



B2B Content Marketing:  
**MAKE OR BREAK CUSTOMER  
EXPERIENCE MOMENTS**

Rating



# Contents

- **Defining the Customer Experience**
- **CX: For Better, Not Worse**
- **Great Expectations**
- **The Personality of Personas**
- **Persona Creation**
- **Content is Key**
- **A Customer is More than a Sale**

# Defining the Customer Experience

Customer experience (CX) is the overall perception a customer forms through individual interactions with your business or brand. This customer experience is made up of three parts: the customer journey, the brand touchpoints the customer interacts with, and the environments the customer encounters during their experience. A good CX means that each individual's experience during all points of contact matches, or hopefully exceeds, their expectations. The customer experience is multifaceted and takes a great deal of care and consideration to nurture but, in the end, is well worth the investment.



**67% of customers say their standards for good experiences are higher than ever. (Salesforce)**

# CX: For Better, Not Worse

67% of customers say their standards for good experiences are higher than ever. More than half have stopped doing business with a company because a competitor provided a better experience. The ease of apps and instant gratification of internet searches, shopping and niche services have infiltrated expectations around B2B buying as well. Customers expect consumer-like, on-their-terms interactions. Customers have more choices than ever, and your product needs to compete on a myriad of levels to stand out. To improve overall perception, you need to address prospects and customers with individual interactions.



## BETTER

- Frictionless interactions
- Personalized communications
- Exceeded expectations
- Customer needs come first

## WORSE

- Lots of hoops for little value
- Legacy sales models
- Channel misalignment
- Gaps in collecting and applying feedback

# Great Expectations

Personalizing individual experiences was once considered “extra” in B2B marketing. A few years ago, the extent of personalization was to insert an individual’s first name in an email or direct mail salutation. Today, B2B customers want the same level of hyper-personalized service as they receive in B2C channels.

At a higher, or macro level, experiences and expectations have changed immensely, more so than many appreciate. Consumerization of customer expectations has changed the B2B buying process drastically. Digital points of engagement continue to replace and evolve traditional points of engagement. Even in an era of ABM, don’t forget that it’s people who are buying your products. The experience you create through content and other means should help your customers feel seen and heard, or you will risk losing them to someone else.



**70% of the customer’s journey is based on how the customer feels they are being treated (McKinsey) and <30% of B2B customers say suppliers provide excellent customer experiences. (Salesforce)**

# The Personality of Personas

There are more expectations of marketing being “easy” because of evolutions in data, algorithms, and automation. However, appreciating and evolving the use of data isn’t enough to satisfy customers—it’s how you use that data. To truly create a positive customer experience, you must have a micro understanding of your customers. If you haven’t already, develop buyer personas...and actually apply them. Your goal should be distributing content to customers in a way they will enjoy, pay attention to, and hopefully, act on.

---

Ensure that the personas you develop cover audience:



- Pain points
- Goals
- Location
- Language and communication styles
- Points of excitement or drain
- Preferred methods of engagement


# Persona Creation

The objective is to develop personas that can inform content strategy at all levels and stages. A persona should be able to clearly define how to satisfy the buyers' objectives and their preferred channels of communication. In short, there are four main steps to creating your personas:

- 1 Collect and analyze customer and prospect data.** If you have been able to collect research and conduct interviews, use that information to start the process. If you have not been able to perform in-depth research, start with stakeholder insight and competitor analysis. Take a closer look at competitive products social media to see the types of people interacting with the product and how they are responding to it.



**93% of companies who exceed lead and revenue goals report segmenting their database by persona. (Bain & Company)**



**2 Identify common patterns and characteristics.** When you feel confident that you have enough data to analyze, begin to identify and categorize the trends you see and determine which are common and which might be outliers.

**3 Create a person(a).** A persona is a fictional composite of actual prospects or customers. Each persona should have a name, photograph or illustration, description of who they are (background, job, income, education), and synopsis of the problems they face, especially when it comes to how your product or service can help them.

**4 Share with your team.** Make sure your team, and all members across your organization, understand your personas. From customer service to sales, personas help inform decisions and problem solving.



If you haven't created personas or aren't sure the ones you have are correct, you can take a deeper into [Developing B2B Buyer Personas](#).



# Content is Key

Content can be a make or break point for advancing relationships with prospects and customers. It plays a huge role in determining whether customers have a favorable or frustrating experience with your business. As you create content, ensure that it is easily accessible and organized. Make sure to avoid content aimed at selling instead of educating. Research has shown that 71% of buyers/readers are turned off by content that sounds like a sales pitch.

**Good content will answer the questions that plague your prospects and customers. It should easily support pre-purchase research and advance dialogue and relationships with your customers and prospects. Above all, content should be compelling and tell a story.**

Content should also be used as much as is needed and not more. Content overload can lead to consumer exhaustion. If something doesn't fit into your brand or story, leave it behind and don't force it to fit. You can also repurpose valuable content. Add that infographic to a blog or, conversely, use the info from the blog to create an infographic.

# Timing

As it is with most things, timing is an important variable with content. Content needs to meet customers where they are in their buyer journey. Provide individuals with content that they can consume at their own pace and that naturally paves the way for next steps and related topics.

## DO

- Make it easy to find the info or answers your audience needs.
- Anticipate what information your audiences will need next.

## DO NOT

- Push content that they are not ready or asking for yet.
- Adopt generic automations that don't consider individual needs.

**Conversion rates are nearly 6x higher for content marketing adopters than non-adopters. (Aberdeen)**



# Relevancy

Content should also be relevant and tailored as much as is possible and practical for individual personas and audiences. 48% of marketers support three to five of their customers' purchasing stages with specialized content and report 73% higher conversion rates when targeting users with content relevant to their position.

## DO

- Ensure proper breadth of content at each buyer stage.
- Use images and verbiage that shows you know your personas.

## DO NOT

- Rationalize one-size-fits-all content when it's insufficient.
- Confuse audiences with mismatched content for their role.



**52% of buyers strongly agree that relevant content packed together helps expedite the research phase. (Demand Gen Report)**

# Access

WRONG STRATEGY

RIGHT STRATEGY

Access to content also plays a role in determining whether customers have a favorable or frustrating experience with your business. Access to content should be crystal clear and devoid of friction. It's important to make sure that your website provides quick access to engaging, informational content and doesn't immediately push buyers into a demo or a quote request.

## DO

- Offer content that can be consumed across multiple mediums.
- Test your website and landing page speeds regularly.

## DO NOT

- Add extra content, text, images and flourishes to pages that add no value and diminish speed.
- Look only at overall engagement metrics.

**62% of buyers say they can make a business decision based on online content alone. (Blue Corona)**



# A Customer is More Than a Sale

Sales may keep the lights on, but satisfied customers keep revenue growing. Consumers are unwilling to settle for content and experiences that miss the mark. A positive customer experience directly impacts the bottom line by creating a repeat customer and fostering referrals and advocacy. Basically, a neutral experience can equal one sale, whereas a positive interaction could lead to two, three, four or more. Learn more about how to turn your customers into advocates.



**Bain and Company found that increasing customer retention rates by just 5% can increase profits by between 25% and 95%. The bottom line of CX is—happier customers means healthier profits.**

# Are you ready to elevate your company's content and enhance your customer experience?

## We're here to help.

Our mission is to be the go-to marketing firm for B2B technology oriented company and product launches by offering turn-key marketing services. Let us help you tell your story.

 [SCHEDULE A FREE CONSULTATION](#)

## About Launch Marketing

Launch Marketing is a boutique business-to-business (B2B) marketing firm in Austin, Texas that provides turn-key services focused on generating leads and driving revenue. The team brings a breadth of senior-level expertise with a full-service approach to help clients maximize the impact of marketing for their business. Since 2001, they have helped countless clients successfully launch their company, dive into new markets, introduce new products, and generate more qualified leads.

For more information, visit [www.launch-marketing.com](http://www.launch-marketing.com).



Are you ready?

  
LAUNCH  
MARKETING

# B2B Crisis Marketing Toolkit

A GUIDE TO COMMUNICATION AND MARKETING  
STRATEGIES FOR TURBULENT TIMES

# Contents

- **Before You Begin...**
- **4 Phases of Crisis Marketing**
  - **Phase 1: Examination**
  - **Phase 2: Direction and Motivation**
  - **Phase 3: Modification and Action**
  - **Phase 4: Evaluation**
- **Making a Digital Connection**
- **...In Closing**
- **Ways to Help**





# Before You Begin...

First and foremost, we at Launch Marketing hope you and your loved ones are safe. If any of you are directly affected by the novel coronavirus, our hearts and thoughts are with you.

COVID-19 is a highly unusual and unexpected disruption to our daily personal and professional lives. To help adapt to these changes as best as possible, we compiled our years of expertise into a communication and marketing toolkit that addresses the new challenges that are coming with these uncertain times.

The purpose of this toolkit is to provide B2B companies with strategies, tips and resources that will help them respond in this uncharted and fluctuating environment.



## ADDITIONAL TOOLS:

Not sure where to begin? [Making Adjustments in Turbulent Times](#) is a good resource to help get you started.



# 4 Phases of Crisis Marketing

The following is a guide to help you and your team tackle the shifts that have happened in the market. We've broken the steps into phases to help ease the uncertainty in such an unprecedented time. To keep up with the rapidly changing pace of our current global health crisis, these phases are meant to be executed over a few days or, potentially, hours.

**Phase 1—Examination:** Review your current plans, content and goals.

**Phase 2—Direction and Motivation:** Practice agility as you guide your team to navigate the fluctuating new normal.

**Phase 3—Modification and Action:** Begin to modify your plans and content. This will involve moving some campaigns, rewriting others and creating new ones to meet the constantly shifting environment.

**Phase 4—Evaluation:** Evaluate how your messaging is resonating with audiences.



The background of the slide is a light blue color. In the center, there is a magnifying glass with a wooden handle. Inside the lens of the magnifying glass, several wooden blocks are visible. Each block has a simple human figure icon on its top surface. The magnifying glass is positioned over one of these blocks, making it appear larger and more prominent. The overall scene suggests a process of examination or inspection.

# Examination

PHASE 1

# Examination

Examining your current marketing plan and all its components is the first step when dealing with an unexpected crisis. While COVID-19 is not a standard company crisis, now is the time to get your organization's name out to the public in a positive and helpful manner.

Three crucial areas to examine before getting started:

1. Personas
2. Content and Calendars
3. Goals



## ADDITIONAL TOOLS:

Does this crisis find your team stretched too thin or do you need additional skillsets to meet this challenge? Read: [How Leaders Bridge Unexpected \(and Expected\) Gaps in Marketing Talent.](#)



# Personas

You and your team shouldn't need to create new personas for the COVID-19 circumstance. Instead, simply reexamine existing personas, their needs and how best to communicate with them. To do this, take your existing profiles and think about how COVID-19 is impacting each one.

## Three key questions to ask yourself include:

1. What persona needs, wants and pain points are new, which remain the same and which have shifted in priority?
2. What offers and terms should be introduced, emphasized or extended to make it easier for audiences to do business with you now?
3. What do your personas need to know about the current state of your business operations?

Once you've answered these questions, you can begin to craft new messaging on how your service or product can help.



## ADDITIONAL TOOLS:

We've detailed how you can start this process in our blog [Building on Buyer Personas When Needs Suddenly Shift.](#)

You can also deep dive into [effectively developing and building personas,](#) as well as [using personas in campaigns.](#)



# Content and Calendars

In addition to updating your personas, it's important to review your content and social calendars, as well as the messaging you had in the upcoming queue. You'll want to identify which campaigns need to move out, which need to be rewritten and if you need a new campaign. We'll go further into the specifics on how to modify your content in Phase 3.

## 5 questions to ask as you start the process:

1. Which campaigns/deliverables in your upcoming queue can be rewritten to address COVID-19?
2. How can you adjust your content to resonate with your audience pain points?
3. How will you uniquely address these pain points?
4. What in your plan can be digitally focused?
5. How will you and your team measure, reassess and put new plans into action?



## ADDITIONAL TOOLS:

Curious how other organizations are handling this crisis? AdAge is compiling [marketers' responses to coronavirus](#).



# Goals

In this phase, you will also need to reconsider your marketing and sales goals during this time. This does not mean all is lost. *You may already know that your service or product fits well into this new normal, but if you are not quite sure, determine:*

1. Does any part of your product or service make remote working easier, more secure or boost performance?
2. Does it help people connect virtually or do personal business from home?
3. What are the key differentiators and how are they enabling people to live and work more easily or comfortably right now?
4. Does it positively affect any part of healthcare or first responder work or lifestyle?



**QUICK  
TIP:**

As you reschedule your campaigns and strategize how you can rewrite or switch gears, realistically set new goals for the next 3 months.



A golden maze with a path leading to a coin with the number 1.

# Direction and Motivation

PHASE 2



# Direction and Motivation

Impactful, positive leadership is always critical to success. It's not just executives and managers that affect the organization, each member of your team can step-up to the plate and be a leader in their own way. Companies can use leadership in two very impactful ways during this time.

1. Demonstrate resiliency by providing optimistic leadership and sturdy guidance.
  - **Unify/reunify your team regularly.** Have daily huddles to ensure your team feels confident and prepared.
  - **Show agility.** It is imperative to be an agile leader, showing your team how to switch efforts as needed.
  - **Delegate and motivate.** Call your team to action and rely on them. Most people want to help and feel valued if they are part of the solution.
  - **Give kudos.** If teams or individuals feel undervalued, they are less likely to produce. It should be a team effort.



## ADDITIONAL TOOLS:

Get inspired with Management Psychology Groups article: [Leading in Tough Times.](#)



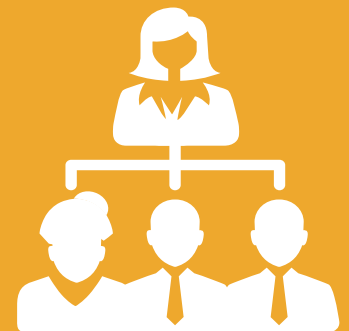
# Direction and Motivation

2. Use social platforms and email to share your insight and knowledge.
  - **Share.** Find educational and informational pieces, both about your industry and what is going on right now and pass along that information to your peers.
  - **Generate.** You and your team can write internal blogs, articles or other pieces on a myriad of subjects, relating to your industry and how COVID-19 is effecting your trade.
  - **Connect.** Use [LinkedIn](#) to connect with other leaders in your industry and share ideas and resources.
  - **Engage.** Don't just share, make sure you engage. Comment, like and share relevant and thought-provoking content.



## ADDITIONAL TOOLS:

Need more insight?  
Read our [Guide to Generating Leads with Thought Leadership](#).



The background features a solid blue color with a subtle pattern of white dotted lines forming a circular path. Six paper airplane silhouettes are scattered around the path, appearing to fly in a clockwise direction. The text is centered on the right side of the image.

# Modification

PHASE 3

# Content and Calendars

When developing new or revised campaign content, use COVID-19 as an example of how your product or service can better help with business or personal needs during times like these.

