

sage

# DIGITAL MARKETING GUIDE FOR SAGE X3 PARTNERS

Your B2B demand generation handbook



# ***THE PURPOSE OF THIS GUIDE:***

## **The ultimate how-to for Sage channel partners**

Marketing know-how can be incredibly helpful when you're selling an enterprise-class business management solution to forward-thinking organizations. Due to a variety of new digital marketing techniques, demand generation has changed significantly in recent years.

Buyers are doing research in advance to educate themselves before they ever engage with a sales person—leading to a variety of new ways to qualify leads. The goal of this guide is to provide you with the tools you need to successfully capture, nurture, and convert more leads than ever before.

With that, welcome to the Sage X3 Partner Marketing Guide.

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## SECTION 1:

# DEFINING KEY TERMS AND CONCEPTS

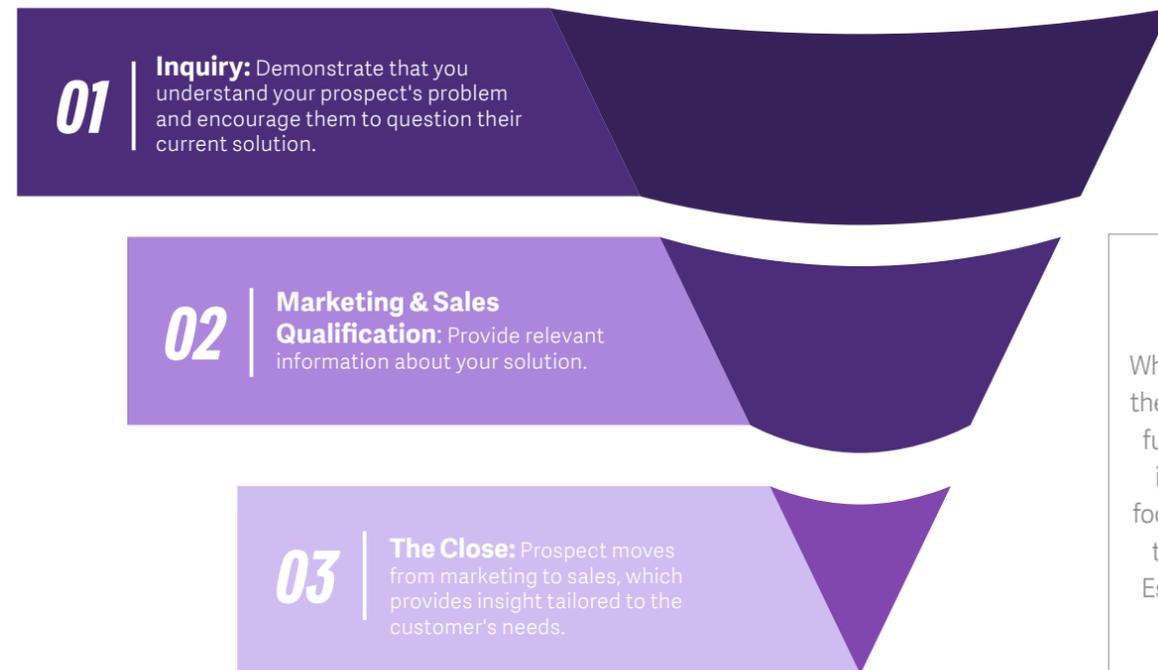
As you use this guide, you'll see marketing terms that may be new to you. To start things off, we've defined a few of the most common terms and phrases below.

### 1. Marketing funnel

Think of a marketing campaign as a journey designed to influence and lead buyers down a path to the ultimate goal: the sale. This path is often referred to as "the marketing funnel" and is divided into stages. Every stage identifies with where the prospect is on the buyer's journey. Often, content is created for each stage to help answer the buyer's questions and guide them through the process.

The marketing funnel allows you to plan tactics you will use to attract leads, how you will manage and nurture leads, and how you'll need to transform those leads into buyers. It is important to take a customer-centric approach when planning your marketing strategy.

