PURPOSES.

Marketing and Communications Plan: Development to Implementation

Prepared For:

Company X

June 2018

Though there are multiple*, the first and foremost goal of this plan is:

Deliver increased revenue and client base to position Company X for the “next level decision” - - expand, sell, go public

Here's how...

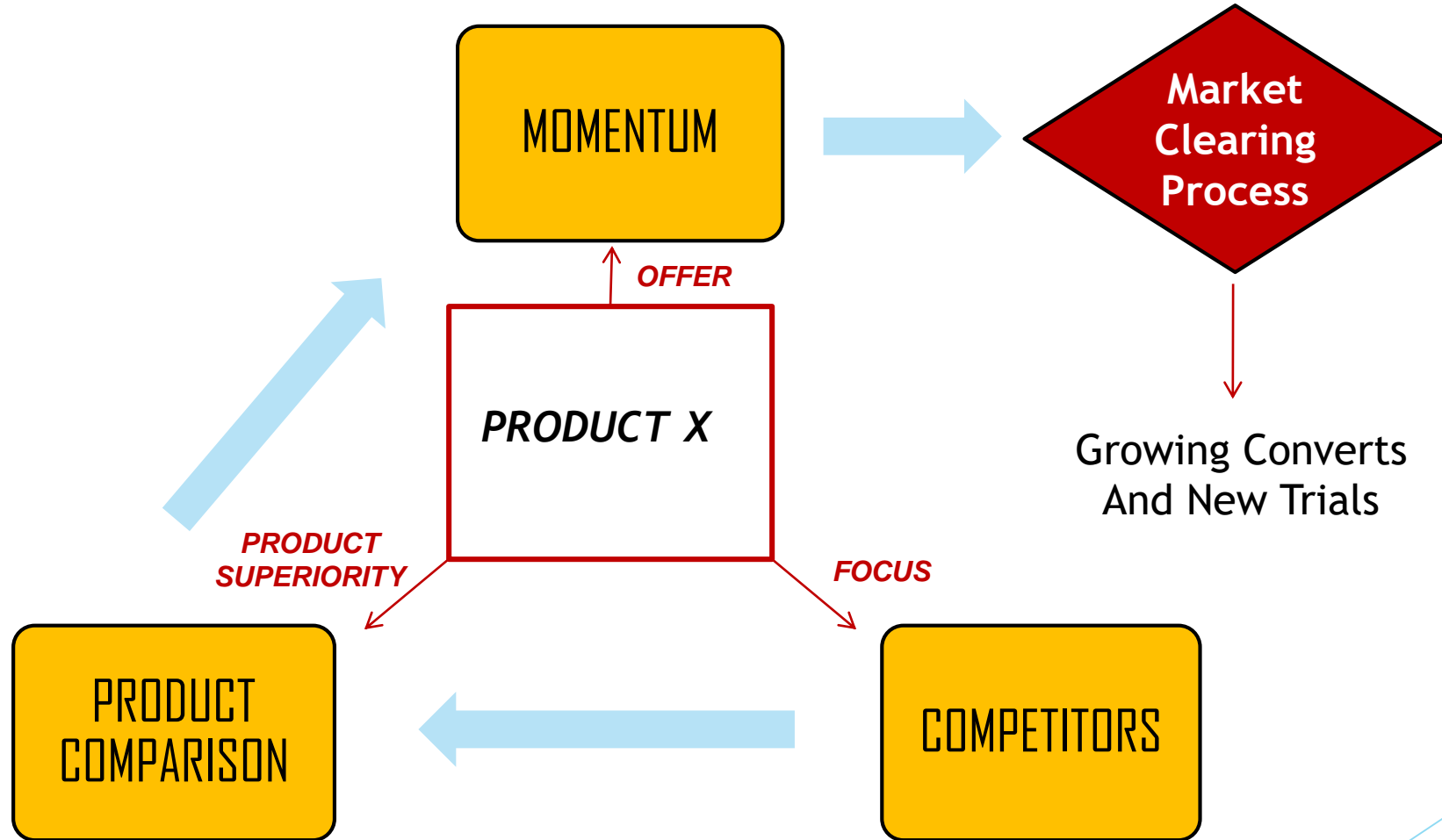
(*see pg 17 for list)

