



HARPETH MARKETING'S

EBOOK TOP PICKS

The Top Chapter from Each of Our 11 Previous eBooks

WITH UPDATES
ADDED FOR 2018!



Introduction

Thanks for downloading our newest eBook!

Since we opened our doors in early 2012, we've been committed to helping the Market Research industry more fully embrace marketing & sales. We've done this, primarily, through our commitment to educating the marketplace with blog posts and articles (more than 300 of them), our Cup of Coffee Tip Sheets™, the Cup of Coffee Webinars™, speaking at numerous industry conferences and – of course – our eBooks.

Since we published our first one in 2012, we've had thousands of downloads of our 11 eBooks (see below)...



For this 12th eBook, we looked back through all the previous ones and selected the one chapter from each that we thought was the most impactful and worth sharing again. We've also added "2018 Updates"... to include a few new ideas since each eBook was first published.

These chapters cover a very variety of topics – from marketing strategy to selling & sales management to content marketing, exhibiting and more. To explore any of the topics in more detail, we invite you to download any (or all) of these previous eBooks when you [Click Here](#).

Thanks again for continued interest and support,



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Harpeth Marketing's eBook Top Picks

The Top Chapter from Each of Our 11 Previous eBooks

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The 12 Guiding Principles of Marketing

Of all the disciplines in our industry – accounting, management, HR, research itself, etc. – ‘marketing’ may be the least understood. It is believed by many to be more ‘art’ than ‘science.’ Many think of it as “fluff.” Ask a dozen people to define ‘marketing’ and you’ll get a dozen different answers. Now with the variety of social media available, it is even less understood.

We hope the following 12 Guiding Principles help to explain marketing and its role in any market research organization.

PRINCIPLE

1

Show me the money!

The purpose of marketing is simple... to help drive revenue to the company. If your marketing doesn’t help to do that directly – or at least move your firm in that direction – then you’re wasting your time and your resources. Also, as you put your marketing & sales plan together, remember to allocate time and resources to the two distinct ways of growing revenue:

- Attracting new clients
- Maintaining and growing existing clients

PRINCIPLE

2

It’s all about the process.

Marketing is a process. Marketing is not luck or gut feel or magic or serendipity. Successful marketing is the result of a well-planned, disciplined, step-by-step approach to growing revenue. So many market research firms are reactive with their marketing... almost making it up as they go along. They simply don’t take the time to think through their marketing & sales efforts, to create a functional plan and then to execute that plan.

PRINCIPLE

3

What gets measured, gets done.

In marketing, you must measure your results. Why? Simple... to see what’s working and what’s not. If it’s working, do more of it. If it’s not working, stop doing it. Years ago, the founder of a large department store was quoted as saying, “50% of my advertising dollars are wasted; the trouble is, I don’t know which 50%.” Don’t find yourself in that situation.

MARKETING DEFINED

According to the American Marketing Association, marketing is defined as “... the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.” Quite a mouthful! At Harpeth Marketing, our definition is a little more straightforward: “Marketing encompasses every aspect of a business (its people, products and processes) that touches a client or prospective client and in doing so, has an impact on their buying decision.”

THE 12 GUIDING PRINCIPLES
OF MARKETINGeBook #1: Marketing & Sales
for the Market Research Firm:
The Fundamentals

PRINCIPLE #

4

Be patient.

Too many research firm owners give up on their marketing & sales plan if it's not generating immediate returns. That kind of knee-jerk response can be detrimental to the business. To be successful, marketing requires a sustained, multi-faceted approach to move your firm and its services from "unknown" to "recognized" to "preferred" in the minds of your prospective clients... and then to keep it there.

PRINCIPLE #

5

Marketing isn't a sometime thing... it's an all-the-time thing.

To be successful with business development, you must understand that marketing impacts and is impacted by every other department in your organization. Too often, marketing is relegated to some corner of the building with instructions like, "update our website" or "we need a social media strategy." Make sure that marketing and sales have a voice at the executive's table to give regular updates on their activities and provide first-hand feedback from the marketplace.

PRINCIPLE #

6

Think about it! Really think.

Having a marketing and sales plan is critical to achieving your growth goals. And while you need a plan to work *from*, what really makes the plan valuable is the *planning* itself... the preparing, the discussions and arguments, vetting ideas and thinking through the "what ifs." If all you want is a plan without the planning, then pick up some marketing plan software at your local office supply store, fill in the blanks... and you'll be done in no time. And you'll get what you pay for. The real power of the plan is in the thinking.



THE 12 GUIDING PRINCIPLES OF MARKETING



eBook #1: Marketing & Sales
for the Market Research Firm:
The Fundamentals



PRINCIPLE

7

Listen and learn... and be prepared to get out of your own way.

Just because you want to sell it, doesn't mean that anyone wants to buy it. Or better said... you can only be successful when you sell what the market wants and needs. Think of it this way, if you are a boutique qualitative shop specializing in in-home ethnographies... and several of your clients start asking about bulletin board focus groups, should you start doing them? Maybe... maybe not. But you do, at least, need to think about it. In business, you need to pay attention to the market and be prepared to respond to it – maybe in ways you weren't expecting.

PRINCIPLE

8

Not all marketing is marketing.

Marketing isn't just about websites, social media, ads and the sales team. Remember, anything and everything that touches a client or prospective client and that can influence their perception of your firm should be thought of as 'marketing.' For example, how your phone is answered (friendly receptionist or automated voice attendant), your project personnel (friendly and empowered or a "that's not our policy" attitude), your project proposals (easy to understand or complicated and full of jargon), even your offices and furniture (nice or not-so-nice) can all impact the perception of your firm. Bottom line: pay attention to the details.

PRINCIPLE

9

2-way dialogue... what a concept!

Thanks to technology, particularly social media, we are now a truly connected society (see SideBar). Like it or not... for better or worse... that's the way it is. For marketers, this interconnectivity means that the rules of marketing have changed. It's no longer just "push" marketing ("I'll advertise like crazy until someone buys from us!"). Now, it's about 2-way communication... it's about getting permission to communicate... it's about transparency and honesty. Most importantly... it's about engaging your prospective clients, helping them to get to know your company and what it stands for, then helping them to buy what they need... not trying to sell them something that you need to sell. It just doesn't work like that anymore.



THE 12 GUIDING PRINCIPLES OF MARKETING

PRINCIPLE

10

Give it away!

In the market research industry, it's harder than ever to connect with a prospective client. Why? Prospective clients have access to two things that didn't really exist 10-15 years ago:

- Access to a TON of information online
- An even larger number of potential vendors (thanks to a global, connected economy)

Given that, how do you get prospects to take notice... to connect with you in that sea of data and competition?

Answer: GIVE them something of value. For free. It is easiest to start with information... an eBook on a relevant topic, a recording of a presentation, an invitation to a private webinar, etc... anything that helps them to do their jobs better.

Their acceptance of your offer is the connection you need to start the buying/selling process.

PRINCIPLE

11

You still gotta execute!

Planning takes time and it takes brain power... but when it's done, it's done (at least for this year). The real challenge, then, in marketing & sales is in the *execution* of the plan... in making it come to life. Sticking to the timeline, making sure all the details are covered, managing the budget, doing things on a regular basis (even though they seem boring or redundant), taking the time to measure and report... now that's hard. Plan execution requires discipline, persistence and focus.

PRINCIPLE

12

Live the brand.

Every company has a brand... good or bad, compelling or weak – but we all have one.

Smart marketers have long been conscious of their firm's brand and trying to create initiatives in alignment with that brand. Often though, it's only the marketing department that's living the brand, not the rest of the company. And – here's the problem – if everyone at your firm is not living the brand (and believing it), then the brand breaks down and you lose credibility. Whatever your brand, make sure everyone in your organization knows it, buys into it, is trained for it and lives it.



THE 12 GUIDING PRINCIPLES
OF MARKETING

2018 UPDATE

There are two more 'Principles' we'd like to add to this list:

PRINCIPLE #

13

Seek first to help, then to sell.

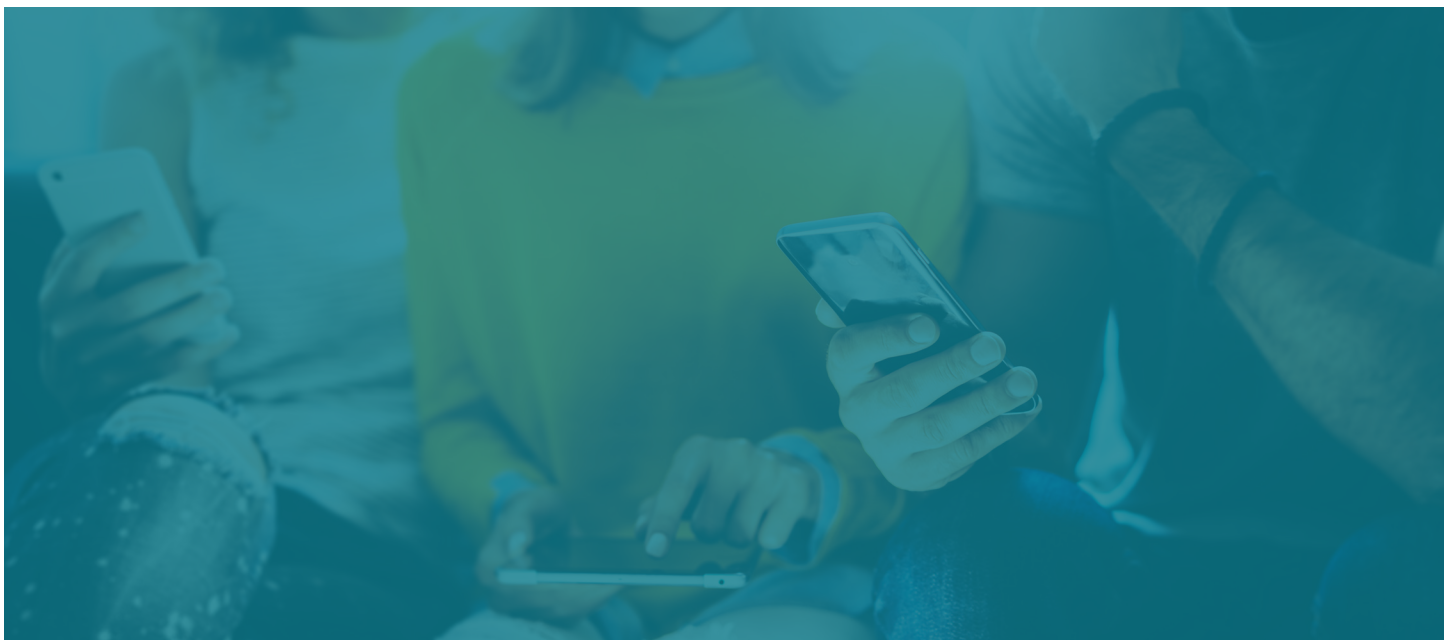
Helping others – by sharing resources and knowledge – is an easy, non-threatening way to begin a buying-selling relationship, especially in an industry that doesn't always embrace sales & marketing. It's also a great way to showcase your thought leadership and subject matter expertise. As people come to know you as someone who's helpful and knowledgeable, it opens the door to other kinds of discussions (i.e. sales calls) – because you've built up a level of trust and credibility with them.

