

HOW TO CHOOSE

THE RIGHT

MARKETING

COLLATERAL

FOR EACH STAGE OF
THE BUYER'S JOURNEY





TABLE OF CONTENTS

Introduction	3
Stage 1: Awareness	4
Brochures	5
Sell Sheets/White Papers/ Leave Behinds	6
Videos	8
Social Media Graphics	9
Landing Pages	9
Guides	10
E-books	11
Stage 2: Consideration	12
Case Studies	13
Infographics	15
Emails	17
Stage 3: Decision	18
Pitch Decks	19
Proposals	21
Stage 4: Loyalty	23
Newsletters	24
Magazines	24
Annual Reports	25
Social Media Graphics	25



INTRODUCTION

With all the different types of marketing collateral in the world, it can be challenging to figure out which sales enablement materials are best for your business. Depending on the industry you serve and the products and services you offer, some pieces of marketing collateral may be more effective at generating leads than others.

Marketing collateral is an incredibly powerful asset to integrate into your B2B lead generation strategy. With the right marketing collateral, you have the opportunity to guide prospects through every stage of the buyer's journey. Throughout this guide, we'll discuss each step of the purchasing funnel and highlight the different types of marketing collateral you can use for your appointment setting and digital marketing efforts.

STAGE 1: AWARENESS

During the awareness stage of the buyer's journey, prospective businesses are introduced to your company as a potential solution to their pain points. Prospects may or may not be aware that they have pain points with their current B2B service provider in the awareness stage. However, sales reps are trained to ask key decision-makers (KDMs) open-ended questions to help them identify weaknesses in their current solution.

The awareness stage comes after the initial point of contact between a sales rep and a prospective business. This first point of contact could be by phone call, email, trade show, or networking event. During this initial conversation, sales reps have the opportunity to learn about a prospect's current B2B solution and discuss how your company's product or service could be an alternative solution for them. This allows your company to build brand awareness. If something goes wrong with their current provider, your company should be the first alternative service provider that comes to their mind.

In the awareness stage, your sales reps should give the prospect an overview of your company and what you have to offer businesses in similar industries. Awareness stage marketing collateral should be problem-focused to determine their pain points with their current provider.

Sales enablement materials in the awareness stage should be educational and informative. Presenting informational content to prospects eases them further down the sales funnel. If you come off too strong with "sales-y" marketing collateral, you could immediately turn off the potential buyer before they even give your business a chance.

Here are some crucial marketing collateral assets that companies can present to prospects during the awareness stage:

Brochures

**Sell Sheets/White
Papers/Leave Behinds**

Videos

**Social Media
Graphics**

**Landing
Pages**

Guides

E-books



Brochures

When people think of sales enablement materials, a brochure is typically the first asset that comes to mind. Brochures are great sales and marketing collateral for the awareness stage of the buyer's journey because they can be used to cover an overview of topics. They can be designed to introduce a company, the products or services it offers, and the benefits it provides for ongoing customers.

The main goal of a brochure is to capture the attention of your target market, promote your company, product, or service in a creative way, and build trust between your company and a prospect. Brochures are an effective form of marketing collateral because they are cost effective, easy to digest, and great for presenting your company's brand.

One of the most significant benefits of brochures is the unlimited number of instances you can use them. For example, many companies

distribute brochures to prospective businesses at networking events, conventions, and trade shows. In addition, when paired with B2B appointment setting services, businesses can also bring brochures to sales appointments set by their business and sales development reps. This piece of marketing collateral is significant for B2B sales presentations because it allows prospects to reflect on the conversation once the meeting is over.

While many companies like to bring physical copies of brochures to give to prospective businesses, brochures can also be digitized for easy accessibility. Many companies digitize their corporate brochures because they can be integrated into email marketing campaigns or embedded into their website. This allows prospects to review what your company has to offer on their own time and ensure that they have access to your company's contact information even if the physical copy of the brochure is lost.



Sell Sheets/White Papers/Leave-Behinds

Whatever you choose to call it — sell sheets, white papers, or leave-behinds — these pieces of marketing collateral are great for the awareness stage of the buyer’s journey. This sales enablement asset is similar to a brochure, but it takes a specific product, service, or concept and expands on it in a visually appealing way.

Sell sheets are simple yet incredibly effective pieces of marketing collateral. The idea of a sell sheet is to give prospects a quick snapshot of what products or services your company has to offer. Sell sheets also often include colorful and engaging photos or graphics that capture the eye of your target audience. This image or

graphic should help readers break down complex products, services, or concepts.

Sell sheets are also ideal because having a spreadsheet of each product or service allows sales reps to present a more focused sales pitch to a prospect. As a response, this encourages leads to move further along in the sales funnel.

For example, if you’re a commercial cleaning company that wants to promote the health and safety benefits of disinfection services, a sell sheet can give sales reps additional data and statistics to back up their sales pitch.

