fluidic

# Growth Activator Report

April 2023

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# Executive Summary & Opportunities

During the roadmapping interview we uncovered the following core challenges:

- Target audience visits the website but doesn't convert (either downloading lead magnets or booking a demo call).
- Landing pages + ads and webinars don't convert into a meaningful volume of qualified sales conversations.
- Churn is greater than acquisition, especially due to the COVID-19 crisis and brain-drain. Hypothesis is that customers stop using the software because the product champions left the company.
- The processes to implement the software were not documented by customers, the next person doesn't know what it does and it becomes an expense to cut, rather than an asset to invest in.

# CRM Analysis and Market Segmentation

## Deal Pipeline

To ensure your deal pipeline analysis is relevant to current trends we limited lookback to data < 12 months ago.

### Current snapshot

| PHASE | $P_{CLOSE}$ | DETAILS | # DEALS |
|---|---|---|---|
| First reach | 10% | Lead is most likely MQL identified through activity or flagged by marketing team | 50 |
| Demo | 20% | Sales team determines fit based on needs and offers demo if SQL | 32 |
| Offer | 50% | 10-20% max agree on the offers, the rest also stays here | 15 |
| Tiedown | 90% | Verbal agreement or formal acceptance | 3 |
| Closed won | 100% | Contract is signed and customer handover to CX team | 1 |

**Reason Lost**

Data below based on analysis of lost deals that were > phase 50% during the last 12 months.

| Reason Lost | # Deals |
|---|---|
| No interest | 2 |
| Blocked by IT | 1 |
| Budget | 6 |
| Alt. solution | 7 |
| On hold | 2 |

### Recommendations

**Qualification**: it seems that not all of the leads:

- Marked as '10% qualified' are actually MQLs (marketing qualified leads), because they haven't yet communicated a need or an interest in your solution.
- Marked as '50% qualified' are actually Sales Qualified Leads (SQLs), that there is a concrete opportunity and they've agreed to receive an offer.

Since these key qualification steps are a 'mixed bag', it's hard to predict and optimise your marketing and sales pipeline.

We recommend that you define stricter qualification criteria and map the buying stages of your customer's buying process, in order to:

- More easily gain insight into your sales process performance and have a more predictable pipeline. When you know the MQL to SQL (sales-qualified lead) conversion rate and conversion cycle, you can easily predict how many sales-qualified leads you'll have in a sales funnel at any given period.
- Influence the buying process with the right kind of actions and information.

The best way to understand the buying process of your target accounts is to run in-depth interviews with your key customers. Once several interviews have been conducted, common patterns will emerge and it will be possible to define and map the standard buying process.

Then, with this knowledge, it is possible to move the lead through their internal 'microstages' at a faster rate and influence the buying process in a positive way. For example, by preparing content that will accelerate sales, facilitate internal buy-in and deliver a high quality, supportive and personalised sales experience.

## Market Segmentation

Analysis of CRM customers (we evaluated 75 companies generating 35% of revenue).

### Recommendations

We need to investigate the market segmentation further, host a segmentation session and define the most fruitful and responsive verticals to focus on creating content tailored to the verticals customer journey.

We should also identify the common patterns that the best accounts have, such as:

- Using any other similar software (meaning they are looking for more efficient processes).
- Have a large sales team (we need to find signs/intent data that proves this fact).

This will help us to improve targeting and get better response to lead generation campaigns. For example:

- It is possible to search for companies using a specific tech using tools like Wappalyzer.
- Search for companies and people based on qualification keywords in their LinkedIn profile or more refined criteria using Sales Navigator.

## Ideal Customer Profile and Buyer Personas

Based on our previous conversations, we have made a start at creating a customer profile. As you will notice, it's broad, and our goal is to narrow it down.

The truth is that different segments buy your products and solutions for different reasons, that's why individual ICPs should be created for every segment, starting with the most lucrative.

| Demographics | |
|---|---|
| Industry | See segmentation above |
| # Employees | 20–1,000 (excl. blue collar) |
| ARR | $2M–$250M |
| Job position | CEO/MD/Founder |
| Gender | Male |
| Age | 25–55 |
| Location | Eastern seaboard |

| Watering Holes | |
|---|---|
| Target resources (where they hang out, website, communities, | TBC |

| | |
|---|---|
| groups, authors, conferences) | |
| Social media the mostly use | Facebook, IG, LI |

| Customer wants / problems | |
|---|---|
| Current goals and challenges | Prepare for new location, reduce operating costs, optimise customer comms |
| Problems that solution solves | Better value from marketing processes. Streamline key sales activities |
| Cost of inaction | • Difficulty growing<br>• Wasted time<br>• Need to hire more staff |

| Sales argumentation | |
|---|---|
| Objections and doubts | • We can do it with our ERP<br>• Build solutions in-house |
| Factors that influence purchasing decision | • Implement easily, see benefits quickly<br>• Simple to use, minimal training<br>• Team likes it<br>• Plug-and-play integration with existing tech |
| Why do they choose your company? | • Local expertise<br>• Personal approach + user led design (empowerment, feeling of influencing development)<br>• Fast and flexible service |

Besides the standard public information about accounts, we don't have information about their research and approval process.