There are 4Rs of crisis marketing communications:

1. Reevaluate
2. Reschedule
3. Rewrite
4. Reunify and Reassess



**ADDITIONAL  
TOOLS:**

Learn more about  
the **4 Rs of Crisis  
Communication.**



# 1. Reevaluate

There are a wide array of B2B companies in the market today, each with its own set of unique offerings and abilities. Revisit your company's messaging and positioning and focus on how your product or service can help in the current circumstances. For example, does your product or service make working remote more convenient, secure and/or enhances performance? There is no better opportunity to personalize and tailor your content to highlight how your company can help others during the current circumstances.

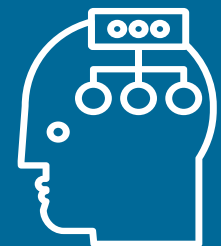
Now could be a time to evaluate if you are able to offer any discount, promotion or other financial assistance to current clients or to consider free trials and promotions for new customers.



## ADDITIONAL TOOLS:

As you rewrite, remember to keep your new messages on brand.

Boost results with personalization and 3 key personalization strategies.



## 2. Reschedule

Review your current content calendar and identify the key milestones that were planned in the next few weeks and months. You'll need to strategize which campaigns can move and what timeline makes the most sense for them. You'll also need to determine which content can be rewritten and shared quickly.

### Content going out now should:

1. Focus on caring, shared empathy and offers of help.
2. Address audience pain points and how your product or service can help.
3. Reflect current circumstances and approach customers and prospects with sensitivity and flexibility.



### ADDITIONAL TOOLS:

There are numerous resources to help you create a **content calendar** if you need assistance.



# 3. Rewrite

Any communications going out within the first few weeks of the onset of COVID-19 should first read as a message of compassion. If you have not yet done that, don't worry, it's not too late to start. Right now, it is best to avoid including sales messages or CTAs. Trying too hard or soft selling at this point could come off unfavorably with your audience and hinder your efforts. You are simply marketing a message of care and concern. If your company decided they can offer a financial promotion or extend other types of help in the situation, you could make that part of your communication.

After you've reevaluated your messaging and positioning to see how you could focus your content, your team should ensure your content focuses on how your company's product or service can help.



## ADDITIONAL TOOLS:

Zoom is an example of a B2B SaaS platform that has taken steps to keep their audiences thoughtfully informed, while marketing their solutions.



## 4. Reunify and Reasses

Come together, albeit virtually, and keep coming together as a team on a consistent, possibly daily, basis. Because these are uncertain times, your plans and messaging may need to change more than once. It is imperative that leaders demonstrate flexibility and ask their team to do the same.

Keep your finger on the pulse of what is happening in the world and in your company, as well as the needs of your audience and your team. Reassess each week the current conditions, tactics, metrics and messages and adjust them as needed to help your company move forward and continue to produce content that compels and enlightens your audience.



### ADDITIONAL TOOLS:

Review the principles needed for coordinating a successful team.







# Evaluation

PHASE 4

# Evaluate

Evaluating and reevaluating is a normal part of any marketing plan. As you navigate the market and environment, reassess how your messaging and campaigns are going over and what is developing each day with COVID-19.

Flexibility will be a key word and trait during this time. Remaining agile with your team, your approach and your plan will be vital.

It's essential to evaluate what content and tactics are resonating and keep your finger on the pulse of what is happening around you. Reevaluate as needed to match the mood of the environment and ensure your audience is responding positively to your messaging.



## ADDITIONAL TOOLS:

Learn why [focusing on long-term ROI](#) and fostering the customer lifecycle ultimately wins the race.





# Digital Connection

THINKING OUTSIDE THE DIGITAL BOX

# Making a Digital Connection

Your marketing plan and campaigns most likely had strong digital components or were digitally focused. However, digital will now be a key part of our everyday work and personal lives. Think outside the digital box during this new normal.

## 5 ways to make a strong digital connection:

1. Use video/web conferencing and chat
2. Utilize webinars
3. Strategically post on social media
4. Personalize email
5. Leverage your website



## ADDITIONAL TOOLS:

Way to make a digital connection:

1. Create digital empathy
2. Review digital marketing best practices



# 1. Use Video/Web Conferencing and Chat

No one has ever said the solution to something is more meetings; however, keeping connected with your team, customers and prospects should be a high priority. Customers, current and future, appreciate easily accessible channels where they can ask questions and get answers, from the convenience of where they reside. While some people prefer to meet in person, these platforms offer a suitable alternative to keep business moving. Remind yourself and your team that almost everyone is currently remote and working. With video conferencing, the lack of in person meetings should not impede any sales or marketing conversations and deals.



**ADDITIONAL  
TOOLS:**

[Think Outside the Digital Box: Benefits of a Digital Connection During a Global Pandemic](#)



## 2. Utilize Webinars

Canceled in-person events, conferences and prospect meetings do not mean you have to cancel your presentation or promotion plans. Utilize webinars to engage with your customers and prospects while ensuring your audience is participating in a safe location. Audiences right now want to keep working, learning, connecting and growing, and luckily webinars help them access all four.

**Webinars are a great way to:**

1. Promote your product or service to a targeted audience
2. Promote discourse
3. Offer thought leadership
4. Personalize your organization



### ADDITIONAL TOOLS:

Webinars can transform into a virtual classroom or showroom for your business.



# 3. Post Strategically on Social Media

Social media is an amazing medium considering how many ways it can be used.

Use social media to do two essential things:

1. Establish yourself and your company as a leader
2. Promote your corporate culture

Each platform offers a different opportunity and audience reach. Don't make the mistake of crafting one message and posting it over all mediums. Each platform should have slightly revised content of each message to match the tone and audience. The four platforms that still see the most success are LinkedIn, Instagram, Twitter and Facebook. LinkedIn and Twitter will be your primary B2B focus. While Facebook and Instagram will also address B2B content, these are great avenues to showcase company culture.



## ADDITIONAL TOOLS:

Learn why your B2B should be using social media or if you need a best practices refresher.



# 4. Personalize Email

Use the digital empathy strategy and create an empathetic email. One way to begin to create empathy is through connection and personalization. Personalized emails have 6x higher transaction rate.

Studies have found numerous benefits to personalizing marketing, including the top five benefits of personalization which are:

1. Increased visitor engagement (55%)
2. Improved customer experience (55%)
3. Improved brand perception (39%)
4. Increased conversion rates (51%)
5. Increased lead gen and customer acquisition (46%)

Personalizing your messages will add a personal touch that is appreciated now more than ever.



## ADDITIONAL TOOLS:

Explore why personalizing your emails helps to revamp your strategy.





# 5. Leverage Your Website

With all the applications, programs, platforms and mediums in our daily lives, sometimes the website can get overlooked as the immediate solution.

You can leverage your website, and put your audience at ease, by adding something as simple as:

1. A crisis communication page
2. An FAQ page related to how your product or service can help or special information regarding current circumstances of your organization and operations
3. A pop-up or banner with messaging that addresses the situation
4. Easy to find contact information or form



## ADDITIONAL TOOLS:

Personalization is important for your website content as well.

Platforms like Unbounce can help you easily create pop-ups for your website.



A photograph of two hands holding a small, folded paper airplane. The hands are positioned on either side of the airplane, with fingers gently gripping it. The background is a solid, vibrant green. The text "We're in This Together" is overlaid in white, bold, sans-serif font across the center of the image.

**We're in This Together**

# ...In Closing

None of us are sure how long the COVID-19 situation will last or how it will change over the next few weeks or even months, but if you follow these guidelines and use them as needed, you should find your marketing plan and your company in good standing.

Almost all B2B work can be done remotely to ensure you are keeping yourself, your loved ones and your team healthy and safe. In an ever changing and scary environment, the CDC has released a [guide to coping with COVID-19 stress](#). There are also many other resources, like [Psychology Today](#), that help with self-care and how to deal with this unprecedented anxiety.



## ADDITIONAL TOOLS:

If you find you need help adjusting your marketing plan or are low on resources, [contact us](#) to see how we can help.

The ABA put together a free [mental health resource guide](#) to help manage the onset or rise in anxiety you might feel during this crisis.



# Ways to Help

- Research if your local schools are taking offers to help make and/or distribute sack lunches to children.
- Support small businesses and restaurants with online orders, take-out or gift certificates.
- Check apps like Next Door to see if anyone near you needs help.
- Donate to funds dedicated to displaced workers.
- Donate food, money or time to your local food bank.
- Donate blankets, towels, food, money or time to your local animal shelter, or foster an animal (or two).
- Take an online fitness class from a local studio. It keeps the business open, the teachers employed and you in your best health.
- Honor those going above and beyond during these trying times: first responders, healthcare workers, truck drivers, customer service employees and farmers.



## ADDITIONAL TOOLS:

[Find inspiration in other organizations.](#)

Give [blood or plasma](#) if you are able.

Coronavirus affects animals as well, see more at [Humane Society COVID-19 fund.](#)



# We are here for you.

Do you need help developing or changing your messaging or marketing plans due to COVID-19. [Connect with us](#) or call 512.495.9900.

 [Schedule a Consultation Now](#)

## About Launch Marketing

Launch Marketing is a boutique business-to-business (B2B) marketing firm in Austin, Texas that provides turn-key services focused on generating leads and driving revenue. The team brings a breadth of senior-level expertise with a full-service approach to help clients maximize the impact of marketing for their business. Since 2001, they have helped countless clients successfully launch their company, dive into new markets, introduce new products, and generate more qualified leads.

For more information, visit [www.launch-marketing.com](http://www.launch-marketing.com).





# How to Transform Your B2B Customers into Advocates

The customer experience has become one of the most significant factors to help turn prospects into customers and customers into brand advocates.

An optimal customer experience, or how your customers feel before, during and after any transaction or interaction with your organization can help or hinder future sales.

While sales drive your business forward and help support organizational efforts, they can only be achieved through positive interactions and a thoughtful customer experience. Keep in mind that one sale does not equal a lifelong customer, and in the same vein, a customer does not always equal an advocate. An advocate is a customer that actively shares information about your company, product and/or services on an ongoing basis, as they engage with your company on social media, grooms other leads and/or keeps an eye on new developments in your company. Considering that 91% of customers say they'd provide referrals but only 11% of salespeople are actively asking for them, it's more likely than you think that some of your customers are ready to be converted into advocates for your business.

As you build your customer journey, consider these key concepts that help grow your customers into active advocates.

## CUSTOMERS ARE MORE THAN A SALE

Understanding your customer is crucial not only for a successful campaign but also to set the stage for eventually transforming your B2B leads into advocates. When developing a plan for reaching your target audience, consider that personalization has become increasingly popular, and for good reason. Epsilon reports that 80% of consumers are more likely to purchase from a personalized marketing experience. Even established brands need to convince potential audiences of their company's value.

---

89% of highly recognized brands, including Coca-Cola, Fabletics, Netflix, Sephora, USAA and Wells Fargo, are investing in digital personalization to meet changing customer demands.

---

This more targeted customer mapping combined with customer ingenuity and utilization of the internet and social media has virtually ended the days of the traditional one-way conversation and hard-sell. B2B

customers can utilize the internet to research products and price their needs instead of relying on information they received from a salesperson. As customers become savvier and more prepared, marketing personalization has become an industry norm.

Properly identifying your customer, their pain points and how you can solve their unique problems puts you in the ideal position to begin bringing in the right leads to transform into customers.

### MAKING THE LEAP FROM CUSTOMER TO ADVOCATE

A satisfied customer can bring in additional revenue in several ways. Happy customers have a higher likelihood of making repeat purchases. Additionally, when a customer feels that a business has gone above and beyond, they are more likely to recommend the company to a friend or colleague.

This is one reason why referrals are a trusted and valuable way to gain new business. In fact, 84% of B2B buyers begin as a referral. Even more astounding, 97% of IT professionals say they rely on peer recommendations and reviews to help inform their buying decisions. Plus, loyal customers are five times more likely to purchase again and four times more likely to refer a friend to the company. Companies that actively seek out a referral earn 4 to 5 times more than the ones that do not.

If you want to actively gauge how your customer experience is going, there are tools like the Net Promoter Score (NPS) that can help measure how likely your customers are to act as an advocate. The survey also gives you insight into how you are doing overall and across several customer focused areas. An NPS survey helps you proactively address and change areas that need improvement, as well as identify areas in which you are excelling and will want to use to your advantage going forward.

However, referrals usually happen because a customer was asked for a referral. Engaging customers in a more formal advocate role can turn one-off referrals into more active recurring engagements.

## 3 Fundamental Ways to Create Advocates

### 1. CULTIVATE COMMUNICATION AND TRUST

According to a Forrester Buyer Insight Study, only 13% of people believe that a salesperson can understand their distinct issues and needs. So how does one cultivate enough trust to flip potentially wary customers to advocates? A foundational best practice to start with is to create one-to-one marketing, personalized correspondence and targeted efforts based on a customer's profile. This is an excellent way to highlight your company's efforts to understand their unique requirements. To reduce friction that can breed detractors, ensure that each point along the customer's journey is part of a seamless flow. It's essential that everyone on your team has the same information and resources to share with customers. Transactions and conversations should leave the customer confident that you value their time, commitment and concerns, and that members of your staff are confident and knowledgeable.

Another way to appeal to customers is offering convenient ways to reach you as quickly as possible. If a customer tries to contact your business on numerous channels but doesn't hear back for several days, this can lead to distrust and frustration. Following up with customers and leads is vital, considering that 30-50% of sales go to the vendor that responds first with quality information.

---

Companies that provide an emotional connection with customers outperform the sales growth of their competitors by 85%, while 49% of customers will leave if they feel unappreciated.

---

Outstanding customer communication creates a vital connection with your customers, which is a foundation for advocacy.



## 2. BECOME SOCIAL SAVVY

Social media is an excellent and easy way for customers to advocate for your business, so it is important to have properly managed social media sites. Social media should be used in two ways to keep customers active, loyal and advocating for your organization: a sales strategy, since 78% of salespeople using social media outsell their peers, and a way to give customers a glimpse into your company.

Creating a strong social media presence starts with an engaging content calendar and social media strategy. If you are not sure where to start, there are excellent resources to help you get started. As you build out your strategy, share a good mix of pieces about your company or product/offering as well as content on industry news, trends, thought leadership and other industry think pieces. This way you are expanding your audience exposure by promoting other important industry content with which people can interact and engage.

Personal engagement with your social strategy is essential. A rule of thumb is to not just post content and leave. Interact with your audience, compliment them, ask them questions and answer their inquiries in a timely manner. If it feels like you are establishing a grounded and lasting relationship, that's because you are.

---

**Want a complete guide to your digital marketing strategy? [Check out our Digital Marketing Guide for B2B Marketers!](#)**

---

## 3. RECOGNIZE AND REWARD LOYALTY

Rewarding your customers for their loyalty doesn't have to be reserved for B2C. While you probably won't be offering a free ice cream cone for their tenth visit, there are other ways you can acknowledge their business and any business they send your way.

Developing a customer onboarding program can be a crucial way to help customers feel valued and confident in their relationship with your company. If a customer does not see your value in the first week, 75% will drop off. A customer's journey should start with the first time they contact you, not when they make their first purchase from your company.

Other ways to reward customers is by featuring them in your content. Testimonials, case studies, social posts and more are great ways to give exposure to both yourself and your customer. Gathering customer quotes as you work with customers makes them feel valued and gives you vital and authentic testimony to the value of your product or service offering.