PRINCIPLE #

14

People do business with people they like.

All things being equal, people do business with people they like. All things *not* being equal, people *still* do business with people they like. There are all kinds of tools and technology to help with our marketing and sales efforts. And they are important, to be sure. But we are still in the 'people business'... so good people skills and solid interpersonal interactions are still critical. And over time, with more interactions, that 'like' evolves into 'trust.' When that happens, you begin to build clients for life.

To download the full eBook mentioned above, [Click Here](#).



Positions / Structure

Now that the goals and responsibilities of both the marketing and sales functions have been covered, it's time to establish the positions (and related job duties) that fit with your needs and your budget. Here are some to consider that are common in the Market Research industry.

MARKETING POSITIONS/STRUCTURE

Generalist	Most firms have someone like this on board, who can do a little bit of everything listed below. If you're hiring your first marketing person, this is a good place to start.
Creative	Designing ads, websites, collateral pieces, report covers, etc.
Writer	Marketing material, blog posts, articles or eBooks (content marketing), sales proposals, etc.
Marketing Management	Responsible for creating the marketing plan, timeline and budget... then keeping track of the plan execution.
Social Media Specialist	Making sure you're engaging clients and prospects on your Blog, LinkedIn, Twitter, Facebook, etc.
PR (Public Relations)	An old-school term, but there is still immense value in getting press releases, announcements or articles published in industry magazines and websites.
Technologist	Helpful for analytics, SEO, website and blog development, social media management, etc.
Product Manager	They wake up every day thinking only about one specific product/service and how to make it better and grow revenue from it.

ON HIRING THESE POSITIONS:

OK, so you've thought about the role(s) your marketing person needs to serve... and now it's time to go find them. Like many non-research roles in a research firm, the question often is, "Should you hire from within the MR industry or not?"

We suggest that you choose marketers from the "outside." Here's why... a marketer with broad experience, a diverse skill set and perspectives established in other industries brings ideas to the table that aren't there now. You might not accept all of his/her outside-the-box ideas, but at least you'll be getting that chance to hear them. Our industry is rife with too much "me too" marketing... hiring from the outside may help you to breakthrough that "sameness" and stand out.



Positions / Structure

SALES POSITIONS/STRUCTURE

<p>'Hunter' or 'Farmer'?</p>	<p>That is, do you want your sales rep(s) focused on sales from new clients (the hunter) or maintaining and growing sales from existing accounts (the farmer)? Or both? And here's the thing... <i>both</i> are important!</p>
<p>Key Account Management</p>	<p>Imagine you have 3 or 4 clients (or less!) that account for more than 50% of your annual revenue. How do ensure that you not only keep that business, but expand it? <i>That</i> is the role of a Key Account Manager.</p>
<p>Lead Generation</p>	<p>That is, spending all of their time on the phone, much of it cold calling, as a means to generate interest and set appointments for more seasoned sales reps or senior executives from the firm.</p>
<p>Seller/Doer model</p>	<p>The other role regularly seen in our industry is that of the Seller/Doer – most often associated with independent moderators – who not only search out new business, but actually moderate the focus groups associated with what they sell; this also applies to the solo-preneur.</p>
<p>Inside or Outside sales reps?</p> <p>There are plusses and minuses to both.</p>	<p>Outside reps command a higher compensation package plus the added expenses of travel but often, they come with more experience. In addition, relationships – particularly with key executives at large firms – are best developed in person, and it's those relationships that lead to higher revenues.</p> <p>Inside reps, on the other hand, are generally less expensive, can talk to more clients on a given day and – thanks to technology – can also do online presentations and talk to people around the world. But they generally have less experience and may be looked down upon as 'telemarketers.'</p>
<p>Setting Sales Territories: Who do you want your sales reps calling on? 'Everybody' seems like the right answer. But it's not, really. To provide focus and to ensure that multiple reps aren't tripping over each other, sales 'territories' have to be established... and there are multiple ways to do that:</p>	<p>Location of clients – define a rep's territory based on a geographic area to cover.</p> <p>Size of the clients – where do you want your reps spending their time? Generally, larger companies represent larger opportunities.</p> <p>Quantity of clients – that is, how many clients can a rep reasonably be expected to manage? Because of the structure, inside can manage more than outside.</p> <p>Verticals served – perhaps your reps should be specialists... each focusing on just one or two industries served – like technology, CPG or education.</p> <p>More than likely, though, your territories will be some combination of two or more of these; e.g. you have three outside reps that each cover a third of the U.S. (geography) calling only on Fortune 1000 firms (size of firms); in addition, you have two inside reps calling on hundreds of smaller companies.</p>



Positions / Structure

COMPENSATION FOR SALES POSITIONS

One of the most difficult things in building out your sales structure is deciding on the compensation plan for your sales team, specifically, the “sales commission.” Why is it so difficult? Simple... because in the history of recorded time, no one has *ever* created the perfect commission plan. Don’t believe me? Ask *anyone* who has ever tried! But you *will* need one. And as you go about the task of crafting it, here are a few things to think about:

- ▶ **Basic structure...** salary only, commission only, salary plus commission? Most MR firms subscribe to the ‘salary plus commission’ model.
- ▶ **How to set goals...** goals can be built around overall revenue, number of clients, revenue by product line, revenue by key accounts and so on.
- ▶ **Who sets the goals?** Is it senior management, the sales reps or a negotiation between them?
- ▶ **An accelerator?** That is, are commissions a flat percentage or do they escalate the more that the goals are exceeded? Do you cap them? (‘No’ should be the answer here.)
- ▶ Do you build in **‘sales contests’** to help motivate and reward your sales reps? Maybe something like, “The first rep to sign three projects this month wins a flat screen TV!”
- ▶ If the **sales function is new to your firm**, then paying commissions is also new and often a difficult pill to swallow for some employees outside of the sales department. Get ready for some anger.
- ▶ **Plans drive the behavior of your sales team...** to change behavior you need to change plans – which could happen often.
- ▶ Successful sales people should be among the **highest compensated people** in your firm... are you OK with that?
- ▶ You usually end up with **different plans for different positions**; e.g. paying inside reps differently than outside reps or account managers differently than account executives. And that means more to manage.

But find the right plan... one that motivates and rewards your sales staff appropriately, while at the same time aligning with your corporate goals and significant revenue growth is likely to follow.

ON HIRING THESE POSITIONS:

On hiring from inside vs. outside the industry, our recommendation for sales positions is a little different than with marketing. First of all, the most important thing is hiring a great sales person, regardless of the industry they come from. The fact is, teaching them the research industry isn’t all that difficult. However, the one ‘plus’ on a sales rep coming from inside the industry is their “rolodex.” That is, who do they already know that will help them to open doors faster and might even lead to some *immediate* revenue?





Positions / Structure

2018 UPDATE

While most firms don't (or won't) do it, a strong case can be made for your marketing staff to share in the sales commission program in some way. After all, the tools and resources they developed to support sales did help lead to the sales team's success.

In addition to the financial reward itself, a 'commission' helps to unite marketing with the sales team aligning them toward a common, tangible goal. And is there a more logical 'bonus' for marketing then to reward their help in revenue growth?



To download the full eBook mentioned above, [Click Here](#).





PROBLEM #7: YOU DON'T HAVE THE MONEY.

PROBLEM #7

You don't have the money.

I talk to a lot of research business owners who tell me that they still are not back to pre-recession business levels, that it's "still a little tough out there," that profit margins aren't what they used to be. Fair enough. Can't argue with the facts.

However, they also use that data as an excuse not to invest in business development efforts of any kind. OK, they might not have the dollars to spend on big, fancy marketing campaigns... but they decide to stop there and don't spend any time thinking about other options. Then complain that business is bad.