EXAMPLE SELL SHEET



Encore Technology Group Keeps Officers Connected

For over 30 years, Encore Technology Group has guided companies through digital transformations that enhance how they do business. Our technical team serves clients of all sizes throughout the Southeast, offering IT implementation, managed services, and support solutions that enable success.



In-House Network Management

Technology is critical for modern law enforcement. Officers need to access reliable information in the field and communicate clearly among themselves and with dispatchers. A local law enforcement agency's network operations were being managed by a major and an assistant chief, which was taking valuable time away from their other duties. With the assistant chief's retirement approaching, the agency needed to find a sustainable alternative.

Outsourced Solutions

Fortunately, the agency already had a long-standing relationship with Encore Technology Group. We'd worked together on several single-project implementations, and they were impressed by our team's customer-first, end-to-end approach. Upon becoming the agency's ongoing managed services provider, we ensured their mobile endpoints stayed secure and connected to their network 24/7/365 as officers traveled throughout the county.

Consistent Connections

Encore continues to fully support the agency's network operations, handling everything from end user support to upgrading hardware and software as necessary. Senior officers no longer need to take time out of their busy schedules for network maintenance, and officers stay connected when they're out among the community. We're proud to continue a partnership that keeps the police safer while protecting and serving the public.



The best technology integrator upstate. The entire team is competent and professional, and communication is superb. From project management to integration and sales and pricing, Encore moves the bar to the top mark.

Chris Lienau

(888) 983-6267 • encoretg.com

141 Grace Drive • Easley, SC 29640



Videos

Studies show that viewers retain 95% of a message when they watch it in a video, compared to 10% that read it in copy format. Since videos play such a crucial component in the user and customer experience, it makes sense why they're such a significant piece of marketing collateral for the awareness stage of the buyer's journey.

Many B2B companies like to use videos during the awareness stage of the buyer's journey to highlight client testimonials. Videos for client testimonials are ideal because it enables potential buyers to put a face with a company and envision themselves in your client's shoes.

Here's an example of a video we send to prospects in the awareness stage:



OR POINT
YOUR PHONE'S
CAMERA HERE!

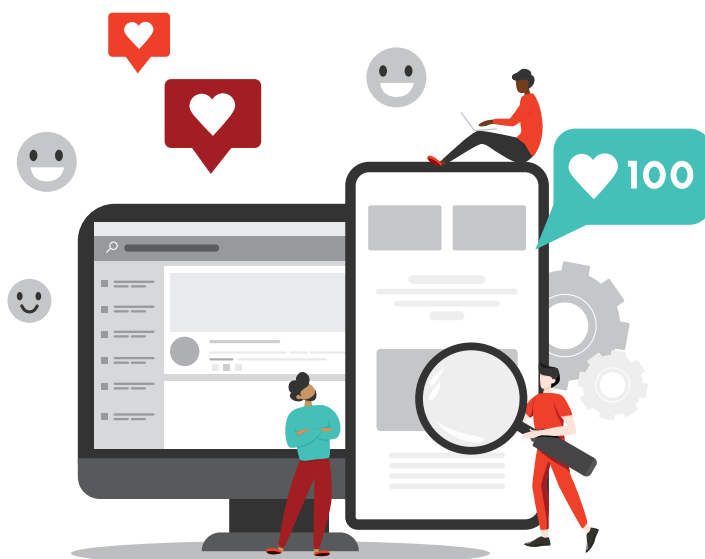




Social Media Graphics

Social media is an excellent platform for prospects to find your company online. By sharing engaging marketing collateral on social media, potential customers can view your content to get more comfortable with your company and learn about the products and services you have to offer.

Social media marketing collateral can range from profile pictures and headers to social posts. Many B2B businesses take advantage of marketing collateral for their social media profiles because they provide a visually appealing call to action for prospects. Calls to action on social media graphics encourage readers to check out your website, whether it's a product or service page or a thought leadership blog.



In addition to eye-catching graphic design, social media marketing collateral could also include promotional videos. Promotional videos are great for social media content because they're engaging and can tell an impactful story in a short amount of time. Recent studies discovered that by 2022, online videos will consume more than 82% of Internet traffic, which is 15% higher than it was in 2017. By sharing promotional videos on your social media pages, you encourage prospects to feel positive emotions toward your company.

Landing Pages

Landing pages are standalone web pages designed specifically for marketing campaigns. As users type specific keywords into search engines, they can find your landing page at the top of the results. Landing pages are ideal for the awareness stage of the buyer's journey because users are actively searching for additional information. Having a landing page builds credibility and brand awareness for your company's products or services.

Web pages serve to accomplish many goals. They encourage users to navigate from one page of the site to another. This allows B2B marketers to track where users are engaging with the site and where they're dropping off. However, with landing pages, marketers aim for users to view the landing page and insert their contact information to receive additional marketing materials. This encourages users to engage with the company's email marketing content actively and eventually convert them from leads into long-term customers.