STRATEGIC DEVELOPMENT

Development Process

1. Identify and model competitors
2. Define and position product “A, B, C’s” - - fill gaps - - develop product roadmap
3. Identify / verify specific vertical markets
4. Develop go-to-market strategy and create Company X sales and marketing “playbook”
5. Create communication and messaging platform

Winning Process In Action



Competitive Model

Develop in-depth competitive matrix that identifies:

- ▶ Key competitors
- ▶ Features / benefits of competitive products
- ▶ Feature gap analysis
- ▶ Vertical and niche markets
- ▶ Geographical players
- ▶ Market leader
- ▶ R&D - - future of market

Product X “A, B, C’s”

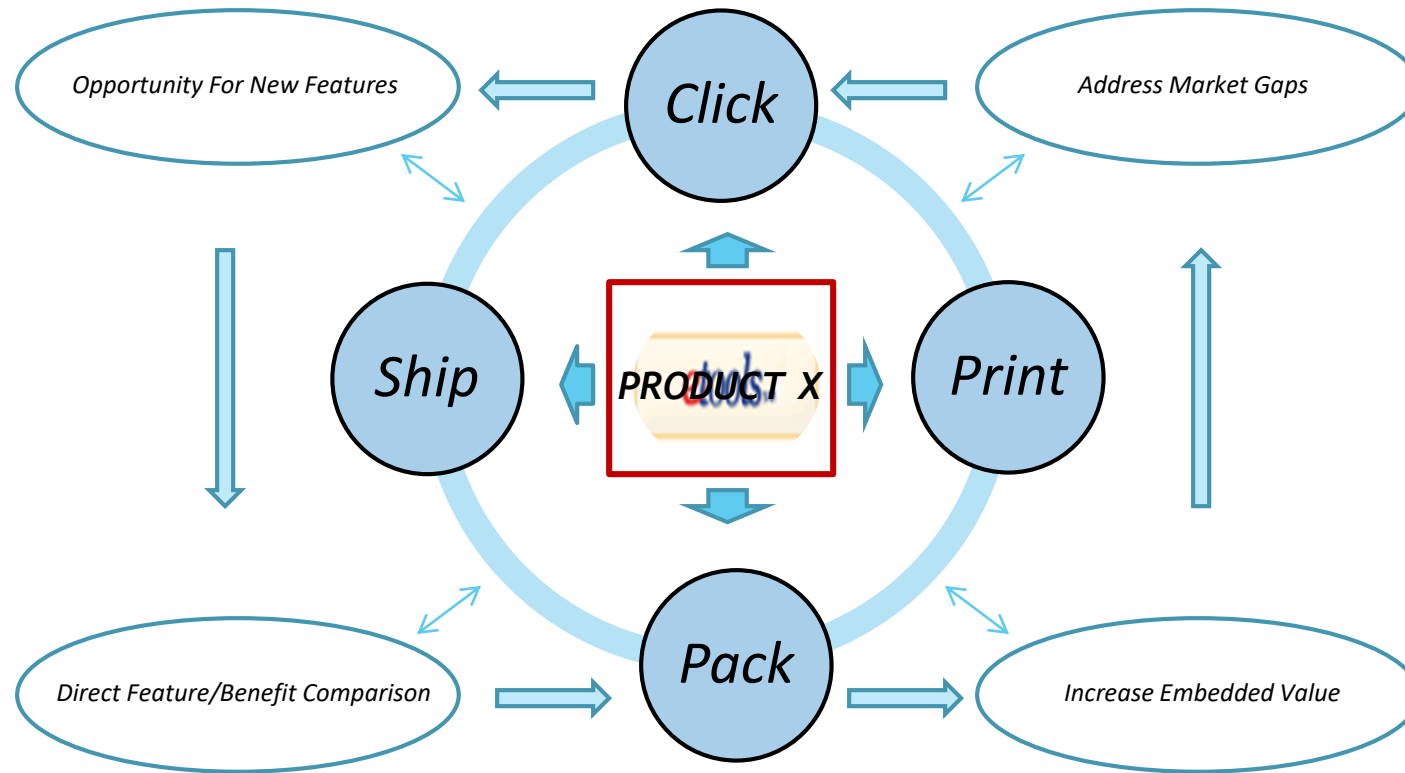
Product X offers on-demand software applications via an ASP model. The tools are designed to address various print management needs from the design and creative stage through print production, fulfillment, distribution and inventory control.