The next step is developing the buying and approval process inside our target accounts. We need to make a detailed profile of the buying committee and their approach (and motivations) to the deal.

Based on this information, we should then map our lead generation and sales process.

## Recommendations

Survey existing customers to understand their buying process.

- Run the market segmentation session to define the most fruitful market segments.
- Define ICP and buying committee structure, figure out motivation and blocking reasons.
- Develop a buying and approval process (customer journey).
- Map out objections.
- Develop a lead generation and sales processes to support the customer journey, based on insights.
- Develop and set up marketing qualification criteria (suggestion: job role, team size, company or website).

# Positioning and Unique Value Proposition

## Company / Homepage

*"Giving sales professionals clarity to smash the gong"*

| Criteria | Feedback |
|---|---|
| Relevance (value) | Not really — there is some implicit value in the words "smash the gong", but it doesn't explicitly communicate value |
| Unique (differentiation) | No. In fact, it's a statement you could apply to almost any sales focused service or product company |
| Specific | No, see previous comment |
| Clear | The current positioning is 'blurred', so it's not clear from first sight what we are all about |
| Targeted | No, it doesn't communicate who it is for exactly. Although it mentions sales professionals the real target is much broarder |

The goal of positioning:

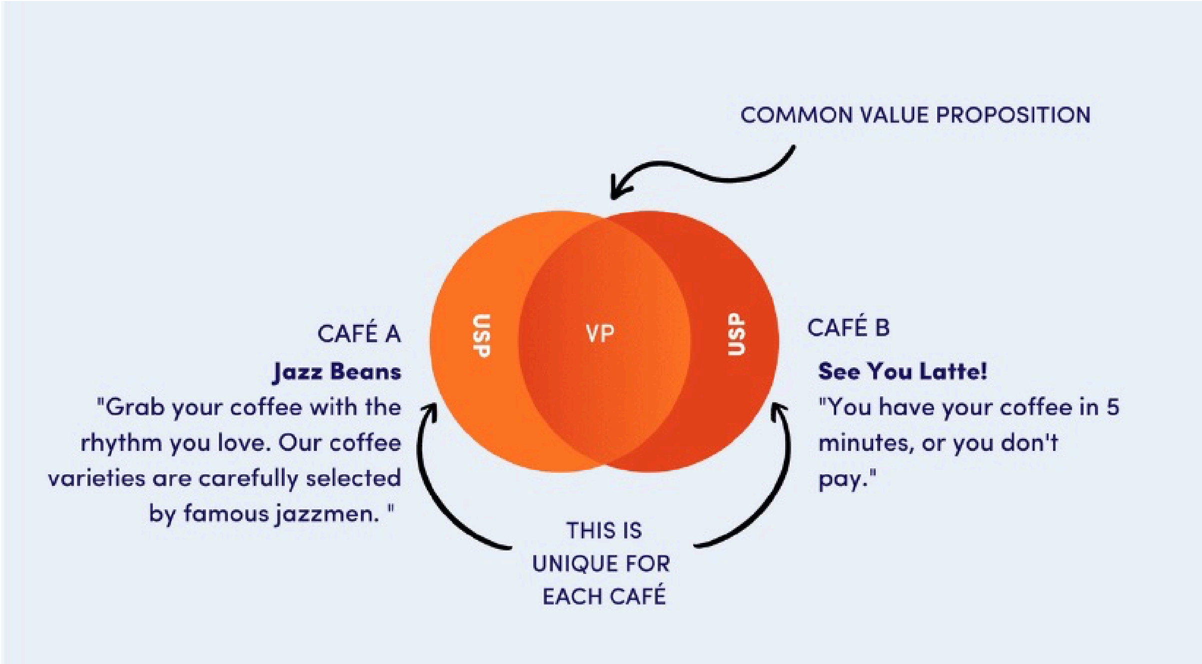
- Highlight the company's / product uniqueness.
- Emphasise specialisation and / or target market

Prospects should clearly understand in less than 8 seconds:[1]

- What this product is all about
- What makes this product different from alternative solutions
- What are the benefits the prospects can get

A USP describes for your target market how you're different, whereas a value proposition answers the question: Why should they care about that difference?

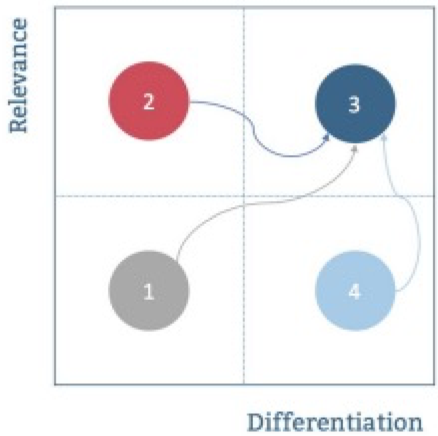
[1] This is how long, on average, people spend to decide if a web page is relevant for them. They will quickly navigate elsewhere if they cannot answer the questions: What is this? How can this help me solve my problem or reach my goal? How is it different from alternatives?




**Example:**
ROIplan.io – the marketing planning software (it is clear what the product is all about). ROIplan helps marketing teams to align marketing with sales, business goals and focus on the experiments which can generate the highest possible ROI (audience + benefits).

