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Marketing Infrastructure

Sales Roles for Everyone in Your Organization



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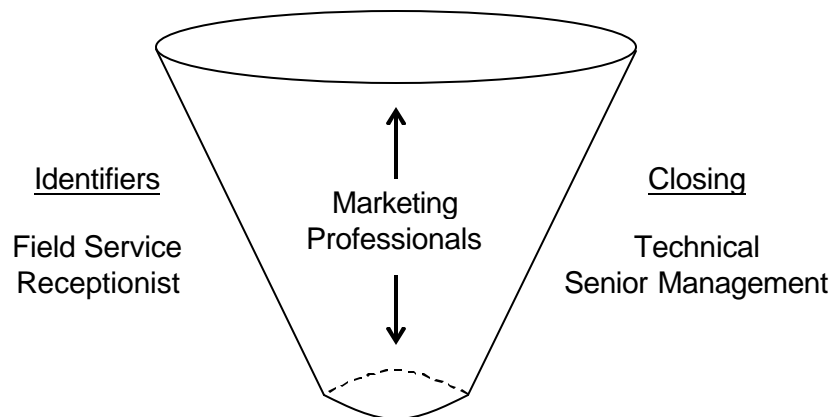
Why Marketing Infrastructure?

A lot of organizations eventually reach a brick wall in terms of their growth. What's brought them initial success doesn't work for continuing their expansion. They eventually come to realize that they need something more formalized, more substantial, more workable. They need marketing infrastructure.

A big piece of this concept is to get everyone—from the very top to the very bottom—of your organization selling. While a junior level staff member may not deliver a formal sales presentation, they should be able to explain what your company does to a prospect they need on the job site. They should also be listening and helping to identify the next project—even if they are still in the middle of a current one. In short, the more your staff takes responsibility for selling, the better you'll meet your client needs, win even larger projects and have enough work for everyone.

This model suggests one way you might organize the different marketing and sales roles and responsibilities. While marketing professionals are responsible for moving projects through the funnel, field service and receptionists should help identify leads and technical staff and senior management should help write proposals, present recommendations and close the business.

Staffing the Sales Funnel



Marketing and Sales Roles

To help you accomplish your marketing goals, all employees should be expected to play a key role in promoting your business to the best of their abilities. Of course, you should have different levels of expectations for each lever of employee. Obviously, more senior managers and supervisors should be expected to do more marketing and selling. Let's look at some possible responsibilities for each level.

Field Service

1. Show your company in a positive light.
 - Be ambassadors (cordial).
 - Follow the dress code (no competitor's tee shirts)
 - Wear a clean uniform.
2. Respond to questions that occur in the field.
3. Describe what you are doing now on your current job. (Why you're there)
4. Describe what your company does and its areas of expertise.
5. Don't talk about private client matters or detailed specifics related to the job site.
6. Don't say who the client is (unless they want you to tell everyone).
7. Be able to give intelligent answers to questions. (Know the project name and number that you're working on.)
8. Attend continuing education programs and represent the company in a positive light.
9. Help identify potential projects.
10. Become (or stay) a member of professional community associations.
11. Carry a packet of your company's brochures with you (keep them clean so you can give them to the client or others who request it on the job site).

12. Carry your business cards.
13. Report potential clients and projects back to your supervisor.
14. Don't make any promise until senior staff can check it out.

Technical Staff

Do everything the Field personnel are expected to do, plus:

1. Offer a slightly more detailed explanation of the projects that you're working on.
2. Have your elevator presentation memorized and well-practiced.
3. Tell your supervisor about any leads you've found, but also refer those leads to the right department.
4. Follow-up with clients and prospective clients to close the loop on any leads that gave you.
5. Know everything your office does.
6. Become (and remain) a member of a professional association.
7. Sign up for leadership positions within this association(s).
8. Contribute to both internal and external newsletters (write one article a year).
9. Help distribute news articles to clients and prospective clients by passing them out or sending them in the mail along with a personal note.
10. Be aware of any contact you may have made who might be good prospects for your company.
11. As you find contacts, keep their information and sign them up to receive your newsletter.
12. Fill out a contract form.