Guides

A guide is a piece of marketing collateral that takes a single topic and expands on it. Guides are designed for users interested in learning more about a specific product, service, or concept. Many marketing collateral guides are structured as “How To” guides because they provide greater insight for users on how to achieve specific tasks.



Guides are incredibly user-friendly and give readers an easy-to-digest explanation of various concepts. For example, this guide is designed to teach B2B businesses what pieces of marketing collateral are best for each stage of the buyer’s journey. While we’re not necessarily going in-depth about how to create pieces of marketing collateral, we’re offering you insight on what sales enablement materials can help guide leads through every step of the buying cycle.

Guides are free, exclusive materials for interested readers. While they are free materials, if users want to access a guide, they must enter their contact information, including their name, phone number, and email address. This enters the prospect into a sales pipeline to nurture the lead and hopefully convert them from a prospect to a customer.

But wait—how do I know what my target audience is interested in learning about? As you brainstorm topics for guides, consider asking yourself the following questions:

- Would most people know how your product or service works?
- What challenges are prospects facing in your target market?
- What questions do customers have about the product or service you offer?
- Have you recently updated a new product or service? Does it contain new features?

If you have a long string of answers to these questions, a guide may be a valuable piece of your marketing collateral to integrate into your lead generation strategy.





E-books

E-books are similar to guides; however, they provide an overview of many topics. An e-book is a collection of guides or checklists that relate to each other under the same umbrella. They are digital books that people access when they want to learn more about a collection of products, services, or concepts.

For example, if you're a roofing company with numerous guides about the specifics of each roof type, an e-book would take all the information from those guides and compile them into a single document. This e-book would benefit business owners and facility managers who want to learn more about their commercial roofing options. By completely understanding each roof type, they can choose a roofing solution that works best for their business.

E-books are significant marketing collateral for the awareness stage of the buyer's journey. If a prospect wants to learn more about a product, service, or concept, they can download a free e-book online to gain more insight. In return, an e-book helps develop brand awareness and establishes your company as a credible industry leader in the subject matter.

E-books provide informative and valuable content that guides readers to learn more about the industry, your company, and the products and services you have to offer. E-books are also great lead generators. Like guides, users become leads because they must enter their contact information to access an e-book. This enters them into the pipeline to receive sales calls and email marketing assets.





STAGE 2: CONSIDERATION

As prospects move into the consideration stage, they're aware of their problem and start to take additional measures to discover alternative solutions. During the consideration stage, buyers research companies that could offer them a high-quality solution. They compare the differences between competing companies, such as the products or services provided, quality of customer service, pricing, and more.

During this stage of the sales buyer's journey, your goal should be to create content focused on providing a solution for the prospect. Rather than explaining to the prospect why your company is better than competitors, position your company as an industry expert. When you share content that presents your company as an industry expert, you build trust with the prospect. In return, this pushes them further toward the end of the sales funnel.

Here are some of the most impactful pieces of marketing collateral for the consideration stage of the buyer's journey:

Case Studies

Infographics

Emails

Case Studies

Case studies are vital marketing collateral for all stages of the buyer's journey, but especially in the consideration stage. Case studies are designed to showcase your company's success to potential customers. These sales and marketing assets strive to grab the attention of prospects and have them envision themselves as your customer.

As you develop a case study, it's important to follow this structure:

- Highlight the problem the client encounters
- Present the client with a solution
- Explain the outcome of implementing your company's solution
- Showcase a client testimonial that explains how your company impacted them
- Provide an overview of your company's mission and values

Case studies can be presented in various ways. However, they are proven to be most effective in the form of a video. If a prospect is on the fence about whether or not they want to partner with your company, a promotional video can add emotion and guide them to feel a personal connection with your business.





EXAMPLE CASE STUDY



Optistar Celebrates 20-Year VERTEX Partnership

PROBLEM

The Vertex Companies is an international firm that provides architectural, engineering, and construction consulting. VERTEX lends its expertise to a diverse range of project types, including forensics for construction and design disputes. We also deliver design, building, and environmental solutions for commercial, residential, and industrial clients. The company partnered with Optistar in 1999 to manage the IT systems that are vital to its professional operations.

SOLUTION

At Optistar, we provide AEC firms like VERTEX with managed IT and forensic IT services, cybersecurity, and software engineering for the planning, analysis, and design of architectural, civil infrastructure, and land development projects. We offer surety forensics, strategic IT infrastructure, and security assessments to help firms navigate complex data. Optistar can deliver the onsite resources to collect secure project data in accordance with all legal requirements.