It doesn't have to be like that. Even without large marketing budgets, you can still put in place effective marketing initiatives. It just requires a little thought, a little planning and little creativity. To help get you thinking in that direction, here are several low-cost/no-cost ways to help increase awareness, generate leads, position your firm and increase revenue:

Email campaigns:	There are some really excellent, inexpensive platforms out there for staying top-of-mind with clients and prospects; they'll help you create attractive, branded emails then measure their effectiveness.
Internal communications:	Make sure to include your marketing message on your invoices, email signatures, etc.
Press releases:	A little old school, but many of the magazines and websites in our industry are happy to post your news... all you need to do is get it to them in an appropriate format.
Social media sites:	There's no reason you shouldn't have [at least] a blog, as well as a corporate and individual LinkedIn pages. Then think about Twitter, Facebook, Google+ and the others.
Social media engagement:	Don't just post to your own social media sites (see above), but participate in industry dialogue – on other's blogs, in LinkedIn group discussions and in Twitter chats.
LinkedIn connections:	Spend a couple of minutes every day reaching out to industry contacts and building up your LinkedIn connections. Then communicate with them via LinkedIn's built-in email function.
Presenting webinars:	Like email, there are also several fine, low-cost platforms available for delivering webinars to your target audience. Two hints: 1) practice and 2) don't sell – educate.
Awesome PPT:	Our industry just loves to put up PowerPoint slides with lots of words... then read the words. BORING! Minimize the words, use compelling imagery and put on a "show."
Networking at conferences:	If you're going to invest in conferences for your education, make sure to set some networking goals and then achieve them! And follow-up, follow-up, follow-up...
Great elevator pitch:	When networking (see above), you've got about 15 seconds to tell someone what you do, why it's different and why they should care. Can you do that?

PROBLEM #7: YOU DON'T HAVE THE MONEY.



eBook #3: 12 Reasons Why Your Marketing & Sales Might Not Be Working and What You Can Do About It

Handwritten notes:	Sending handwritten notes after a meeting, presentation, referral or just out of gratitude for their business will stand out more than almost anything you can do – because no one does it these days.
Content marketing:	Enhance your credibility, position your firm and improve your SEO with the continuous creation of useful content – articles, white papers, case studies, eBooks, and so on. And remember, no selling.
Sharing articles (1-to-1):	Not everything you do has to be targeted to large groups. If you come across an interesting article that you think one of your clients will appreciate, send it to them with the short note, “Thought this might interest you...”
Testimonials / client lists:	Very few of us show our clients’ logos on our website or post testimonials from them. Why not? That kind of information is “proof” that you can deliver on your promises.
Great business cards:	Spend a couple of extra bucks on really nice business cards – often the only tangible thing a prospective client will see from you. Good design, good printing, good paper... it’s worth a few extra dollars. And don’t forget to use the back side of the card, too.
POP:	Do you get many visitors to your offices? If so, create some attractive point-of-purchase displays to scatter around. Promote your services, website, webinars, etc.
Adjust your writing:	Become more client-focused. Write from your clients’ perspective... write about benefits, not just features... address their pain points. This applies to your website, PPT presentations, collateral, etc.
SEO:	Optimize your website and blog for Search Engine Optimization. Focus on continually adding new content and the effective use of key words and phrases.
Remote sales:	The same platform you use for webinars (above) can be used to deliver remote sales presentations. It’s an effective way to present information without having to hop on a plane.
Excellent website:	Maybe the most expensive of these recommendations... but also the most important. Your website will be the first impression you make with almost every new client and prospect. And you only get one chance to make a first impression. Not sure how your site stacks up... get a bunch of friends and neighbors (or better yet, some clients) to surf your site and give you their ‘honest’ feedback.

And if you think about it for a few more minutes, you could probably come up with another dozen or more. But they’re just ideas – their execution also requires additional commitments:

- Execute your ideas by following a strategy and a plan. If not, you’re just wingin’ it.
- Results will not come overnight. Stick with it and be patient.
- Remember, though these ideas might not cost a lot of money... they do take time.



eBook #3: 12 Reasons Why Your Marketing & Sales Might Not Be Working and What You Can Do About It

PROBLEM #7: YOU DON'T HAVE THE MONEY.

2018 UPDATE

Even if your entire marketing program is built on low-cost/no-cost tactics, those tactics still need to be “integrated.” That is, all tactics need to work together and support one another. Nothing is in a silo. For example: You send out a monthly e-newsletter to your database... which links recipients to a blog on your website... which has a call to action linking readers to your latest eBook... the downloaders of which go into your CRM... who are then given to your sales team for follow-up... and who are included in next month’s e-newsletter blast. With integrated marketing, 1 + 1 really does = 3.



To download the full eBook mentioned above, [Click Here](#).



ADVERTISING

Dan Quirk, Quirk's Marketing Research Media



eBook #4: The Top 10 Tips for the Top 10 Marketing Tactics: 100 Killer Marketing & Sales Ideas from Seven Different Experts!

Advertising

Do you believe that display advertising works? Do you wonder how effective your advertising really is? Advertising, done right, works extremely well and there is plenty of research to back this up. That's why it is a multi-billion dollar industry. But it is just as true that advertising isn't a cure-all or a guarantee of success. Too often, advertisers in marketing research miss the mark because they don't really understand how advertising works and therefore create advertising that misses the mark.

Next time you contemplate a print or digital display advertising campaign follow these Top 10 tips for success.

1. Have a realistic objective.

In the marketing research industry, most advertising should focus on promoting a brand or specific product or service. Because the purchase decision-making process can be so long, ads that attempt to elicit calls to action don't usually work well. The objective should be for you to reach as many of your prospects on a repetitive basis with a message that clearly articulates what you are (or what your product or service is) and what makes you unique.

2. Make sure your ads match your objective

Many times I've seen ads that do a fantastic job of branding a company but the advertisers are disappointed because the ad didn't generate any phone calls. Not

only is getting an immediate call to action difficult in the marketing research space, but in almost every case the problem is compounded by the fact that the ad didn't even contain a call to action. In other words, the advertiser's objective and the ad copy did not match.

3. Include a headline.

According to research, 80% of readers will read your ad headline but only 20% will read your text. An ad with no headline is like throwing away 80% of your money.

4. Add text and images that make a great ad.

A.	Make sure the ad is memorable especially in the context of being surrounded by other ads. You want viewers of your ad to remember it even if they aren't currently in the market for your product or service.
B.	Don't get text-heavy. The ad should provide quick, clear information.
C.	Don't be clever just for the sake of being clever. If a reader can't easily see the connection between your ad and the message, you've only confused them.
D.	Write the ad for the prospect. The copy should not be what you want to say, but instead it should be what will inspire customers to do business with you.
E.	Make sure the ad leverages the medium in which it appears. E.g., a reader will likely spend a minute on a print ad but less than 5 seconds looking at an online ad.



BY DAN QUIRK
Quirk's Marketing Research Media

Dan Quirk is the V.P., Marketing and Innovation for Quirk's Marketing Research Media which promotes the understanding, use and value of marketing research through a suite of free products including a monthly print and digital magazine, e-newsletters, mobile apps, supplier directories and the industry's most comprehensive website. For more information, go to: www.quirks.com

QUIRK'S

ADVERTISING

Dan Quirk, Quirk's Marketing Research Media



eBook #4: The Top 10 Tips for the Top 10 Marketing Tactics: 100 Killer Marketing & Sales Ideas from Seven Different Experts!

5. Make sure your ad campaign is integrated.

The most effective advertising campaigns are those that catch your audience at different times and in different ways – in print, online, e-mail, etc. It is a simple way to reinforce your message and make it more memorable.

6. Make sure you have reach.

Purchasing media with a large reach allows you to reap the benefits of advertising more quickly. In addition, the cost per reach is often significantly cheaper.

7. Make sure your reach is targeted.

Although it is important to have the largest possible audience, that reach must also be targeted. Ensure that you are advertising in the right place by looking at your existing customers and matching their profile to the media you've chosen.

8. Include frequency.

Frequency is the number of times a prospect sees your message in a given time frame. Research shows that frequency is important if you want your message to resonate and be memorable. Idea: You are better off running small ads more frequently than larger ads with less frequency.

9. Give advertising time to work.

Marketing research products and services are not an impulse buy. Numerous people can be involved in the buying process – which can take several months to a year or more. Advertising works slower than most people realize but when you understand this and act accordingly you will reap long-term benefits. Generally speaking, you should be willing to commit to 12 to 18 months, assuming your media matches your prospect profile.

10. Measure and refine.

Because advertising's influence is often subtle, it can be difficult to accurately measure its effectiveness. Many people often don't recall when or where they first heard of a product or service, so simply asking callers where they got your company name is not enough. Consider measuring your brand awareness every couple of years to see if it is growing. You may also get existing clients to provide feedback on your ad materials.



ADVERTISING

Dan Quirk, Quirk's Marketing Research Media



eBook #4: The Top 10 Tips for the Top 10 Marketing Tactics: 100 Killer Marketing & Sales Ideas from Seven Different Experts!

2018 UPDATE

While this chapter refers to all kinds of advertising – print, digital, etc. – one that is relatively new to the MR industry is re-marketing (a.k.a. “re-targeting”). These are ads that pop-up for potential clients who visited your website but took no action. You’re familiar with this, even without being aware of it. Have you ever been to amazon.com, for example, searched for a certain product (e.g. an Epson printer) but didn’t buy it... then, for the next several days, you saw ads for that Epson printer everywhere you went online? That’s re-marketing... and it’s worth considering as a tool for your marketing toolbox.



To download the full eBook mentioned above, [Click Here](#).





What is Content Marketing?

As simply as it can be stated, **Content Marketing** is the creation and sharing (“giving away”) of useful information that will help the reader/viewer to better understand a particular subject and, in doing so, help him or her to do their job better.

As an example, for a research firm, that could include providing content with titles like:

- › Conducting ethnographic research in the digital age
- › 10 things to look for when sitting “behind the glass”
- › How to save time and money with online bulletin boards
- › The top 5 coming trends in CPG research

Notice anything unusual? None of the topics are salesy. None of them are internally focused.



Content Marketing is about providing genuinely helpful information.

Here are the 13 most popular methods for delivering quality content to your target audience:

1. Blog: Your blog should be the cornerstone of your content program – the place you go to most often to provide your readers with good information, insight and observations. Most importantly, you must be consistent with your blog posts... create a schedule and do whatever it takes to stick to it. Importantly, make sure it’s easy to find your blog from your website’s home page.

2. Articles: Think of these as really long blog posts... only they’re not posted on your blog. With articles, you can dig a little deeper into a particular subject. Get a little broader. These longer articles can be posted in a **Resources** section on your website or – where you have a good relationship – included in industry magazines and websites.