Finally, perks, like special discounts or exclusive first sneak peeks at new items, can help elevate a customer to think like an advocate. Offering a reward increases referral likelihood, but luckily, according to the American Marketing Association, the size of the reward does not appear to matter to most customers. In other words, it's the thought that counts. Leave your customer remembering that yours was the company that thought about them as a person and not as a number.

## Transforming Through Your Customer Journey

Reshaping and rethinking the way your customers experience your business will not only cultivate stronger relationships between your company and your customers, it will also help motivate current customers to active engagement and advocacy of your brand. Authentic and genuine customer recommendations and engagement are a strong indicator of how your business is delivering value to its intended audience. By using these steps as a jumping off point for remapping your customer experience journey, your organization will be better equipped to transform B2B customers into advocates.





## Leankor Site Updates

### B2B Telecom Vertical Web Page

#### [HERO 1]

Drive Customer-Centric B2B Telecom Projects with a Virtual Solution Focused on Proactive Management

Leankor increases customer satisfaction with more stable and profitable projects.

#### [CTA] REQUEST A DEMO

Natively Built on Salesforce

#### [SECTION DIVIDER-INTRO]

#### [HEADER]

#### [Header Intro]

### Advance Your Projects in the Digital World

Today's consumers are more tech savvy than ever. On account of this, when they need to secure telecom products for their enterprise, they expect higher quality, shorter installation cycles and reduced costs. With Leankor's SaaS enterprise work and project management solution, B2B Telecom's are empowered to develop scalable, repeatable and flexible processes by productively managing projects to ensure on-time delivery. In an environment as dynamic but instable as Telecom, Leankor's proven solution is critical to meet a wide range of customer needs in a cost-effective way.

The impact? Leankor brings together your team, projects and customer data in real-time. This marrying of information and individuals increases revenue through accelerated delivery and customer satisfaction.

#### [SECTION DIVIDER]

#### [HEADER]

### The Right Fit for Large-Scale Challenges of B2B Telecom Projects

#### [ICON]

#### Transformative. Elevate Your Innovation

Adopting a digital project management solution can generate cost savings, increase margins and reduce overhead. By using Leankor, Telecoms can shorten timelines through real-time management of their projects, people and priorities. Leankor allows Telecoms to redistribute time, resources and money into product innovation by fast-tracking their current projects.

#### [ICON]

#### Flexible. Operate the Way You Perform Best

Link different operational and project methodologies as projects flow through teams. Leankor translates and adapts to work the way you want to work by offering options. You can now easily



interconnect styles, such as Kanban, Lean, Rolling Wave, Agile, Gantt, Waterfall, hybrid and more as you work.

[ICON]

**Visual. Unlock a 360 View of Your Projects and Teams**

Gain real-time insight into every aspect of your projects and projects within projects. Leankor's control tower dashboard view continually updates information from order to delivery. This gives executives the accurate information and transparency they need for critical decision making and accountability.

[ICON]

**Collaborative. Unite Individuals and Teams Anywhere – Any Time**

Work from anywhere successfully through digital management of your Telecom projects. B2B Telecom teams often operate outside of a traditional office. Leankor offers the ability to virtually connect no matter where people are located, when that connection is essential.

[ICON]

**Scalable. Utilize Customer Data for Rapid Scaling**

Maximize your resource loading and project data to decrease deliverable cycles. Leankor's up-to-date information allows for better planning and resource allocation, leading to quicker scalability and delivery. Enhanced delivery cycles can result in smarter pricing and lower costs.

[ICON]

**Effective. Elevate Your Project Success for Customer Satisfaction**

Revamp the management of your projects. Through personalized dashboards, individuals are able to share issues and information, plan activities, manage risks and agree on strategy changes as they happen.

[ICON]

**Reliable. Deliver On-Time Peace of Mind**

Achieve on-time delivery every time with improved business processes. Leankor is exclusively designed for the unique challenges in enterprise work and project management. Leankor's solution streamlines B2B Telecom projects for consistent, outstanding results.

[SECTION DIVIDER]

[HEADER]

TBD based on Quote or Stat.

[Quote]

"Quote" or stat

[SECTION DIVIDER-CTA]

[HEADER]

**Transform Your B2B Telecom Operations with a Solution Focused on Delivery**

[BODY]



Ready to advance your B2B Telecom projects?  
Enhance customer satisfaction and increase margins through streamlined delivery cycles.

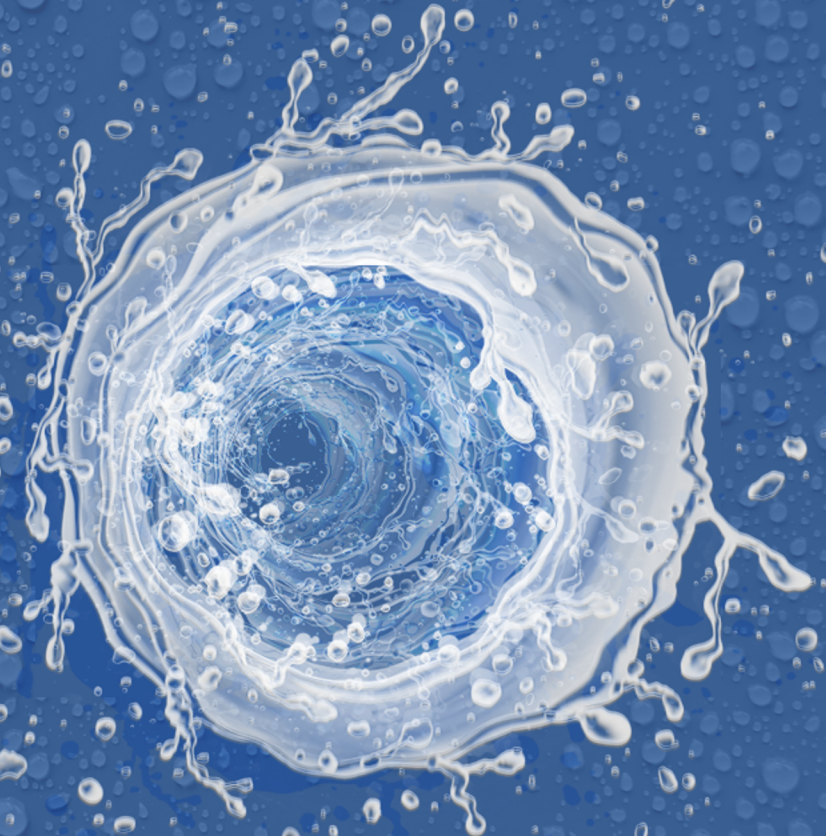
**[CTA BUTTON]**  
REQUEST YOUR DEMO





# *Optimizing Stormwater Management*

Value Messaging



# Value Messaging: Pillars

## *ERP-O*

- Economical
- Resilient
- Peace of Mind

# Value Messaging: ERP-O

- Economical
  - Opti saves 60-90% of costs over passive methods and allows communities to optimize their capital investments in existing and future infrastructure.
- Resilient
  - Opti enables dynamic stormwater management in a constantly changing and unstable environment.
- Peace of Mind
  - Opti supports the safety of communities before, during and after storm events by equipping decision makers with remote real-time data visualization, alerting and proactive control of stormwater assets.

# Value Messaging: Economical

- Opti ensures communities can:
  - Save 60-90% over passive methods.
  - Dramatically lower total cost of ownership (TCO).
  - Optimize capital investments in existing and future infrastructure.

# Value Messaging: Resilient

- In a constantly changing environment Opti provides:
  - The ability to quickly and easily configure your system.
  - Improved wet weather performance.
  - Development of healthier environments through robust infrastructure.



# Value Messaging: Peace of Mind

- Opti facilitates proactive asset management by:
  - Lowering the risk of non-compliance.
  - Forecast driven control and decision providing support.
  - Empowering decision makers with real-time data visualization and altering



# Elevator Pitch & Boiler Plate

# Elevator Pitch

Opti is revolutionizing stormwater management with our real-time, data-driven platform that proactively prevents stormwater runoff and damages.

# Boilerplate

Opti is revolutionizing stormwater management using a real-time, data-driven platform that proactively prevents stormwater runoff and damages. Used in over 160 deployments across 20 states, Opti's data enables decision-makers to preemptively predict when events will occur, and easily configure or adjust their stormwater storage system, while capitalizing on their existing infrastructures or under-utilized land. For more information, visit [optirtc.com](https://optirtc.com).



# Value Messaging

## By Persona

# Personas

- Politico
  - Government officials (City, County, Regional, State and Federal)
- Engineers (Storm Chasers)
  - Engineers working in the public and private sectors responsible for stormwater management solutions.
- IT Professionals (Techies)
  - Technology influencers in public and private sectors that weigh in on technology decisions.

# Persona Messaging: Politicos

## Opti helps Politicos:

- Maximize capital investments in existing and future infrastructure.
- Save 60-90% over traditional methods, reduce TCO, as well as overall operating and maintenance costs.
- Accelerate stormwater management outcomes
- Proactively protect and prepare communities for storm events.
- Deliver the system that decreases disasters, damages and displacements from storm events.
- Triple bottom-line outcomes.
- Create healthy communities through resilient watersheds.
- Enable “smart city” initiatives.

# Persona Messaging: Storm Chasers

## Opti helps Storm Chasers:

- Enable proactive asset management through predictive analysis, real-time visibility and preemptive control.
- Significantly improve decision making with real-time, quality data and NOAA forecasting.
- Maintain compliance, meet regulations and obtain permits.
- Install a system that provides significant cost savings.
- Shorten implementation timelines by retrofitting existing assets
- Safely manage an infrastructure with real-time alerts, notifications and numerous fail-safes in place.



# Persona Messaging: Techies

## Opti helps Techies:

- Solve challenges in the community through reliable real-time data for proactive asset management.
- Offer trust with actual case studies and exemplary results.
- Save money with cost-effective solutions and reduced timelines.
- Know that quality data is driving and informing decision making.



# Additional persona references

# #1: The POLITICO

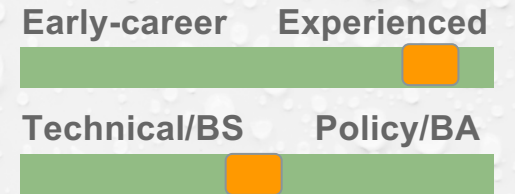
Politicos are appointed or elected officials such as directors, or commissioners or even mayors/CEOs and public affairs teams who like to promote their vision and responses to storm events.

They tend to be **more experienced** (20+ years) and are active on smart city or water advisory boards and committees.

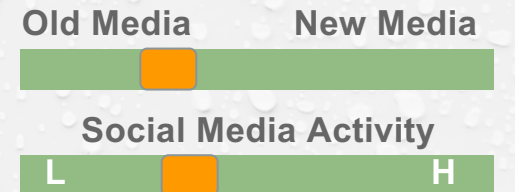
Often **media savvy** - tend to be spokespeople, also promoted on social via their dept or corporate Twitter feeds

Messages/terms - lower risk, reduce capital costs, smarter, help their community prevent flooding + prepare for the future

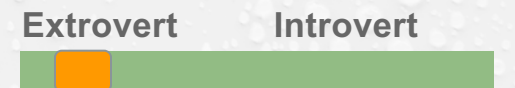
## BACKGROUND



## BEHAVIOR



## PERSONALITY



# #2: The TECHIE

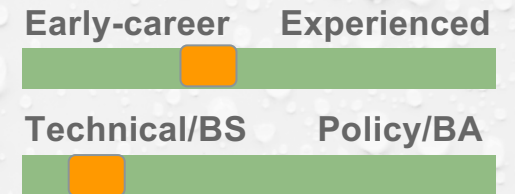
Techies are more hands on and data-driven, and often have IT or reporting or sometimes planning roles in their organization.

They are generally **less experienced** (~10 years) and are active in peer technology user groups.

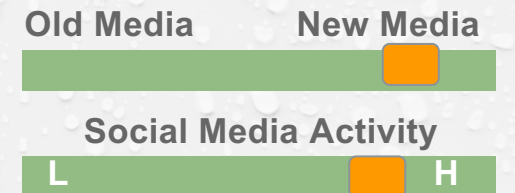
Many are **heavy social media users** - some have blogs or a GitHub profile, others are active on Twitter; likely to present at technical vs water-related conferences

Messages/terms - better visibility, cloud-based, open approach

## BACKGROUND



## BEHAVIOR



## PERSONALITY



# #3: The STORMCHASER

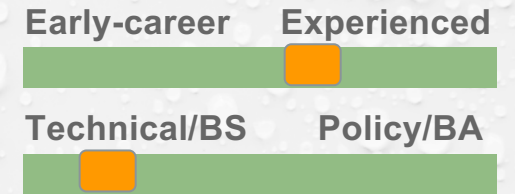
Stormchasers are often Civil or Environmental Engineers by training and like to be in the field in their roles as engineering or stormwater managers

They tend to be mid-career (~15 years experience), have professional credentials (PE), and affiliated with professional societies (ASCE)

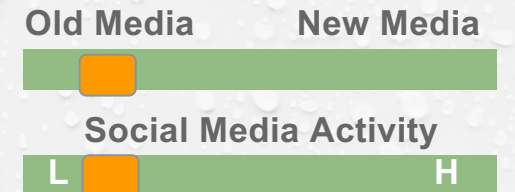
Not active on social (except LinkedIn) but usually active in their local community - giving talks, appearing in local print/radio/TV

Messages - adaptive control, improve water quality, compliance

## BACKGROUND



## BEHAVIOR



## PERSONALITY



# Leankor Messaging

May 2020

# Agenda

- Competitor Snapshot
- Competitor Comparison
- Target Audiences and Personas
- Corporate Messaging
- Persona Messaging





# Competitor Snapshot





# Competitor Snapshot

## **Oracle**

- Enterprise Project Portfolio Management Software that allows for Global Project Planning of projects and portfolios of any size using cloud-based solution.

## **Workfront**

- Web-based work and project management software that features enterprise work management, issue tracking, document management, time tracking and portfolio management.

## **MS Project Server**

- Using SharePoint it supports the Microsoft Project (Professional edition) interface as a client application or by web browser connecting to its Project Web App (PWA).

## **Excel**

- Formula-based spreadsheet tool featuring calculation, graphing tools, pivot tables, and a macro programming language called Visual Basic for Applications.

## **Smartsheet**

- SaaS offering collaboration and work management, using assign tasks, track project progress, manage calendars, share documents, and manage other work, using a tabular user interface.

## **Trello**

- Web-based Kanban-style list-making application.

# Competitor Snapshot

Company	High-Level Messages
<b>Leankor</b>	Transforming project management. Better outcomes from a new approach.
<b>Competitor</b>	
<b>Oracle P6 (Primavera)</b>	Powerful Tools for Global Project Planning.
<b>WorkFront</b>	Stay Connected. Work Management that aligns teams to achieve results, wherever we work.
<b>MS Project Server</b>	A flexible, scalable solution for project portfolio management and every day project management.
<b>Excel</b>	A powerful data visualization and analysis tool.
<b>Smartsheet</b>	Enabling your dynamic enterprise
<b>Trello</b>	Trello lets you work more collaboratively and get more done.



