



## Yes, You Can Recession-Proof Your Business!

Of course, it requires a level of discipline and commitment to marketing that is likely a few notches higher than it is today.

Marketing is, essentially, a mind game played by the conscious mind, trying to reach the subconscious mind, to affect human behavior. Madison Avenue knows this. Edward Bernays taught the ad world, the CIA and US presidents, how to influence opinions (control minds). Some marketers, very few actually, know how this game is really played, and they play it very well. If you think about it, you are trying to hypnotize your customers and prospects to make automatic or easy decisions, to give you their money in exchange for a set of perceived benefits. If you disagree, it may be time for a career change.


With that said, can smart marketing really protect your business from the pending recession that seems to be at our doorstep? Can you achieve growth through smarter marketing in a tough economy? Now is the perfect time to examine where every marketing dollar is invested.

Whether you call it a slowdown in growth or the onset of a recession, you must revisit your marketing game plan to ensure success. The fact is that consumers and businesses are tightening their belts, and you are going to have to work harder to fight for their expendable income.

There are no magic marketing pills to cure what ails your company or to protect you in a recession. Good products and services, delivered as promised – and smart marketing – are your only options. Consider these seven points and fasten your seatbelt.

1. **Focus on the gray matter:** Marketing is a process of educating and reminding, all toward influencing a buying decision, or reinforcing one that has been made. Do your existing customers know everything you can do for them? What are you doing to retain your best customers? Consistency is key.
2. **Learn to dance with your customers:** Start doing the bump and up-sell, or the bump and cross-sell. Sell sheets with that mattress! Apple pie with that burger! You get the idea.
3. **Nothing beats great performance:** Deliver great service and treat the customer like gold. Handwritten thank you notes in a tough economy are very powerful.
4. **The mindfulness of marketing will set you free:** Go read: Thik Nhat Han's "Miracle of Mindfulness." You'll know what I mean. What are you really selling, and what are your customers really buying from you?
5. **Go beneath the waves – like a submarine:** Go deep, and understand the true benefits your customer is buying from you. Focus on the benefits of the benefits. This is an article in and of itself. Meditate on this one.
6. **It's not B2C or B2B, it's P2P:** It's about "People to People" marketing. Companies don't buy software, people do. It's just different money—and often times, a different approach.
7. **Take a lesson from Mattie Stepanek:** Google him. He died young, but

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taught us how to face the future – and it applies to business as well as life. "Every journey begins with but a small step. And every day is a chance for a new, small step in the right direction. Just follow your Heartsong."

Understand your customers' core desires and factor them in to your (emotional) marketing efforts.

Remember, the best marketer wins! And a smart (direct) marketer knows how to use database tools to stay ahead!

*Source: Bob Martel is principal consultant at the [JMB Marketing Group](#).*

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## Sales Enablement – Bridging the Divide Between Sales and Marketing

*By Chetan Saiya, CEO of Assetlink*

Marketing can increase the efficiency and effectiveness of sales reps, leading to shorter sales cycles, larger deal size and higher win rate. How else can marketing help sales?

Marketing organizations typically invest a lot of money in creating the right tools needed by the sales force to move prospects forward in a sales cycle and close them. Despite this investment, salespeople still spend an average of 40% of their time preparing client-facing deliverables, while leveraging less than 50% of the materials created by marketing.

By bridging this divide, marketing can increase the efficiency and effectiveness of sales reps, leading to shorter sales cycles, larger deal size and higher win rate. How can marketing address this issue?

After creating sales tools, the marketing organization often uploads them on an intranet or a shared file server, so a sales representative can go there, search through the various documents, select the one they need and download them to their desktop/laptop. However, a number of issues exist with such a homegrown solution:

- Sales force spends too much of their productive selling time trying to find the right materials. Over time, the intranet or shared file directory begins to contain hundreds of marketing documents such as brochures, data sheets, sales tools, email templates, customer success stories etc. The names of the files may not be descriptive enough – as a result one cannot clearly discern the content from its file name. There is often no search available on this homegrown solution – when such a capability will allow sales representatives to find the right marketing content by entering certain attributes in the search field. Even when the search capability exists, the marketing documents may not be tagged well enough – so either the search returns with nothing or too many documents. Besides, some of the material may be outdated and no longer relevant. As a result, sales representatives then take it upon themselves to create the documents during their productive selling time instead of using it to meet other prospects.
- There is very low awareness among the sales force of available marketing resources & tools. Sales representatives often ignore the emails they get from marketing about notification of new sales tools. However, when they need that content, they have no way of searching through old emails to find the right sales tool.
- Inconsistent use of branded marketing materials at the local level. Often corporate marketing assets have to be localized or regionalized – such as replacing the corporate contact information in a document with local address/contact information. Assets created by marketing often cannot be easily localized by the local sales organization – as a result, regional sales

organizations often end up creating their own material. However, the messaging on such locally created material may be 'off' or the branding elements often used incorrectly or look-and-feel consistency not maintained across documents. Such problems dilute the brand equity of the company.

- There is lack of tracking and measurement capability on the homegrown solutions. With no usage metrics, marketing is not equipped to answer simple questions such as which content is performing well or which content is hardly being used. Clear visibility into such metrics may point to problems such as marketing not creating relevant material or inability of the sales organization to find potentially high impact material. Without good usage metrics, such problems remain hidden.

As a result of such issues, the ROI on sales and marketing tools tends to be lower than expected. Marketing often complains that sales representatives do not use the tools they have created and sales force complains that marketing does not create the content that is useful for them. Such finger pointing often leads to a divide between the two organizations. Simple technology investments such as Marketing Asset Management can break this logjam. Leading marketing organizations have significantly increased the usage of the content created by them and have enabled the local sales organizations to easily localize the content while preserving messaging and branding elements by using such technology.