3. Social Media: In addition to linking to content on your website and others, social media platforms also provide an easy way to deliver short nuggets of content across your connected audience.

4. White papers: These are “clinical’ examinations of a particular topic... very fact-based. A white paper might have a title like “How Online Bulletin Boards can Save Money and Time vs. Traditional Focus Groups.” White papers often include charts and graphs that prove how and why the claim is true.



WHAT IS CONTENT MARKETING?

5. Case studies: These are reviews of specific projects for specific clients showing, in the end, how working with *your* firm benefited them. The four parts of a Case Study are:

- › The Client (describe them, don't name them – unless you get permission)
- › The Situation (or problem the client was facing)
- › The Recommendations (what you proposed and implemented to solve the problem)
- › The Result (how your efforts solved the problem... or saved time, saved money or provided higher quality results)

6. eBooks: You're reading one! A broader and deeper exploration of a particular topic, eBooks are anywhere from 8-50 pages, attractively-designed and looked at as a legitimate resource for your clients and prospects. eBooks also represent an opportunity to collect contact data from those who are interested in downloading it (by filling out an online form)... helping you to build a database of prospective clients.

7. Live Presentations: Stand in front of a room to deliver a presentation and the assumption is that you are the "expert." Leverage that assumption, deliver a presentation that genuinely helps to educate (not sell to) the attendees and the result is a level of credibility and trust that money can't buy. Presentations will generally happen as a result of being invited to speak at a conference or workshop for an industry association or trade group. Like writing for an industry publication, speaking there comes with an implied endorsement.

8. Webinars: Like Presentations (#7 above), webinars provide a forum for sharing your expertise... only this time, remotely. While the attendees don't get to "look you in the eye," there are several benefits to webinars vs. live presentations:

- › Generally, there is no limit to the number of attendees.
- › They're convenient... attendees can participate from the comfort of their home, office or favorite coffeeshop.
- › The session can be recorded and re-purposed.
- › There is much less stress for those who don't like public speaking.
- › There are no travel-related expenses.

9. Podcasts: As the adoption of smart phones continues to increase (and dramatically so), offering podcasts provides a way for your clients and prospects to "take your message with them" and listen to it when and where they want. Tip: invest a few dollars in basic recording equipment so the audio quality is good.

10. Videos: We are a video-centric society... so take advantage of it and present your content in the way that most people like to process it. And with outlets like YouTube, it's easy to put your video on the internet for all to see. You can even create your own 'channel' if you'll be posting videos regularly. Like podcasts, spend a few dollars on equipment – it doesn't have to be theater-quality, but it does need to be sharp and professional.

11. Engage in social media: Having a social media presence (LinkedIn, Twitter, etc.) is one thing... but to disseminate content, you really need to *participate* in others' sites and conversations. For example, post comments on top industry blogs, initiate or participate in discussions within popular LinkedIn groups, get involved in Twitter Chats, etc. Remember... never be salesy – your goal is to be seen as a "helpful expert."



WHAT IS CONTENT MARKETING?

12. E-newsletters: While generally thought of as a way to promote good content (on your website) and link readers to it, e-newsletters themselves can also contain quality content in the form of short articles, images and graphs.

13. Infographics: A relatively new phenomenon, infographics are generally large, attractively-designed, visual representations of information, data or knowledge intended to present complex information quickly and clearly. As many people are visual learners, infographics present data in a way that is easy for readers to process.



2018 UPDATE

Of late, some “interactive” types of content are gaining in popularity. These include:

- Downloadable Excel templates to help with tracking and specific calculations. (see the Harpeth Marketing example [here](#)).
- Online calculators that solve a simple problem (e.g. online mortgage calculators)
- Games & contests
- Simple surveys (afterward, the data is shared with the participants)

Consider engaging your readers with content like this.



To download the full eBook mentioned above, [Click Here](#).



- ❑ **Get a business card from every booth visitor** but don't rely just on the card. Most booth workers will have a conversation with someone, collect a card and then [maybe] scribble a note on the back of it. Instead, create a small form to which you can attach the card and answer a few standard questions to help with follow-up (see sample on right).

You'll want to write down all of these important details at the event because there is no way you'll remember them days later. Once you complete a form, have a specific box or envelope into which it's placed. After the event, you can sort the leads and start following up.

Most firms have no idea how to effectively 'work a show.' They pop up their booth, set down a table and a couple of chairs, pull out some literature and think they're ready. Virtually no thought goes into getting set-up on-site, as well as how to create an experience inside the booth that generates a very positive perception in the eyes of everyone who visits.

LOGISTICS

- ❑ Don't wait until the last minute to **set-up your booth** – even with a simple little “pop up.” Build in some time to fix any problems that might occur... because they will.
- ❑ **Know the exhibit hours.** Be in your booth before the doors open and stay until they close.
- ❑ **Silence your cell phone.** You do not want a good conversation with a prospective client to be interrupted. Check your messages during a break.

BOOTH LEAD CAPTURE FORM

Event: _____ Date: _____

Staple business card here or complete:

Name: _____

Title: _____

Company: _____

City: _____ State: _____

Phone: _____

Email: _____

Type of company: _____

Size of company: _____

What products/services interested them?

Service 1 Service 2 Service 3

Service 4 Service 5 Service 6

Timing: Urgent Soon No rush

Follow-up plan? _____

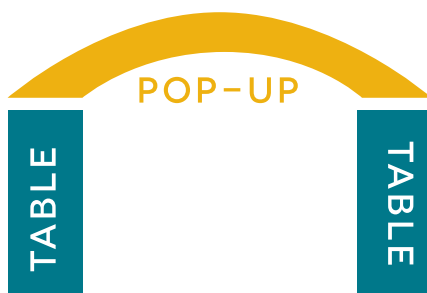
Notes: _____

Rate them: Hot Warm Cold

Booth rep: _____



- ❑ **No chairs allowed!** Never sit. When sitting, you look lazy and uninterested – and prospective clients will sense this and walk on by. Yes, you'll get tired but you'll survive. If you need a break, leave the booth and go sit in the lobby or the food court. To help with the fatigue, make sure your booth is always carpeted.
- ❑ **No eating or drinking in the booth** – it looks unprofessional and you certainly don't want to spill your drink. Leave the booth if you need to, but keep all food and beverages out of the booth. No chewing gum either. Fresh breath is a must so get a supply of mints.
- ❑ **Never leave the booth unattended** – ever! The way to make sure that never happens is to have two people working your booth (assuming you have an 8-10 ft. space). If one needs a break, the other can stay behind.
- ❑ Never – and I mean never – **put a table across the front of your booth**. This is the cardinal sin committed by most firms that exhibit in small booths with a pop-up backdrop. The trouble with the table is that it creates a barrier between you and a prospective client – and why would you want that? Instead, try the “friendly” layout shown below. It's open, has plenty of table space (use *tall* tables so you have ample storage underneath) and provides an unobstructed view of your booth.



- ❑ Finally, **never break down early**. If the exhibits close at 5pm, wait until 5:01pm (even if the other exhibitors have already started). There are always a number of attendees who save their walking-around-the-exhibits for the end of the last day. If you break down early, you miss them.



MARKETING

- ❑ “More imagery – less words” is the proper guideline for **booth design**. The goal for your booth is that it act as a “visual train wreck,” literally stopping people in mid-aisle to take a look at it.
- ❑ **Activity/motion** in the booth will draw attention. At the very least, have a laptop running a looping PowerPoint presentation or company video.
- ❑ **Have both good literature and cheap literature**. Many visitors to your booth will not be qualified or ready to talk about purchasing decisions. No need to give them your very expensive, glossy corporate brochure. Instead, give them a nice, little (but still professional) overview sheet and save the good literature for the ‘hot’ leads.
- ❑ **Consider a uniform...** maybe have the entire booth team wear polo shirts in the corporate colors and with a logo. Not only do you want to reinforce your brand while in the booth but also while walking around the hotel.
- ❑ To engage visitors, **stand at the front of the booth** where your space meets the aisle. Maintain an open and relaxed position (no crossed arms, hands out of pockets), smiling and making eye contact with passers-by.



- ❑ **Ask the right questions.** As you're standing in your booth, smiling, the one question you should never ask but almost everyone does is, "Can I help you?" Almost everyone will reply, "No, thanks. Just looking." (Others might ask, "How are you today?" The response to which is, "Fine, thanks.") Your goal is to engage passers-by in some sort of conversation that then leads to a business discussion. Try, for example, "Hello, John, what's brings you to the conference this year?" or "Good morning, Mary, do you do much online qualitative research at [insert company name from her name tag]?"
- ❑ Remember the old joke: How do you get to Carnegie Hall? Answer: **Practice, practice, practice.** The same goes for your booth presentation. Whether you just have some key talking points, a PowerPoint presentation or a software demo, practice it often so you're as polished as you can be when it's 'show time.'
- ❑ **Don't spend all of your time in the booth.** Where appropriate, take advantage of all that the conference has to offer: attend sessions; check out other exhibitors – particularly your competitors; attend social events; network in the hallways; take clients out to dinner; etc. And remember to have a little fun while you're at it!

2018 UPDATE

If you market software – and doing live demos is an important part of the selling process – consider renting a room in the conference hotel and scheduling private, personalized demos as a way to have more in-depth conversations than are possible at your exhibit. Have a laptop, projector and screen all set... and beverages and snacks to make a good impression.



To download the full eBook mentioned above, [Click Here](#).





12 REAL-WORLD WAYS TO DIFFERENTIATE YOUR FIRM

“The reality is no one recruiting agency is truly unique from its competitors so the points of differentiation shift to solving the most common points of pain for clients, which tend to be deadlines and budgets.”

Chris Lee, President,
MedQuery, Inc.

While there is no magic bullet, following are 12 ideas that we’ve seen used across our industry (and others) that we hope will be a catalyst to jump-start your thinking and discussions about how you might differentiate your firm.

