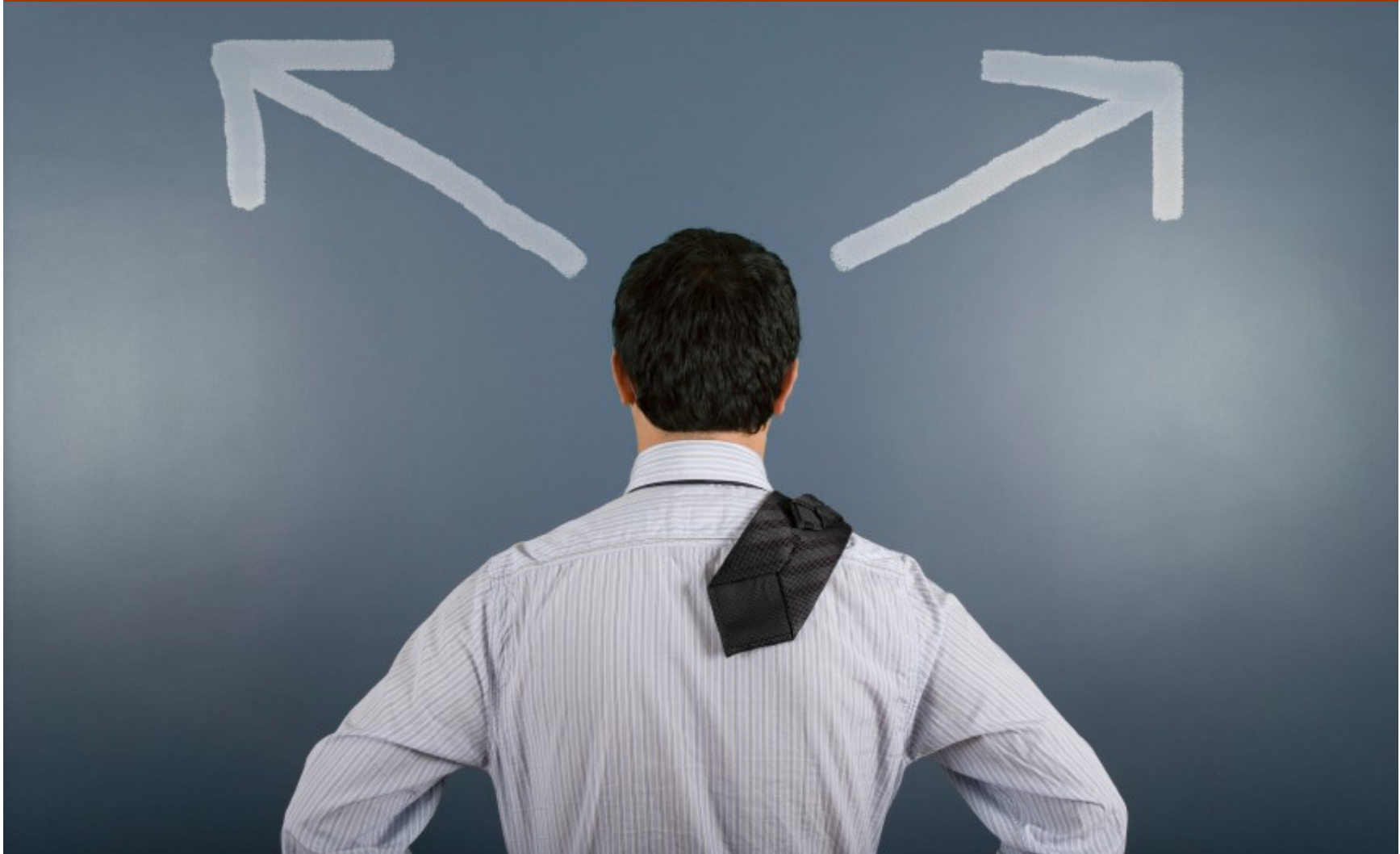


MARKETING OPTIMIZATION:

4 STEPS TO BUILDING SALES AND MARKETING OPERATIONS EXCELLENCE



Brought to you by  **patmcgraw**
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marketing

the activities and processes for creating, communicating, delivering, and exchanging offerings that have value for your organization, your customers, your partners, and society at large.

optimization

the design and operation of a system or process to make it as good as possible in some defined sense.

Today, many organizations face a significant gap between strategic will and operational skill. That gap causes organizations to fall short on key performance metrics such as new customer acquisition, customer retention and referrals. That gap also negatively impacts the organization's ability to quickly develop and launch new products and services as well as enter new markets and successfully target new segments of the population.

Marketing optimization helps your organization focus on its current strengths as well as develop and execute a plan to develop and/or acquire the additional strengths needed to take your organization to the next level.

By focusing on today and tomorrow, marketing optimization ensures that you immediately begin to move beyond 'survive' and towards 'thrive'. Improvements designed with future objectives in mind—so your investment pays dividends today and long into the future.