Questions:

- ▶ What are the specific tools (features)? Their end-user benefit?
- ▶ How do these tools fill market gaps?
- ▶ What additional features are necessary to become more attractive / fill gaps?
- ▶ What are the feature market differentiators? If none, how can you create some?

(see graph pg 7)

Product Solutions: Product X “A, B, C’s”



Vertical Markets

Thoughts:

- ▶ In what markets does Product X best compete? Vertical, geographic?
- ▶ Establish niche verticals in “stealth” stage - - move toward market domination (see market strategies)
- ▶ Build allies and partners in the vertical markets (establish user groups, advisory committees, etc.)

Assumed Markets

- Health
- Education
- Hospitality
- Financial Services

(see graph pg 9)

Vertical Process

CHOOSE MARKETS YOU CAN WIN..



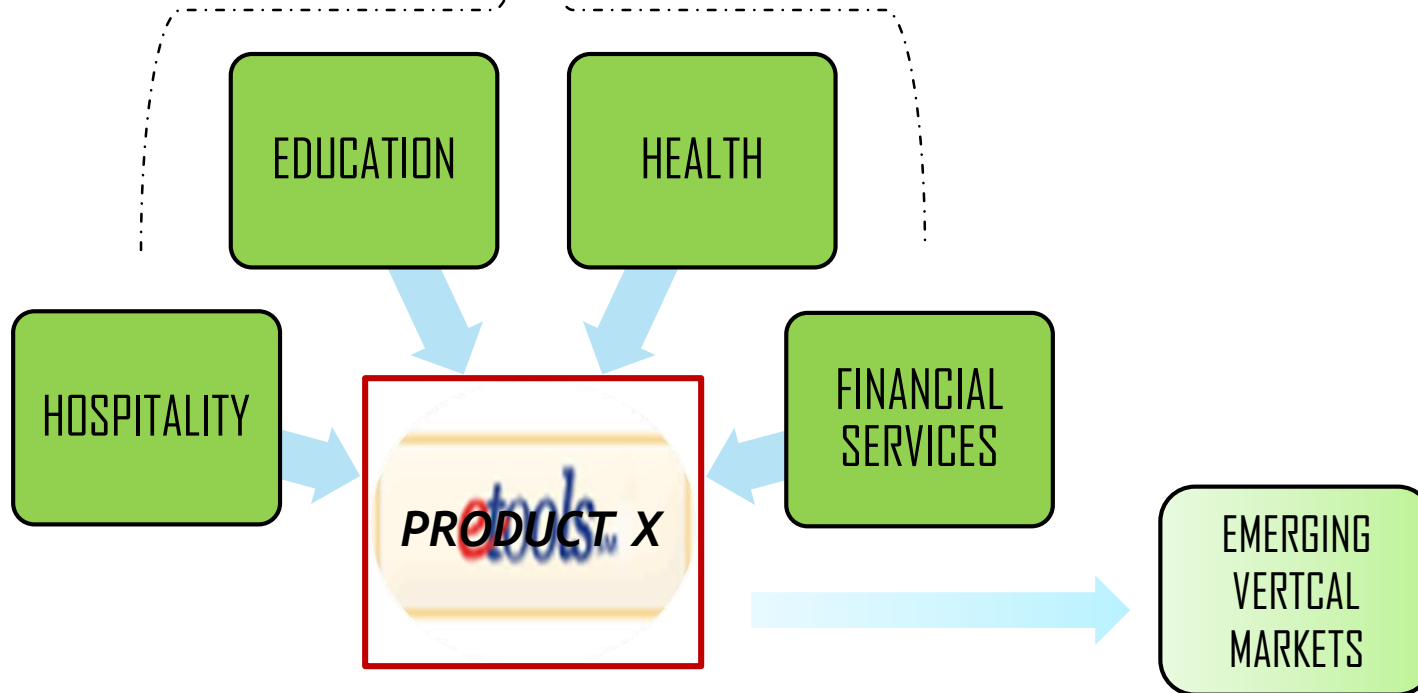
Partners In Future Offerings

BENEFITS

- Extend to sensical markets
- Expand set of stakeholders
- Develop alternative markets
- Lucrative business model

WANTS

- Quantifiable Results
- Testimonials
- Case Studies
- Product Advocates



“Go-To-Market” Strategy

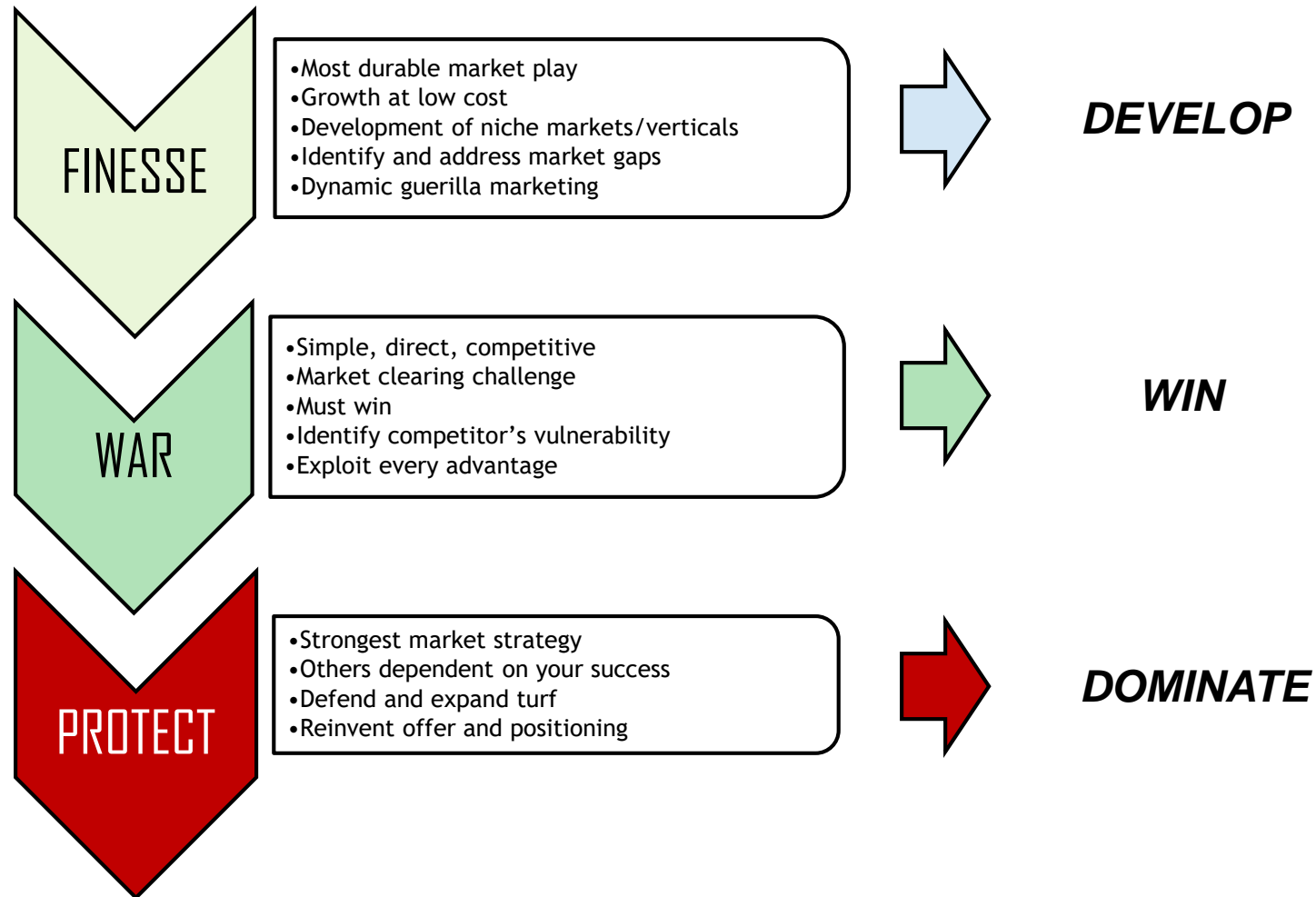
To become the clear leader in the print on-demand / management market, Company X must choose the correct “go-to-market” strategy and successfully execute the involved processes.