# Target Audiences and Personas



# Industries

- Industrial Manufacturing
  - Solar Manufacturing
  - Wind/Energy/Other Renewables
  - Construction
    - Site Construction
    - Solar Construction
- Biotech & Pharma
  - R&D
  - Global Product Launches
- B2B Telecom



# Primary Audiences

- Senior Level Titles:
  - SVP, VP, Director
    - Operations, Projects, Portfolio, Product, PMO
- Manager Level Titles:
  - Sr. Manager, General Manager, Department (Name) Manager
    - Operations, Projects, Portfolio, Product, PMO
- Channel Partnerships

# SVP, VP, Director Operations

## Responsibilities

- Manage, at a high level, the global supply chain, from sourcing to manufacturing to distribution
- Oversee multiple teams (e.g., manufacturing, purchasing and sales departments)
- Manage team leads, oversee employee productivity
- Research and implement new directives for business growth and prosperity
- Manage, prioritize and drive resolution on all technical and commercial issues that are negatively impacting operations performance
- Lead the development, implementation and maintenance of policies and procedures for the organization

# SVP, VP, Director Operations

## Pain Points

- Want to implement all the right solutions – but red tape and budgets can get in the way
- Getting the best results from limited resources
- Representing a technical department to non-technical executives
- Delays in tasks and milestones, affecting customer accounts
- Any kind of waste—money, time, space, product, process
- Margin pressure, being overbudget
- Siloed information across departments
- Real-time visibility into metrics, statuses, performance
- Ensuring customer satisfaction



# Company Messaging





# Company Pillars

## Leankor is:

- Transformative
- Customizable
- Visual
- Collaborative
- Scalable
  - Effective
  - Reliable

# Transformative

- Gain an enterprise work and project management SaaS solution that fits to your unique processes from strategy to delivery, no need to alter your processes to fit the tool
- Convert high-volume, intricate, complex projects that span over numerous global teams into easy to manage, collaborative plans
- Transform the way you do business with a cloud-based enterprise solution that increases flexibility and allows virtual, remote workflows and collaboration
- Reduce siloes and decrease the number of systems your teams need by implementing a seamless SaaS solution that holds all tools and resources in one flexible software
- Link the different styles of work management and project management methodologies in your organization with smooth project transitions throughout departments and the project lifecycle
- Achieve best-in-class TCO and generate exceptional ROI using the most cost-effective enterprise level solution
- Save valuable time by swiftly and effortlessly importing data from other software (e.g., Oracle P6, MS Project), with no need to recreate schedules
- Improve performance, productivity, security and stability through the Salesforce cloud platform

# Customizable

- Set up your project management system to fit your industry specific workflows, organizational and project management styles
- Automate common workflows and build pre-defined automations to help your process move faster
- Create custom financials, expenses, budgets, baselines and reporting for each project, product and/or portfolio
- Connect to other business intelligence tools, apps and data access initiatives for event-driven integration and real-time business processing
- Supply active and proactive control to the workforce with real-time, personalized dashboards that deliver current views of project health and status all in one place
- Modify your workflow and preferences with customized projects and reports, at the individual level, allowing continuous, in time management of all projects
- Set up features unique to your organization with advanced tools

# Visual

- Gain situational awareness over concurrent projects by visualizing numerous projects and their correlated information including risk, milestones and resourcing
- Enable more strategic decisions and create a control tower environment to provide deep visibility into disparate projects and portfolio performance
- Boost the user experience with a visually dynamic, intuitive, easy-to-learn and simple-to-use interface designed for individuals of all levels
- Bring teams together and give them full visibility into their projects with virtual integrated workspaces that enable work autonomy, personal ownership, and transparency among team members
- Stay on strategy, even though strategy is changing, by using a tool that streamlines all information and gives teams real-time visibility and insight
- Examine different boards side by side (Gantt vs Kanban vs Calendar), as well as hyperlink to other project boards to see status of all connected projects
- Gather a deeper understanding of all connected projects with a roll-up master board

# Collaborative

- Connect and unify all processes, projects and teams to proactively manage your organization
- Unite teams from anywhere in the world allowing them to brainstorm, preplan, plan, discuss and review projects
- Remove communication boundaries with advanced features that support distributed teams by providing virtual, effective communication of work status and real-time collaboration
- Link disparate organizational and workflow methodologies, ensuring fluid interaction between teams
- Meet and exceed project deliveries by enabling live engagement and orchestration of projects
- Update data, user actions and sprint/task progress across all boards simultaneously
- Enable continuous importing of quality data from different sources, allowing for inclusive decision making
- Eliminate chain delays with easy-to-set-up predecessors, notifying the team the next task is ready
- Alert resources automatically to new information or tasks as they happen
- Access your project, it's resources, tools and your team anywhere, anytime, reducing travel expenses and delays from in-person meetings
- Benefit from high touch, expert-led customer service including white-glove implementation and monthly meetings that offer ongoing strategic guidance
- Enable teams to plan, prioritize and execute on their work together – keeping collaboration flowing throughout the process

# Scalable

- Gain a scalable, enterprise solution that seamlessly responds to increased demands, growing project workloads and additional resources
- Enable efficient workload expansion with comprehensive orchestration of remote, outsourced resources
- Access a control tower view of all projects that allows you to disrupt the disruptors that interfere with proper scaling
- Deal with surges in production and demand, create better stability, avoid significant shortages, as well as losses in time and revenue
- Leverage cloud functionality and optional Salesforce platform integration to start and scale up new projects rapidly
- Benefit from the Salesforce Cloud metadata platform

# Effective

- Improve project health and efficiency by reducing timelines, assessing risks and providing an accurate, real-time view into every component of your projects and resources
- Utilize an effective, interactive and streamlined workflow across all teams
- Enable teams and individuals to work together virtually, resulting in diminished deadlines, risks and, in the long run, overhead costs
- Take action to mitigate risks and delays using immediate alerts and notifications
- Provide a straightforward workflow with easy-to-follow visual elements
- Reduce repetitive, unnecessary tasks for your workforce
- Lower risks and solve challenges in the organization through accurate, continuously updated data and information
- Reduce environment communication noise (e.g., Slack, Zoom, IM) and confusion by channeling all communication through Leankor
- Enable time-saving measures, which reduces cost, by compressing complex project delivery cycles

# Reliable

- Allow swift decision making and action to mitigate and resolve risks, and/or change course, by employing risk assessment tools, and other real-time information, alerts and notifications
- Create organizational focus through one platform
- Empower your decision makers with accurate, current information, resource availability and data
- Eliminate unnecessary and uncertain guesswork with up-to-date data and information
- Ensure customer satisfaction by keeping all stakeholders informed of project shifts as they happen
- Enhance security by setting security measures and strict permissions, as needed, throughout organizations
- Ease financial management and increase forecasted profitability from matching expenses to forecasts and budgets and submitting them as they happen
- Safeguard your data and find reassurance in knowing Leankor is housed in Salesforce Cloud, an enterprise-grade data security and availability cloud





# Persona Messaging



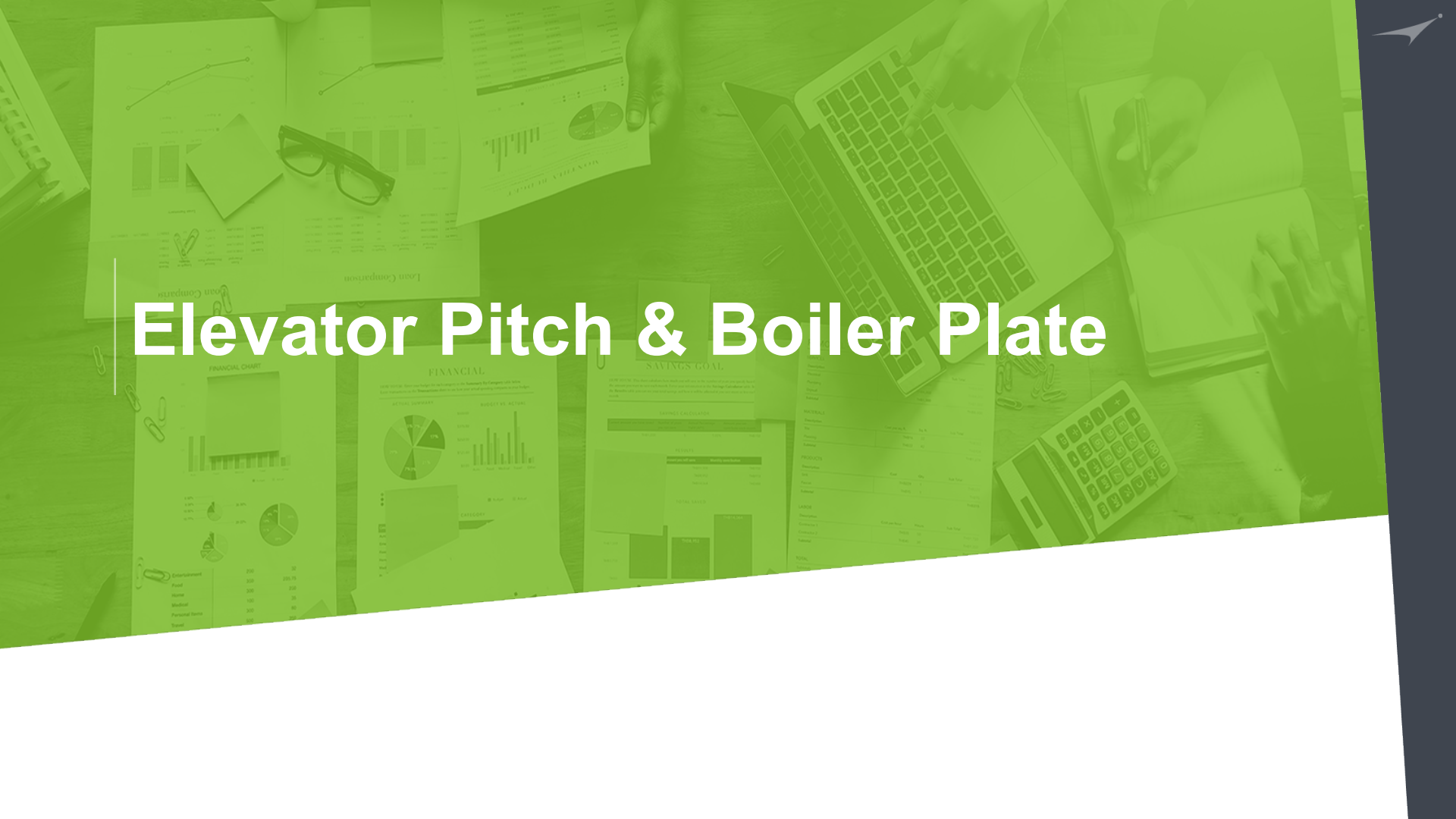
# Persona Messaging: SVP, VP, Directors of Operations

Leankor helps Operations Executives:

- Focus on organizational strategy to delivery outcomes while providing teams the environment, tools and resources they need in disruptive, highly competitive markets
- Manage global projects and supply chains by providing visibility into portfolio health through personalized dashboards
- Combine data from multiple teams to produce essential metrics that can be used to improve responsiveness, efficiency and the customer experience while reducing costs and increasing profits
- Undertake projects of any size with the ability to scale as needed, deal with surges, avoid shortages and delays and bring stability to production
- Direct cross-functional teams across the world remotely to streamline processes effortlessly and improve bottom-line outcomes
- Maximize ROI and optimize TCO with a minimal and highly competitive cost per user, as well as timeline reduction, effective resource assignment and real-time awareness
- Preserve business continuity by enabling a remote workforce
- Reduces operational risks and minimize rework across projects, portfolios, departments and the organization as a whole



# Elevator Pitch & Boiler Plate



# Elevator Pitch

Leankor has transformed outdated, fragmented project management systems by creating a dynamic, customizable and user-friendly SaaS enterprise work and project management solution that is securely hosted in the Salesforce Cloud and meets all your project needs in one, scalable tool.

# Boilerplate

Leankor is a dynamic, customizable and user-friendly SaaS enterprise work and project management solution that addresses large, long-running and complex project needs in one, scalable tool. Securely hosted in the Salesforce Cloud, Leankor delivers real-time visibility and collaboration, eliminating and mitigating the biggest work and project workflow challenges. Committed to proving that one size solutions do not fit all, Leankor is transforming the space by eliminating outdated, fragmented project management systems. Linking different styles of workflows and methodologies and designed to integrate with unique business processes, organizations are leaving behind project risks, negative margins and poor communication and trading them for a highly visible and easy to operate solution that works the way they do. Leankor is available as an independent SaaS and as a Salesforce AppExchange partner.

For more information, visit [Leankor.com](https://Leankor.com).



## Recognize Revenue Faster with On-time Project Delivery

With Leankor, you can now execute simple to complex projects on-time, every time, at scale.

Leankor's enterprise work and project management solution empowers individuals and teams to work more effectively by transforming complex workflows and business processes into easy-to-manage plans. Leankor offers real-time visibility into financials, resources, people, tasks and performance, allowing decision-makers to easily evaluate overall effectiveness throughout the organization. This dynamic benefit aides in making significant improvements to processes and timeliness, vital for quicker revenue recognition.

### Leveraging the power of the Salesforce cloud, Leankor's dynamic and user-friendly SaaS:

- Optimizes an order-to-cash value stream
- Elevates customer satisfaction through reliable delivery
- Operates using real-time data for informed decision-making and control tower visibility for a 360 view of the organization
- Translates and adapts different organizational and project management methodologies (Kanban, Lean, Agile, Gantt, Waterfall, hybrid and more)
- Enhances security and productivity through the Salesforce platform by extending Salesforce solutions like: Quip, Tableau, Field Service Lighting, Einstein Analytics and Service Cloud



**Collaborative Work Management**



**Scalable Project Management**



**Innovative Portfolio Management**



**Reliable Risk Surveillance and Management**



**Real-Time Resource Management**



**Intuitive Life Cycle Task Management**



**Dynamic Reporting and Dashboards**

## Gain Enterprise Sized Results

Through digital transformation, Leankor is designed to reduce your project cycles and safeguard delivery outcomes. Leankor's solution serves industrial enterprises in Manufacturing, Construction, Solar, Energy and B2B Telecom with additional emphasis on R&D and product launches for Biotech and Pharma.

### The end result?

Leankor will help you deliver more efficient projects while achieving faster revenue cycles.

# Transform Your Enterprise with a Flexible Solution Focused on Outcomes



## Transformative

Transform large, complex projects into easy to manage, collaborative plans



## Customizable

Link disparate methodologies and automate workflow



## Visual

Gain a 360 enterprise-wide visibility across all your projects



## Collaborative

Connect global operations and unite remote workforces



## Scalable

Scale rapidly with ease



## Effective

Improve performance and productivity for on-time delivery



## Reliable

Decrease departmental siloes while empowering strategic decisions

## Rely on Salesforce Security and Stability

Leankor is natively built on the Salesforce platform, one of the most secure, trusted and reliable cloud platforms. Through the power of Salesforce, Leankor provides the ability to start and scale projects rapidly, improve performance and productivity, all while providing the utmost security and stability. Leankor is available to be downloaded on your Salesforce instance or as an independent SaaS solution.