#### The Key Stages of The Marketing Funnel

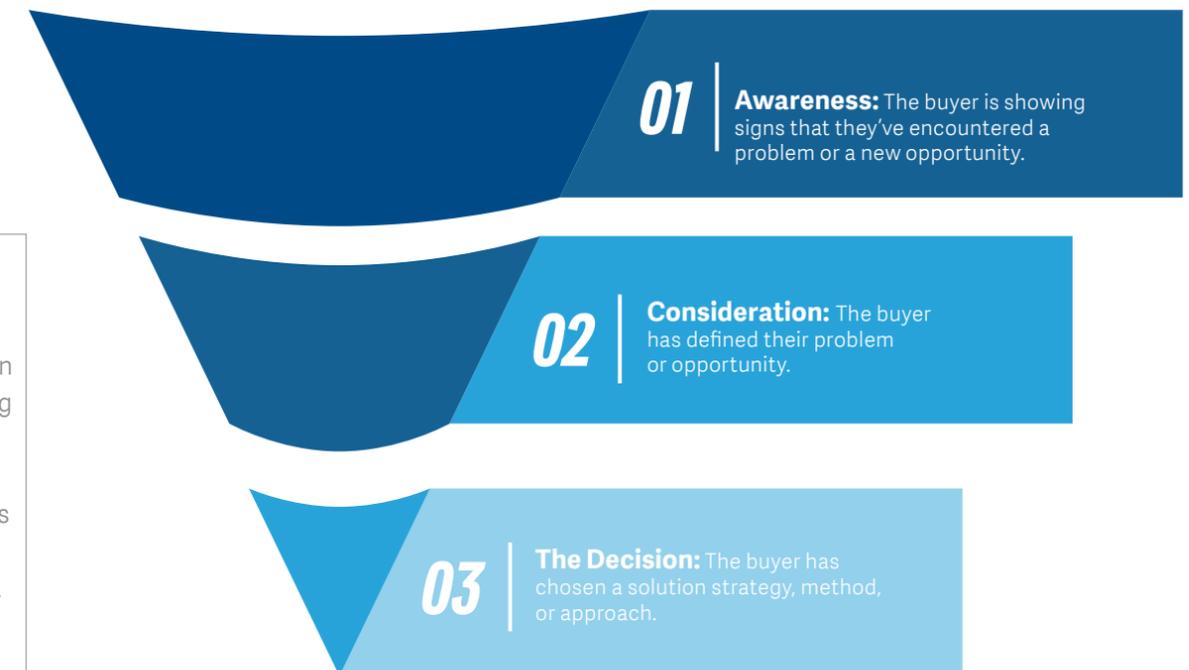


### 2. Buyer's journey

The buyer's journey is the process a person takes before purchase. Before we get into specific Sage X3 insights and target audiences, we'd like to explain the key stages in the buyer's journey.

As previously stated, today's buyers are able and willing to do extensive research before ever talking to a sales representative. That's why it's important to provide accurate information that speaks to where the buyer is on their journey—whether they're still trying to identify their problem or are ready to choose a solution.

#### The Key Stages of Buyer's Journey (according to HubSpot)



#### So, what's the difference?

While very similar, there's one important distinction between the marketing funnel and the buyer's journey. The marketing funnel (also known as the sales funnel or purchase funnel) is a model of your sales and marketing activity generally focused on acquisition, while the buyer's journey represents the paths customers take when considering a purchase. Essentially, the same process explained from two different perspectives.



### 3. Lead generation

To develop a sales pipeline, you first need to generate “leads,” which means stimulating interest with a prospect and enticing them to engage with you. This is done by spreading marketing messages through various digital channels such as social media, display banners, blogs, websites, and email—or through traditional channels such as direct mail and events.

A successful lead generation campaign will allow you to capture valuable contact information from interested prospects. When properly executed, you’ll spend more time selling and less time prospecting.



### 4. Nurture

In marketing, nurture refers to the importance of developing relationships with buyers at every stage of the sales funnel, through every step of the buyer's journey.

When generating leads, marketing and sales should always have the joint goal of nurturing their prospects. While it might be tempting to jump right in and place cold calls to all of your leads once you get their contact details, this can be a time-consuming and inefficient approach to building a strong trustworthy relationship with a potential buyer. Why? Because leads often aren't ready to jump in and talk to a sales person right away. They are still collecting information and learning more about you and your solution.