Based on the current market and product knowns concerning Product X, a three-phase “go-to-market” strategy is recommended:

1. **Finesse**: Undermine status quo in the market by chipping away at competitive weak points and developing niches.
2. **War**: Head-to-head battle to win market.
3. **Protect**: Develop barriers, gather allies, launch defenses on all fronts.

(see graph pg 11)

“Go-To-Market” Process



Message / Brand Platform



Goal

Develop multi-point communications that emphasize and reinforce the Product X brand and benefits. Use communication efforts to educate potential clients, excite the marketplace and build partnerships & business relationships.

Benefits

- ▶ Educates target audiences about Product X and its overall value proposition (A, B, C's)
- ▶ Expands communication channels
- ▶ Delivers consistent cohesive messaging that builds and reinforces brand and product association
- ▶ Builds emotional ties to company and product

Message / Brand Platform



Recommendations (not inclusive - - based on basic review of available materials - - more in-depth analysis needed)

Mission, Vision, Values: Develop corporate mission, vision and values statements to aid in product advancement and market expansion.

- ▶ Best-of-breed solution(s)
- ▶ Environmentally friendly
- ▶ Employee centric
- ▶ Philanthropic / community involvement

Tagline Suggestion: “One click. Many tasks. Infinite possibilities.”

- ▶ Universal adoption of tagline with Product X
- ▶ Tag becomes part of logo - - everywhere
- ▶ Same font as “Product X”

Message / Brand Platform

Collateral: Develop company and product specific collateral pieces to extend message and brand awareness.

- ▶ Company and product brochures
- ▶ Extend web content
- ▶ Company / product-based advertising
- ▶ Business based communications - - elevator pitch, position statement, et. al.
- ▶ Media kit (bios, fact sheet, industry overview, et. al.)

Website: Refine / add...

- ▶ Mission, vision, values
- ▶ Community / philanthropic outreach
- ▶ Management
- ▶ Product tour / demo - - flash
- ▶ News & events (develop newsletter for circulation, etc...)
- ▶ Solutions
- ▶ Contact (800#) / locations (list)

“GO-TO-MARKET” IMPLEMENTATION

Objectives

- ▶ *Deliver increased revenue and client base to position Company X for the “next level decision” - - expand, sell, go public*
- ▶ Build awareness of Company X and Product X among industry audiences
- ▶ Establish Product X as the leading on-demand print management solution within identified verticals - - leading to market dominance
- ▶ Pave the way for new long-term Product X clients through development and implementation of the Company X sales and marketing playbook

Audience

Build awareness of Company X and Product X among industry audiences. Likely audiences within identified vertical markets:

- ▶ Marketing Decision Makers
- ▶ Procurement Decision Makers
- ▶ Executives (Chief, Technology, Operations, Marketing)

(see chart pg 24)

Communication Strategies

- ▶ Initiate a phased media campaign designed to target decision makers in identified vertical markets through national media outreach that support the “Finesse” to “Protect” market strategies.
- ▶ Build industry awareness through targeted outreach and marketing communications campaigns (direct, tradeshow, webinars, etc.)
- ▶ Support Product X with industry education and sales / marketing materials (newsletter, collateral suite, etc...)
- ▶ Capitalize on current vertical industry issues and trends to insert Product X into discussion - - establish Company X (Mr. X) as on-demand print management industry evangelist / expert.
- ▶ Develop lead generation programs to support sales. Includes targeted vertical “hit lists.”

