Scaling Marketing for Growth

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Session I

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Ascend National

Why me, why this, why now

30 years as a marketing professional

BRANDS WORKED ON

Fisher

Fisher

GLAD
FORCEFLEX

GLAD
Food Storage
Bags

Microsoft

Pringles

Starbucks

Starbucks
STARBUCKS
BREWED

STARBUCKS
BREWED

frappuccino

Starbucks
STARBUCKS
ESPRESSO

Verismo
BY STARBUCKS

Pringles

Popums

Pringles

REI

Microsoft

TEAVANA

Seminar Roadmap

#1. UNDERSTANDING OUR CURRENT CUSTOMERS AND MARKET

- *Who are your current customers?*
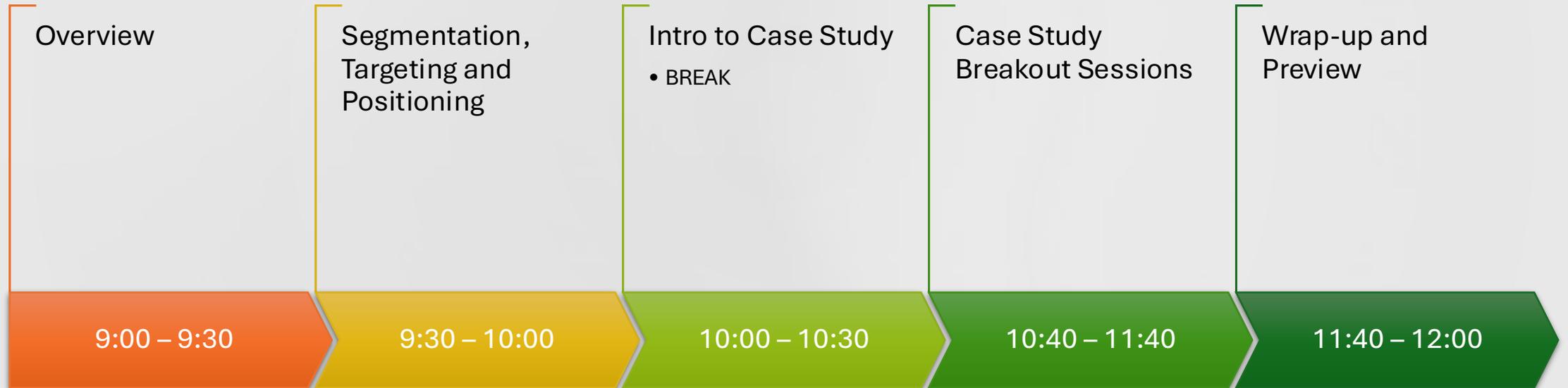- *What patterns do we see?*

- ***Tool- segmentation***

#2. DEFINING OUR POTENTIAL FUTURE CUSTOMERS

- *How might we segment our market?*
- *Who is our ideal customer?*
- *What do we uniquely offer them better than our competition?*

- ***Tool – Ideal Customer Profile***

#3. EVOLVING OUR MARKETING

- *How might we tailor our offering and/or messaging?*
- *How can I create awareness with our future customers?*

- ***Tool – Marketing Audit***

Today's Agenda

Overview	Segmentation, Targeting and Positioning	Intro to Case Study • BREAK	Case Study Breakout Sessions	Wrap-up and Preview
9:00 – 9:30	9:30 – 10:00	10:00 – 10:30	10:40 – 11:40	11:40 – 12:00

Who is here today.

Please put your name, title, and company into Chat.

Poll #1: What is the purpose of marketing?

"Marketing is the process by which a firm **creates value** for its **chosen customers**."

B2B Marketing is…

- Business marketing is concerned with the marketing of goods and services to **organizations**.

- The key distinguishing feature of business marketing is the **nature of the customer**,
- rather than the nature of the product.

Poll #2: What does good/great marketing look like?

Poll # 3: What companies or brands do you admire? Why?

Poll #4: What is your biggest business/ marketing challenge? Why?

Seminar Roadmap

#1. UNDERSTANDING OUR CURRENT CUSTOMERS AND MARKET

- *Who are your current customers?*
- *What patterns do we see?*

- ***Tool- Customer Analysis***

#2. DEFINING OUR POTENTIAL FUTURE CUSTOMERS

- *How might we segment our market?*
- *Who is our ideal customer?*
- *What do we uniquely offer them better than our competition?*

- ***Tool – Segmentation***
- ***Tool – Ideal Customer Profile***

#3. EVOLVING OUR MARKETING

- *How might we tailor our offering and/or messaging?*
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- ***Tool – Marketing Audit***

Let's evaluate your current customer base.