### 5. Content

Effective content stands as the foundation for all of your marketing efforts, and it's where all successful lead generation efforts begin—involving every touchpoint (email, social media, event collateral).

In today's “self-service” world, buyers want to educate themselves—which means you need to develop the type of content that:

- 1 Puts you in the buyer's mind by answering their early questions
- 2 Compels them to engage with you to learn more

Different types of content work at different stages of the marketing funnel, which we will explore in more detail in the following pages.

**Examples of content include:**

- |                      |                        |
|----------------------|------------------------|
| 1 Blogs              | 5 Website content      |
| 2 Articles           | 6 Webinars             |
| 3 At-a-glance guides | 7 White papers         |
| 4 eBooks             | 8 Interactive articles |

## SECTION 2:

# SELLING SAGE X3 - THE CAMPAIGN STRATEGY

Now that we've outlined the key terms, we want to provide you with the audience insights and market research behind the Sage X3 campaign.

### Sage marketing insights

Businesses have developed large enterprise resource planning (ERP) systems in an effort to make their businesses easier to manage. In reality, they ended up creating enormous inefficiencies that have undermined their growth potential. To use an analogy, they have built mainframes rather than smartphones. To put it statistically, businesses have said they are...

Unsatisfied with the cost of implementing and maintaining an ERP

38%

Not scalable enough

25%

Dissatisfied with an ERP's flexibility

36%

Lacking in mobile device support

24%

Dissatisfied with ERP's user experience

32%

### Sage solutions

Sage X3 is changing how medium to large enterprises compete and grow—with faster, simpler, and more flexible business management. Sage X3 offers the next-generation ERP solution that offers a better way to manage the entire business on a global scale. It offers the capacity and benefits of an enterprise-class business management solution without the complexity of a typical ERP—with a demonstrated ROI of 177% and payback period of only five months. Combined with a choice of versatile deployment (public, private, hybrid cloud, or on-premises) and purchasing options, Sage X3 delivers full ERP functionality without ERP complexity.

Whether it's inventory, financials, CRM, reporting and analytics, or more, Sage X3 offers the right solution for your enterprise.



## Let's talk target audiences

We have two key segments in the business management solutions category: Mid-market enterprise and SMBs

### 1. Mid-market enterprise companies

Key personas:

- CEO, CFO, CIO, and COO
- \$50 million - \$1 billion in revenue

### 2. SMB

Key personas:

- CEO/Business owner, CFO/Finance and IT/Operations
- \$25 million - \$50 million in revenue



## Audience intelligence at Sage

Businesses looking for an ERP solution often make purchasing decisions by committee. This committee is usually led by the CFO and includes representation from multiple business units – CEO, CIO, COO, and other lines of business.

Sage audience intelligence has led us to a vertical-industry focus that speaks to the relevant needs of our prospects and customers. Having identified these growth-oriented industries, we continue to develop solutions and marketing programs to serve their requirements:

- 1 Discrete manufacturing
- 2 Process manufacturing
- 3 Wholesale distribution
- 4 Business services

# SECTION 3: APPLYING THE STRATEGY TO SAGE X3

Now that you understand how the campaign was created, let's take a look at the different stages of the marketing funnel and buyer's journey as they relate specifically to Sage X3:



Based on this framework, Sage has created industry-specific marketing programs that align with every stage of the funnel: Inquiry, marketing and sales qualification, and the close.

# ***INQUIRY***

## **1. At the inquiry stage**

This part of the marketing funnel relates to the awareness stage of the buyer's journey. This is when your prospect acknowledges they have a problem. At this stage, you should be able to demonstrate that you understand their problem and encourage them to question their current solution. This is a prime opportunity to convince your prospect there's a better way to make their business more efficient.

How do we do this? The following pages describe the next steps:

- 1** Create content that demonstrates your thought leadership.
- 2** Build a landing-page to engage your prospects and capture leads.
- 3** Drive prospects to your landing page experience.



## Step 1: Create content that demonstrates your thought leadership

With thought-leadership content, the goal is to establish your business expertise in the prospect's industry, their business needs, and their goals. You do this by providing content that will answer the specific question, need, or problem they're facing. It's important to avoid getting too technical or focusing too much on the solution at this stage. That's because they're still in the research phase of their buyer's journey and are trying to educate themselves on the problem they're facing.