Learn more at [leankor.com](https://leankor.com)  
or call us directly at 1-888-532-6567

## Global Agility Solutions Opens Office in Vietnam, Ensuring Safety, Continuity and Security During COVID-19

AUSTIN, Texas, April 14, 2020 – Global Agility Solutions LLC, provider of onshore, offshore and hybrid Business Process Outsourcing (BPO) services and solutions today announced the opening of its new production facility in Da Nang, Vietnam.

Chief Revenue Officer and Co-founder Martin Tyson expanded on the choice, “After visiting Ho Chi Minh City, Hanoi, and Da Nang, it was clear that the large university student population, technology infrastructure and growth environment in Da Nang most closely aligned with our corporate culture.” Experiencing exponential growth in the last 15 years, Da Nang is the heart of the tech boom and is Southeast Asia’s version of Silicon Valley. Currently almost 14,000 IT companies reside in Vietnam.

While much of the world is reducing workforce and shutting down business due to the COVID-19 pandemic, Global Agility is moving forward with its expansion into Vietnam. Global Agility expects to be able to keep all its over 800 employees during this global crisis. “When many companies are closing their business because of the virus, we are lucky to have an opportunity of a new job,” said My Dang, a new employee at the Vietnam site.

In the event quarantines are implemented in production locations, Global Agility’s hybrid cloud technology allows for agents to work from home. Chief Operating Officer Martin Maldonado remarked, “This new facility gives our clients the comfort of knowing that their operations will continue regardless of any power or connection issues, including natural disasters. With the current global pandemic, this opening comes at the perfect time to ensure stability for our clients.”

Although excited to be opening a new office, Global Agility is remaining mindful of the COVID-19 pandemic and focusing on the safety and wellbeing of their employees. They will continue to closely monitor the situation and follow all guidelines provided by the local and national governments. In its seven-year history, Global Agility has been committed to being one of the best places to work in each region in which they operate.

Thanh Duong, HR Manager, was the first hire and a key person in the development of the new facility as well as instrumental in preparing the first 60 employees. Duong noted, “I chose to come to work at Global Agility Solutions because I can see a strong future with a company that provides a fair environment and cares about its people.”

Senior Vice President of Asia Pacific Region, Paul Hartley sums it up best, “Opening our new facility in Da Nang, is testament to our continued success, and our continued investment in our people.”

### About Global Agility

Global Agility Solutions offers comprehensive on and offshore Business Process Outsourcing (BPO) services and solutions focused on automating and advancing repeatable business operations that impact bottom line revenue. With offices in the US, Philippines and Vietnam, Global Agility is backed by an extensively trained and highly scalable workforce that is proven to ramp quickly and deliver unrivalled results. Committed to continuous process improvement, industry-leading technology and client satisfaction, Global Agility is modernizing the BPO space and reshaping the way organizations do business. Learn more at [GlobalAgilitySolutions.com](https://GlobalAgilitySolutions.com)





---

Contact: Martin Tyson

[martin.tyson@globalagilitysolutions.com](mailto:martin.tyson@globalagilitysolutions.com)

5128250399



## Leankor Site Updates

### Solar Page

#### [HERO 1]

Recognize Revenue Faster with On-Time Delivery of Large-Scale Solar Projects through Increased Visibility and Collaboration

Leankor's all-in-one solution allows stakeholders to visualize the entire lifecycle for a 360 customer-centric view

#### [CTA] REQUEST A DEMO

Available in Salesforce or as a Standalone SaaS.

#### [SECTION DIVIDER]

#### [HEADER]

**Compile Customer Data and Foster Stakeholder Collaboration, All In One Place**

#### [Header Intro]

Delivering on time is critical to the success of each phase of solar development. With Leankor's cloud-based work and project management solution, managing the countless projects, projects within projects and stakeholder alignment has never been easier. Developed to address the specific needs of large, long running and complex projects, Leankor reduces risk of solar projects by providing real-time insight into mission critical project interdependencies and individuals working on them throughout their lifecycle.

The impact? Using Leankor, stakeholders have complete visibility into all customer information from sale to delivery, which is securely located in one all-inclusive solution. This exceptional transparency results in the ability to recognize revenue faster for optimal cash flow.

#### [SECTION DIVIDER]

#### [HEADER]

**The Right Fit for the Large-Scale Challenges of Solar Projects**

#### [ICON]

**Transformative. Utilize Digital Transformation for Real-Time Connection**

Implement an all-in-one SaaS solution that holds all information from the start of the lifecycle through the final project delivery. Gaining this increased accountability grants everyone the ability to operate with the same, correct information. Real-time data can help to alleviate issues, allowing them to be addressed more efficiently, at an accelerated rate and without severely impacting project cost.

#### [ICON]



**Flexible. Interconnect Organizational and Project Methodologies**

Adopt a solution that seamlessly interconnects all methodologies. Many applications don't take into account that large-scale solar projects use a variety of methods to get the job done. Leankor works the way you want to work (Kanban, Lean, Agile, Gantt Waterfall, hybrid and more).

**[ICON]**

**Visual. Gain a 360, Control Tower View**

Provide executive visibility for complete transparency and efficiency across the enterprise. Leankor's real-time, cloud-based solution provides high visibility that spans all teams over the multiple solar development stages. This 360 view gives insight into razor-thin margins and budgets, changing requirements, rapidly multiplying vendors and tracks progress throughout the lifecycle.

**[ICON]**

**Collaborative. Unite Stakeholders, Teams and Team of Teams**

Connect a multidisciplinary team of experts, stakeholders, contractors and field service workers. With Leankor's virtual solution, the potential for collaboration among individuals' increases, since they can now join efforts and capacities from anywhere to better respond to issues as they arise.

**[ICON]**

**Scalable. Reduce Risk and Scale with Ease**

Apply real-time visibility into your resources for increased scalability as projects shift and grow. Leankor allows managers to view up-to-date availability to maximize resource loading and implement quick decisions to support project growth. This provides managers an ability to scale with ease, even out the workload and think agilely about the workforce for the entire project.

**[ICON]**

**Effective. Increase Customer Satisfaction Levels**

Realize on-time delivery every time for high customer satisfaction. With Leankor, organizations now have an opportunity to say goodbye to the days of siloed data, misinformation and delayed communication. Adopting a digital work and project management solution mitigates the risks that become the causes for delays and increases delivery satisfaction.

**[ICON]**

**Reliable. Improve Data-Based Decisions**

Employ the only work and project management solution that is 100% Native to Salesforce. Leankor is built and housed on one of the most secure, trusted and reliable cloud platforms. This ability to update and store data in real-time is mission critical for informed decision making for reliable outcomes.

**[SECTION DIVIDER]**

**[HEADER]**

**Real-Time Data Collaboration For Improved Scalability**



**[Quote]**

“Leankor helps us to visualize the entire process. SunPower’s vision is for all project-related information and communication in one place, accessible via a mobile app. This has brought a tremendous accountability to our teams and helps us scale.” Sun Power

**[SECTION DIVIDER-CTA]**

**[HEADER]**

**Transform to an All-Encompassing Solution Focused on Delivery Success**

**[BODY]**

Ready to achieve optimal results for outstanding customer satisfaction?  
Start accelerating your delivery cycles to improve your revenue recognition now.

**[CTA BUTTON]**

Request Your Demo



## Leankor Site Updates

### Industrial Manufacturing Page

Navigation:

Current [Solution: Industrial Manufacturing]

Recommend [Industries: Manufacturing]

#### [HERO 1]

### **Achieve On-Time Customer Delivery Every Time through Real-Time Data, Collaboration and Streamlined Order-to-Cash Processes**

Leankor's solution compresses delivery cycles and improves revenue recognition for Manufacturers.

Secure in Salesforce or as a Standalone SaaS.

**[CTA] Request Your Demo**

#### [SECTION DIVIDER-INTRO]

#### [HEADER]

#### [Header Intro]

### **Gain a 360 Control Tower View of All Data and Projects for Reliable Delivery**

On-time delivery equals enhanced customer satisfaction and quicker revenue recognition. Manufacturers can now utilize a holistic 360 view of all their customer and project data from sale to delivery. Leankor's highly-visual and easy-to-use work and project management solution allows individuals to use personalized dashboards and reporting for informed decisions. It also seamlessly supports and links different workflows and project management methodologies throughout their organization. Leankor enables industrial manufacturers to bring together all the components they need to successfully and proactively manage every project in their queue.

The impact? Using Leankor, Industrial Manufacturers can decrease project timelines and create more stable projects that result in consistent on-time delivery and faster revenue recognition.

#### [SECTION DIVIDER—PILLARS FOR MANUFACTURING]

#### [HEADER]

### **The Right Fit for the Large-Scale Challenges of Industrial Manufacturing**

#### [ICON]

#### **Transformative. Enable a Continuous Improvement Mindset.**

Gain an all-in-one, real-time, cloud-based solution that provides high visibility into your global projects and supply chains. Leankor tracks and manages on-time delivery performance and revenue targets by transforming complex projects, that span numerous teams and workflow styles, into easy to manage, collaborative plans that deliver.



**[ICON]****Customizable. Implement a Solution Created for You.**

Link different work and project management methodologies in your organization for smooth project transitions across departments throughout the project lifecycles. The result, improved communication, real-time access to accurate data and on-time delivery.

**[ICON]****Visual. Gain Visibility into Every Project and Resource.**

Compile all project information and factory metrics into one tool that links disparate systems. Leankor's visual dashboards heighten insight into demand and resource availability, giving project leads and executives the information needed to make informed decisions and manage risks across all teams and projects.

**[ICON]****Collaborative. Unite Remote Teams Worldwide.**

Reduce delays by uniting world-wide teams in real-time, allowing them to brainstorm, preplan, plan, discuss and review projects. Leankor's advanced features to support distributed Industrial Manufacturing teams remove communication boundaries, enabling virtual, effective communication and collaboration.

**[ICON]****Scalable. Meet Customer Requirements Quickly and Efficiently.**

Develop rapidly, and at scale, when customer requirements arrive. Built for Industrial Manufacturers, enables you to deal with unexpected surges in production and demand, while creating more stability, avoiding significant shortages and mitigating losses in time and revenue.

**[ICON]****Effective. Define Value Streams and Grow Profits.**

Ensure projects stay on track to deliver on-time, assuring customer satisfaction and improved revenue recognition timelines. Offering the tools leaders need for value stream mapping, Leankor helps Industrial Manufacturer's to achieve agility in volatile markets.

**[ICON]****Reliable. Improve Data-Based Decisions.**

Gain real-time metrics that drive better business decisions. Now you can collect, analyze, visualize and distribute lead times, cycle times, throughput and cumulative flows, in real-time. Leankor's shared personalized dashboards and connected data provide essential transparency for Industrial Manufacturing project efficiency.

**[SECTION DIVIDER-Case study]****[HEADER]****Proactive Management Drives Unmatched Results****[Quote]**

“Leankor gives users access to what’s happening on a project. It’s a quick way to see what’s going on with the tasks people are working on. Everyone can see project status information and update inputs in real-time without needing to be in the same room.” - Molecular Devices

**[CTA BUTTON]**

Read Success Story

**[SECTION BREAK-Industry]**

**On Order: A Better Work and Project Management Tool.**

- **Build to Order (BTO)**  
Manage your order to cash business process more efficiently, and with greater transparency into production KPIs, capabilities and global supply chain readiness.
- **Engineer to Order (ETO)**  
Advance your project management software to foster rapid deployment in demand-driven environments.
- **Assemble to Order (ATO)**  
Streamline your ATO manufacturing to develop projects that nurture quick delivery based on any customer requirements.
- **Make to Order (MTO)**  
Meet the diverse needs of your clients quickly and efficiently by ensuring timely production once the order is received.

**[SECTION DIVIDER-CTA]**

**[HEADER]**

**Transform Your Industrial Enterprise with a Solution Focused on Outcomes**

**[BODY]**

Ready to take your Industrial Manufacturing work and project management processes to the next level? Start compressing your delivery cycles to improve your bottom-line now.

**[CTA BUTTON]**

Request Your Demo



**Deliverable:** Leankor Solar Infographic

**[HEADER 1]**

**5 Ways Digital Project Management Solutions Combat Unique Solar Challenges for Utility-Scale and Commercial Projects**

**[INTRO]**

Large-scale solar projects, like utility-scale photovoltaic (PV) power stations or commercial solar farms, require a considerable investment, so the last thing a project with that kind of funding needs is delay that causes budgets to soar. Effective and efficient planning, scheduling and managing of all project components is critical to project success, but without a digital work and project management solution, this can become difficult and inefficient.

**[CALLOUT]**

The US is likely to install 3 million solar panels in 2021 and 4 million panels in 2023. ([Wood Mackenzie](#))

**[CHART / GRAPHIC]**

1.

<b>PROVIDE A 360 VIEW</b> No matter where or when it happens, executives need situational awareness of all components in a large-scale solar project lifecycle.	
<b>[CHALLENGE]</b> Solar projects require a considerable investment in time and money and have razor thin budgets. The solar lifecycle contains numerous stages and can span from <b>3-4 years</b> .	<b>[Solution]</b> A dynamic solution with a highly visual, intuitive framework that involves all stakeholders and teams. With Leankor, executives gain a <b>360, control tower view</b> of all interdependencies, resources and financials during the solar project lifecycle.
<b>[BENEFIT]</b>	<b>Measure anything.</b> <b>Tableau and Einstein Analytics</b> offer best in class AI and analytics. Drive insight into all financials from cost breakdowns to changes in gross margins to forecasted revenue.

2.





<b>ACCELERATE PROJECT DELIVERY</b>	
One size fits all is not the right solution for enterprise work and project management, large-scale projects need interconnecting methodologies.	
[ISSUE]	[SOLUTION]
Many project management tools don't offer teams the ability to work they want to work. Instead, forcing them to adjust their workflows to fit the solution.	No matter what method, or methodologies you use--Kanban, Lean, Agile, Gantt, Waterfall or a hybrid style--Leankor has you covered. Leankor translates and adapts different operational and project management styles for seamless workflows.
[BENEFIT]	<b>Move at a faster pace.</b> Improved processes set-up projects to deliver faster for quicker revenue recognition.

3.

<b>KEEP STAKEHOLDERS CONNECTED</b>	
A key piece to keeping projects on track is making sure individuals can participate in real-time collaboration.	
[ISSUE]	[SOLUTION]
The commercial/industrial scale solar development process involves a multidisciplinary team of experts, contractors and field workers.	Leankor provides an advanced level of digital sharing that allows real-time access of all critical project information to all stakeholders. Now individuals and teams can join efforts and capacities to better respond to issues or opportunities as they arise.
[BENEFIT]	<b>Manage projects anywhere, anytime.</b> With a virtual solution, the potential for collaboration among stakeholders' increases. No matter where they are located, stakeholders and teams can collaborate in real-time via the highly-intuitive desktop or mobile app.

4.

<b>ENABLE RISK SURVEILLANCE</b>	
Large-solar projects are at risks due to the many distinct segments within the whole ecosystem of solar power.	
[ISSUE]	[SOLUTION]
Large-solar projects contain projects within projects and a wide array of	Leankor's all-in-one solution keeps teams and stakeholders aligned on the many



vendors, numerous stakeholders, teams and contractors can amplify risks throughout the lifecycle.	interdependencies that exist in complex projects to enable rapid risk identification.
<b>[BENEFIT]</b>	<b>Informed decision making.</b> If all stakeholders and team members operate with the same, correct information, issues can be addressed more efficiently, at an accelerated rate and without severely impacting project cost.