Importantly, we’re not suggesting that you need to do all or most of these. Pick one (or two) and do it really, really well to begin to build your Points of Differentiation.

The Big 4:

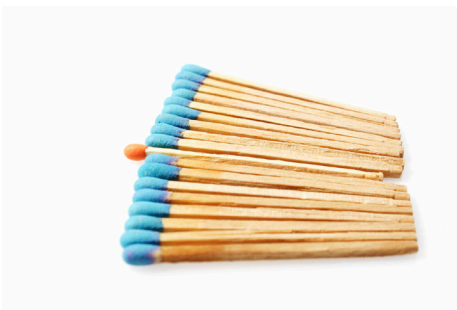
We’re calling these the “Big 4” because they are the ones we see most often. The opportunity is in finding your specific niche within one of these categories and “owning it.” But don’t just pick one “out of a hat”... build on where you have already had proven success.

- 1. Industry focus:** Establish and build an expertise in a certain vertical industry (e.g. automotive, healthcare, technology, etc.).
- 2. Methodology focus:** Become the go-to firm for certain types of work – e.g. online qualitative, ethnographies, mobile surveys, etc.
- 3. Application focus:** Specialize in certain research applications, like new product research, patient satisfaction surveys, website usability, etc.
- 4. Market focus:** Somewhat similar in nature to an industry focus, when you focus on a particular market segment (e.g. Hispanics, Women, Children, Physicians, etc.), you can position your firm with a unique expertise that others won’t have.

To differentiate your firm even more, think about where more than one of the Big 4 intersect. As an example, you could decide to specialize in patient satisfaction (application) surveys (methodology) for rural hospitals (industry).

8 Other ideas:

- 1. Technology advantage:** Are you an “early adopter” of technology? If so, be the first one on the block to get and use it – positioning your firm as very innovative. This isn’t just about research technology (e.g. bulletin board focus groups), but technology that supports other parts of the research processes, as well.



12 REAL-WORLD WAYS TO DIFFERENTIATE YOUR FIRM



eBook #7: "Why should I choose you?" How to Differentiate your Firm in a Crowded Marketplace

"As the competition for business continues to accelerate, finding what differentiates us from our competitors becomes more and more crucial. And when clients ask — and they always do — the answer has to be something that makes their eyes light up with comprehension. And that is not easy!"

Kathy Doyle, Founder & President, Doyle Research Associates

2. With unique operational processes:

- A survey is a survey is a survey... but if you can recruit to it, distribute it, process it or report on it an interesting and unique way, you'll stand out from the other average survey providers. This applies to most popular research methodologies.
- **With speed:** Of the three components of business (better, faster, cheaper), which is most important in our industry? Everyone we've spoken with over the years immediately points to *speed*. Can you re-engineer your processes to be the "fast" research firm – in all aspects of the client engagement?
- **With your level of service.** We all like to think that we deliver a high level of service to each and every client. And maybe we do. But what if there was a level above even that? Think Nordstrom vs. Sears vs. Wal-Mart.

3. With your size & scope: Take a look at the top of the Honomichl 50. Many of those firms don't necessarily have a 'specialty' or 'focus.' But what they do have is size and scope... they can do pretty much *anything* for *anybody anywhere* in the world at any time. And that's different.

4. With your 'first touch': How do you respond when a new, prospective client submits an RFP? Probably like everyone else... nice email thank you, maybe a brief follow-up phone call and then a fairly standard bid package. But what if you could blow them away at this phase? What if your responsiveness, professionalism and deliverables were so different that your competitors didn't stand a chance? Remember, you only get one chance to make a first impression.



12 REAL-WORLD WAYS TO DIFFERENTIATE YOUR FIRM



eBook #7: "Why should I choose you?" How to Differentiate your Firm in a Crowded Marketplace

"Differentiation in the market research industry starts with the hiring process... differentiate with your employees: they will be your biggest asset in differentiating you from the competition."

Brett Watkins, President,
L&E Research

5. **Who you target:** Everybody wants to work with P&G, Coca-Cola, Nike, etc. Not only are you competing with scores of other firms on every bid, it's incredibly price sensitive and the nod often goes to one of the "big boys." But who's calling on the mid-tier buyers, not the Fortune 50, but the Fortune 5000. It's not nearly as competitive and much easier to build 'relationships.'
6. **With a unique business model:** There are a handful of firms that have sprung up in the past few years that were built very differently from the ground up. Their structure and their way of conducting business are very different than traditional firms. Are they better, faster or cheaper? Maybe, maybe not... but they are genuinely different.
7. **Being first to market:** Being first to market has always been a competitive advantage... first with a new technology, a new methodology a new pricing model, etc. The key is a strong promotional effort – so everyone *knows* you're first.
8. **With your marketing:**
 - Flip through the pages of any research publication. Notice anything? Most of the ads are pretty much the same... and are pretty boring. Stand out from the crowd with unique, interesting or thought-provoking marketing.
 - We work in a knowledge industry. You can help to "prove" yours by *consistently* sharing some of it through articles, blog posts, white papers, eBooks, presentations, etc.
 - Having a well-trained, professional sales person/team... when many of your competitors do not. It's a very direct way to proactively build relationships.

I hope this list triggers some ideas that serve as a springboard for your internal discussions and planning. Remember... not a single one of them is easy – which is why so few firms do it.

2018 UPDATE

Congratulations! You've found your Points of Differentiation. Now what? Now you need to "live it."

- Start by sharing the vision with your staff. Make sure every employee understands what you're doing, why you're doing it and how they will be impacted.
- Make sure your operational processes are brought up to speed. You've got to be able to deliver on the new promises you'll be making with your PODs. Conduct additional training if needed.
- Your new PODs should become the focus of all your marketing and messaging.
- And finally, learn to say "no." Once you decide to be different, you can never go back to being (and doing) the same as everyone else.



To download the full eBook mentioned above, [Click Here](#).



The Growth Grid

The Growth Grid asserts that – based on your client mix and your product mix – the marketing & sales efforts of any organization fall into one of four categories. It provides an effective framework for thinking about business development...

Core Growth

Or... *“How can we sell more of our existing services to our current targeted markets?”*

Also called ‘market penetration,’ this is most likely the kind of marketing & sales that you focus now... and that’s a good thing. For example, if you work for a full-service research firm selling primarily to the automotive industry, the questions you might ask are:

- “Do we have other services to offer our existing clients that they’re not currently buying from us?” E.g. They’re using your firm for qual, but not quant.
- “What other research buyers in the automotive industry should we go after?”



Market Expansion

Or... *“Who else, outside of our current client base, would be interested in buying our services?”*

Market Expansion suggests that you focus your marketing & sales efforts on those verticals where you’re having the greatest success. This is not to suggest that you ignore the rest... only that you leverage that success and take a purposeful approach to growing your business in those verticals.

Another option might be ‘horizontal’ expansion rather than vertical. For example, suppose your area of expertise is employee satisfaction. Within that, you don’t really care about the industry of the potential client, but you look across all industries at certain buyer types, e.g. HR Managers, COOs, etc.

Lastly, you might need to think about geography. E.g. If you service the automotive industry in Detroit, you might want to think about opening an office on the West Coast or in the Southeast to better serve the auto industry there.



Product Enhancement

Or... *“What new kinds of products and services can we sell to our existing clients?”*

There are certain obvious ones here... quant shops can start offering qual, etc.

Beyond that, though, there are still numerous options. And today, technology can help to make it easier to make that happen.

Consider the full-service shop again, offering both quant and qual. What if webcam surveys were added to their quant-side service offerings? On the qual side, what if they became experts in bulletin board focus groups or mobile qual? Similar processes... unique tools... new revenue streams.

Take a look at your current clients... what opportunities exist to add to your service mix and expand your relationship with them? And the broader your relationship, the more difficult it is to be displaced by a competitor.

Diversification

Or... *“Is there a brand new business we should be in that in some way ties into our current business?”*

As an example, let's assume that you offer website usability testing services. With that level of website and UX experience, it's not hard to imagine expanding into actually offering website design services to a very broad market, perhaps through a new division or subsidiary.

Look around... are there opportunities for your organization to expand outside the walls of your core business? But a word of caution... just because you can doesn't mean you should. Anyone remember Exxon computers or Levi's suits?

2018 UPDATE

Sometime after we published this eBook, we found out that the Growth Grid is actually called the **Ansoff Matrix** and was named for **Harry Igor Ansoff**, the “father of strategic management.”



To download the full eBook mentioned above, [Click Here](#).



15 TIPS, TRICKS, AND TECHNIQUES FOR SELLING SUCCESS

#1: Use proof sources.

One of the most difficult things to do in sales is to get a new prospect to do business with you the very first time... to “take a chance” with your firm, even though they currently have a supplier that’s doing a good job. To help minimize their fear, they need to know that you can do what you say you can do. They need *proof*. There are several kinds of ‘proof sources’ that can help convince them, including case studies, white papers, long client lists on your website and an available list of references when asked for it.

#2: Monitor your KPIs

You can’t manage what you don’t measure... so, at the very least, keep track of the following Key Performance Indicators related to sales:

- Deep interactions. Not emails sent, not 3–minute check-in calls... but how many significant conversations did you have with prospects and how many presentations/demos did you deliver? It’s these strong interactions that lead to...
- Requests for Proposal. No supplier ever picked up a project without first being asked to bid on it.
- Conversions. Of the proposals submitted, how many and what percentage did you win? And while you can’t control the size of the project... it all starts here.
- Revenue, of course. But track it this way: Revenue this month; Revenue year-to-date; vs. Last year-to-date; vs. Goal year to date; by Service line; by Industry served. This level of detail will help you understand where you are *really* being successful (and not).

#3: Follow-Up/Follow-Up/Follow-Up

Nothing in our industry ever happens quickly, especially the sales cycle... so that high quality lead you met at the conference *last* week is not going to buy from you *this* week. You need to stay in touch with them... and not just for a week or two. Consider these statistics...