- Do you have a good profile of your customers?

- What are your current target segments? (industry, geo, size)?

- Who are your top 10 customers?

- Do you have concentration risk?

- What are common characteristics of those customers?

Seminar Roadmap

#1. Understanding Our Current Customers and Market

- *Who are your current customers?*
- *What patterns do we see?*

- ***Tool- Review Customer Lists***

#2. Defining Our Potential Future Customers

- *How might we segment our market?*
- *Who is our ideal customer?*
- *What do we uniquely offer them better than our competition?*

- ***Tool – Customer Segmentation***
- ***Tool – Ideal Customer Profile***

#3. Evolving Our Marketing

- *How might we tailor our offering and/or messaging?*
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What is Segmentation?

What is Segmentation?

One view of segmentation by Wendell R. Smith:

"consists of viewing a heterogeneous market …
as a number of smaller homogeneous markets
in response to differing product preferences
among important market groups."

Segments, differentiation and positioning

Companies that engage in an undifferentiated targeting strategy make the same offer to all segments

Differentiated target market selection involves choosing a variety of different segments and providing offerings that focus on meeting the needs of those targets

Identifying differentiated segments means firms can **position** themselves better to appeal to and serve those segments

Why segmentation, targeting and positioning? Same as B2C

SEGMENTATION

Group customers based on similar needs

Profile each segment

TARGETING

Assess attractiveness of each segment

Select segments to target

POSITIONING

Define value proposition for target segments

Develop an action plan

Ways to Segment

Demographic (e.g., women)
- Gender
- Age
- Income

Psychographic (e.g., "green" consumers)
- Social class
- Values

Geographic (e.g., Seattle)
- Global regions
- States or cities
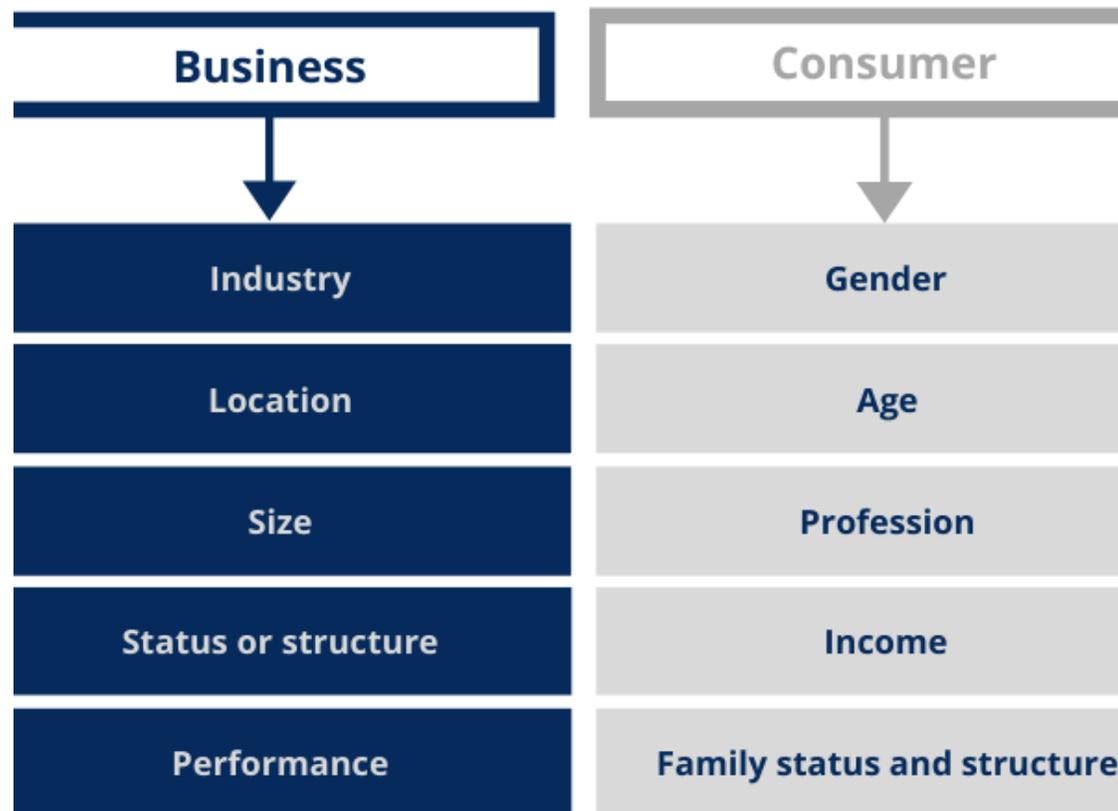- Urban vs. rural

Behavioral (e.g., vacation travelers)
- Benefits sought from purchase
- Occasion
- Loyalty or purchase history

B2B Segmentation uses Firmographics

Firmographics **vs** Demographic

Business	Consumer
Industry	Gender
Location	Age
Size	Profession
Status or structure	Income
Performance	Family status and structure

Snovio

Focus on most critical elements

Why:
Needs, preferences, decision process

What:
Usage, loyalty, profitability - purchase behavior

Who:
Firmographics, buyer characteristics

Coffee Example

What makes a good segmentation system?