### Creating relevant content

In the Sage X3 campaign, the key for the audience is two-fold. We start by aligning around the prospect's industry whenever possible (trends, messaging, content), and then we try to diagnose what their key trigger point is for starting their search.

Based on conversations with customers, partners, sales, and product marketing teams, we have identified four triggers/use cases that are leading people to adopt an enterprise management solution. The more use cases an individual relates to, the more likely we are a good fit for them.

- 1 Inefficiencies undermining profits and growth potential.
- 2 Losing insight into operations because of organizational growth and loosely integrated management tools.
- 3 Losing agility and responsiveness because of business complexity and increased time spent on non-productive tasks.
- 4 Navigating change: When the company expands to a new geography with a new office/warehouse.

Based on these insights, we can create content that is relevant and informative to our prospects. A combination of high-level and in-depth thought-leadership content should be provided. The high-level content should be freely accessible, and the more in-depth pieces should be gated. At this stage of the funnel, content pieces can take the form of blogs, at-a-glance guides, eBooks, or website content.

## Step 2: Build a landing page to engage your prospects and capture leads

Once you have created a number of quality thought-leadership content offers, the next step is to consider how you will use this content to capture your leads.

We recommend providing a combination of free, ungated content pieces with more in-depth, gated content offers. One of the most effective ways to present your content is on an industry-specific landing page.

A landing page should be optimized specifically for prospects at this stage. It serves two purposes:

- 1 To provide content offers that give leads an opportunity to learn more about their problem and a possible solution.
- 2 To provide a way to capture leads' contact information.

Once a prospect visits your landing page and begins to engage with your ungated thought-leadership content offers, there should be strategically placed **calls to action (CTA)\*** that entice prospects to download more in-depth thought-leadership content pieces. At that point, you should ask prospects to provide their contact information.

Prospects are more likely to provide their personal information in exchange for more in-depth thought-leadership content such as eBooks, white papers, and webinars.

### \*What is a CTA?

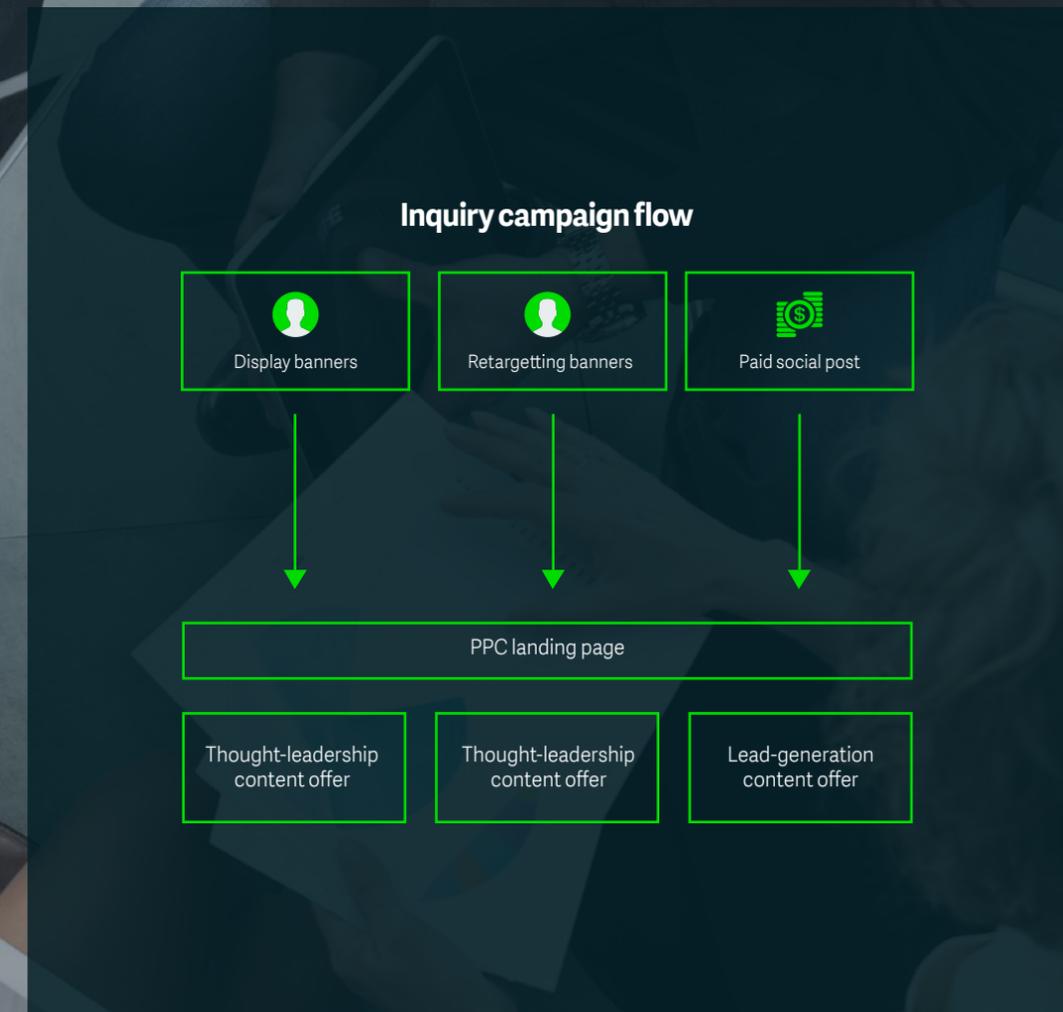
A CTA is an instruction designed to elicit an immediate response from your prospect. Your CTA should give clear direction on what next step you want your prospect to take. CTA examples: "Download now," "Read more," "Request a business review," and "Take a product tour."