RESULT

We value VERTEX as a long-term client because we can provide its team with the customized tools needed to be a global leader in the AEC field. By helping VERTEX increase its productivity and effectiveness to grow as an organization, we are able to evolve and diversify our services for long-term success. Optistar is proud to have served VERTEX for most of our time in business, and we look forward to our continued partnership as we collaborate on future IT challenges.

Why Optistar?

Optistar Technology Consultants delivers value-driven IT and cybersecurity solutions to businesses around the globe. Since 1996, we've maintained a 97% customer retention rate. Our clients love us because we excel at providing strategic IT services that transform how business gets done.



The Vertex Companies has worked with Optistar since 1999. Optistar has always done an excellent job of maintaining our systems within workable budgets. I look forward to continuing our work together in years to come."

Jeffrey E. Picard, President
The Vertex Companies, Inc.



Infographics

An infographic is a collection of images and visualizations that present readers with valuable information. This information can be about your industry, company, processes, or product and service offerings. This piece of marketing collateral should have minimal text and be easily digestible by someone unaware of your company or the industry you serve.

For example, managed service providers use a lot of industry-specific jargon that only makes sense to individuals with a basic understanding of information technology. With infographics, MSPs can illustrate complex processes and systems for prospects. Even if the infographic doesn't show the full scope of the subject matter, it at least gives them a better understanding of the systems they work with and why they're necessary for everyday business operations.

Many B2B companies create infographics for the following reasons:

- Give a quick overview of a specific topic
- Expand on complex processes or concepts
- Present significant research findings or survey data
- Provide an overview of a lengthy blog post or annual report
- Compare and contrast different industry options or solutions
- Bring attention to an issue or cause

One of the best things about infographics is that they can be used in every industry, making them a versatile piece of marketing collateral. Many companies choose to showcase infographics on their website or social platforms to give users greater insight into their company, industry, product, or service.

Each infographic your marketing team makes should aim to achieve a goal. When choosing what type of infographic you want to use for your sales and marketing efforts, think about the response you want from prospects. Here are some of the most common types of infographics used by B2B companies:

Statistical: Statistical infographics are designed to present numerical information, such as data and surveys. These infographics appeal to a reader's sense of logic, persuading them to trust your company and the research you provide.

Informational: Informational infographics are built to inform readers about a specific product, service, or concept. These are strictly educational and are structured to teach the prospect what your company does and what it represents.

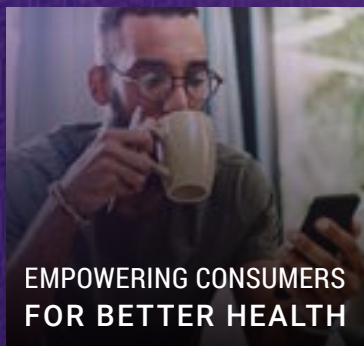
Timeline: Timeline infographics are intended to show the history of a particular idea. In addition, they can be used to show prospects anticipated timelines for different projects.

Process: Process infographics give readers insight into how a product, service, or concept works. This type of infographic is ideal for software companies because it can explain how their program works in an easy-to-follow approach.

Comparison: Comparison infographics show readers their options and encourage them to make logical decisions based on their current situation. For example, when comparing your company to a competitor, you can compare product or service offerings, prices, customer review ratings on Yelp or Google, and more.



EXAMPLE INFOGRAPHIC



EMPOWERING CONSUMERS FOR BETTER HEALTH



ABOUT US | Empowering consumers to make more informed decisions about their health at the point-of-care has the power to change everything: improve the experience, increase adherence to medication, and lower costs. What if your members could have the choice, transparency and control they need in real-time, **right from their mobile device**, to make more informed decisions for their health?

PLANS DEMAND MORE

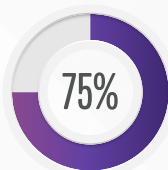


Only **1/3 of employers believe** their PBM's business model is aligned with the interests of their company.

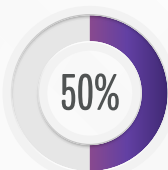


Nearly **2/3 of employers agree** that PBMs lack transparency about how they make money.

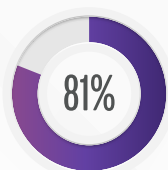
CONSUMERS DESERVE MORE



75% of consumers recall getting a prescription that **cost more than they thought**.



50% of consumers admit to leaving the pharmacy empty-handed because a **prescription was too expensive**.



81% of consumers want shopping for healthcare to be **as easy as shopping for other services**.

SOURCES:

1,2: 2018 Real-Time Benefit Check National Adoption Scorecard, CoverMyMeds
3: The 2020 Healthcare Consumer Experience Index
4,5: Pharmacy Benefit Management, March 9, 2018
6 - 10: Prescriptive Health 2020 - 2021 book of business and research results

PRESCRIPTIVE HEALTH DELIVERS MORE



Choice:
Members who acted on our real-time alerts spent 6x less on a prescription drug.



