

MEASURABLE CUSTOMER-CENTRIC PLAN CAPTURES FUNDING AND ACCELERATES PIPELINE

THE SITUATION

Headquartered in Miami, FL, CONQUEST Technology Services (CONQUEST) offers a broad range of IT Solutions and IT Managed Support Services. The company is a certified partner with a variety of industry leaders, such as Cisco, VMware, Dell, and Microsoft. Microsoft presented CONQUEST with an opportunity to be a “go-to” partner in their region for their new Microsoft Unified Communications (UC) solution. This opportunity would enable CONQUEST to achieve the next level of partnership with Microsoft related building a Unified Communications practice. To realize this opportunity, the company would need Microsoft’s financial support. Funding depended on providing a compelling measurable marketing plan.

“In the past we had a tendency to become very tactical in our approach to the market and realized that our success with this effort and with securing funding would require us to step back and take a different more strategic approach,” recalled Ben Tosado, Vice President of Professional Services, CONQUEST Technology Services.

“We wanted to construct a customer-centric marketing plan to support demand generation that would meet our partner’s requirements for measurability. We had a limited window of opportunity and realized this was not something we could tackle on our own.”

THE NEED

The CONQUEST leadership team had experienced mixed results with their past marketing efforts. This opportunity required a commitment for a sustained

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period of time, and they recognized this would take developing a more comprehensive and strategic plan. “We knew Microsoft was looking for numbers and that we needed to be very buttoned up when we presented the plan,” said Ben. CONQUEST wanted help to

produce a marketing plan directly tied to specific pipeline goals that would capture Microsoft's attention.

THE DECISION

Using their personal partner experience as a reference point, Ben and the team decided to establish criteria for whom to select. Since a significant portion of the company's future hinged on the success of this new line of business, size of the supplier and the cost of the project while part of the criteria were not as important; experience is what mattered. "We wanted a firm with technology experience, a firm that could blend marketing and technology, someone who understood the partner, and had expertise in both strategy and marketing measurement," reflected Ben.

The company focuses on midsize to large organizations in their area. As a member of the local business community CONQUEST prefers to employ local people and suppliers. CONQUEST considered two options to help them with this undertaking: local consultants they had previously employed and consultants they had met at local events.

The team had met VisionEdge Marketing (VEM) when Laura Patterson presented at the CISCO Velocity Partner event that had been held in Miami. Several members of the CONQUEST leadership team had

attended the session and remembered that VEM suggested a process for building the very type of plan they needed. "We decided to interview a number of firms including VisionEdge Marketing even though they were located in Texas. For each firm, we spoke with a number of their customers similar to our organization," explained Ben.

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After reviewing several firms and completing their due diligence CONQUEST was comfortable that VisionEdge Marketing had the experience and expertise they needed. They selected VisionEdge Marketing for the project and finalized the scope of work. A key part of the work included a hands-on two-day working session using VisionEdge Marketing's Accelance™ OutcomeBased Mapping™ methodology.

THE PROCESS

VEM's Outcome-Based Mapping methodology was designed specifically to produce a customer-centric measurable marketing plan. The approach is ideally suited for this project. VEM's Mapping Methodology creates an initial framework (blueprint) of a marketing plan with a focus on producing quantifiable business results.

The process enables organizations to create a plan based on the customer buying process and to establish performance targets for all aspects of implementation: including marketing objectives, programs and tactics. The result of the process is a marketing plan blueprint aligned to specific business outcomes that emphasizes marketing effectiveness and accountability.

The blueprint serves as a visual vehicle and provides direct line of sight from marketing activities and programs to outcome-based measurable marketing objectives and business outcomes. The mapping methodology is often delivered in a two-day onsite strategic working session and this was the case for CONQUEST.

"We have an organization of talented experienced business people who have been through a number of marketing sessions, but this session changed the way we thought about marketing and our entire approach," said Ben. "The customer-centric view introduced our organization to a new

way of thinking and a host of new tactics to consider, such as a customer advisory board and videos that would make our intangible process more tangible to the prospect. This was the first session of its kind that had a process that enabled us to stay focused on what we needed to do to secure the opportunity."

THE RESULTS

CONQUEST would know immediately whether the investment paid off because a critical gate was securing funding from Microsoft. "The blueprint provided an excellent vehicle for developing the presentation to Microsoft. It made it easy for Microsoft to understand what we wanted to do, how we were going to do it, and how we would measure success. We pitched the plan to Microsoft and passed all of their tests with flying colors. Microsoft gave

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us what we asked for and we were ready to begin executing the plan," commented Ben. While securing Microsoft's approval was a critical milestone the next test was whether implementation would yield the results. In addition to helping build the plan, VEM helped identify and bring on an internal marketing resource to support plan execution and maintain continuity. Once the new person was on board, plan execution began. "The plan is working better than we expected. We now have the high class problem of needing more resources to support our new customers," said Ben.

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The pipeline has doubled and the organization is on track to double its UC business, already experiencing a 60% increase. As soon as the company can ramp up to meet the current demand they plan to reuse the process for another line of businesses.

PARTING ADVICE

"We learned a great deal from this experience," revealed Ben. Ben shares these lessons learned:

1. Leverage a planning process. Slowing down to take a methodical approach may be counterintuitive but truly makes a difference in being able to achieve the desired results.

2. Take a customer-centric view. If you don't know, find out how customers use and consume your product.
3. Bite the measurement bullet and set performance and cost targets. Even if you aren't sure of your baseline, set performance targets. Clarifying what you want to produce by a specific period of time within a certain budget is much more helpful than vague ambiguous broad-brushed goals such as generate awareness or increase demand.
4. Plan for success. It can be easy to move into implementation mode forgetting the organization may not be ready to field the results. Anticipate the upside and resource accordingly.

ABOUT VISIONEDGE MARKETING

VisionEdge Marketing (www.visionedgemarketing.com) is a data-driven metrics-based strategic and product marketing consulting firm recognized as a trusted authority in the area of marketing performance management.

The company excels at helping companies strengthen their competitive advantage, accelerate their ability to acquire, keep, and grow profitable customers, and measure Marketing's contribution to business goals. Founded in 1999, VisionEdge Marketing is located in Austin, Texas.

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