Trade Media Relations

The trade media, as well as industry peers, can be very influential advocates. Educate and inform them on who Company X is and why Product X is a leading on-demand print management solution. Build a strong foundation that will enable Company X to move up the communications continuum.

Benefits

- ▶ Build credibility and a reputation for Company X and Product X
- ▶ Differentiate Product X and position it as a leading on-demand print management solution
- ▶ Build rapport with key industry and vertical market reporters
- ▶ Coverage in trade publications is a stepping stone to future outreach to national, business and consumer publications

Trade Media Relations

Recommendations

- ▶ *Refine trade media lists (segmented by categories such as journals, newsletters, etc.)
- ▶ Create pitches and story angles, such as:
 - ▶ Product X and the future of on-demand print management solutions
 - ▶ Importance of Product X within their vertical markets
- ▶ Conduct background briefings with key target publications to introduce Company X
- ▶ Create briefing sheets for scheduled media interviews
- ▶ Identify publications that accept bylines; write and approve bylined articles to position Company X executives as thought leaders
- ▶ Create and maintain an editorial calendar

(*see media continuum chart pg 24)

General Media Relations



Develop and maintain proactive, regional media relations program - - initially in all areas with a Company X presence - - leading to a national campaign.

Benefits

- ▶ Reinforces and creates industry and brand awareness for Product X with “low hanging fruit” in Southern CA - Orange County - - leading to national awareness
- ▶ Establishes credibility for and positions Product X as the leading on-demand print management company within the identified verticals / niche markets
- ▶ Provides value-add to clients - - creating referral and word-of-mouth prospecting
- ▶ Establishes company validity for “next level decision”

General Media Relations

Recommendations

- ▶ Conduct proactive outreach to regional / national media
 - ▶ Develop media lists
 - ▶ Create media pitches, story angles
 - ▶ Distribute and pitch press releases
 - ▶ Pitch media; coordinate interview opportunities

- ▶ Potential story angles
 - ▶ Customizable, cutting edge solution
 - ▶ Vertical / niche market development (Finesse mode)
 - ▶ Growth
 - ▶ Community outreach: green business, philanthropic endeavors

Media Continuum

Category	Professional / Trade		Business / Financial	
Media Type	Agencies	Journals / Mags	National Business and Financial Publications	Commercial and Local Media
(Not inclusive -- further analysis needed)	Restaurant <ul style="list-style-type: none"> Restaurant Marketing Grp. Marketing Grp. Quantified Cohen Rest. Grp. Aaron Allen Consultants Healthcare <ul style="list-style-type: none"> Strategem Health Fischer Health National <ul style="list-style-type: none"> Dailey & Assoc Deutsch McCann Grey Young & Rubicam Ogilvy TBWA 	Marketing <ul style="list-style-type: none"> Inside Direct Mail Target Mktg. Journal of Rest & Food Svc. Mktg Journal of Healthcare Mktg DMA Magazine Restaurant <ul style="list-style-type: none"> Restaurant Biz Nations Rest News Food Svc & Hosp Mag Healthcare <ul style="list-style-type: none"> Healthcare Purchasing News Healthcare IT Procurement <ul style="list-style-type: none"> Procurement News Global Procure Supply Chain 	<ul style="list-style-type: none"> Wall Street Journal Business Week Forbes Fortune Investors Business Daily Fast Company US News and World Report Dow Jones News Service Entrepreneur Online Media 	<ul style="list-style-type: none"> Orange County Register Los Angeles Times USA Today San Diego Business Journal Orange County Business Journal OC Weekly OC Metro All wire services
Audience	Full service marketing and PR agencies supporting identified verticals	Prospects, partners, investors, decision makers, industry analysts	C level executives, decision makers, partners	Local decision makers, business people, consumers

Customer Testimonials

Word of mouth is one of the most effective forms of promotion. Take advantage of successful implementations / clients and personalize the Product X story through **quantifiable** client testimonials—your clients can be your strongest sales force.