Member Savings:
The median savings per member per prescription was \$92 for those who acted.



Member Satisfaction:
9/10 Prescriptive Health members would feel disappointed if they no longer used MyRx.io text alerts.



Client satisfaction:
100% of our current clients would recommend us to others.



Transparency:
100% pass-through of rebates and discounts, with up to 40% cost savings for employers.



Emails

Even with the growing number of communication channels out in the world, email marketing remains the most powerful marketing tool. When customers are in the consideration phase of the buyer's cycle, they're more open to opt in to an email marketing campaign. An effective email marketing campaign could push them to the next stage of the purchasing cycle.

Email as a piece of marketing collateral can be used across all sales funnel stages, but it is most effective during the consideration stage. Emails are flexible because they can be used to present a new product or service, deliver sales promotions, or promote educational content.

Decision-makers receive promotional emails all the time, so what makes your email stand out from the rest? When building an email marketing campaign, making each email personal to the specific prospect in the sales pipeline is essential. Crafting personal emails that mention a prospect's name in the subject line reduces the risk of them viewing the email as spam. When a prospect's name is mentioned in the subject line, they immediately feel more connected with your company. Since you included their name, they perceive the email as personal and specifically written to meet their consumer needs.

Writing the perfect email is time-consuming, and so is finding the perfect time to send them to each prospect. Integrating email marketing software into your email marketing operations

ensures that emails are sent to the prospect when it makes the most sense for them. This enables your sales and marketing team to focus on crafting the email message rather than remembering to send it.

Using email marketing software also gives you the opportunity to send prospects emails that align



with their business needs and current stage in the purchasing funnel. In addition, email marketing software enables you to monitor the performance of the email so you know what prospects are resonating with and what they're sending to their Junk folder. This allows you to review your email marketing collateral and brainstorm ways to adjust the template or messaging.



STAGE 3: DECISION

The decision stage of the buyer's journey is when a prospect is narrowing down their B2B service provider options to see which fits best with their company's short- and long-term goals. In this stage, prospects directly compare your company to a competitor, so you must have marketing collateral that helps you stand out.

Here are some of the most significant pieces of marketing collateral you can use at the decision stage of the buyer's journey:

Pitch Decks

Proposals



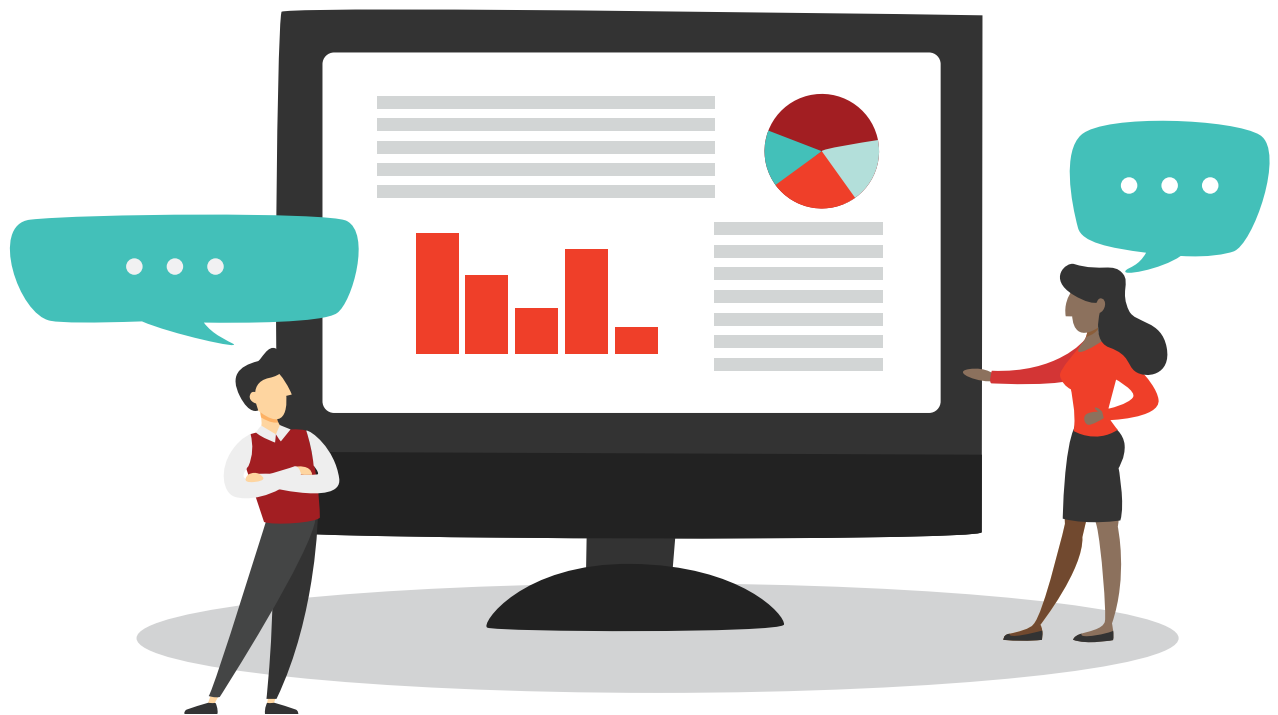
Pitch Decks

You've spent months prospecting, qualifying, and nurturing leads—and now it's your time to shine. With a high-quality pitch deck for your sales presentation, you have the chance to capture the attention of the prospect and their business.