SALES STATISTICS

- 48% of sales people never follow up with a prospect.
- 25% of sales people make a second contact and stop.
- 12% of sales people only make three contacts and stop.
- Only 10% of sales people have more than three contacts.
- 2% of sales are made on the first contact.
- 3% of sales are made on the second contact.
- 5% of sales are made on the third contact.
- 10% of sales are made on the fourth contact
- 80% of sales are made on the fifth to twelfth contact.



#4: Take notes when networking

Does this sound familiar? Over the course of a 3–day conference, you meet with 30 or 40 people, many of them potential clients. You start each conversation with your elevator pitch, have good conversation, swap business cards and move on. You get back to the office a few days later... pull out that stack of cards... and can't remember the details from a single one of those conversations, what the other person may have been interested in or what you're supposed to do next. Ugh!

The solution: keep a little 3"x5" note pad in your pocket... and as soon as the encounter is over... scribble down all the notes you can, recounting the details of the conversation. Now, when you get back to the office, you'll know exactly how you want to follow-up with each person you met.

#5: Use a CRM

Customer Relationship Management platforms have an amazing array of capabilities these days. But at heart – its primary role is to help you keep track of your client and prospect interactions. Use it. You're calling on hundreds of contacts... there's no way you can remember every detail of every conversation with them and what your next steps are in the process. The good news is – you don't have to... as long as you track your activities in a CRM. And if someone has to jump in to help out while you're on vacation, the details are right there for them to use.

#6: Ask good questions

And lots of them. In fact, done right... you might never have to make a "sales pitch" – your good questions and their answers will do it all for you.

There are four types of questions you should use:

- Conversation starter questions. Like this, "Before I tell you about what we do, tell me about your business and the challenges you face related to [insert topic here]." Then, based on their responses, keep probing to develop a really strong understanding of their needs.
- Sales questions. A simple example is, "What's important to you when looking for a new supplier?"
- Power questions. Think about this scenario... instead of "Do you want to try our online bulletin board software?" try something like, "If I was able to eliminate virtually all your travel and time spent in facilities, what would that mean to you?"
- Moving-forward questions. Something like, "If I was fortunate enough to win your business and it was a year from now – how would you know if it was a good decision?"





#7: Testimonials are powerful

Another kind of proof source (see #1 above) is testimonials – when a client says something really positive about your firm and you use those words in your marketing & sales. And here's the way to get them... just ask! After most projects – assuming it went well like most of them do – ask your client contact, “So, how'd the project go?” When he or she responds, “It went great... your team did a terrific job.” Simply follow that up with, “Thank you... that's great to hear. Would you be willing to put that in writing for us?” And there you go...

#8: WIIFM Radio

Not really radio... it stands for “What's in it for me?” That's the question that every prospect is continually asking themselves, hoping you'll be answering it with your information and presentations. So make sure you do. Remember... people don't care about what you can do... they care about what you can do *for them*.

#9: Do your homework

Before you have a chance to chat with a sales prospect, spend a few minutes prepping for the call. Spend time on their website – learning what they do, who they do it for, areas of expertise, key executives and how they're different. After that, check out the LinkedIn profiles of your contact and a few others key execs. Finally, look through their Twitter feed (and any other social channels). The time spent should give you a pretty solid understanding of *who* and *what* you're dealing with.

#10: The 4x4 rule

One of the biggest issues in our industry is capabilities presentations and the slides in those decks that have 7, 8, 9 or more bullet points.

And each of those bullet points is a complete sentence.

Which causes the presenter to literally have to read each bullet point word for word... making the presenter the *least* important part of the presentation. Try this instead... use the 4x4 rule: no more than 4 bullets per slide... no more than 4 words per bullet. Then the slides just *guide* the presentation – and the presenter (you!) becomes the center of attention!





#11: Prepare for the sales dialogue

After some back–n–forth emails, a sales prospect finally agrees to a phone call or an in–person visit. Great! Your first real “sales call.” Are you ready? The two areas where you need a little extra prep are:

- **Questions.** Anticipate the kinds of questions you’ll get (and how’ll you answer them, of course) about your services, pricing, customer service, comparison to the competition, and so on.
- **Objections.** In every sales situation, the prospect will have 'objections' – things he or she does not like or understand – and so, will push back. Be ready to respond to things like cost (“you’re too expensive”), service levels (“we need faster turnaround”), or technical understanding (“not sure we can use webcams for this”).

#12: Feature/Benefits/Advantages

People don’t buy drills at the hardware stores just because they need *drills*... they buy drills because they need *holes*! Learn to talk not just about what you do... but about how your prospect can benefit from what you do and what you might mean for them. For example:

- **Feature:** “*Online bulletin boards are asynchronous platforms...*”
- **Benefit:** “*... which means they are not in ‘real time’ so that participants can log on at times that are most convenient for them...*”
- **Advantage:** “*... which results in deeper, richer and more complete comments – and ultimately, better research.*”

#13: Get good at remote presentations

You work nationally – or even internationally. It’s a rare treat to find a client in your own city. But it’s awfully expensive to go flying all over for every sales presentation or software demo. The solution – get good at remote presentations. With a software platform like [Webex](#), [GoToMeeting](#), [Join.Me](#) (and scores of others), it’s easy to give a live, high–quality presentation to anyone, anywhere in the world. The key... be as well rehearsed with the presentation platform as you are with your PowerPoint deck or software.





#14: Qualify the sales prospect

Ever get really excited about a new sales prospect... spending time with them on the phone... putting together a killer proposal... only to find out that they couldn't afford you, couldn't really use your services, didn't have an immediate need or were just gathering information for their boss? That's because **you failed to qualify them up front**. To make sure that you're ready for the and they're ready for you, ask appropriate questions to uncover their BANT...

- **B – Budget...** do they understand the cost of what they want... and do they have the budget to afford it?
- **A – Authority...** you never want to pitch your services to someone only to learn they they, in turn, have to pitch them to someone else. Understand the decision-making process at every firm... and do what it takes to get in front the true decision-maker(s).
- **N – Need...** do they really have the need or the project for which your services are required? Or are they just doing a little research to see what's out in the marketplace? Or maybe just using your bid to get a better price from their current provider?
- **T – Timing...** how urgent is their need? Coming up next week, next month, or next year?

#15: Ask for the business

Too often, at the end, of what would seem to be a really good sales call, the sales rep just sort of leaves things hanging. To move toward a 'close,' **you must ask for the business** or, at the very least, the next step. Consider these options...

- *"John, we've had a good conversation today. For which upcoming project do you think we'd be a good fit?"*
- *"Mary, I think I've answered all of your questions and I understand your needs... how do we move forward together?"*
- *[and my personal favorite] "George, you've really helped me to understand your challenges... how can I help?"*





2018 UPDATE

Let's add two more to the list...

#16: Mine your database

How many contacts are in your sales database/CRM right now? Several hundred? Maybe several thousand? And these people already know you and might even have done business with you in the past. So, leverage all of that effort. Spend a large percentage of your time re-connecting with them and re-kindling those old relationships. It is far easier than trying to create a relationship out of thin air with people who don't know you.

#17: Think activity, not results

You cannot *control* a buying decision, you can only hope to *influence* it. But what you can control is what you DO. Your activity. So, set and work to achieve a series of "Activity Goals." For example:

- # of phone calls and emails sent every day
- # of capability presentations or demos each month
- # leads generated at a networking event

Remember, "*Activity breeds results!*" So, focus on that!



To download the full eBook mentioned above, [Click Here](#).





8 TIPS, TRICKS AND TECHNIQUES TO ENSURE REPEAT CLIENTS

#1 – Cross-selling & Up-selling

Every time I go to my local coffee shop – which is several times each week – I get the same thing... a medium coffee. In fact, when they see me walk in, a cup is waiting for me at the counter. But what's really interesting is that the person behind the counter *never* says... "Would you like a scone with that?" or "We just took some muffins out of the oven – would you like one today?"

And my question is... why not? Why not take 5 seconds to try to up-sell me? To add to my order? To incrementally increase sales?

I think I know why...

- They assume that I've got what I want and don't want anything else.
- They are uncomfortable asking for the additional business.
- They haven't been trained on how to best ask those kinds of questions.

Well, guess what? The same thing happens in the Market Research industry, too.

The thing we often forget is that **it's a lot easier to sell to an existing client than to a new one...** and the client that's in the midst of a project with us is the easiest of all. Why? First, they already know us, like us and trust us. Second, they're already spending money with us... if we have a recommendation that will genuinely enhance their project experience, it makes sense to ask about it right then and there.

- It might be something as simple as a focus group facility operator asking a client if they'd like a bottle of wine with the dinner that was just brought in.
- Or something a little larger... maybe suggesting an additional question to your client who's participating in your omnibus study.

That's up-selling!

What if you work for a full-service shop and your client comes to you to conduct a series of focus groups before going



8 TIPS, TRICKS AND TECHNIQUES
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to field with a major quant study (with another supplier)? Why wouldn't you say to them, "Did you know that we also do quant? In fact, we've been doing it for more than 10 years. It would be very easy for us to transition from the qual to the quant for this project..."

That's cross-selling!

So why aren't you doing it? For the same reasons my barista doesn't try to sell me a biscotti...

- You assume your client's got what they want and doesn't want anything else.
- Your employees are uncomfortable asking for the additional business.
- Your employees haven't been trained on how to best ask those kinds of questions.

The employees we're talking about here are – most often – your Project Manager-types... those who are working directly with your clients during the execution of their projects. And they're researchers... not sales reps, right?

Right... except that they are in the absolute best position to do the up-selling and cross-selling... because they are the ones who (at least for the moment) *own* the client relationship. So, if you want to incrementally increase revenue, you'll need to do it through your PMs... and it will require a few 'tweaks' to your current processes...