### Step 3: Drive prospects to your landing-page experience

Now that you have created a selection of content offers and a landing page for the content to live, it's time to think strategically about how you are going to drive users to that landing page. There are many marketing techniques you can use to attract prospects to your landing page; we call these techniques "drivers."

#### Driver examples

- 1 Online display banners**  
A display banner is an online paid advertisement that appears on other websites to drive users to your landing page. You can target prospects with banner ads in different ways. For example, you can target based on keyword searches or by manually selecting which websites you want to run your ad on. Keep in mind, banner ads should be created with your audience in mind and have a strong CTA.
- 2 Retargeting banners**  
Retargeting banners look similar to display banners but are served to users who visited your landing page. The difference is that they did not submit the form through the use of a tracking pixel. Later, when the person who visited your landing page browses the web, the pixel will tell your retargeting provider to serve up your ad. This will ensure that your message is only being served to people who have previously visited your landing page.
- 3 Social posts**  
Social media is a great platform to build awareness for your brand and can be a great way to target and drive users to your landing page. For the Sage X3 audience, we've found LinkedIn to be the most powerful social channel for driving conversions in B2B. LinkedIn also allows you to target users by industry, job title, or location.
- 4 Pay per click (PPC)**  
PPC is a good way to quickly increase visits to your landing page—rather than attempting to "earn" those visits organically. PPC works by allowing you to bid for ad placement in a search engine's sponsored links when someone does a search using keywords you've specified. You only get charged a fee if someone clicks on your ad.
- 5 Search engine optimization (SEO)**  
SEO, or organic search, is a way to optimize your website so that it will rank higher in search engines' initial search results. Generally speaking, the higher your ranking, the more traffic you should see coming to your website.



## Tracking

Success rates will vary from company to company depending on their goals, but there are a couple of ways to track how things are going.

### Drivers

- 1 **Outbound/retargeting banners:** Track the number of outbound and retargeting banner impressions, clicks, and conversions (completed forms) by use case.
- 2 **Social posts:** Track reach and engagement (number of likes, shares, and comments) for LinkedIn, Facebook, and Twitter.

### Content

- 1 Track the number of inquiries, MQLs, SQLs, and won deals from specific content assets.
- 2 Create unique campaign IDs in Google Analytics to track form completions across different CTAs.
- 3 If you are using retargeting banners to drive directly to your content pieces, leverage UTM parameters\* when promoting particular content assets from paid search, display, social, and/or blog posts to better understand traffic sources.