A pitch deck—also known as a sales presentation—could be the make or break factor of converting a lead into a customer. When you design your pitch deck, make sure you focus on the prospective business's problem and how your company can provide them with a solution, rather than just selling your business. A comprehensive

understanding of the lead allows you to craft your pitch deck to align with what they're looking for in a B2B service provider.

As you design your pitch deck, highlight your key differentiators without putting too much text on the slide. If you put too much copy on each slide, you risk turning the prospect's attention away from you and directing it to the presentation itself. This could cause the lead to not listen to what you have to say, making it feel more like a presentation than an open conversation.





Pitch Decks (cont.)

When designing a pitch deck, structure and the flow of the conversation are everything. As you construct your sales presentation, consider organizing it like this:

Slide 1: Presentation Overview

This slide will provide an overview of everything you'll discuss throughout the sales meeting.

Slide 2: Company Introduction

In this slide, you have the opportunity to tell the prospect the history of your company, who you are, and what your business represents. This would be an excellent time to showcase a short promotional video about the mission and values of your company.

Slide 3: Identify the Problem

This slide is the reason they've agreed to meet with you today—there's a problem. During this stage of the pitch deck, you'll acknowledge what they're dealing with and empathize with the prospect. Remember to ask questions during this part of the presentation to gain a better understanding of their pain points.

Slide 4: "Why Us?"

This slide allows you to explain why your company would be the best solution for the prospect. This could include discussing client testimonials and how you've been able to aid similar businesses when they were experiencing problems.

Slide 5: Product and Service Offering

This slide focuses on the products and services your business offers. In this section, remember to specifically highlight the products and services they're interested in.

Slide 6: Meet the Team

This slide introduces the team members that the prospect would be working with during the partnership. This slide is crucial for industries in commercial cleaning and other client-facing businesses.

Slide 7: Implementation and Pricing Information

This is the section that most decision-makers are eager to hear about. During this slide, explain what the onboarding process looks like and how much they're expected to pay at the end of each billing cycle.

Slide 8: Conclusion and Next Steps

Once you have all of your bases covered, wrap up the conversation and discuss the next steps. If things go well with the sales meeting, give the prospect a timeline of when to expect a business proposal.

By following this structure, you ensure that you discuss everything you need to without getting off track. Through this presentation, it's essential that you consistently ask the prospect open-ended questions to make it more of a conversation than a presentation. This allows the prospect to feel more comfortable with you and your company.

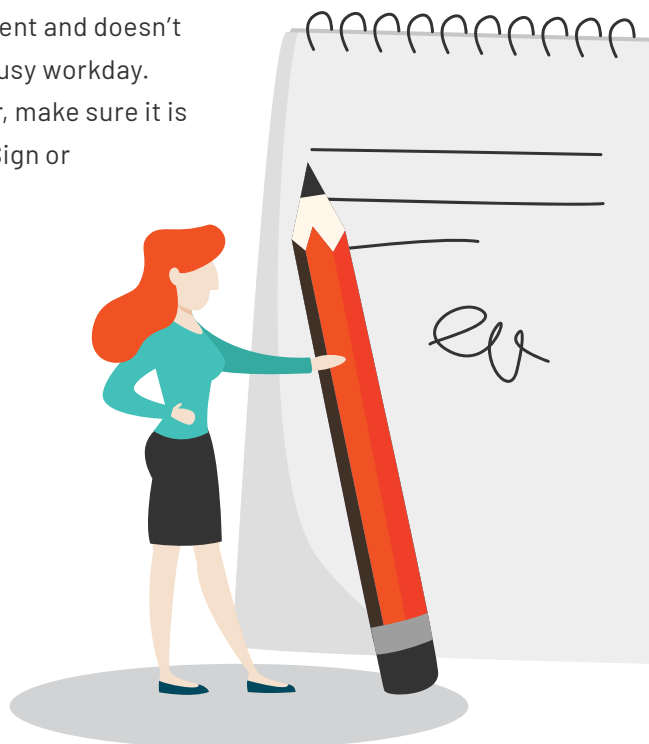


Proposals

After you nail your pitch deck and sales appointment, it's time to submit a proposal to the prospect. A business proposal should be clear, to the point, and easy to read. When sending a client a digital proposal, it should be sent in a PDF format for legibility and simplified signing purposes.