## UVP Recommendations

Create a UVP based on the value (the biggest problem we help them solve or the goal we help them achieve), and differentiation (how you are different from your competitors in a way that matters to your clients).



**Positioning and UVP draft idea:** Sales intelligence software. Get x-ray vision on your website visitors, identify high-intent leads to deliver dynamic, personalised experiences and close more deals.

**Note**: The example above is just one way to build a UVP based on the key messaging elements and we can iterate. But the first step is to make sure we uncover and validate these messaging elements from your best clients. Even if you believe there is no real competition (and as you will see in subsequent sections, there is a lot of competition on the local market), it is because your target audience somehow solves their issues.

We need to clearly articulate what makes your solution different from the alternatives offered by competitors, or their systems (with respect to workflows), and even CRM software.

In addition, we need to ask your customers what they consider as an alternative, in order to get a better view of the competition.

The next step should then be the UVP validation. We need to understand what values and features resonate with clients and can motivate them to learn more about the product.

This can be achieved by surveying customers to discover which UVPs resonate the most with them. An example is provided below for further context.

**Custom Software Development**

1 Page 1 ② Page 2 ③ Page 3

**Please, rate from 1 to 5, what value proposition statements resonate and are essential for you?** *

*1 - if the statement doesn't resonate or non-essential. 5 - if the statement resonates and is essential for you.*

| | Non-essential | Somehow essential | Neutral | Essential | Vital |
|---|---|---|---|---|---|
| We help healthcare technology companies to develop an MVP or add new features to the existing product while saving 40-60% on development compared to the local resources. Evaluate our team with a pilot project with continuous feedback. * | ○ | ○ | ○ | ○ | ○ |
| Cost effective custom healthcare software development with 40-60% savings compared to the local in-house development. Evaluate our team with a pilot project with continuous feedback. * | ○ | ○ | ○ | ○ | ○ |
| Custom healthcare software development with a project manager for free on all projects. * | ○ | ○ | ○ | ○ | ○ |
| Custom and flexible software development with 40-60% savings compared to the local in-house development. * | ○ | ○ | ○ | ○ | ○ |
| Get access to a broad technology skillset pool with an in-depth knowledge of the healthcare domain. * | ○ | ○ | ○ | ○ | ○ |
| Empower and strengthen your digital healthcare team on a need basis, while saving up to 50% compared to the local development costs. * | ○ | ○ | ○ | ○ | ○ |
| Focus on marketing and sales while your dedicated development team with healthcare domain knowledge creates the product your target audience will love. * | ○ | ○ | ○ | ○ | ○ |

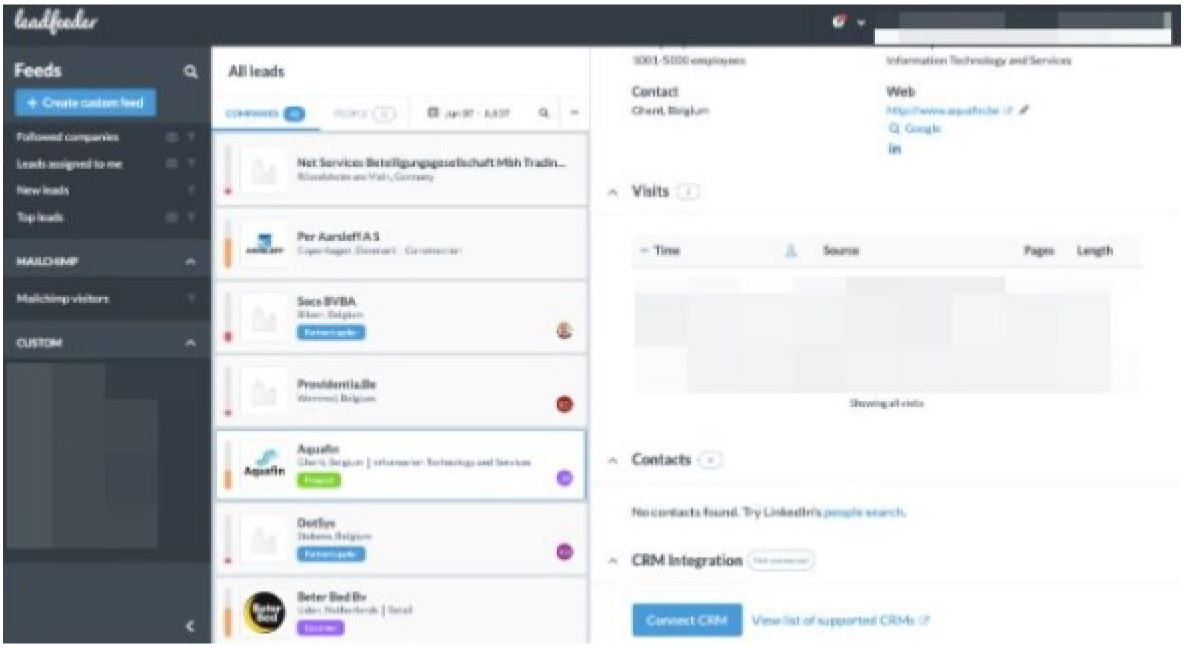
Next

## Industry and the use-case specific pages

No specific UVP on the use-case specific pages, or for the industry-specific pages.