If your organization believes that improvements are possible and that working smarter rather than harder will be critical to your ability to thrive in an ever-changing world, marketing optimization is the program and process that will help you consistently deliver unique value and differentiate your organization from the competition in the hearts and minds of the consumer.

Marketing optimization moves your organization beyond 'survive' and towards 'thrive'.

“A goal without a plan is just a wish.”

Antoine de Saint-Exupery
French writer (1900 - 1944)

4 Steps to Operational Excellence

The Marketing Optimization Process is simple, straight-forward and immediately provides practical solutions for enhancing performance. But it also requires focus, discipline and commitment in order to fully help your organization improve performance in the near and long-term.

Step 1: Sales and Marketing Optimization

The purpose of Sales and Marketing Optimization (SMO) is to identify opportunities to immediately improve sales and marketing performance—so at the completion of this work, you are presented with specific recommendations. Here's an overview of the process:

Internal Analysis

- In-depth Interviews: From your C-level leadership team, key management and staff to your customers (current, former and prospective), vendors and partners, as well as other key constituencies.
- Secret Shopping: In order to gain the true 'Customer Experience', this analysis will be performed following several key scenarios in order to gain understanding into how well your organization executes on its current plan from the perspective of prospective, new and regular customers personas.
- Communications Audit: All communications—written and spoken—are evaluated in relationship to the customer experience and the impact the communication has on key audiences in regard to your brand position.

Sales and Marketing Optimization provides practical recommendations for immediately improving performance.

4 Steps to Operational Excellence

External Analysis

- **Industry Analysis:** This is a state-of-the-state exploration of your industry—how large is it, what has been the historical rate-of-growth for the industry, what is the projected rate-of-growth for the industry, what are the key trends and factors impacting the industry. This analysis also looks at the industry leaders in order to determine strengths and weaknesses with an eye on identifying opportunities and threats for your organization.
- **Market Analysis:** Similar to the Industry Analysis, the Market Analysis focuses on the specific geographic markets in which your organization operates. Special focus is placed on the impact of government, society, economy and technology as well as the market's population trends.
- **Competitive Analysis:** Within each market your organization operates, the competition will be analyzed on a wide variety of key factors in order to identify opportunities and threats for your organization.
- **Target Audience Analysis:** Is your target audience growing or shrinking in numbers? Are their needs remaining the same or are they changing? How do they perceive your organization and how do they feel about the competition? These are just a few of the questions that will be identified, explored and analyzed in order to gain a clear understanding of your opportunities in the market.

At the completion of this phase, you are presented with recommendations to improve sales and marketing performance in key areas that can immediately implemented.

Emphasizing collaboration, *Building the Action Plan* forges commitment that are critical to your success.

“Opportunities are often missed because we are broadcasting when we should be listening.”

Author Unknown

“Marketing is not the art of finding clever ways to dispose of what you make. It is the art of creating genuine customer value.”

Philip Kotler

4 Steps to Operational Excellence

Step 2: Building the Action Plan

Taking the information gathered and analyzed during the prior step, this step brings together the appropriate members of your organization to participate in the building of the action plan.

With an emphasis upon collaboration across departments , this step, forges ownership bonds and commitment that are critical to your organizations ability to successfully implement.

Beginning with a 2-day workshop*, and including several days of one-on-one coaching, your team builds a detailed action plan that clearly identifies goals, objectives, strategies, tactics, owners, milestones and budgetary guidelines.

One-on-one sessions also develop your staff so that they are prepared to execute marketing optimization on a daily basis well into the future—ensuring your organization of long-term benefits and efficiencies.

Specific emphasis is placed upon how to more effectively attract a higher quality prospective customer, how to more efficiently convert that prospect into a first-time buyer as well as how to develop and maintain a long-term relationship that generates higher life-time value, and referrals.

* Each participant is provided with a workbook, worksheets and must complete work prior to the start of the workshop. At the end of the 2-days, participants are given assignments that they must complete within an agreed upon time frame. During that time, one-on-one coaching helps individual members of your team build their section of the plan in collaboration with others. Finally, there is a 1-day session that allows your team to present the finished action plan in advance of your final presentation to the senior leadership team.

4 Steps to Operational Excellence

Step 3: Internal Launch

Once the plan has been developed and approved, your success rests upon the ability of everyone within your entire organization understanding what they need to do on a daily basis in order to bring the plan to life. Our work includes developing and deploying an internal communications program as well as participating in employee training programs—whatever it takes to ensure a successful launch to your target audiences and customers.

Step 4: External Launch

Once the scale and scope of the effort—and its expected outcomes—are understood within your organization, the implementation of the action plan begins outside your organization.

During this step, focus is placed upon successfully launching the plan as well as ensuring that key data is captured and analyzed so that recommendations for improvements can be made in a timely manner.