Today, more and more companies require digital signatures rather than handwritten. This is because it's more convenient and doesn't require a potential customer to travel during their busy workday. When submitting a proposal to a potential customer, make sure it is submitted in an eSignature program, such as DocuSign or Adobe Sign.

As you craft your proposal, you must cover everything you mentioned during the sales presentation. This should include project or contract timelines, pricing, and products and services given to the new client. When a proposal is clearly defined, you build trust and set yourself and your new client up for a successful partnership.





EXAMPLE PROPOSAL

TODAY'S AGENDA

- ABOUT YOU
- ABOUT US
- OUR PROCESS
- RESULTS PORTAL
- TEAM AND TOOLS
- YOUR INVESTMENT
- NEXT STEPS

PIPELINE SDR

ABOUT US

Our Mission

We create predictable growth for our exclusive partners by building robust sales pipelines that generate consistent, quality leads.

Who We Are

- St. Louis B2B Business Growth Agency
- Providing marketing services for 1700 partners, over \$100 on Pipeline SDR
- Pipeline SDR
- Pipeline SEO
- Pipeline Digital
- Salesforce Consulting
- Clients in all 50 states
- \$500 team members - \$500 by year end

Industries

TECHNOLOGY
Managed Service Providers, Managed Print Services, SaaS, Software, Telecom

PROFESSIONAL SERVICES
Marketing Recruitment, Real Estate, Accounting

INDUSTRIAL
MNC Commercial Cleaning, Construction, Training, Solar, LDC Heavy Equipment

SPECIALTY
We have worked with 100+ industries

Growth Through Our Process

Revenue 2009: \$54,000,000
Revenue 2010: \$54,000,000
Revenue 2011: \$54,000,000
Revenue 2012: \$54,000,000
Revenue 2013: \$54,000,000
Revenue 2014: \$54,000,000
Revenue 2015: \$54,000,000
Revenue 2016: \$54,000,000
Revenue 2017: \$54,000,000
Revenue 2018: \$54,000,000
Revenue 2019: \$54,000,000
Revenue 2020: \$54,000,000
Revenue 2021: \$54,000,000
Revenue 2022: \$54,000,000
Revenue 2023: \$54,000,000
Revenue 2024: \$54,000,000
Revenue 2025: \$54,000,000
Revenue 2026: \$54,000,000
Revenue 2027: \$54,000,000
Revenue 2028: \$54,000,000
Revenue 2029: \$54,000,000
Revenue 2030: \$54,000,000

7 TIMES

Leader in Business Growth & Innovation

Over 100 Awards in 12 Years

SBM, INC. 2023

PIPELINE SDR

OUR PROCESS: INTRODUCTION

In the **Introduction Phase**, our goal is simple: Have the best possible conversation with your prospect. We get an appointment if an opportunity exists and, if not, leave the door open to build a relationship over time. We reach more decision-makers and collect more information so you can sell more.

Call Result Options: N-Move to Nurture | A-Set Appointments | S-Suspend/Not a Fit

PIPELINE SDR

OUR PROCESS: NURTURE

Our **Lead Nurturing Phase** is about getting useful, relevant content to prospects early in the sales process. Once delivered, it's about developing and maintaining a relationship with those prospects until they are ready to have a conversation about your products.

Call Result Options: A-Set Appointments | S-Suspend/Not a Fit

PIPELINE SDR

PIPELINE SDR PROCESS - WHY?

What it takes to build a Predictable Sales Pipeline

It takes an average of 100 dials to set a qualified appointment

	5-5	5-10	10-15	15-20	20-25	25-30	30+
2009	37.6%	25.8%	14.3%	8.2%	4.3%	2.9%	5.9%
2010	40.7%	24.4%	13.2%	7.4%	4.3%	2.8%	5.8%
2011	37.4%	24.6%	14.2%	8.4%	4.9%	3.4%	7.1%

63.57% of appointments set during attempts 1-10
86.41% of appointments set during attempts 1-20

PIPELINE SDR

OUR PROCESS: APPOINTMENTS

In our **Appointment Setting Phase**, we connect our partners with leads to build and develop relationships. Our partners are converting a high percentage of those connections into closed business.

PIPELINE SDR

OUR PROCESS: CLEANSING

In the **Cleansing Phase**, we confirm who the decision-maker is, identify their contact information, and start gathering critical sales data. As this critical data is gathered, your prospects are either qualified or disqualified pending the result of the qualification surveys they complete.

Call Result Options: N-Move to Nurture | A-Set Appointments | S-Suspend/Not a Fit

PIPELINE SDR

PIPELINE MARKETING COLLATERAL

With Abstract's Pipeline Marketing Collateral, you'll receive marketing materials each month. With the point values shown, customize your package by choosing which assets would be most beneficial to your business. Marketing collateral is ideal for increasing brand awareness and providing information about your product or service. It also sets you apart from the competition and builds salesperson confidence.