*\*UTM parameters are tags you add to a URL (when your link is clicked, the tags are sent back to Google Analytics and tracked). With UTM parameters, you can tag your links to gauge the effectiveness of your campaigns and identify the best ways to drive more visitors to your website.*

### Landing page

- 1 Total number of landing page visits, new visitors, bounce rate (page visitors who leave before taking an action), sources of traffic (paid search vs. organic, desktop vs. mobile), and the number of visitors completing forms (download asset, request demo, etc.).
- 2 Create unique campaign IDs to track form completions across different CTAs. Tracking is accomplished through Google Analytics, HubSpot, or a similar tool with embedded analytics.
- 3 Confirm tags and tracking with media partners for any paid search activity.
- 4 Track the number of downloads on content pieces.

## Tips to improve and optimize your campaign

### Drivers

- 1 Test different copy, imagery, and CTA text, and look for an increase in conversions.
- 2 For social media, test posting at different times of the day and week.

### Landing page

- 1 Monitor behavior flow throughout the page. This can be accomplished by including tracking pixels at certain points throughout the page to understand where users are dropping off.
- 2 Test different page placements for your content pieces.

### Content

- 1 Test different content titles.
- 2 Test the length of content pieces – long vs. short.

## Inquiry checklist

- ✓ Map the journey you want prospects to take. For example, after your drivers find prospects, the prospect will visit the landing page and then download content.
- ✓ Define your success metrics.
- ✓ Gather your assets: drivers, content offers, and landing pages.
- ✓ Work with an agency/media planner to define the audiences you want to target.

## Getting started

To help you get started generating leads, Sage has created some vertical-specific campaigns for you to use. These campaigns include thought-leadership content, a vertical-specific landing page, and a selection of drivers in the form of social posts and banners. You can find these co-branded assets in your Zift platform.

### 1 Drivers:

**One display banner:** Designed to drive users to the vertical-specific landing page where the user will find different content offers. (Note: One of these high-value content offers should be gated to allow you to capture your lead.)

**One retargeting banner:** Used when someone visits your landing page but doesn't download any gated content.

**Three social posts:** Similar to display, social posts are an effective way to drive leads to your landing page. These vertical-specific posts can be used on LinkedIn or other social channels to drive engagement.

### 2 Content:

**Two ungated content offers:** These thought-leadership pieces are used to build brand awareness and demonstrate your knowledge about the prospect's problems and needs.

**One gated content offer:** Once a prospect realizes you understand their business and challenges, this in-depth piece of content requires a prospect to provide their contact information in return for a download.

### 3 Vertical-specific landing page:

# ***MARKETING AND SALES QUALIFICATION STAGE***

## **2. At the marketing and sales qualification stage**

The following pages describe the steps involved in the marketing and sales qualification stage:

- 1** Create content that is relevant to your prospect.
- 2** Create a destination for your content.
- 3** Drive your leads to download your content.

## Marketing and sales qualifications

After the awareness stage in the buyer's journey comes consideration. This is when your prospect has identified what their problem is and begins to search for a solution.

By this point, your prospect has taken some action (they may have provided their contact information in exchange for downloading a content piece such as a report or guide) to indicate they have some level of interest in your solution. At this point, they are known as a marketing qualified lead (MQL), and chances are they aren't ready to purchase yet. The most common reason for this is because they have just diagnosed a problem and are trying to learn more about what they need in order to solve their issue. At this point, they should be moved into an email nurture program.

An email nurture program will help you develop and measure your lead's interest by providing more information about your solution and how you can help solve their problem. Be prepared: Nurturing takes time. When done right, you'll have a steady flow of sales qualified leads (SQLs) that are ready to move to the next stage of the funnel.

### So how do we do this?

## Step 1: Create content that is relevant to your prospect

The content provided at this stage of the funnel should continue to be educational and move the lead along in the buyer's journey. This is also the stage where you want to begin introducing your solution and how it solves the lead's specific business challenges.

Once you have created a number of content offers, the next step is to consider how you will use this content to move your prospect from MQL to SQL status.