Receptionist

Do everything the Field personnel are expected to do, plus:

1. Never say, “We don’t do that.”
2. If possible, try to put a client or caller in touch with a live person—not an answering machine.
3. Route questions to the right person.
4. Attend internal information sessions.
5. Attend in-house marketing training programs.
6. Memorize the Elevator Presentations and be able to clearly communicate it in person and on the phone.

Project Manager

Do everything the Field and Technical Staff personnel are expected to do, plus:

1. Become (and remain) a member of client organizations (Rotary or Chamber of Commerce).
2. Follow-up on former clients (periodic telephone calls, meetings, etc.).
3. Know some personal facts about your clients (what they like to do, their spouse’s name, number of children, etc.).
4. Strike a balance between mailing personalized newsletters and making follow-up telephone calls.
5. Be flexible and do what makes the most sense for the current or prospective client (send an email instead of calling if the email will work better).
6. Use a personal touch.

7. Take any opportunity to get face-to-face with your client
8. Manage proposal tracking (make the follow-up call after the proposal is delivered).
9. If we lose a proposal, make a follow-up call to find out why. Record results on a contact form.
10. Make a copy contact report and post it in Outlook so everyone can be updated.
11. Write and prepare coherent proposals.
12. Deliver Chamber of Commerce or association presentations (or at least be present to answer questions while someone else does the presentation).
13. Whenever possible, meet with a client and walk them through your proposal.
14. When you're part of a team project, effectively present your own service area.
15. Become (and stay) involved in some level of non-work related social activity that employees like (golfing, fire department, sports, clubs, etc.).
16. Be "seen" in other social settings in addition to professional meetings.
17. Entertain clients.
18. Attend higher level marketing, selling and communication training programs.
19. Take the opportunity to close the deal if it comes up.
20. Whenever possible, walk out with a signed contract.
21. When appropriate, ask clients to introduce you to other members of their organizations.
22. Always ask new or prospective clients, "How did you hear about us?"

23. Send timely, accurate invoices.

Senior Manager

Do everything the Field, Technical Staff and Project Manager personnel are expected to do, plus:

1. Review proposal presentations.
2. Take the lead role in presentations.
3. If the project requires a number of disciplines, set the process in motion.
4. Coordinate interoffice projects.
5. Assign project managers that are compatible with clients.
6. Keep an eye on staff and project people.
7. Mentor younger staff on projects and marketing.
8. Meet your minimum amount of new business requirements/goals.
9. Interact with upper echelon of our clients.
10. Seek opportunities to position your company as the experts.
11. Seek out leadership roles in associations.
12. Encourage your staff to become strong marketers who are comfortable with their roles.
13. Make marketing a fun and energizing activity at the company.
14. Praise employees who do a good job with their marketing efforts.

15. Champion a project. Buy-in to a project and sell it.
16. Conduct a periodic analysis of the marketing plan and explore ways that it can be improved.
17. Provide suggestions and input into the future direction of the company.

Marketing Professionals

1. Stay focused on relationship building.
2. Be a big picture person.
3. Put a personal touch on all marketing efforts.
4. Attend multiple events (associations and networking).
5. Provide structure on SOQ's rather than proposals.
6. Become more involved in lead development.
7. Become more focused earlier on in the marketing and sales pipeline.
8. Be in charge of the contacts database.
9. Be familiar with business from all the offices.
10. Handle multiple proposals from different fields.
11. Build coordinated proposals with one voice.
12. Conduct periodic contact with clients.

13. Review what is going on.
14. Make follow-up calls to client service cards.
15. Follow-up on trade show leads.
16. Man the hospitality suite at trade shows.
17. Handle all press releases.
18. Keep track of the number of new clients and the number of proposals generated.
19. When applicable, provide mentoring or training to other employees.