### Recommendations

It's great that you have verticals, and analytics shows that visitors and leads mostly check the industry pages rather than solutions for different departments, but they quickly leave the page. In the last 30 days you had 42 accounts that visited your website, and 12 of them were marked as prospects. Only 3 of them spent more than 1 minute on the website.




This fact means we need to rewrite each of the pages with the following structure:

- Who is this for (we suggest mentioning the sub-segments).
- Highlight core challenges and critique the existing way of solving their challenges (3-5 challenges we can get from customer interviews).
- What makes us different (our unique value proposition and UVP amplifiers for a particular industry).
- Adoption process (describe the clear steps until the desirable result).
- Customer logos and testimonials (we have them, but we suggest, if possible, that we rewrite the testimonials in the benefit-driven style and seek customer approval).
- Success stories (we have a lot, but it would be good to have a few detailed studies where the complete process and benefits are explained).
- Short recap of all the benefits.
- Clear call to action to get the demo (Ask a question should be replaced by live chat).
- Add an alternative call to action as an e-book or webinar (but it should be at the bottom of the page).

**To-do:**

- Run a deep-dive survey with existing customers.
- Figure out how customers perceive your business and the value they get.
- Define positioning and unique value proposition for different industries.

- Run positioning and UVP validation survey.
- Rewrite and redesign pages for every service using the structure detailed above.
- Prepare comparison report/s *e.g.* Your Solution vs Competitors, identified during customer interviews.

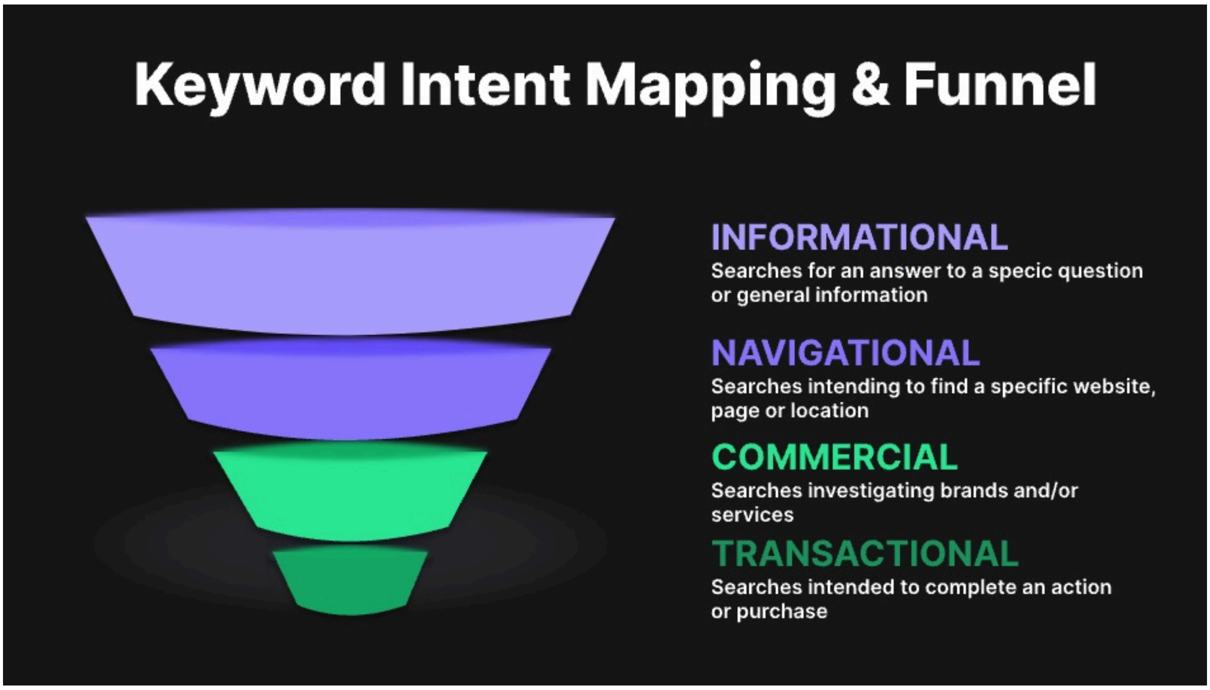
# Google Search

## Paid Search (Google Ads)

While you assume there is no direct competition, there are many international and national competitors who target the local market with target keywords. In fact, there are 24 companies advertising in Australia on this keyword alone, some of them spending up to $7K per month, and 44 advertisers from international markets, some of which are spending more than $40K per month.

There are even specialised lead generation companies who it can be assumed sell leads to the other providers. Whilst they are likely to be low value / poor fit, it demonstrates that the market is actually highly competitive, despite first appearances.

When running Google Ads, it's important to make a distinction between intention or "buying signal". Generic keywords like "what is XYZ" don't signal any buying intention, while "user friendlier alternative to XYZ" or even "XYZ reviews" demonstrate a much higher degree of purchase intent.