1. **First, you'll need to change the culture a bit** – let your PMs know that it's OK to sell to existing clients during a project. It's good for the client and it's good for you.
2. **Second, you'll need to train them on the best ways to do it...** develop scripts... role play... maybe bring in a sales trainer to help.
3. **Finally, you'll need to make it worth their while.** Small commissions on sales success reward and encourage the behavior. Done enough times, it will soon become a habit for your PMs.

Up-selling and cross-selling are great ways to grow revenue... and done right, they enhance the project for a better customer experience.



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#2 – Get to know everyone

Without question, the number #1 reason a client is lost (assuming that you did good work for them) is because the relationship with that entire client was based on a relationship with just one key contact. And when that contact goes away (new job, retired, laid off, etc.)... so does your business with that client.

The solution? Get to know as many people as possible at that company. For the typical market research firm, that could mean getting to know everyone in corporate research, the head of marketing, the head of branding and as many brand and marketing managers as you can.

TIP:

Create and keep up-to-date an org. chart of all of your key clients.

Then, over time, as the new contacts you've met get to know you/like you/trust you... the odds of them switching suppliers after your key contact leaves progressively lessens.

The added benefit is this... these new contacts may also leave at some point in the future. And if you've built and maintained a relationship with them, you may be able to re-connect with them at their new employer and sow the seeds for additional business.

#3 – Own the mistakes

First, you get excited that you picked up a new client. Then you find yourself really fortunate when that client comes back to you again and again. And then it happens. You drop the ball... a detail falls through the cracks... the research gods stop smiling on you – and a project goes badly.

What do you do?

First, know that you've got some goodwill built up with this client. You've been a good research partner for a while and that means something. But you've still got to handle the situation properly.

Step 1 – Don't avoid the issue... jump right on it.

Step 2 – Gather all the details that you can (from your team) so you are fully aware of what happened.

Step 3 – Call (DON'T EMAIL) your client and let them know what happened; this call has three steps:

- Tell your client what happened (focus on 'what,' not 'why' – 'why' doesn't matter at this point)

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- Apologize... be brief and mean it!
- Tell them what you're going to do to fix it... and by when

Note: Sometimes your client won't even know there was a problem. Should you tell them? The safe answer here is 'yes.' Better to be upfront with it... than to take the chance that your client finds out later and realizes you never got involved.

Step 4 – Go fix it and report back to the client

The simple fact is that projects sometimes go awry – and your clients know that. When you take ownership of the situation, commit to fixing it and then fix it, your actions reinforce in your client's mind that you are the right partner for them. It reinforces their TRUST in you.

Problems are a part of business. Managing them effectively shows that you are a vendor that can be relied on to do the right thing. Remember... *your success is not determined by what happens to you, but by how you respond to what happens to you.*

#4 – Pick up the phone

Rule #1 in maintaining relationships with existing clients... don't rely only on email! Please!

Yes, email is a critically important tool for staying in touch and sharing information. It's fast, efficient and virtually free. But it's also a bit cold and impersonal.

Warm up your relationships by picking up the phone once in a while. And sure, talk about the project you're working on and get done whatever business you need to get done.

But then use this person-to-person opportunity to really get know your client. No, not their title or their biggest challenges at the office – though those are important. But... are they married or not? What about kids? Their hobbies or favorite sports team? Where they went on vacation last week? And so on... and so on.

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Don't think knowing that kind of thing is important? You'd be wrong!

All things being equal, people do business with people they like. All things NOT being equal, people STILL do business with people they like.

No, there's not a checklist of questions to go through with every client... that's not what we're talking about here. What is important is that, over time, through real human-to-human interaction, you peel away the onion and get to know them as people, not just as clients.

#5 – Be active on LinkedIn

Without a doubt, LinkedIn is the #1 social media site for firms in the MR industry. It's ideal for connecting, promoting and engaging... not only with prospective clients, but also with all of your existing clients, as well. To be successful, follow these 4 steps...

1. **First, reach out and 'connect'** with all of your existing client contacts.
2. **Next, join the appropriate LinkedIn groups.** Which ones are appropriate? The ones that your top clients belong to, of course.
3. **Now, post some content.** Do you blog and tweet? Maybe publish articles, white papers or eBooks? Then make sure you are also posting them on your personal profile, your firm's profile and within those LinkedIn Groups where it's appropriate.
4. **Then, engage in conversations.** Scroll through the groups you belong to and look for those threaded conversations in which you can share your knowledge and show off your expertise. Your informative comments can not only help those who participate in the thread, but will keep you top-of-mind with those in the group (including your clients), as well as help position you as a subject-matter-expert.

The regular and frequent posts you make... plus your regular and frequent participation in the threaded conversations in the LinkedIn groups... are easy and smart ways to achieve top-of-mind status.

Did you catch that theme? "Regular and frequent" is what makes this work. Your use of the LinkedIn platform and your engagement with the LinkedIn community cannot be an occasional effort... to provide value, it **MUST** be regular and frequent.

“The regular and frequent posts you make are easy and smart ways to achieve top-of-mind status.”



#6 – Say ‘thank you’

On a flight home recently, I was watching an old movie on my iPad... *Finding Forrester*, with Sean Connery. A really good movie, by the way, if you haven't seen it. In it, he's giving advice to a young man on the best way to a woman's heart. And his advice is to give... *"an unexpected gift at an unexpected time."*

Great advice... and it works for clients, too.

Many of us (our firm included) give gifts to clients at Christmas time or for their birthdays. And that's fine. But beyond that, there are many other times when "an unexpected gift at an unexpected time" can really help to build, maintain or enhance your relationship with a client. Think about:

- As a thank you for a referral (even if that referral doesn't become a client right away)
- Just showing up with donuts or bagels one morning
- When you happen to be in town and want to get together for a drink (yes, your presence is a gift, too)
- When your contact (or spouse of a contact) is having a baby
- When your contact has a work anniversary or gets a big promotion (easy to find on LinkedIn)
- When you find out a client's favorite sports team or hobby... and give a related gift
- After a client sends you an unsolicited testimonial letter raving about your work
- As a way to simply say "thank you for your business" to a first-time client
- As a way to simply say "thank you for your business" to a long-standing client

What's appropriate for a gift? These "unexpected" gifts do not have to be elaborate or expensive. But they do have to be from the heart. This all gets back to one of the great truisms in business... *"People don't care how much you know until they know how much you care."*





#7 – Share content 1-to-1

My guess is that your firm is – at some level – creating and sharing content (blog posts, articles, eBooks, etc.) with the marketplace. And that's a very good thing... keep it up.

But it's not necessarily targeted to a specific client... it's important, but it's broad in its scope. So, as a way to nurture a deeper, 1-to-1 relationship with an existing client, consider searching for good information online and sharing it with them. In the old days, we called this "clipping articles."

It should be something very simple like,

"Hi John, I came across this article (click here) on segmentation that I thought you might find interesting, given our conversation a couple of weeks ago. Hope you find it beneficial. Regards, Steve"

And that's it.

But as simple and easy as that is... it's also a really good touchpoint (to keep you top-of-mind) and it shows the client that you're thinking about them (i.e. that you *care*).

How do you do it? The easiest way we've found is to set up **Google Alerts** based on your clients' names, their competitors, areas of expertise and the industries they serve... then scan your Alert emails each morning to see if anything worth sharing pops up.





#8 – Monitor your KPIs

In the sections above, we've discussed a number of tactics you can use to help maintain and grow your relationships with existing clients. Great! But once you start implementing them, how do you know if they're working?

Like all other marketing & sales activities, *measurement* is critical. To that end, here are a handful of items to track and trend to see if your efforts are paying off:

- **Revenue, of course.** Not only should you be tracking revenue per client for the year, look at each client over the past 4-5 years. Look for trends. And if your accounting system will allow, monitor each client's revenue by service line and by application (i.e. what they're using the research for) to keep an eye on changes.
- **Activity.** As the part-time sales rep... what level of activity are you attaining while involved in the selling process. Over time, track your calls, emails, bids, etc. – by client.
- **Client satisfaction scores.** If your operations team is not doing a very good job... your job as the relationship-builder becomes nearly impossible. So, to make sure they're delivering the level of service you *think* you are... the head of operations needs to conduct and report on post-project surveys.
- **SOC – Share of Client.** This will be a difficult metric to track... but your really good clients might share it with you. You want to know how much of your client's research work is actually coming to you (and what percentage is going to your competitors). Then trend it over time.

Remember, you can't manage what you don't measure.



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2018 UPDATE

#9 – Remember to visit your clients in-person.

Email, social media and phone calls are all good... but nothing beats the H2H (human-to-human) interaction of sitting down and chatting over a cup of coffee. Think about it this way... if a client is spending \$50-100-250,000 in a year with you, doesn't that warrant an occasional plane ticket and nice diner as way to help secure their on-going business?

To download the full eBook mentioned above, [Click Here](#).



Management Tools

Managing salespeople can be very different than managing PMs or Analysts. To help you get started, here are the key management tools you'll need:

Group meetings.

On a regular basis – usually weekly – most sales teams get together for a sales meeting. While everyone should be given the chance to share a recent “big win,” these meetings are not just to make everyone feel good, they should be about sharing critical information that helps to make the reps better at what they do. For example:



- Make sure they stay up-to-date with what marketing is going to be doing and how recent marketing tactics performed.
- Share any key items from the operations side of the house; in fact, have someone from the Ops team deliver this message.
- Get reps to share recent challenges – and get feedback from the others on how they might respond in that particular situation.
- Share the pipeline and team progress toward goals.
- Build in ‘mini’ training lessons – maybe a re-fresher training on a particular sales skill or some training on a new service line or product your firm is launching.

Shadowing.

Want to really know how your sales rep is performing? Watch them in action. Listen in on telephone sales calls or travel with them when they're out selling. The more you see them work first-hand, the better you'll be at coaching them to improve, and also learn to appreciate how difficult their job really is.

One-on-one meetings.