### For Sage X3, the most common questions buyers ask are related to:

- 1 Functionality**—Can the solution meet my requirements to manage financials and operations quickly and effectively? What about compliance? Does it support industry best practices with minimal need for managing software customization and add-on solutions?
- 2 Ease of use**—Is the UI easy to use? Can it be used on web and mobile apps? Can it improve productivity? How do I ensure fast adoption by users?
- 3 Technology**—Is the system scalable? Can it adapt to the changing needs of my business? Am I able to access new applications easily? How does it help me accelerate internal and external collaboration?
- 4 Time to value**—Does the solution have a proven return on investment? How does it simplify software management? How does it reduce overhead costs?

## Step 2: Create a destination for your content

In this stage of the buyer's journey, your content landing page should be optimized specifically for leads. It should have two objectives:

- 1** Offer a single piece of content that gives leads an opportunity to learn more about your solution.
- 2** Provide a way to capture the lead's behavior and interactions.

## Step 3: Drive your leads to download your content

Once you have accessible content, you'll want to consider the sequence you use to drive leads to your offers.

At this stage, you'll have some key information about your prospect—such as email address, job title, or industry. Email is a particularly effective way to let your prospects know you have relevant content for them. From here, you can create different email tracks that provide different pieces of content based on different roles (finance, operations, etc.). Or, alternately, you can plan based on the lead's actions.

Once an MQL has downloaded your content, you'll want to continue drip-feeding them new content until they download a pre-determined number of content pieces or are ready to speak with someone in sales. At that point, you can qualify them as an SQL and pass them over to your sales team. Keep in mind, many marketing automation platforms allow you to automate these workflows so they run automatically.

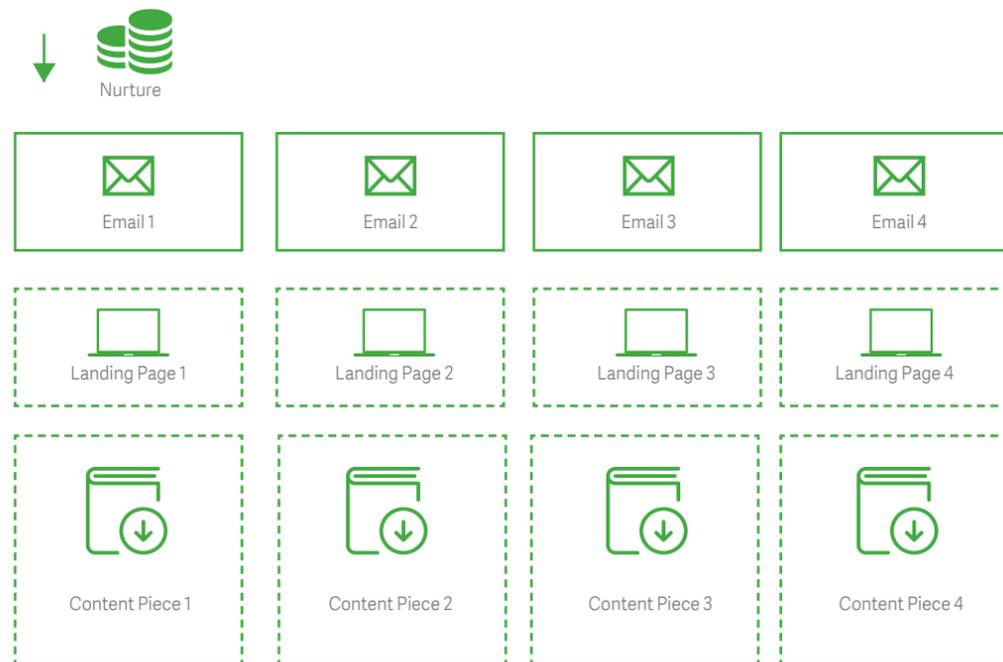
### A few email best practices to keep in mind:

- 1** Keep the information fresh and relevant.
- 2** Show some personality.
- 3** Get to the point.
- 4** Establish a sending schedule—don't overload your prospects.

### Moving from MQL to SQL

Once a prospect graduates from MQL status, they move to SQL status. Similar to MQLs, companies may have different criteria for how they define SQL, but it is important that marketing and sales are aligned in the definition so marketing knows what type of content and nurture program to put in place, as well as the type of behavior they need to drive.