One improvement to make is mapping keywords into a funnel based on the stage the prospect is in. Here are a few examples of interesting keywords across the funnel:

| | Type of keywords | Examples |
|---|---|---|
| MOFU | Differentiating feature | |
| TOFU/MOFU | Specific use case | |
| MOFU | Industry specific | |
| MOFU | Researching requirements | |
| MOFU/BOFU | Competitors | |
| BOFU | Branded | |

### Recommendations

- When creating the UVP, make sure to research the competitors advertising on the local market, so we have a clear differentiation.
- Create vertical-based landing pages for ads (without menu bar, just classic landing pages with minimal distractions, using the structure from UVP block).
- Improving ads copy and creatives by adding UVP.
- Testing different UVP amplifiers in headlines.
- Creating specific landing pages / landing page variants for the different keywords.
- Set up a lead nurturing campaign and retargeting with case studies/customer success stories in order to move leads down the funnel on the path to MQL.

## Google SEO

See the Content Analysis section below.

# Website Improvements

When we are visiting the CLIENT homepage, there is very little information on the product itself or 'how it works'. How sure are we that people understand what CLIENT is and what concretely it can do for them?

The main CTA "Request your free audit" has no context. Audit of what? How does it work? What will you need from me? What do I get? Is it confidential? How quickly do I get the result? Will this result be useful for me? Will it be practical? Is this not just a sales call masked as something else?

Even if we solely focus on the outbound activities (which isn't smart), most leads will check your website.

The website structure and sales copy need improvement, which is the main reason why the conversion rate is low (and why the majority of visitors spend so little time on the website). Below, please, find out the recommendations on how to improve them.

## Homepage

- UVP
- UVP amplifiers
- Call to action
- Critic the existing way to solve problems (3-5 points)
- Call to action (let's talk)
- Customer testimonial
- Call to action (let's chat)
- Core features description with the link to learn more
- Call to action (let's talk)
- Vertical solutions
- Call to action (let's chat)
- Case studies
- Call to action (let's chat)

## About page

Right now we don't show the people behind the product which is critical to build trust and demonstrate that you take care of visitors and are open to discussions. Here are the recommended page blocks:

- Add the history of CLIENT: why and how the product was created? What makes you passionate about this product?
- Mention that CLIENT is a local product that is targeting local markets
- Client's short testimonial
- Tackle industry challenges (your target audience pain points)
- Tell them how do you solve them and why your product is unique
- Client's short testimonial
- Add the bio of co-founders with their background, awards, pictures, links to the social media profiles
- Add awards if you have them
- Customers logo
- Add a Let's chat button and contact form

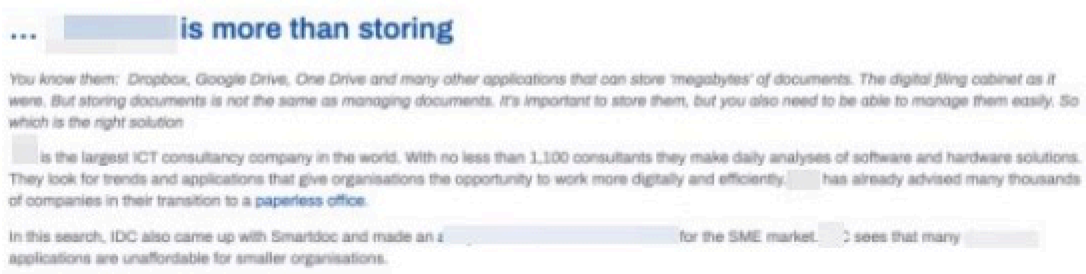
## The Industries and the Solutions pages

- Who is this for (I suggest to mention the sub-segments or the job roles for Solutions pages)
- Highlight core challenges and critique the existing way of solving document management challenges (3-5 challenges we can get from customer interviews)
- What makes us different (our unique value proposition and UVP amplifiers for a particular industry)
- Migration Process (describe the clear steps until the desirable result)
- Customer logos and testimonials (we have them, but, if possible, rewrite the testimonials in the benefit-driven style)
- Success stories (we have a lot, but it would be good to have a few detailed studies where the complete process and benefits are explained)
- Short recap of all the benefits
- Clear call to action to get the demo (Ask a question should be replaced by live chat)
- Add an alternative call to action as an e-book or webinar (but it should be at the bottom of the page)

# Content Analysis

We've analysed all existing content on LinkedIn and in the blog.

In general, the blog posts are weak, don't generate traffic, don't demonstrate the CLIENT's benefits, and look like short promotion posts. They cover vast generic topics and provide little value to the target audience.