PIPELINE SDR



STAGE 4: LOYALTY

All right, you got the prospect's business—now what? Are you just going to forget about them and leave them in the dust? Absolutely not. Now that you scored the prospect as your client, you must do everything in your power to sustain your relationship with them and keep them as your client.

Here are some forms of marketing collateral you can use to nurture your relationship with your customers consistently:

Newsletters

Magazines

Annual Reports

Social Media Graphics

Newsletters

Newsletters are a great way to stay connected with your ongoing client base. This enables them to know what's new with your business and any upcoming products, services, or features to keep an eye out for.

Newsletters are commonly distributed through email marketing campaigns. More recently, however, many B2B businesses are taking an innovative approach to company newsletters. Many companies are designing newsletters as interactive e-books, encouraging readers to engage with content. This can include polls, surveys, and other interactive components.

While newsletters are great for maintaining relationships with customers, they also drive customers to your website. Including calls to action in your monthly newsletters can direct readers to view recent blog posts and learn about new industry trends.



Magazines

Magazines are great pieces of marketing collateral to include brand-focused short- and long-form articles. These articles can tell stories about how your company is making a significant impact on the lives of employees and customers.

Company magazines are designed to cover various topics centered around the brand. For example, if you decide to produce magazines for your mortgage company, your magazine could highlight how you offer a remarkable program for growing Realtors. This could include a case study about how you've helped a Realtor achieve their personal and professional goals. In addition, your Realtor magazine could also highlight how your real estate agents have helped clients find the homes of their dreams.

Magazine marketing collateral for the loyalty phase can also include important announcements about your company or product and service offering. Since there is no standard format for company magazines, marketers can design announcements in a more entertaining, relatable, and trendy way that resonates with their target audience.



Annual Reports

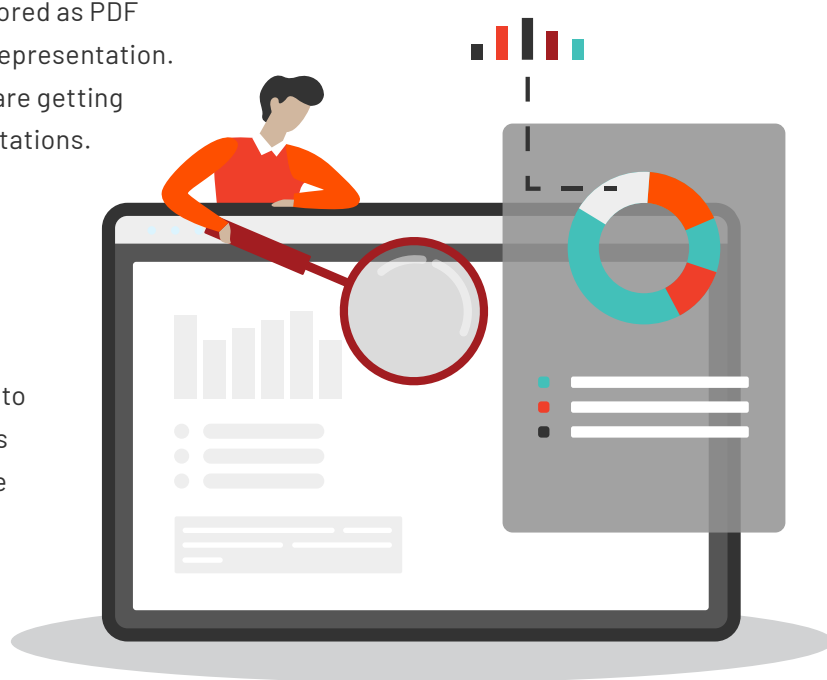
Annual reports are digital industry-focused documents that provide vital statistical and analytical information about your company. Within these reports, data analysts take the gathered information and study the results to provide valuable insight for company employees, stakeholders, and investors.

Data compiled in annual reports typically involves important company information, such as financial metrics, sales figures, and overall business growth. This data allows investors and customers to understand how your business impacts the community, other businesses, and the public.

Traditionally, annual reports are stored as PDF documents with little to no visual representation.

Today, more and more companies are getting creative with annual report presentations.

With advancing software and CRM platforms like Salesforce, companies have the opportunity to take critical company data and transform it into charts, infographics, and other visual aids to help readers further understand its impact. This allows readers to have a better understanding of the data that's presented to them.



Social Media Graphics

While social media graphics are great for the awareness phase of the buyer's cycle, they're ideal for the loyalty stage as well. Presenting a call to action that encourages customers to interact with your social media platforms gives you the opportunity to learn what customers like or dislike about your company and the products or services you offer. This allows your business to make changes to how you operate on a day-to-day basis.



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