What makes a good segmentation system?

- <mark>Identifiable</mark> - can find them
- Differentiable - are distinct from each other
- <mark>Substantial</mark> - of a good size
- <mark>Accessible</mark> - can reach them
- Stable - aren't in constant flux
- <mark>Actionable</mark> - can treat them, act on insights
- Supported - are supported within the organization

Core to the Process: DATA

- You can't do segmentation without data
- Customer data: firmographics, product usage, purchase history, behavior, sales
- Prospect (and customer) data: market studies, web traffic data, surveys
- 3rd party data: industry reports, government reports
- Statistical validity is key balanced with practical knowledge. AI has raised the game. Ethical and privacy concerns.

Ideal Customer Profile (ICP)

Ideal Customer Profiles (ICP)

Your Ideal Customer Profile defines the perfect customer for what your organization solves for.

- Often described as a fictitious company that has all of the qualities that would make them the best fit for the solutions you provide
- INCLUDING their pain and awareness of their pain

ICP Examples

SAMPLE IDEAL CUSTOMER PROFILE

Industry	Financial, Legal, SaaS	
Geography	U.S.	
Size	Funded startup, Less than 20 employees, One office location	
Budget	$10,000/month	
Decision-Making Factors	Rely on referrals for purchasing decisions CEO and sales manager are primary decision makers	
Pain Points	Generating high-quality leads Losing time to data entry	
Business Objectives	Short term: Grow their customer base in the next two months Long term: Raise funding to expand current offering	
Notable Attributes	Reputation as SaaS industry thought-leaders Well-connected in the startup space	

Ideal Customer	Demographic	Pain
Has Problem/Aware of Problem	Serial Entrepreneur building a Scalable Startup (vs. lifestyle business) Requires Institutional Funding	Too much time spent on non-core activities Knows time better spent building core value (product, business development)
Acute Pain	Out of compliance with some government authority	Fix non-compliance or face penalties or even shutdown
Latent Pain	Poor business infrastructure may complicate downstream fundraising	Future funding may be jeopardized because core value underdeveloped and potential liability lurking in undeveloped G&A infrastructure. Leave poor impression on potential investors
Able/Willing to Pay	Raised Friends & Family Money Bootstrapping with Proceeds from Last Startup	Responsibility to protect investors Unable to comply with investor requested reporting because of poor G&A infrastructure

How to create an ICP

Carbon Robotics Case Study

1. How should they view the potential market?

2. Which customers should they pursue?

3. Which customers are they most likely to win with?

Breakout Session Goals

Breakout #3: What might be a market or customer segmentation for Carbon Robotics?

I encourage you to pick the key characteristics that might matter in the agriculture market. (Geography, size of farm, type of crop etc)

Breakout #3 Debrief

What would a customer segmentation look like for your company?

Breakout #4: What might be an ideal customer profile look like for this company.

Again, think about the farm characteristics that might be favorable to Carbon Robotics solution. (Comfort/use of technology, access to labor, etc)

What would an ideal customer profile look look for your company?

Breakout #4 Debrief

Seminar Roadmap – Seminar II

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Preview of Seminar Part II

Creating a Preliminary Marketing Plan

- Audit your current marketing assets.
- Using your ICP, refine your messaging and offering.
- Outline marketing goals and metrics for success.
- Incorporate digital marketing, content management, account based marketing.

Homework Assignment

Your turn to apply the Seminar Session I concepts on your own company.

Create Company snapshot (1–2 pages)

- What are your current target segments (industry, size, geo)? Who are your top 10 customers by revenue &/or margin? Do you have any concentration risks?
- Do you have a sense for your ideal customer? Which customers are you best suited to win with? Can you describe the customer pain point, size of company/budget, authority level (role), and timing needs your company is best suited for?
- Can you describe your competitive set (1-3 direct competitors) and their key differentiators?
- Can you articulate your customer value proposition in one sentence and provide 3 proof points on why you are better than your competitive set?
- Can you jot down your current marketing goals and provide your most productive marketing assets and collateral (website, brochures, etc)

Any Questions?