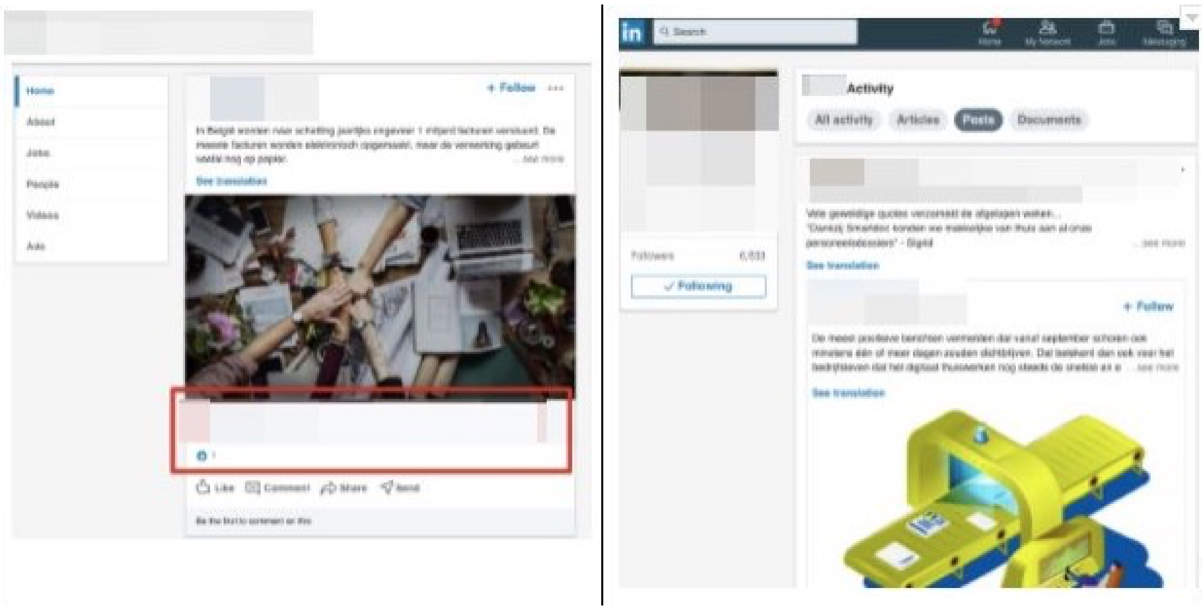
... is more than storing

*You know them: Dropbox, Google Drive, One Drive and many other applications that can store 'megabytes' of documents. The digital filing cabinet as it were. But storing documents is not the same as managing documents. It's important to store them, but you also need to be able to manage them easily. So which is the right solution*

is the largest ICT consultancy company in the world. With no less than 1,100 consultants they make daily analyses of software and hardware solutions. They look for trends and applications that give organisations the opportunity to work more digitally and efficiently. has already advised many thousands of companies in their transition to a paperless office.

In this search, IDC also came up with Smartdoc and made an for the SME market. sees that many applications are unaffordable for smaller organisations.

The situation on LinkedIn is similar. On the company's page, you promote blog posts and Tom's profile, resharing posts from the company's page.




The same situation also occurs with the YouTube videos. In short, they are targeting customers, not prospects.

## Google Organic Traffic

We neglect a huge opportunity to grow the target network and nurture them on LinkedIn. There is a viable option to generate targeted traffic to a website with long-read guides like “The ultimate guide to XXXX system”.

We can easily rank lots of target keywords (low/moderate keyword competition) and then retarget and nurture target traffic.

Examples of keywords:

**Example:**
The impact of SEO-optimised articles can be huge. This is my own example from a few years back. If you look, only two of my most popular articles brought more than 300K visits to my website:

### Recommendations

- Perform in depth keyword research

- Select focus keywords. We are looking for keywords that are (1) relevant, related to your product or specific (industry or otherwise) use-cases (2) with limited competition (3) have moderate to high search volume
- Brainstorm articles (but also templates, checklists etc) around the focus keywords (*e.g.* XXX in construction: roadmap to saving 40% of administrative costs, The most complete employee personnel file template…)
- When writing the article around a focused keyword, check the existing content on the web (you want your piece of content to stand out), as well as related questions (*e.g.* Facebook groups, Quora…) and longer search phrases (using a tool like Ubersuggest). Use images, sections, bullet points etc to make the article engaging and easy to skim
- Think about a specific content upgrade, a related lead bait that you could offer to people reading the article in exchange for their email
- Once the article is finished, write the title, url and meta-description, and use free tools like the Snippet Optimization Tool to make sure you stay within limits.
- From each article, derive 2-4 social posts (*e.g.* with the main points, concepts…)
- Promote the article to the existing email list, *via* social media, and in relevant groups and communities.

To gain a better understanding of the basic principles of Google SEO and how it relates to content, check out this presentation.

## LinkedIn Content Strategy

For LinkedIn, we have included our e-book and slides on how to leverage LinkedIn as an inbound marketing channel. Once we start this campaign, we can add sales touches based on audience engagement.

Example of such flow you can find here:

Creating a content plan for LinkedIn isn't complicated at all. Here is a brief 3-steps process of how to create a content plan.

**1. Create topic clusters**
Topic clusters are global topics such as XXX, Workflows, and SOP, that are relevant to your target audience.

They are the vectors for your LinkedIn content strategy that can be repurposed into definitive guides, e-books, webinars, or any other comprehensive content form.

These clusters should be sliced into subtopics.

**2. Create subtopics.**
Once you've figured out your topic cluster, you can easily figure out the subtopics.

Workflows and SOP subtopics could be:

1. How to create automated workflows that accelerate the approval process
2. How to automate documentation SOPs
3. SOP examples and real case studies

**3. List all questions your target audience has that belong to specific subtopics.**
Besides brainstorming, the best ways to figure out the questions your target audience has are:

- Survey your existing customers.
- Visit relevant Facebook, LinkedIn, or Slack communities, and see what questions people ask there.
- Visit the most popular blogs and see what questions people ask in the comments.
- Talk to your customer support and look at your chat or emails you got from current clients.