5.

<b>TRANSFORM PROJECT PERFORMANCE</b>	
Large-scale solar projects need a work and project management solution that consolidates all project data and enables 360 visibility.	
<b>[ISSUE]</b>	<b>[SOLUTION]</b>
Lack of an application that acts as a single, definitive source of information for all users.	Leankor helps visualize the entire process by delivering projects through a highly interactive solution, involving all stakeholders and teams. Keeping executives focused on driving decisions and actions that reduce waste, increase value and control costs.
<b>[BENEFIT]</b>	<b>All-in-One Solution</b> Record and connect all your customer data, projects, communication and financials from order to delivery.

**[CTA]**

Ready to transform your solar project for accelerated delivery outcomes? Find out how Leankor can advance your daily operations to result in an optimized order-to-cash value stream for faster revenue recognition. **Leankor.com**

**[Footer]**

©2020 Leankor. All Rights Reserved.





GENERATE LEADS. DRIVE REVENUE.

LEANKOR PRODUCT ANIMATION

NARRATOR

Transforming your enterprise to a digital workspace is critical for success in today's environment.

Global enterprises need the right work and project management solution to ensure they deliver on-time, every-time.

100% native to the Salesforce cloud, Leankor is an all-in-one virtual application, that provides a complete record of all customer information, project activities and communication, from order to delivery.

This 360, control tower, dashboard view gives executives the advanced situational awareness and complete transparency they need for mission critical decision making--no matter where they are.

Leankor's highly visual solution empowers individuals and teams to work more effectively and improves organization-wide processes. The result? Accelerated project delivery, an optimized order-to-cash value stream and faster revenue recognition.

Commented [JA1]: [50 seconds]

With Leankor, organizations gain the power to:

Gain real-time insight into projects, people and priorities across the organization.

Translate and adapt different organizational and project management methodologies effortlessly.

Commented [JA2]: On screen [Kanban, Lean, Agile, Gantt, Waterfall, hybrid and more]

Connect global operations and remote workforces easily through an intuitive desktop or mobile app anywhere--any time.

Collaborate virtually from anywhere in the world.

Utilize a 360, customer centric model by extending Salesforce solutions for power and productivity.

Commented [JA3]: On Screen [Quip, Tableau, Field Service Lighting, MuleSoft, Einstein Analytics and Service Cloud]

Enterprise projects are large and complex, and with most work and project management solutions, one size does not fit all.

That is why Leankor has designed a solution to fit your industry's unique needs.

Commented [JA4]: Show icons of industries.

Leankor. It's the right time for the right solution.

Commented [JA5]: [40 seconds]



## Leankor Site Updates

### Home Page

#### [HERO—4 Total]

#### [HERO 1]

#### **Ensure Business Continuity for Global Enterprises**

Unexpected disruptions like the recent COVID-19, remote locations and outsourced teams are made simpler with enterprise work and project management.

Secure in Salesforce or as a Standalone SaaS.

[CTA] **TRANSFORM NOW**

#### [HERO 2]

#### **One Size Does Not Fit All**

Gain an easy-to-scale enterprise work and project management SaaS solution designed to address the unique needs of industrial organizations.

[CTA] **REQUEST DEMO**

#### [HERO 3]

#### **Transform Delivery Management, Transform Your Business**

Our customized, scalable and cloud-based solution addresses large, long-running and complex projects in real-time, while compressing your order to cash cycle.

Secure in Salesforce or as a Standalone SaaS.

[CTA] **TRANSFORM NOW**

#### [HERO 4]

#### **Unify Industrial Processes Globally**

Connect your teams and their disparate methodologies anywhere, anytime for real-time collaboration and visibility.

[CTA] **REQUEST DEMO**

#### [HEADER]

#### **Leankor Transforms Large Scale Delivery into Bottom Line Effectiveness**

#### [Header Intro]

Leankor generates revenue faster by offering a solution that provides better delivery management and predictability. At Leankor, we are transforming outdated, fragmented project management practices with a dynamic, customizable and user-friendly SaaS enterprise work and project management solution designed around the specific and unique needs of industrial enterprises. Securely hosted in the Salesforce Cloud, Leankor meets all your project needs in one, scalable tool.

It's the right time for the right solution.

#### [ICONS—WHAT WE DO]







**Engineered to Provide Enterprise Results**

	Collaborative Work Management
	Scalable Project Management
	Innovative Portfolio Management
	Real-Time Resource Management
	Intuitive Life Cycle Task Management
	Dynamic Reporting and Dashboards
	Risk Surveillance Management

**[ICONS—INDUSTRIES SERVED]**

**Designed to Fit Your Industry Specific Workflow**

	Manufacturing
	Solar
	Construction
	Biotech and Pharma
	B2B Telecom

**[BODY—PILLARS]**

**[HEADER]**

**Speed-up Revenue Recognition with On-time Project Delivery—Every Time.**

**[INTRO]**

Leankor takes complex large-scale enterprise work and project management to the next level by providing all the tools you need to successfully manage every customer delivery project in your queue.

**[ICON]**

**Transformative. Enable Innovative Industrial Project Management.**

Transform the way you do business with a cloud-based enterprise solution that increases flexibility, reduces delivery timelines, allows remote workflows and enables collaboration, all while improving your bottom line.

**[ICON]**

**Customizable. Configure to Your Industrial Organization.**

Customize Leankor to fit your unique industry workflow, no need to alter your processes to fit the tool. Our solution supports teams, projects, and portfolios across your enterprise, no matter what kind of methodologies and styles you use.



**[ICON]****Visual. Boost Situational Awareness.**

Create a 360 view of your enterprise with a control tower environment that enables more strategic decisions by providing your team a highly visual project and work management tool to visualize numerous projects and their correlated information.

**[ICON]****Collaborative. Connect Your Teams—Anywhere, Anytime.**

Connect and unify world-wide teams, processes, and projects to proactively manage your organization. Leankor unites teams and disparate methodologies allowing them to brainstorm, preplan, plan, discuss and review projects. Individuals and teams finally have access to the same, current information, allowing them to all be an effective part of the planning process

**[ICON]****Scalable. Ensure Rapid, Accessible Growth.**

Scale your complex projects rapidly with an easy-to-learn and simple-to-use enterprise solution that seamlessly responds to increasing demands, growing workloads and additional resources. Leankor's simple-to-scale solution compresses delivery cycles, enabling time-saving measures, while reducing costs.

**[ICON]****Effective. Keep Delivery Success on Target.**

Improve delivery outcomes while providing teams the environment, tools and resources needed for disruptive, highly competitive markets. Leankor improves the health of your projects and workflow by reducing timelines, assessing risks and providing real-time visibility, safeguarding on-time delivery and improving cash flow.

**[ICON]****Reliable. Gain Real-time Reliability.**

Empower your decision makers with the accurate, current information, resource availability and data they need to make informed decisions. From C-Suite to coordinators, everyone has real-time insight into portfolios, projects, people, resources and active workloads.

**[SECTION DIVIDER]****[HEADER]****Start and Scale Industrial Projects Rapidly with Our Salesforce Cloud-Hosted SaaS Solution****[BODY]**

Available through your Salesforce work environment or as an independent SaaS solution, Leankor addresses complex project needs in one simple to scale tool. Securely hosted in the Salesforce Cloud, one of the most trusted and reliable platforms, Leankor improves performance, productivity, security and stability.

**[SECTION DIVIDER]**

**[HEADER]**

**Transform Your Enterprise with a Customized Solution Focused on Outcomes**

**[BODY]**

Ready for real results? Experience for yourself the enterprise work and project management solution that transforms your complex projects into easy to manage, collaborative plans, all while compressing your order to cash cycle.

**[CTA BUTTON]**

**INCREASE MY BOTTOM LINE**



## Global Agility Social Descriptors

### LinkedIn

#### DESCRIPTIONS:

- **Tagline (120):** Comprehensive On and Offshore Business Process Outsourcing (112)
- **Overview Description (2000):** Global Agility Solutions offers comprehensive onshore, offshore and hybrid Business Process Outsourcing (BPO) services and solutions focused on automating and advancing repeatable business operations that impact bottom line revenue. Committed to continuous process improvement, industry-leading technology and client satisfaction, Global Agility is modernizing the BPO space and reshaping the way organizations do business.

Our hybrid cloud technology enables seamless integration and limitless scalability. Our services and solutions are designed to integrate instantly with a scalable workforce for accelerated ramp time, increased global redundancy and the flexibility to meet changing demands with ease. With virtual technology that eliminates the need for extra costs, equipment or hassle and offices in the US, Philippines and Vietnam, our services and solutions are designed to scale with you. (902)

#### OTHER FIELDS:

- **Website URL:** GlobalAgilitySolutions.com
- **Industry:** Outsourcing/Offshoring
- **Company size:** 201-500 employees
- **Company type:** Privately Held
- **Phone:** 01 888 283 0154
- **Year founded (not required):** 2014
- **Specialties (up to 20):**
  - Back Office Customer Service Centers, Business Process Outsourcing, Business Support, Call Center, Customer Care/Contact Centers, Customer Support, Customer Service, Data Entry, Data Process, Document Review, Image Review, Intelligent Transportation Systems (ITS), Research, Virtual Workforce, Tolling Solutions, Transportation (16)
- **Locations:** Austin, TX/Eagle Pass, TX/Baguio, Philippines/Da Nang Vietnam
- **Hashtags:** N/A
- **Featured Groups:** N/A



### Twitter

#### DESCRIPTIONS:

- **Bio (160):** Global Agility is reshaping the way organizations do business with comprehensive onshore, offshore and hybrid Business Process Outsourcing services/solutions. (158)

#### OTHER FIELDS:

- **Name (max 50)** Global Agility Solutions
- **Location (max 30)** Texas, Philippines, Vietnam (27)
- **Website (max 100)** GlobalAgilitySolutions.com

### Facebook

#### PAGE INFO:

- **Company Description (255):** Global Agility Solutions offers comprehensive onshore, offshore and hybrid Business Process Outsourcing (BPO) services and solutions focused on automating and advancing repeatable business operations that impact bottom line revenue. (234)
- **Category:** Business Services, Consultation Agency
- **Tele:** 01 888 283 0154
- **Website:** [GlobalAgilitySolutions.com](http://GlobalAgilitySolutions.com)
- **Email:** [Info@GlobalAgilitySolutions.com](mailto:Info@GlobalAgilitySolutions.com)
- **Address:** 823 Congress Avenue • P.O. Box 1864 • Austin, Texas 78767
- **Hours:** 24/7 / Never Closes
- **Product Links:** N/A (Will need to add links once the updated web pages are up).
- **Privacy Policy:** \*FLAG-no privacy policy on website

#### ABOUT SECTION:

- **Name:** Global Agility Solutions
- **Username:** @globalagility
- **Founded in:** 2014
- **Tele:** 01 888 283 0154
- **Chat:** N/A
- **Email:** [Info@GlobalAgilitySolutions.com](mailto:Info@GlobalAgilitySolutions.com)
- **Website:** [GlobalAgilitySolutions.com](http://GlobalAgilitySolutions.com)

#### ABOUT MORE INFO:

- **About:** Global Agility is reshaping the way organizations do business through comprehensive onshore, offshore and hybrid Business Process Outsourcing services and solutions.

#### OUR STORY:

- Global Agility Solutions offers comprehensive onshore, offshore and hybrid Business Process Outsourcing (BPO) services and solutions focused on automating and advancing repeatable business operations that impact bottom line revenue. Committed to continuous process improvement, industry-leading technology and client satisfaction, Global Agility is modernizing the BPO space and reshaping the way organizations do business.

Our hybrid cloud technology enables seamless integration and limitless scalability. Our services and solutions are designed to integrate instantly with a scalable workforce for accelerated ramp time, increased global redundancy and the flexibility to meet changing demands with ease. With

virtual technology that eliminates the need for extra costs, equipment or hassle and offices in the US, Philippines and Vietnam, our services and solutions are designed to scale with you.

**SERVICES PAGE:**

- **Manual Image Review**  
Minimize leakage and code-off's, eliminate the risk of downtime and reduce overhead by seamlessly outsourcing image review to a virtual team of professionals averaging 18+ months toll industry experience. Well-versed in a variety of regions and regulations, our specialized professionals ensure the highest levels of effectiveness.
- **Image Quality Detection (IQD)**  
Close the gap on leakage and code-offs by identifying and addressing camera quality issues when they start. IQD is a comprehensive early warning solution that proactively identifies camera malfunctions, from outages to quality issues, and sends you real-time alerts so you can address issues in hours instead of weeks and bill for more vehicles.
- **Image Processing Engine (IPE)**  
Reduce image processing fees and leaked revenue with a comprehensive image analysis engine that can be configured to your exact business rules. Combining an AI-powered ALPR engine, make/model identification, DMV validation and manual reviews, IPE considers every facet of image analysis so you can reduce manual involvement, increase automation, boost confidence and bill the right people.
- **Contact Center**  
Gain a seamless extension of your team with professional inbound and outbound contact center services. Deeply trained to support your customers through phone, chat or email sessions and monitored by industry veterans, our contact center teams are poised to deliver top-notch customer service every time.
- **Data Entry**  
Reclaim time for your important business tasks and outsource the busy work to a team of data entry and research specialists. Satisfying even the most complex of data entry requirements, our experienced team will design a custom solution for your specific needs that maximizes accuracy and eliminates unnecessary costs.
- **Back Office Support**  
Trust your back-office operations to an experienced team well-versed in all facets of account management, from billing to administrative duties. Leveraging experience across industries, our back-office teams are trained to keep your account operations smooth and efficient.

## Leankor Site Updates

### Construction Vertical Web Page

#### [HERO 1]

#### **Connect Your Construction Projects to Build Optimal Workflows**

**Leankor supplies proactive virtual project management to efficiently control your baselines.**

#### [CTA] REQUEST A DEMO

100% Native to Salesforce

#### [SECTION DIVIDER]

#### [HEADER]

#### **Heighten Awareness and Visualization for All Your Projects**

#### [Header Intro]

Transform your infrastructure and construction projects with a solution that manages the entire process through every phase, resulting in increased value-chain control, on-time completion and outstanding customer-centric outcomes. Leankor's cloud-based work and project management solution helps construction firms effortlessly and virtually manage their projects, interdependencies, communications, documents and teams.

#### [SECTION DIVIDER]

#### [HEADER]

#### **The Right Fit for the Large-Scale Challenges of Construction Projects**

#### [ICON]

#### **Transformative. Develop a 360 View for Complete Transparency**

Acquire a control tower view of all your projects. Leankor provides managers the personalized dashboards they need to analyze all of their baselines and teams. They can now roll all projects into one holistic view. Schedulers also gain accountability into missed deadlines or other risks and can update priorities in real time.

#### [ICON]

#### **Flexible. Optimize a Solution Ideal for Pull-Planning**

Link work styles for optimal project planning and management. Leankor translates and adapts different operational and project management styles for seamless workflows. This includes Lean principles, Critical Path Method, Kanban, Gantt Charts, Waterfall, hybrid and more.

