



Marketing Plan Audit

www.eXubrio Group.com

Paul McAfee – Buffalo, New York

Why eXubrio Group?

We know how to get sales growth with tight financial controls.

We built eXubrio Group on the following three beliefs:

- Marketing must deliver sales.
- Sales must deliver profitable revenue.
- You should spend less for both.

Our mission is to help companies improve their marketing and sales effectiveness to deliver greater return on their marketing investments.

The Marketing Plan Audit

- Assess Outbound Marketing
 - Activities
 - Expenses
 - Measures and Results
 - People
- Report
 - What works & what doesn't
 - Final report is structured so that the next steps are obvious

Ongoing consulting support is available when desired by the client.

Inbound vs. Outbound Marketing

- **Inbound Marketing**

The front end of product development

- Customer needs research
- Definition of new product opportunities
- Value Proposition development
- New product development processes
- Market segmentation

Inbound Marketing leads to new products or services.

Inbound vs. Outbound Marketing

- **Outbound Marketing**

What most people normally associate with the word “marketing,” such as ...

- Advertising
- Public Relations
- Pricing & Promotion
- Sales Tools
- Trade Shows
- Direct Marketing
- Lead Generation & Lead Qualification
- And so on ...

Outbound Marketing sells existing products and services.

The Marketing Plan Audit

- Concentrating on Outbound Marketing ...
 - Evaluate current marketing, lead generation, and sales support activities
 - Assess expense budget and actual expenses supporting these activities
 - Examine measures that are in place to determine effectiveness
 - Report on alignment between marketing expenses, sales support, and results

The Marketing Plan Audit

- Following assessment of existing Marketing programs ...
 - Deliver alignment report
 - Develop and present a revised plan that better aligns activities and expenses with measurable revenue generating results
 - Discuss next steps to implement new marketing programs

You have a roadmap to improve your marketing efforts.

How a Prospect Becomes a Customer

To become a customer for a business product or service, a prospect must go through six Behavior Steps – Here are 1 – 3 ...

1. **Awareness** – The prospect becomes aware of your product or service.
2. **Interest** – The prospect identifies your solution with an existing or anticipated problem, taking enough time and energy to begin to consider your communications.
3. **Intent** – The prospect invests sufficient time and energy to understand your marketing and sales messages. The prospect starts to consider purchasing from you.

Imagine these six steps for the last time you bought a car.

How a Prospect Becomes a Customer

Behavior Steps 4 - 6 ...

4. **Trial** (or Evaluation) – If your product has a trial opportunity, the prospect enters into a trial agreement and actually tries to use your product. If your product doesn't have a trial opportunity, the prospect takes the time to evaluate your product with respect to a known problem he or she needs to solve.
5. **Purchase** – You make your first sale to the prospect.
6. **Retention** (or Repurchase) – The prospect continues to use and pay for your service, purchases replacement product, buys more from your product line, or returns after the original purchase has depreciated and makes a new acquisition from you.

Imagine these six steps for the last time you bought a car.

The Marketing Plan Audit Process

- We will break your Marketing and Sales support activities down into the six stages
Awareness > Interest > Intent > Trial > Purchase > Retention
- We will work with your Marketing, Sales, and Business Development teams to optimize current expense allocations to drive results
- We will help you decide how to realign these expenses to get prospects to move through these six stages to become – and remain – your customers

Benefits of the Marketing Plan Audit

- Understand how your marketing budget is being used
- Decide if your marketing investment can deliver the revenue growth results you need
- Realign expenses (as required – cut) to improve results
- Establish ROI performance measures for marketing expenses
- Create marketing programs quickly to improve sales and achieve revenue objectives

The comfort that you know your marketing expenses are working to achieve your business goals.

Appendix

- Marketing Plan Audit Example
- Partial Client List

Marketing Plan Audit Results Example

Category (\$000)	2000	2001	Change
Print, Radio & Yellow Pages	\$2,917	\$1,000	-66%
Direct Mail	\$262	\$662	+153%
Trade Shows	\$193	\$218	+13%
Sponsorships (Includes Radio Spots)	\$267	\$0	-100%
Chambers & Associations	\$38	\$25	-34%
Web	\$92	\$85	-8%
PR	\$43	\$36	-16%
Premiums & Customer Meeting Incentives	\$85	\$206	+289%
Total	\$3,897	\$2,232	-42%

These are actual expense changes by key **Activity** category.

Marketing Plan Audit Results Example

Behavior (\$000)	2000	2001	Change
Awareness (Branding)	\$2,160	\$348	-84%
Interest (Branding)	\$1,216	\$449	-63%
Intent (Customer Asks to See Sales Rep)	\$1,133	\$1,076	-5%
Evaluation (Sales Rep Meets Customer)	\$148	\$627	+324%
Purchase (Sales Rep Closes)	\$0	\$80	NA
Retention	\$0	\$0	NA

These are the actual expense changes by *Behavior* category.

Partial Client List

- Cognigen
- Contract Staffing – The Alcott Group
- Danaher
- Eastman Kodak Company
- Millennium Funding
- Niagara Thermal Products
- Protronica Inc.
- Rexnord Corporation
- SofTrek
- SumoKids Foundation
- Summer Street Capital Partners
- TelePacific
- Trustfile
- VoIPSupply.com
- Entrepreneur in Residence at:
 - University of Rochester Office of Technology Transfer
 - SUNY University at Buffalo Technology Incubator