This way, you can create a content plan for TOFU and MOFU stages. BOFU content should be created after developing a lead generation and sales process based on the customer journey

## Sales Enablement

We need to improve existing case studies and add some more bottom of the funnel content.

Here is what we need to add to the case studies:

- Customer info

  - Business
  - Location
  - Who was the decision-maker
- Goal
  - What was the reason for our customers to start searching for software like CLIENT?
  - What were their goals?
  - Why did they choose CLIENT? Exact reasons
- Execution
  - How quick was the migration process? Timeline and milestones
  - Who are the end-users (add their short testimonials), and what are the main areas/cases the client uses CLIENT?
  - How long does the client use CLIENT?
  - What are the tangible results the client got from CLIENT?
- Customer comprehensive testimonial
  - Why did you choose CLIENT?
  - What exact challenge did we solve for you? Did we exceed the expectations?
  - What did you like most about using CLIENT? What is a 1 unique feature of CLIENT that impressed you?
  - What was our impact on your business? (e.g. annual savings, team
  - productivity, etc.)

Besides case studies, we need to prepare three types of content for the sales team:

1. Checklist for automating and moving to clouds xxx processes. The target audience must see all the details and realise that the migration process is transparent and convenient.
2. Comparison reports. CLIENT vs. Google Disk/Dropbox, CLIENT vs. xxx, CLIENT vs. Evernote/Notion. What are the benefits of using CLIENT vs. alternatives? It is crucial to have this content for TOFU prospects because they have no idea how different is CLIENT before getting them on Demo Call. We need to generate demand and interest to move further and jump into a demo.
3. ROI calculator. We should clearly articulate what is the ROI of implementing and actively using CLIENT, because it’s not clear immediately.

## MOFU (Middle of the Funnel) Content

The MOFU content goal is to convert prospects in the Consideration stage of their customer journey into marketing-qualified leads, segment and nurture them, and move to sales once they are ready.

As you mentioned, your webinars and e-books don't convert.

From our point of view, the problem lies in your content strategy.

With webinars, you cover either topics for the audience that is actively buying or for existing customers, while the webinar's goal is to generate demand.

The same is with e-books. They cover broad topics that are not related to the goals, needs, or challenges of the target audience.

### Recommendations

Instead of using gated content, I'd rather create the long-reads ranking for target keywords and then follow-up prospects on LinkedIn and Leadfeeder as you are doing now.

Below are some suggestions on how to improve the process.

If you want to use gated MOFU content, it should be extremely relevant and cover your target audience's needs while delivering exceptional value.

Ideas of the MOFU content:

SOPS and workflows for HRs (can be replaced with any target job role): How to save up to 4 hours per week working with xxx documents. This e-book can be quickly done by reviewing workflows and automation of your clients. All we need is to describe:

- Workflow or automation goal
- Team members that are involved
- How it works (screenshots)
- How to set it up with CLIENT
- Customer testimonial (where possible)

It helps prospects to improve their workflows while natively promoting the CLIENT.

Xxx management checklist. The list provides all the small steps you need to move through to improve xxx. The list's goal is to show HRs (or other target job roles) how time-consuming is xxx and provide the ideas of processes that can be automated.

On the "thank you" page, we need to show them the links to the relevant case studies and embed your calendar to book a meeting.

The best part is that we can since the lead is qualified:

- Add a sales touch to high-quality leads
- Nurture them
- Retarget them

**To-do:**

- Create a map of informational needs including the questions, needs, goals and challenges your audience has
- Create topic clusters
- Create subtopics
- List all questions your target audience has (mapping their informational need)
- List all the objections and doubts they have during their sales process
- Find out the low hanging keyword and write long reads
- Develop a content plan for LinkedIn and blog
- Start working on sales enablement content
- Prepare at least one MOFU content

# Lead Nurturing

It was not possible to login to Mailchimp because of verification, so recommendations have been made based on our kick-off call.

You said that people enter nurturing sequences when downloading e-books, subscribe to webinars, visit your website, so you send the data from Leadfeeder to Mailchimp.

You also mentioned that sequences aren't personalised by job roles and industries.

The nurturing problem is that the content is all about the product to be useful only for the hot prospects.

These emails don't have any value for the leads that aren't ready to buy: emails don't educate them or help them make a better decision, don't segment prospects and collect more info about their needs.

That said, it's great that you at least have this one sequence, but there is a vast opportunity for improvement in this area.

## Recommendations

- To make an effective lead nurturing sequence, we need to finish the tasks mentioned in the content section: map of informational needs, topic clusters, objections and doubts
- Add to emails links to the content hub (Docsend is a perfect tool) where you can track account engagement with the shared content and add a personal touch when necessary (not to say you'll have multiple reasons and insights for contact, not a generic "I just wanted to check in")
- Add more progressive profiling emails to collect info about the leads' needs
- Create nurturing sequence for the leads that are not ready to buy

# Lead Generation Outreach

I've analysed connection requests and follow-up messages you are sending from GrowthLead.

Connection requests are not personalised, contain the copy that every BDM uses and are often ignored by the target audience.