Benefits

- ▶ Builds credibility for Company X / Product X
- ▶ Great resources for media outreach and leave-behinds for prospective clients
- ▶ Offer real scenarios for media to base stories on or to use as references; validates Product X' value propositions

Customer Testimonials

Recommendations

- ▶ Develop five testimonials focused on differing verticals and solution deployment
- ▶ Design and print testimonials (great for handouts, web, etc.)
- ▶ Pitch story to media including newspapers and relevant trade publications

Thought Leadership



Position Mr. X as an evangelist / expert / thought leader in the on-demand print management space.

Benefits

- ▶ Educates potential clients, media and industry analysts about Company X
- ▶ Creates networking opportunities for business development and prospecting leads
- ▶ Provides timely news hook for PR and outreach campaigns
- ▶ Validates company, product and management

Thought Leadership

Recommendations

- ▶ Identify vertical market and industry outreach opportunities and insert Mr. X as a speaker
- ▶ Develop speaking abstracts, pitch and follow up
- ▶ Identify and coordinate media interview opportunities

Direct Marketing

Develop direct marketing campaigns targeting prospective vertical clients - - delivering sales leads. Use interactive campaigns using customized Product X sites.

Benefits

- ▶ Reach and educate prospective clients on the value proposition of Product X
- ▶ Encourage them to schedule a product demo with Company X
- ▶ Build client base and revenue

Direct Marketing

Recommendations

- ▶ Develop “hit list” based on vertical / niche markets
- ▶ Determine list characteristics (target audience); purchase list(s), if necessary
- ▶ Brainstorm creative concept, direction (e.g., implement “Are you Connected?” , “Distributing Savings”, or “Your Procurement and Distribution Department” themes)
- ▶ Determine co-opt partnership opportunities for the direct marketing campaign (partners)

Milestone Communications

Stay top of mind with reporters, clients and potential clients. Have an active voice and communicate Company X's / Product X's successes and developments - - give your target audiences something to remember.

Benefits

- ▶ Indicate company / product progress and establish credibility
- ▶ Provide a platform to keep the media updated with product news and keep Company X on their radar
- ▶ Elevate Company X's profile and maintain media momentum

Milestone Communications

Recommendations

- ▶ Create a milestone news announcement calendar (include new clients, major corporate developments, association affiliations)
- ▶ Develop press releases announcing company milestones
- ▶ Create pitch and send to media lists

Block & Tackle PR

Develop press materials that help communicate the Company X story and Product X value proposition to the media with on-target messaging and information they can use as they develop stories.

Benefits

- ▶ Educate media on the Product X value proposition
- ▶ Offer ready-to-use resources for media
- ▶ Help brand and position Product X with key audiences
- ▶ Hone Company X and Product X messages and ensure consistent delivery

Block & Tackle PR

Recommendations

- ▶ Develop key press kit materials
 - ▶ Corporate/Product fact sheet
 - ▶ Executive bios
 - ▶ Media FAQs
 - ▶ Market overview

Marketing Collateral

Build brand awareness and reinforce messages with printed and online marketing collateral that emphasizes the benefits of Product X. Use collateral to educate potential clients and build business relationships.

Benefits

- ▶ Educate target audiences about Product X and its overall objectives and value proposition
- ▶ Expand communication channels to include leave-behind collateral for potential clients

Marketing Collateral

Recommendations

- ▶ Develop creative direction (e.g., “Your Procurement and Distribution Department” theme) and content for:
 - ▶ Corporate/Product fact sheet
 - ▶ Corporate folders
 - ▶ Online demo
 - ▶ Print advertising
 - ▶ B-roll / online video commercial announcement
 - ▶ Webinars
 - ▶ Company X newsletter

Video Production

Visually tell the Product X story through b-roll (raw video footage), or structured video, that will support pr / marketing and prospecting efforts.

Benefits

- ▶ Reach target audiences with visual, enticing footage that conveys the Company X / Product X message

Video Production

(upon video completion)

Recommendations

- ▶ Post on website
- ▶ Show at outreach events
- ▶ Send to “hit list”
- ▶ Upload to YouTube

Thank You!