Marketing Asset Management solution enables marketing managers to organize the marketing content (such as brochures, data sheets, sales tools, email templates, customer success stories, logo treatments, advertisements etc) in a multi-level hierarchy of their choice. Once organized, such solutions offer intuitive navigation over the intranet, making it easy for the sales force and field marketing organizations to find and use the marketing content. It can also convert graphic files into thumbnails to enable easy viewing and referencing by the sales force. In addition, such a technology provides the ability to add multiple tags on the asset (called Metadata). These tags later enable the sales rep to find and retrieve an asset by searching for all assets that carry a certain tag. As a result, finding the right content among hundreds of marketing documents becomes very easy.

Marketing Asset Management solutions typically support multiple media formats, including multiple formats of raster graphics and streaming video. Marketing managers can store different formats of marketing assets in a single repository, instead of maintaining separate repositories for different formats – making it easy for sales force to find and leverage the marketing content.

In addition, marketing organization can create certain content as a template and allow the sales rep to localize certain textual and graphical elements by simply supplying textual information and selecting predefined images. Such templates and predefined images can also be stored in the Digital Asset library. The solutions also enable the marketing teams to build an internal brand, product or service websites without requiring any knowledge of HTML or Internet technologies. As a result, any marketing user can quickly set up a comprehensive and informative site that is packed with important and relevant information and downloadable digital assets that can be searched and accessed globally. Finally, the technology can provide usage metrics, which can be used by marketing to either identify assets that are not used and either purge them or make them more relevant or ensure that sales is aware of them.

Marketing Asset Management has been used successfully by large and mid-sized marketing organizations to eliminate the traditional divide between sales and marketing and better enable the sales force to sell more efficiently and effectively. I invite you to take a closer look at it.

---Source: *Chetan Saiya is the Founder, Chairman and CEO of Assetlink, a powerful marketing operations management (MOM) solution that serves Global 2000 companies worldwide [www.assetlink.com](http://www.assetlink.com). He can be reached at [chetan.saiya@assetlink.com](mailto:chetan.saiya@assetlink.com).*

## Profiles of Success: Gary Whiddon

Visit Gary online at: [HealthPlansOnline.com](http://HealthPlansOnline.com)

### **Tell me a little about your agency and what insurance lines you market.**

We primarily are small-group employee benefits, health, dental, vision, disability, life. We also write large group and individuals, including Medicare supplements.

### **How has your agency changed the way you do business in the past few years?**

We have changed in that we've had to be more forward - thinking in how to catch clients and keep them happy. We have a good service staff and I've increased my overall services to clients.

### **What types of traditional marketing do you use?**

We just started telemarketing. We haven't got it up-and-running yet – it just happened. We're also doing e-mail marketing. We have about four different HTML ads we're going to try to get out. We're also moving more toward referrals, because there's a higher chance of closing referrals.

### **What expectations do you have when running a marketing campaign?**

I expect to have new conversations or new appointments with prospects, build new relationships, and, ultimately, to increase our client base.

### **How do you provide proposals for customers?**

We basically do it electronically because we write all through California and Texas. We write local business, but then we either have clients visit us or we visit them, bringing a hard copy paper proposal. We use Quotit as our main presentation. We've used it long enough to know how to get around Quotit and utilize its capabilities. Using Quotit, we feel we have a clearer and better presentation to clients than having to use a general agent's generic proposal.

### **What challenges did your agency face during this time? What led you to look for other ways to market and sell insurance?**

The natural attrition of existing business, plus the desire to always want to grow larger next year than we were this year.

### **How has Quotit helped your agency?**

It's a time-saving tool that gives us immediate ability to respond to clients. The agent who knows how to utilize Quotit well can truly help his or her customers much more than a traditional agent. (Quotit) has a lot of helpful resources at your fingertips, from underwriting to benefit summaries for all carrier plans in California.

### **How has your business benefited from Quotit's proposal system? How did your agency's client and sales management change with this proposal system?**

Most importantly, it has enhanced our customer service by doing individual worksheets for new employees.

### **What impact has been made by taking your business online and creating your agency's website?**

That is the reason I use Quotit – because Quotit gives the employer the opportunity to login with a password and have 24/7 access to look at rates and

benefits, and we get notification via e-mail when our clients enter the system. That lets us know that they are interested right at that specific time so we can follow up and answer their questions before they make a decision.

**What percentage of your business now comes from online?**

Probably 60 percent of our business comes from online.

**What is the biggest value added by offering online proposals to customers?**

The biggest value is providing our customers immediate answers rather than waiting for a hard copy proposal and appointment a week from now.

**What is the biggest factor that has made your agency more effective since working with Quotit?**

The ability to stay in my office more instead of having to drive the freeways and spend a lot of wasted hours.

**What do you like to do in your spare time?**

Golf – I'm an 8 index and would like to play more. I have two (children) at Pepperdine University, so I still have to work.

**Where do you see your agency in the next 5 years?**

I hope it will double. We feel that we are positioned well to draw new business and maintain our old clients. I believe that some of the smaller insurance agents may not feel as secure. They've been sitting on their blocks of business without really actively writing new business. I have developed a young agents' program that empowers the new agent to become an entrepreneurial partner with me while we help finance (his/her) success. We have three agents currently building their business. Our office is very involved with Consumer Directed Health Plans and Health Savings Accounts. We're spending more time explaining HSAs and making less money, but it's the right thing to do for our clients. I have one young agent up and running with his own LLC and two others who are in the building stage.

**In your opinion, will online technology play a role in your agency's success in the future?**

Yes. It has for the last 12 years and it will continue to do so.

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