Highly effective organizations make certain that change occurs within so that a consistently superior experience can be delivered to the customer.

“Authentic marketing is not the art of selling what you make but knowing what to make. It is the art of identifying and understanding customer needs and creating solutions that deliver satisfaction to the customers, profits to the producers and benefits for the stakeholders.”

Philip Kotler

“Plans are only good intentions unless they immediately degenerate into hard work.”

Peter Drucker *(1909 - 2005)*

12 Critical Questions to Ask Yourself

1. How are your customers' needs evolving and what resources are your customers using to make buying decisions?
2. Which customer segments offer your organization the best opportunities and what marketing strategies must be deployed in order to take advantage of these opportunities?
3. How can your organization more effectively target highly qualified prospective customers in order to achieve your growth goals with a lower than projected 'cost per new customer'?
4. Where can your organization gain a competitive advantage?
5. What is your organization Unique Selling Proposition (USP) - and is it truly unique?
6. How will your organization consistently deliver a unique, valuable customer experience so that customer retention, loyalty and referrals increase?
7. What factors will make the greatest material contribution to your organization's key performance metrics—and how confident are you that these factors will be successfully accomplished?
8. What are your organization's key metrics and performance indicators—and how confident are you that your organization has the processes in place to accurately capture the data required to analyze and report on your success?
9. How is collaboration between departments within your organization fostered and developed in order to ensure greater organizational success?
10. How quickly can your organization respond to opportunities in the market with a quality solution—and is that fast enough?
11. What new products and services will your organization's target audience demand over the next 3 to 5 years—and how will your organization develop and offer a unique, valuable solution that differs from the competition's offerings in the hearts and minds of your audience?
12. What investments will your organization need to make in order to be able to successfully differentiate itself from the competition over the next 3 to 5-years?

“It is a bad plan that admits of no modification.”

Publilius Syrus (~100 BC), Maxims

Testimonials

"I worked with Pat for several years at a public nonprofit institution. Pat ran a strong and effective marketing organization that produced some of the highest growth in the institution's history. He has a detailed understanding of marketing, recruiting, and operations in the education space enabling him to understand and operate within the big picture. He is a strong team player and an excellent colleague."

Bob Gay
Vice President
The New School

"Pat possesses a unique combination of strategic marketing skills and tactical know how to get the job done."

Bernie Joyce
Vice President, Major
Brands
Harte Hanks Direct
Marketing

"Without reservation, I strongly recommend Pat to any organization that is searching for an executive who can improve their marketing and achieve profitable growth over the short and long-term."

Dr. Gerald Heeger
President
Whitney International
University

"Pat McGraw is one of the best strategic minds I've encountered in my 25 years in the industry. Pat is able to coordinate and complete on time, on budget, on plan. All with the eye constantly on ROI, and fine tuning the program as the results are analyzed."

Jeff Armstrong
Program Manager
Lowe's Home
Improvement

"We hired Pat at UMUC to bring a fresh look at how we branded ourselves and, subsequently, marketed that brand to the world. Pat brought energy, creativity, integrity and ... most important ... results."

Dr. Robert Myers
President
Daniel Webster College

"Pat understands how to attract and retain profitable customers to your business. His ability to develop unique solutions based on customer needs and your company's available resources delivers highly successful results. If you need help attracting and retaining profitable customers - Pat's your guy!"

Dudley Stevenson
Managing Partner
DWS Associates

"Double digit growth in new student enrollments, stronger student retention and a more profitable and productive enrollment management effort. Pat has helped us (UMUC) build a student recruitment and retention process around our resources and our culture as well as the needs and expectations of our prospective and active students."

David Freeman
Director of Marketing
Strayer University

"Pat combines solid direct marketing know-how with a keen understanding of higher education as a business practice very effectively. His expertise and insights in these two areas let to great work for UMUC."

Lisa Magerl
Vice President, Account
Director
RTC Relationship
Marketing



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SERVICES

Sales and Marketing Optimization

Provides your organization with specific recommendations for immediately improving sales and marketing performance in key areas such as conversion and retention rates, referrals, and average order size.

Developing the Action Plan

Provides your organization with a detailed sales and marketing plan, developed in a collaborative environment that builds consensus throughout your organization. This service includes a 2 to 3 day workshop as well as coaching—please contact me for your personalized proposal.

Interim CMO

For organizations that need sales and marketing leadership—but aren't ready to make an immediate full-time commitment. This option offers you immediate access to the expertise you desire with a lot less strings.

Additional Services

Market Research, Business Intelligence and **Analytics** (lead scoring, segmentation predictive modeling, marketing dashboards, campaign performance), **Campaign Management** for new customer acquisition and nurturing, retention and loyalty, referrals, launching new products, entering new markets and attracting new audiences.

Call 410-977-7355 today for your FREE consultation.