#### [ICON]

#### **Visual. Employ an Intuitive and User-Friendly Solution**

Apply a solution that was designed with every user in mind. Leankor is a visually dynamic, easy-to-learn and simple-to-use interface intended for individuals of all levels. Because it is a more



instinctual user experience it allows for faster expansion and adoption, preventing costly operational inefficiencies.

[ICON]

**Collaborative. Foster Team Communication and Collaboration**

Bring together your team in real-time, no matter where they are. Construction projects have a lot of moving parts and people. Leankor's digital application allows for virtual collaboration and communication in the moment, anywhere, any time – using their desktop or mobile app.

[ICON]

**Scalable. Improve Short-and-Long Term Planning**

Improve engagement, support and contribution for more scalable projects. Resources and adoption do not flow evenly. Leankor features always updated information that allows for optimized resource management. This allows decision-makers to stay ahead of the curve, and secure the people and equipment they need.

[ICON]

**Effective. Turn Project Data into Actionable Information**

Leverage state-of-the-art AI for informed decision making. Leankor is natively built on Salesforce and can utilize applications like Einstein Analytics (AI) and Tableau to identify, quantify and mitigate risks through customer data. These platforms capture trends and risk factors—helping to highlight issues before they become more costly problems.

[ICON]

**Reliable. Deliver Projects On-Time in Every Stage**

Achieve consistent completion in every stage. Leankor features a situational awareness for managers that allows for complete analysis of cost, production and schedule baselines. This proactive management helps update priorities, mitigate risks and keep schedules on track.

[SECTION DIVIDER]

[HEADER]

TBD Based on quote.

[Quote]

Need quote or stat

[SECTION DIVIDER]

[HEADER]

**Transform to a Solution that Keeps all Phases, Projects and Priorities on Track**

[BODY]

Ready to evolve your complex construction projects into easy to manage, collaborative plans? Start streamlining your projects for growth of your infrastructure and bottom-line improvements.

[CTA BUTTON]

REQUEST YOUR DEMO



## Craftsman: Cisco and NetApp 10 Year Partnership, FlexPod Blog

May 8, 2020

<Title Tag> Cisco and NetApp: Ten Years of Continuous Innovation & Digital Transformation

<Keyword(s)> FlexPod + Cisco + NetApp + technology + integrated stack + converged infrastructure + innovation + digital transformation

<Image Alt-Text> Cisco and NetApp: Ten Years of Continuous Innovation & Digital Transformation

### Partner

#### Cisco and NetApp: Ten Years of Continuous Innovation & Digital Transformation

A lot can change in a decade, and, in this last one especially, I have seen technological advances hit hyper-speed. While I still don't have that futuristic flying car I was promised, self-driving cars, Artificial Intelligence, robotic surgeries and even the iPad have all come to life since 2010.

### A Powerful Partnership

In the last ten years, analog processes have become nearly obsolete and organizations need faster, more extensive and extremely adaptable IT solutions for the digital revolution. Cisco is always looking for [powerful partnerships to innovate, differentiate and grow](#), so we teamed up with NetApp. Together, we had a unique opportunity to partner and create a best-in-class CI platform to provide customers a more scalable architecture, network, storage and server infrastructure.

The result was [FlexPod](#), a highly dynamic integrated stack. During the first few years, the FlexPod partnership expanded to include Microsoft, VMware, SAP, Citrix and Oracle. This dynamic gathering of powerhouses enabled FlexPod to effortlessly unify numerous infrastructures and platforms, allowing companies to simplify, stabilize and secure their daily operations.

Cisco and NetApp are committed to providing customers turnkey IT solutions for their growing data, storage and performance needs while minimizing compatibility issues. Since inception, FlexPod has evolved to meet the changing face of technology and the new challenges facing customers each day. In 2017, FlexPod incorporated hybrid cloud technology, allowing workloads to move back and forth from on-premise to the cloud and between cloud providers. In 2019, FlexPod integrated Artificial Intelligence (AI) and Machine Learning (ML) to meet the modern challenges of technology head-on and to equip customers with the solutions and services they need to gain exceptional outcomes.

**Customer Focused. Innovative. Versatile. Trusted.**



FlexPod delivers modernization to every aspect of your organization by providing a responsive, reliable foundation to support your IT strategies. FlexPod allows faster deployment potential, higher efficiency, less risk, minimized costly downtime—all while providing customers solutions and services to facilitate deployed workloads and applications successfully.

FlexPod currently supports 9500 customers around the world, employing 1,100 partners in 100 countries. Cisco and NetApp designed FlexPod to give customers what they want while also proactively anticipating their needs, including:

### ***DevOps***

Customers desire and require an accelerated time to market. FlexPod equips the essential automated workflows that improve productivity, enabling customers to build, test and deliver apps and solutions faster.

### ***Hybrid Cloud***

FlexPod gives customers a flexible hybrid cloud strategy that meets them wherever they are in their development. It allows workloads to move quickly back and forth, facilitating simple orchestration between on-premise and cloud providers.

### ***Machine Learning***

Big data does not need to be a big problem. FlexPod helps customers efficiently handle big data by scaling each component independently while simplifying management and enhancing data access.

### ***Managed Private Cloud (MPC)***

Customers can advance their cloud journey with the FlexPod Managed Private Cloud (MPC), providing administrators the ability to enable a private-cloud-as-a-service model to address data sovereignty, location flexibility and scalable staff resources for their on-premises IT.

### ***Microsoft Productivity Applications***

The broad-spectrum usage of Microsoft Productivity Applications, such as Microsoft Office, SharePoint and Exchange, can pose management challenges inside any organization. FlexPod with All Flash FAS provides a sturdy foundation for productivity application deployment and management, enabling rapid deployment of virtualized environments.

### ***Microsoft SQL Server***

Customers, more than ever, need high-performance databases. FlexPod combined their datacenter and SQL Server to accelerate database application performance by up to 20x and reduce application deployment from months to weeks, while still maintaining performance standards.

### ***Oracle Real Application Clusters (RAC)***

Organizations deserve enhanced performance, balanced scalability and outstanding availability. FlexPod's proven performance at scale with Oracle RAC delivers the data that powers your applications and accelerates your enterprise, all while leveraging your applications.

### ***SAP***



Customers using FlexPod as their SAP foundational infrastructure get an agile solution that provides a single point of management, but also allows them to scale each component on demand and in response to their expanding business needs.

***Virtual Desktop Infrastructure (VDI) Solutions***

FlexPod delivers virtualization without limits. Organizations can now reduce both operational and capital costs while remaining flexible, allowing businesses to scale their virtualized environments endlessly.

Cisco and NetApp know that customers will always require more agile solutions and services and that the demands will continue to grow each day as technology evolves. FlexPod is committed to evolving with those shifts to be able to leverage their existing technologies, limit downtime, scale for growth cycles, perform highly efficient workflows and have expandable storage.

Discover how [FlexPod](#) can help your organization, follow us [@FlexPod](#), and watch the [FlexPod](#) transformation.



**Deliverable:** Leankor Business Continuity Infographic

**[HEADER 1]**

**7 Ways Enterprises Ensure On-Time Delivery – Every Time**

Today the enterprise environment is faced with complicated challenges. Business continuity and remote capabilities are critical to stay relevant and achieve success. Customer satisfaction relies upon delivering on-time, every time, and making the adopting an effective a work and project management solution can mean the difference between success or being superseded by the competition.

**[CALLOUT]**

Only 2.5% of companies successfully complete 100% of their projects. ([Gallup](#))

**[CHART / GRAPHIC]**

<b>1. INNOVATIVE TRANSFORMATION</b>	
From strategy to delivery, enterprise organizations need a fully automated work and project management solution that fits their unique processes across teams.	
<b>[Barriers to On-Time Deliver]</b>	<b>[Solution]</b>
Many organizations are expected to alter their operational processes to fit a solution or use outdated, disconnected software.	Your organization will benefit from the ability to effortlessly transform large, long running and complex projects across all teams into holistic, easy to manage, collaborative plans.
90% of companies have reported that using an open source software enhanced their teams' efficiency and innovation ( <a href="#">Foreign Policy</a> )	<b>[Key Benefit]</b> <b>Gain an all-in-one solution.</b> With Leankor, you can record and connect all your customer data, projects, communication and financials from order to delivery.

<b>2. CUSTOMIZED FLEXIBILITY</b>	
Business continuity relies on having a project management system that adapts to industry specific workflows, organizational and project management styles.	
<b>[Barriers to On-Time Deliver]</b>	<b>[Solution]</b>





<p>Hybrid styles of project management have become the new normal, but many solutions don't conform to different methodologies.</p>	<p>Waterfall to agile and everything in between, you must demand a solution that fits to your needs, not the other way around. This requires an application that links different processes and methodologies, enabling seamless workflows.</p>
<p>Around 56.6% of manufacturers used a mix of PM methodologies. (<a href="#">Foreign Policy</a>)</p>	<p><b>[Key Benefit]</b> <b>Link disparate project management methodologies.</b> Leankor works the way you want to work (Kanban, Lean, Agile, Gantt Waterfall, hybrid and more).</p>

<p align="center"><b>3. REAL-TIME VISIBILITY</b></p> <p align="center">Real-time visibility across all portfolios and projects is vital for today's remote workforce.</p>	
<p><b>[Barriers to On-Time Deliver]</b></p>	<p><b>[Solution]</b></p>
<p>Many enterprise organizations struggle with outdated data and disparate systems, heightening the risk for unreliable decision making.</p>	<p>Your enterprise warrants a system that integrates and retains quality data in real-time and can be seen through personalized, highly visual and intuitive dashboards, allowing access to up-to-date financials, resources, people, tasks and performance.</p>
<p>55% of organizations do not have access to real-time project KPIs and 50% said that they spend one or more days to manually collate project reports. (<a href="#">Wellington</a>)</p>	<p><b>[Key Benefit]</b> <b>Increase operational insight.</b> With Leankor, real-time visibility and collaboration improves overall organizational and project processes to help deliver faster, promoting quicker revenue recognition.</p>

<p align="center"><b>4. GLOBAL COLLABORATION</b></p> <p align="center">In today's global workstream, enterprises must unite teams from anywhere, allowing them to brainstorm, preplan, plan, discuss and review projects in real-time.</p>	
<p><b>[Barriers to On-Time Deliver]</b></p>	<p><b>[Solution]</b></p>



<p>Travel, time zones and complicated schedules hinder person-to-person collaboration.</p>	<p>Not in the same room? You don't need to be if you have a solution that facilitates communication, collaboration and connection virtually, making remote teams no longer a concern with real-time, digital connection.</p>
<p>57% of projects fail due to "breakdown in communications." (<a href="#">Bull Survey</a>)</p> <p>The one tool that has the greatest impact on team communication is project management software. (<a href="#">Capterra</a>)</p>	<p><b>[Key Benefit]</b> <b>Collaborate anywhere, anytime.</b> With Leankor's virtual solution, the potential for collaboration among stakeholders' increases. No matter where they are located, stakeholders and teams can collaborate in real-time via the highly intuitive desktop or mobile app.</p>

<p><b>5. RAPID SCALABILITY</b></p> <p>Enterprises must have full visibility into how they fund, plan and execute work if they want true scalability</p>	
<p><b>[Barriers to On-Time Deliver]</b></p>	<p><b>[Solution]</b></p>
<p>Unreliable information and disconnected systems cause poor visibility and hinder effective planning, limiting the ability to rapidly scale projects.</p>	<p>Enable efficient workload expansion and reduce disruptors that interfere with proper scaling with a control tower view of all your projects and resources.</p>
<p>The 3 root causes of project failure are inconsistent execution, lack of continuous team improvement and poor scalability. (<a href="#">ENKI</a>)</p>	<p><b>[Key Benefit]</b> <b>Increase visibility for improved planning and scalability.</b> Leankor's real-time utilization allows you to maximize your resource loading for rapid scaling and decompressed delivery cycles.</p>

<p><b>6. RELIABLE DATA ACCESS</b></p> <p>Data is key and loss of data or unreliable productivity can be detrimental. Enterprises need to safeguard their data and keep connectivity reliable across teams.</p>	
<p><b>[Barriers to On-Time Deliver]</b></p>	<p><b>[Solution]</b></p>



<p>There are many options when it comes to cloud servers, but some cloud solutions come with more issues than benefits.</p>	<p>When you choose a SaaS application, it is imperative to consider where it was built and where it is hosted. A less reliable cloud platform could result in serious data loss, productivity lags and security issues. Platforms like the Salesforce Cloud come with almost 20 years of trust, reliability and security.</p>
<p>It is estimated that the average cost for any major data loss can cost an organization hundreds of thousands of dollars in recovery costs and fines. (<a href="#">The DSS Blog Keep it Running</a>)</p>	<p><b>[Key Benefit]</b> <b>Improve performance and productivity.</b> 100% native to Salesforce, the world's most reliable and trusted platform, Leankor provides enhanced security and stability.</p>

<p align="center"><b>7. EFFECTIVE OPERATIONS</b></p> <p>When you implement a solution that reduces operational risks and minimizes rework across projects, your project delivery cycles are put back on track.</p>	
<p><b>[Barriers to On-Time Deliver]</b></p>	<p><b>[Solution]</b></p>
<p>Rework is often caused from using disparate systems and outdated information which can be frustrating and harmful to project health and compromise delivery.</p>	<p>To avoid rework, which compromises budget and timeline, you must implement a digital solution that offers updated and current data for teams, no matter where they are located.</p>
<p>52% of rework is caused by poor project data and miscommunication (<a href="#">Autodesk + FMI</a>) and costs of rework in poorly managed projects can be as high as 25% of contract value and 10% of the total project costs (<a href="#">Barber et al</a>)</p>	<p><b>[Key Benefit]</b> <b>Take analytics to the next level.</b> With Leankor, you can drive insight into all financials from cost breakdowns to changes in gross margins to forecasted revenue. Plus, easily leverage Tableau and Einstein Analytics for best in class AI and analytics.</p>

**[CTA]**



Ready to modernize your project cycles and delivery outcomes through digital transformation? Find out how Leankor can advance your projects to result in an optimized order-to-cash value stream and faster revenue recognition. **Leankor.com**

**[HEADER 3]**

**INDUSTRIAL.**

Leankor provides solutions for industrial global enterprises. We specialize in large-scale, complex workflows and business processes work and project management for energy, solar, construction, manufacturing, wind and B2B telecom.

**[HEADER 3]**

**BIOTECH/PHARMA.**

The Leankor solution is also ideal for multi-faceted research and development projects and complicated product launches in the Biotech and Pharmaceutical industries.

**[Footer]**

©2020 Leankor. All Rights Reserved.

<Title Tag> How to Create a Marketing Plan in an Uncertain Future | Launch Marketing

<Keyword(s)> +digital +communication +messaging +coronavirus +Covid-19

<Image Alt-Text> How to Create a Marketing Plan in an Uncertain Future

## **How to Create a Marketing Plan in an Uncertain Future**

While tools and skills can simplify planning, there is no scientific way to know when unexpected shifts will happen in the market. The novel coronavirus pandemic (COVID-19) and the social distancing that has come with exemplifies that. Even if your 2020 planning accounted for contingencies, the odds are that you did not plan for such a colossal and inimitable disruption.