The same with follow-up messages. They aren't personalised and are perceived as a sales message.

We need to develop a completely different approach connecting with your target audience. Below are some lead generation ideas we recommend to implement.

## Sales touch cadence based on the website activity

We need to tweak your existing outreach approach leveraging an effective multi-channel outreach with personalised videos. You don't have too many leads so can easily go with the personalisation.

## Podcast (draft idea)

This is a podcast for the target audience who are interested in improving their processes and workflows. It could be narrowed down to the specific vertical and job role.

## LinkedIn inbound funnel

The goal is to connect with 3 groups of people: ideal customer profile, active LinkedIn members that have in their network our target audience, and asset owners (micro influencers, media senior editors, journalists, podcast hosts, community admins).

With the help of content we create multiple opportunities to start sales conversations and bring prospects to the pipeline without spammy outreach.

# Other recommendations

## Implement client success process

Right now you don't have a structured onboarding or in-depth client interviews. We need to develop an evergreen process of:

- Onboarding clients
- Create client's portal with educational videos and process maps so if the end user changes, it will be clear for the new team member how to use the software
- Tracking satisfaction and value they are getting
- Learn about strategic goals
- Finding upsell opportunities
- Generating referrals
- Creating case studies and getting testimonials

## Further Ideas

Here is a list of other ideas to try and recommendations:

- Paying invoices manually is painful. Is there a way to automate the process? Stripe, Pinch?
- Create onboarding and client's portal with step by step checklist and product videos for clients
- Install right message to personalise website and navigate to industry case
- studies and move to relevant nurturing sequences
- Try LinkedIn InMail retargeting
- Do video outreach with content hubs
- Remove multiple pop-ups from the website which annoy visitors and move them away from the website.

## Marketing Bottlenecks

During the analysis we have identified some more bottlenecks that were not discovered during the kick-off:

- We have a broad targeting while some segments (such as B2B services (IT and payroll) + construction are more lucrative. We should focus more on these segments and define the ideal customer profile.
- The product positioning and unique value proposition are vague. While you have a robust customer database, it's not clear for prospects what CLIENT is all about and how it can be valuable to their organisations. That's why the website converts poorly.
- Product features and values are described poorly. There is a lack of information the prospects want to get before talking to sales.
- Customer stories need to be updated, including the use cases and tangible results.
- The lead nurturing sequence is not really about nurturing but about short sales touches and tailored to prospects actively buying right now, ignoring leads that aren't sales-ready.
- The same with content strategy. E-books, webinars, YouTube videos, and blog posts cover broad generic topics that provide 0 value to the target audience.
- You don't engage with the audience on LinkedIn, which is a huge opportunity and a great channel to nurture and generate leads organically.
- Outreach sequence is not personalised and feels like a sales cadence; that's why messages are ignored by most of the prospects.
- We don't have a client success process. This is the exact reason why we don't know about clients' strategic plans and don't do timely upsell. As well, we don't have a product tour and checklists for client's teams, that's why when a new team member comes, they stop using the software.
- We don't have enough bottom-of-the-funnel content that converts. We need to add comparison reports, improve case studies, create a migration process map

## Marketing Analysis

Based on the interview and marketing analysis, we suggest investing in LinkedIn inbound marketing while adding soft sales personal touches and growing the audience.

We will create multiple opportunities for starting the sales conversations and generate more demand and awareness, shorten the sales cycle, and focus on warm leads.

Here are basic stats to expect from implementing the campaigns mentioned in the report.

At the same time, we have enormous opportunities for:

- Ranking for the targeted keywords,
- Leveraging LinkedIn as a nurturing and social selling channel,
- Improving lead nurturing sequence (we can repurpose the content we'll be publishing on LinkedIn),
- Launching a niche podcast to empower CLIENT branding and positioning.

Below are the links to the detailed marketing plan, the necessary marketing stack, and the proposal for further engagement.

- Marketing plan
- Marketing and sales stack
- Resources

# Implementation Support

During the kick-off interview, we discussed that the best option to proceed would be a coaching/advisory format.

The Advisory format means that project execution is on the CLIENT side while the project orchestration, management, control, and feedback on every project task is on Fluidic.

## Responsibility

**Fluidic**

- Project plan, orchestration, management and control
- Prepare necessary templates. Training CLIENT team to launch different campaigns
- Feedback on all marketing and sales content
- Campaign documentation: checklists, templates, instructions
- Timely advice and feedback to project team members on project implementation issues.

**CLIENT**

- All technical tasks related to the launch of an online summit, content distribution, etc.
- Marketing and sales content design
- Control of tasks executed by the dedicated person.

## Comms & Project Management

- Weekly conference call (each month, 4 calls x 60-90 minutes)
- Sprints with concrete milestones and deliverables to help you build and keep a positive momentum in building your sales and marketing approach
- Ongoing support via Slack or another messenger for chat and discussion
- Project dashboard with tasks status

## What You'll Get

Besides calls and advisory, you'll get access to our:

- Proposals, workflows, and templates
- Fluidic Growth Academy course

- LinkedIn Inbound Marketing e-book and workshop

## Pricing

| | Consulting |
|---|---|
| Monthly engagement | $ / month |
| Quarterly engagement | $ / month |