Your sales reps – especially those who are relatively new to your firm or to selling – need on-going coaching. They need support and encouragement. They need occasional help with certain selling situations, input on proposals and so on. They need direction on personal development. We suggest blocking off a small chunk of 1-on-1 coaching time for each rep, every week. Make it a habit.

One of the challenges for many managers is that they've never been a sales rep, and don't have the depth of experience to draw on to share with their sales reps. That is, they've never really been “in their shoes.” Want to fix that? Assign yourself some clients/prospects – even just a handful – and become the sales rep for them. It might be trial-by-fire, but the perspective can be invaluable when coaching others. [It will also earn you some ‘street cred’ with your reps!]



Marketing.

Marketing is your friend – your ally – and one of the keys to your success. Marketing opens doors by building awareness in the markets you serve. It can help to differentiate your firm in the marketplace and help you stand out from your competitors. Marketing generates sales leads for your reps to follow-up with. As importantly, make sure your sales reps know what marketing has planned, and let marketing know what you need from them. Marketing is your partner. Work WITH them to ensure everyone's success.

Territories.

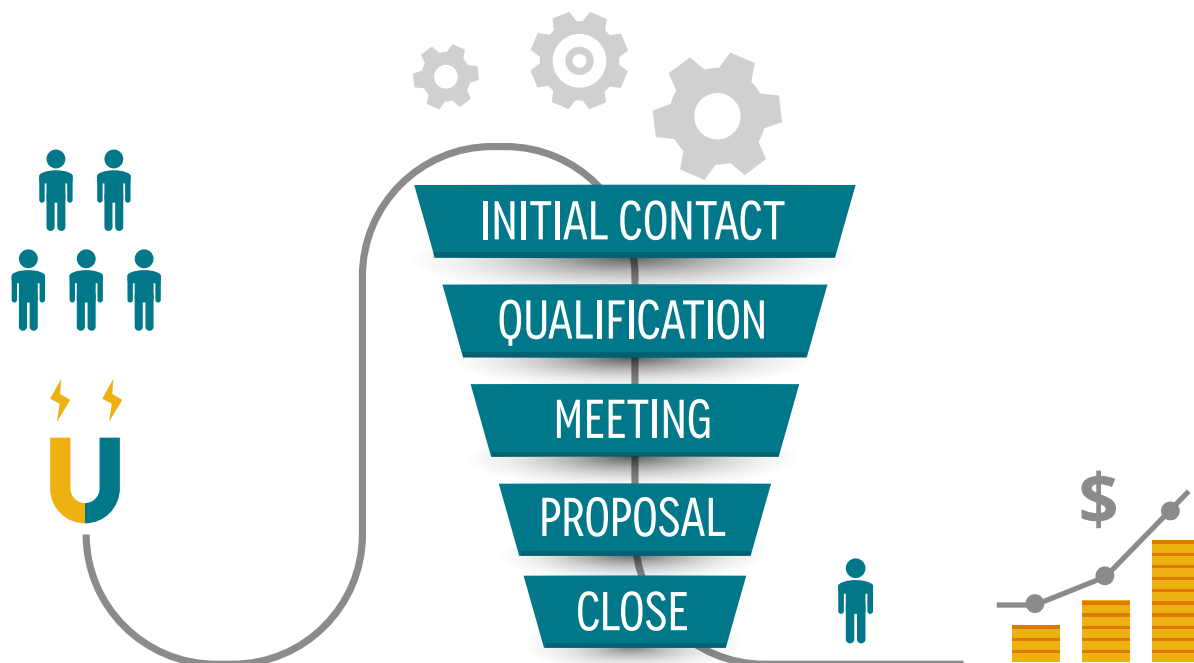
Provide some kind of a *defined* sales territory. Never just say “go sell.” Territories gives your reps focus and ownership, are usually tied to comp plans and help to avoid conflict between the reps. Three common examples of territory dividing lines are:

- By geography
- By industry vertical
- By size

The Pipeline.

A pipeline is a way to help track your sales reps' progress with their sales prospects. That is, how close each prospect is to becoming a client. There are two common ways to track this:

- The first is by tracking each prospect and assigning them a 'status' in the sales funnel. Here's a typical funnel:



It is the sales rep's responsibility to keep each of their prospects properly categorized and to change that status of a prospect as their relationship evolves (i.e. as they move *through* the funnel).



- The other option is to assign a numerical probability that a prospect will become a client (this also comes from the rep). Further, it can also include a potential dollar amount (that the rep thinks each prospect might generate) – the combination of the two resulting in a forecasting tool.

As a simple example, let’s assume that your sales rep has five prospects. A spreadsheet does the math and provides a probable amount of revenue that will be generated by these companies.

PROSPECT	PROBABILITY OF CLOSING	DOLLAR OPPORTUNITY	FORECAST*
Wilson Manufacturing	50%	\$50,000	\$25,000
Oakmont Services	20%	\$100,000	\$20,000
The Smith Agency	75%	\$60,000	\$45,000
Jones & Jones	10%	\$140,000	\$14,000
Carter Building	40%	\$50,000	\$20,000
Total			\$124,000

* Forecast = Probability x Opportunity



A CRM system.

A CRM (Customer Relationships Management) system will allow your reps to manage their time better, record their activities and manage their pipeline, but it’s just as much a tool for the manager. It provides you with insight into each rep’s sales efforts, can deliver a litany of management reports and can help you keep an eye on your marketplace on a client-by-client basis.

Note: There are literally hundreds of off-the-shelf CRMs. The Grand-Daddy of them all is [SalesForce.com](https://www.salesforce.com). It’s very comprehensive, but also expensive – relative to many other platforms. There are two low-cost/no-cost options we like: [ZoHo CRM](#) and [HubSpot CRM](#).

Patience.

As an industry, we’ve got no patience for sales. You bring in a sales rep on a Monday, give him a base salary, hefty commission plan (at least, you think so), cell phone, laptop, travel allowance and new sales collateral. So, why don’t you have any new clients by Friday?!

We get it. You make a big commitment and want some kind of ROI. But new clients – especially in our industry – take a long time to acquire and cultivate (that is, to ‘steal’ away from their current suppliers). If you believe you’ve hired the right person and trained them well, then you’ve got to be willing to invest in them and give them the time to succeed.



2018 UPDATE

Want to really know how your sales reps are performing? Ask their clients!

Prior to the sales reps' annual reviews, send out a brief, confidential survey to a number of their clients and prospects, asking for honest feedback. Ask about things like their product knowledge, communications skills, responsiveness and professionalism. Then aggregate the data and discuss at the review. In addition to that, consider making occasional random calls throughout the year... checking in with a few clients and prospects on how your reps are doing.



To download the full eBook mentioned above, [Click Here](#).



B O N U S C H A P T E R :

How to Sell to Market Research Buyers

In keeping with the “top picks” theme... this chapter is the first of a 3-part series of interviews with corporate research and insights professionals from a variety of Fortune 5000 corporations. They are three of the most widely read articles we’ve published in the past 5 years. In them, we explore the best ways for you to connect with market research buyers during the buying & selling process.



Up first, **Kristin DeGraff**, Senior Manager, Consumer Insights/Beer Division for Constellation Brands. So, yes, she spends her days helping to sell Corona and Modelo beers, among others!

Kristin, let’s start with a question about Content Marketing and its use by many insights agencies. Does content (blogs, eBooks, white papers etc.) help to influence your perception of a firm or your buying decision?

“Yes, absolutely! I think it is very important for insight agencies to do their own exploratory research to share with the insights community—particularly research that challenges the status quo, or debunks common perceptions, etc. It’s not something that we on the client side have the time or budget to do, so I really do look to my insight agencies to keep me smart in that way! Those insights agencies that make me smarter are the ones I want to work with.”

What about social media? Do you engage with suppliers on Social Media (connect on LinkedIn, follow on Twitter, etc.)? If so, do you use that engagement as part of your evaluation process of potential suppliers? Does it matter if a supplier has a limited or no social presence?

“I do not engage with insight suppliers on social media very much. However, I have insights colleagues that spend a lot of time on LinkedIn reading thought pieces or searching for a specific research need. So even though I don’t often

engage in social media, I would think it wise for most insight suppliers to have some presence in this space.”

What are the top 3 conferences/events you (or your colleagues) attend each year?

“It varies year to year, but for example, this year those on my team have attended TMRE, ARF (annual conference and several different events) and IteX Behavior.”

Kristin, if you are on an Email list from a supplier, what would you want to see in their emails that would keep you wanting to receive those emails (rather than opting out)?

“Not surprisingly, clever headlines do catch my eye; also, things that challenge a typical research process or that sound like the supplier has come up with a new/proprietary methodology.”

Let’s talk about the MR agency Sales process for a minute. What is the #1 thing a potential supplier can do to get on your “short list” for consideration?

“Do not call me! And especially don’t email me, then call me, then email me again to say you called me. Email works best for me but it must have some content attached. Ideally that content would NOT just be a standard capabilities deck but rather a case study or white paper that you think would be relevant to me. Don’t hold anything back with the intention to “wow” me once you’re able to schedule a capabilities call/presentation.”

**BONUS CHAPTER:
HOW TO SELL TO MARKET RESEARCH BUYERS**

Describe the perfect Capabilities Presentation from a potential supplier?

“Light on description of capabilities (honestly, they all start to sound the same), heavier on the case studies and specific examples of your work that you can share or mask.”

Last question... Describe the perfect Proposal from a potential supplier? All things (services, pricing, timeframe) being equal between potential suppliers bidding on a project, how do you make your decision?

“Beyond services, pricing, timeframe, it really goes to the experience of the supplier (or usually the individual person from the supplier that would be working on my project). Through the conversations we have about the research need, I want to get a sense that they are curious about my brand/portfolio/company and are thinking about how this research question fits into the bigger picture. I am drawn to those who can understand my business challenge and identify analogous situations outside of my brand and category.”

Thanks for the insight, Kristin... and have a great 2018!

To read Interview #2, [Click Here](#).

To read Interview #3, [Click Here](#).



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