## Marketing and sales qualification flow



## Tracking metrics

Success rates will vary from company to company depending on the objectives, but here are some proven ways to track how things are going.

### 1 Emails and corresponding landing pages

- Track subject line testing (opens and click-throughs).
- Track the number of sends, opens, unique clicks, forwards/shares, and form completions from CTAs associated with emails.
- Depending on the marketing automation program you are using, you should be able to create unique campaign IDs to track form completions across different CTAs on your emails and corresponding landing pages.

### 2 Content offers

- Track the number of inquiries, MQLs, SQLs, and won deals from specific content assets.

## Tips to improve and optimize your campaign

- 1 Test new subject lines on emails with low open rates.
- 2 Test new email copy on emails with high open rates but low clickthroughs.
- 3 Try reducing the number of fields on your form if prospects are not downloading content.
- 4 Create additional email tracks based on segmentation.
- 5 Track which content offers are the lowest performing and optimize by updating the titles, length of the pieces (long vs. short), and gated vs. ungated.

## Inquiry checklist

- ✓ Map out the MQL-to-SQL journey.
- ✓ Determine the content offers you are going to need.
- ✓ Decide how you are going to drive leads to these content offers.
  - What emails are you going to send out?
  - Are you going to automate the sending of your emails with Zift or your own marketing automation platform?
- ✓ Define your success metrics.
- ✓ Test your campaign and optimize it.

## Getting started

Sage has created an email drip campaign to put MQLs to SQLs on the nurture track. You can find these co-branded assets in Zift . The campaign includes four content pieces with corresponding emails and landing pages.

### 1 Four content pieces

- Solution-focused, we have four nurture content offers designed to help continue to educate your prospect through the decision-making process.

### 2 Landing pages and corresponding thank you pages (with optional marketing automation through Zift)

- We've created a landing page for each content piece. This is a simple web page with a form that holds the relevant piece of nurture content. Once a lead fills out the form, they can download the content piece—which appears on the corresponding thank-you page. (Note: This landing page is different from the landing page you use in the inquiry stage before a prospect becomes an MQL.)

### 3 Nurture emails

- Each content piece has a corresponding email that can be used to drive prospects to the content landing page.

# ***THE CLOSE***

## **3. Now you're ready to make the sale**

Once your prospect is SQL-qualified and is ready to speak to a sales representative, remember one key point moving forward: You're the expert. That's exactly the type of person a prospect wants to deal with when buying. It's equally important that the meeting takes place within the prospect's time frame and that the rep can communicate effectively at the customer's comfort level. At every opportunity, try to:

- 1 Assume a teaching role.
- 2 Take charge of the sale.
- 3 Provide insights tailored to the customer's needs.



## Issues to avoid at the end of the funnel

- 1 Giving customers too many purchase options.
- 2 Introducing new options.
- 3 Confusing implementation plan.

To help you conduct successful sales meetings and get the win, Sage has various materials available on our [Sage Sell Portal](#) to assist you.

The Sage X3 Partner Sales Messaging Playbook will provide your sales team with great insights into what they need to know and say about X3 during this stage of the funnel. There are also a number of resources available online to help your sales team talk about Sage X3.



## Ready to take your marketing to the next level?

Once you have created a well-rounded campaign, there are many advanced marketing techniques that will allow you to take your campaign to the next level. Some of these include account-based marketing (ABM), lead scoring systems, persona-based campaigns, progressive profiling, interactive content, multi-track email workflows, and adding intent to the email nurture experience (creating tracks that lead a user somewhere specific based on the actions they have taken so far).

# CONCLUSION

This guide is only the beginning. As you continue to develop your marketing campaigns, remember that each stage of the marketing funnel—Inquiry, Marketing and Sales Qualification, and the Close—requires specific techniques and different types of content. Be prepared when your prospect is ready to move on to the next stage. Remember, we're here to support your efforts at every stage of the funnel.

To help you in your marketing efforts, we've made a variety of content and other resources available to you on Zift, the Sage partner marketing platform. If you need assistance getting the most out of Zift or your own marketing automation tool, let us know and we'll be happy to help.

## Next steps

Have questions? Want to dive deeper into lead-generation best practices? Please contact your Sage Partner Account Manager.