Most of us are currently living day-to-day and business are having to do the same. Due to the kind of interruption COVID-19 has caused, certain organizations are not failing but thriving, including grocery stores, delivery services and big box stores that focus on everyday necessities. Even thriving companies had substantial shifts to their demand forecasts and supply chains. It is also a near guarantee their marketing plans had to be thrown out the window to shift messages to focus on compassion and meeting new concerns and demands.

How organizations, including B2B, message their content right now is crucial. However, completely starting your marketing plan over and shifting gears can be overwhelming. [Marketing adjustments for Turbulent Times](#) is a good resource to get you and your team started.

### **Adding Agility to Planning.**

Agile is a term that took American businesses by storm in the last decade. It originated in the world of project management as a methodology that, in laymen terms, means to plan projects in shorter durations and be able to handle changes quickly and more efficiently, as well as rely on team dynamics, not just independent workers. The term caught on in many areas of business due to its flexibility and collaboration in a fast-moving marketplace. The days of newspaper ads and radio commercials that were placed months in advance have gone into hyper-speed as digital platforms became the norm.

With the entry of digital into our everyday lives, marketing began to move much faster. Results suddenly could be seen and analyzed in real-time. Teams became able to adjust plans and messages in response to how their campaigns perform. Digital also has enabled us to reach more people in more ways. The social distancing we are participating in has led us to work remotely, and we must now lean on digital more than ever. In our daily lives, our workdays and how we plan for the future, digital has become a staple. If you are unsure of ways to use digital platforms to address the crisis, explore ways to [think outside the digital box](#).

### **Bring Conventional Planning into Unprecedented Times**

Adopting and taking full advantage of an agility mindset is crucial. For the foreseeable future, you will continue to need to be mindful of what is happening each day and adjust messaging and plans as needed. However, that does not mean you cannot think about your future marketing plans and actually begin to plot out your strategies.

If you are having trouble organizing how to go about changing your plans and messaging, review our free [B2B Crisis Marketing Kit](#). Key things to consider are does your B2B product or solution help with the current situation - does it make working remote easier, save businesses money and increase ROI, help healthcare industries or increase safety, assist organizations that make delivery a focus, and so forth? Many B2B products and services can help make everyday lives easier in the current circumstances and now is the time to make that known.

Leaders should also examine current industry trends. Companies have been reporting a shift from canned food goods to puzzles and family at home entertainment to grooming and personal healthcare items over the past few weeks. [Nielsen](#) has a deeper in-depth study tracking the effects of COVID on certain markets, which gives a good insight into overall behavior and trends.

As you look past the immediate term, you can begin to plan out your 3-9-month plan. We know that COVID-19, and all the havoc it has reeked, will not magically go away in the next three months, but we do expect that more “regularity” will return to our lives. Below are general considerations for planning your marketing for the rest of 2020 and into 2021. As with any good plan, you may need to shift if more unexpected developments arise.

### **3-Months Out**

Now is the time to consider how some of the following could impact your product or service. In three months, we most likely will see:

- Social distancing restrictions removed
- Some people shifting back to office environments and some remaining remote
- Travel beginning to pick back up slowly
- Businesses continuing to utilize virtual conferencing and other digital platform replacements, e.g., having a webinar instead of an in-person event
- Family and friends will be a common premise in marketing and advertising themes
- SaaS platforms experiencing growth
- New types of businesses emerging out of the needs that arose from this crisis, e.g., products and services that improve digital performance and security
- Physical, mental and spiritual health ideologies will be more mainstream and businesses that promote or use them will be more commonplace

### **6-Months**

In six months, we expect to be back to a sort of pre-COVID-19 normal. There will most likely be some trends that will hang-on and should be kept in mind while planning. Think about how future consumer behavior shifts will impact your product or service and apply to how you will need to market. Predictions for trends that will influence post-COVID-19:

- Social distancing will most likely have been over for a few months
- More people will use conferencing in their everyday lives, including continuing to be a popular alternative, if not the norm, in work situations
- Remote working will be more common and companies will be more open to that trend
- Brick and mortar businesses and restaurants will begin to thrive and become steady again
- Delivery business may decline a bit but remain steady as new customers experienced and enjoyed the convenience
- More SaaS-based platforms will be popping up, some with solutions that are new to their industries
- Eco-health related organizations will begin to form, flourish and become a key value for many businesses
- Travel should bounce back and become back to normal around the holidays

The next three to six months will lend valuable data to how your product or service is performing and allow you to set better-defined goals based on those metrics. It is essential that you analyze your data on a regular basis over the next week and months, more than ever before it is vital to your business health.

### **The New Normal and Beyond**

As you begin to look to 2021, you should be able to adjust your marketing focus back to “normal.” Remember to be flexible and adjust as needed to keep up with what is happening globally, from an economic standpoint and a health outlook. If you and your team remain vigilant and agile, your B2B organization should be able to withstand the intense circumstances that are upon us.

---

<CTA>

Does your organization need help planning for the future in these uncertain times? [We are here to help.](#)

Launch Blog – Think Outside the Digital Box: Benefits of a Digital Connection During a Global Pandemic – March 2020

<Title Tag> Think Outside the Digital Box: Benefits of a Digital Connection During a Global Pandemic | Launch Marketing

<Keyword(s)> +digital +communication +messaging +coronavirus +Covid-19

<Image Alt-Text> Think Outside the Digital Box: Benefits of a Digital Connection During a Global Pandemic

## **Think Outside the Digital Box: Benefits of a Digital Connection During a Global Pandemic**

In 2020 we are long past the beginning of the digital age. While technology is still growing and changing, we adapt more quickly to the convenience of the new tools being offered. The novel coronavirus pandemic (COVID-19) and the social distancing that comes with it is an unimaginable challenge, but fortunately numerous B2B organizations offer digital tools to help us live and do our jobs virtually.

Using digital platforms is commonplace in our daily lives and talking about it might seem banal at this point; nevertheless, now is the time to use digital to its full advantage and think outside the digital box. Examine your current marketing plan and see how you can more dynamically and strategically use digital tactics. Whichever tactics you use, don't forget to analyze your results. You want to make sure your content is resonating with your target audience and that you can reassess your next steps.

Before you move forward, ensure you follow the 4 Rs of compassion communication and flow compassion through all of your efforts in the next few weeks. Keep in mind; empathy should not be forgotten outside of times of crisis. Learn how to use and learn from [digital empathy](#) in all of your communications.

### **1. Virtual Conferencing and Communication**

It's probably safe to say everyone has participated in a video or web conference call at least once and for many, it is a weekly, sometimes daily, routine. No one has ever said the solution to something is more meetings; however, keeping connected with your team, customers and prospects should be a high priority. Customers, current and future, appreciate easily accessible channels where they can ask questions and get answers, from the convenience of where they reside. While some people prefer to meet in person, these platforms offer a suitable alternative to keep business moving. Remind yourself and your team; almost everyone is currently remote and working. With video conferencing, the lack of in person meetings should not impede any sales or marketing conversations and deals.

Many companies have a standard conferencing and chat provider. In some organizations, not all departments have access to the same tools, check with your Operations, IT or Human Resources department if you are not sure which provider you use and to get a profile. Not all companies have a standard, especially in start-ups and smaller businesses. If you need a service provider, [Zoom](#) is one leading video conferencing platform. They



are also a great example of how a brand can take positive steps to keep their audiences informed while still showcasing their solutions. [Microsoft Teams and Skype](#) are another leading conferencing platform offering resources to help.

## 2. Webinars

Canceled in-person events, conferences and prospect meetings do not mean you have to cancel your presentation or promotion plans. Webinars are a great way to promote your service, offering and thought leadership in a more personal way, while ensuring your audience is participating in a safe location. They are a great way to be a [virtual classroom](#) or showroom for your business. Audiences right now want to keep working, learning, connecting and growing, luckily webinars help them access all four.

Review what has been canceled, were you going to present at a tradeshow, conference or another type of leadership event? Are you able to get a list of who signed-up for that presentation? If not, utilize your CRM and internal lists. Don't let a cancellation stop you, move forward and schedule your own presentation. If you are able to tie in crisis strategy, or how your product helps during times like these, put that messaging first. Don't forget to record these events and use them for ongoing lead generation on your website or in future marketing campaigns.

## 3. Social Media

Like your content calendar, you will need to strategically update your social media calendar. If you are saying social media is not for B2B, learn why your [B2B should be using social media](#). If you know you should be using social media more or need a best practices refresher, [review](#) how to effectively use social media for your B2B. No matter which platforms you use, make sure you engage with your audience. Don't post and run. Communication and connection are more important than ever.

Social media is an amazing medium for how many ways it can be used. You can use social media to do two essential things: establish yourself, and your company, as a leader and promote your corporate culture. Each platform offers a different opportunity and audience reach. Don't make the mistake of crafting one message and posting it over all mediums. Each platform should have slightly revised content of each message to match the tone and audience.

The four platforms that still see the most success are LinkedIn, Instagram, Twitter and Facebook. LinkedIn is your primary B2B audience. Your tone should be more professional and the content you share should address pain points and solutions regarding business and operations during the COVID crisis. Twitter is another great B2B resource. Search for trending hashtags and post more succinct and straightforward messages and relevant content.

Facebook is a good platform to share the more human-interest part of your company. This is a great place to post news about ways your product or service is or has helped people and the community. It's also a great place to post internal photos of your team,

perhaps at the last in person team gathering. Instagram is a purely visual way to represent your company but that doesn't mean it isn't any less valuable. Instagram has seen a huge rise in ad placement. There are a billion users on Instagram each month and [33% of B2B businesses](#) now have a presence on there. Even more exciting is that [83% of users](#) say they find new businesses through the Instagram app. Get creative, use the Instagram stories section; [500 million users take advantage of stories each day.](#)

#### **4. Email**

Email is a staple in any marketing plan, but in a sea of mass-produced e-communication, how do you stand out? One key is to use the digital empathy strategy and create an [empathetic email](#). One way to begin to create empathy is through connection and [personalization](#). Personalized emails have [6x higher](#) transaction rate.

Messaging that you use in the next few weeks and through the COVID-19 crisis should be focused on concern rather than a sales pitch. That does not mean you have to scrap your marketing plans, simply rewrite your content to reflect current circumstances. Learn how to adjust your [marketing personas](#) to craft new messaging. Instead of a hard sell, sympathize with your audience, address their pain points and offer help through your product or service. Remember, the first email they receive from you should be compassion based, if it is sales oriented it could turn-off your customers and prospects.

#### **5. Web**

With all the applications and programs and platforms and mediums in our daily lives, sometimes the website can get overlooked as the immediate solution. Something as simple as adding a crisis communication page, an FAQ page, a pop-up or banner that addresses the situation or ensuring you have an easy to find contact form can put customers at ease.

This is a very confusing and scary time for most people, professionally and personally. It can seem overwhelming to move forward in such an uncertain time. If you are not sure where to start, [Marketing Adjustments for Turbulent Times](#) is a great resource to help navigate these uncharted times, keep your team and business afloat and have a vision to move forward. To quote business leader Adam Neuman, "As the world becomes a more digital place, we cannot forget about the human connection." This has never been more relevant than now. Use digital wisely; keep it personal; keep it empathetic.

---

<CTA>

Need help thinking outside the digital box or with your marketing plans? [We are here to help.](#)

Launch Blog –

<Title Tag> B2B HealthTech Support During COVID-19| Launch Marketing

<Keyword(s)> +B2B +HealthTech +digital +communication +messaging +coronavirus +Covid-19

<Image Alt-Text> Supporting Your Service or Solution: B2B HealthTech

## B2B HealthTech Marketing Strategies for a New Reality

COVID-19 has put much of healthcare in dire straits. Just because we are experiencing a pandemic does not mean that other health issues will magically go away. Per [Research2Guidance](#), **34% of healthcare organizations said COVID-19 would have a positive impact on their business**, while 31% predicted a negative impact. Digital healthcare companies expressed the highest hopes, with a 44% positive outlook.

Over the past year or so, B2C Teladoc services have become more mainstream and has become even more vital in light of COVID-19. Of course, Teladocs are just one service in the wide array of B2B healthcare and medical services in the online solutions and products spectrum. There are numerous online solutions for processes, databases and workflows specifically designed for medical, pharma biotech and other science related fields. Whatever the niche in the healthtech industry, there is almost certainly a virtual solution for it. If your organization falls into that category, take a step back and think how your messaging and marketing plan can change to address COVID-19, remote work and intertwining of the two.

**CTA:** [Creating an impactful brand identity is another way your vertical can stand out. Download our Establishing and Evaluating Your Brand Identity eBook for a guide to updating or creating a unique brand identity.](#)

### B2B HealthTech COVID-19 Direct Impact

B2B healthcare businesses directly impacted by the COVID-19 pandemic may have seen an uptick in sales due to COVID-19, and it is imperative to keep momentum going. Some items you may want to start thinking about:

1. Can I gather feedback and quotes from my clients about my product and/or service?
2. Do they have any positive stories from use of my product or service?
3. How does my product or series make their day-to-day easier?
4. Where in our marketing could we incorporate quick quotes?
5. Is there a way to showcase feedback on our website?
6. How can we utilize feedback in a social media campaign?
7. Do we have budget that allows for testimonial videos?

### B2B HealthTech COVID-19 Indirect Impact

B2B healthtech organizations not directly impacted by the COVID-19 crisis but still offer helpful products or services providing business continuity, remote work, or other ease to the new normal should consider how to alter parts of their marketing to address the recent changes. Helpful questions to ask include:

1. How does our current campaign address social distancing and the new normal?
2. What should our message be during this time?

Launch Blog –

3. Are there places we can easily weave in this new message?
4. What areas should we scrap our current plans and brainstorm new ones?
5. Does our website reflect new normal messaging?
6. What social campaigns could we run to emphasize our solution to the new normal?
7. How do we allocate budgets and timelines to put the right messaging at the forefront?

Of course, these sections can also be switched, and the direct impacts can ask the indirect questions and the indirect the direct. These are merely jumping off points to help you start positioning yourself as the B2B healthcare resource now, and years from now.

- If you are a B2B organization that needs help navigating how to message and marketing during this time, Launch has compiled a set of helpful resources to get you started in our [COVID-19 Marketing & Strategy Resources Hub](#): A phased-approach toolkit for readjusting your current marketing strategy
- Steps to plan your marketing 3-months out, 6-months out and beyond  
Quick reads on digital marketing, adapting to new buyer expectations, creating compassionate communication and more...

<CTA>

**Does your organization need help planning for the future?** The Launch team is here for you and can help via strategic consultation, messaging revamp, digital strategy, email optimization and more. Please do not hesitate to [contact our team](#) or [schedule a free 1:1 consultation](#) for more information.

---

Launch Blog –

<Title Tag> Streaming Your Service and Solution: How to Answer the COVID-19 Challenge | Launch Marketing

<Keyword(s)> +digital +communication +messaging +coronavirus +Covid-19

<Image Alt-Text> Streaming Your Service and Solution: How to Answer the COVID-19 Challenge

## Supporting Your Service or Solution: How to Answer the COVID-19 Challenge

There are unfortunately numerous businesses adversely affected by the COVID-19 pandemic. Restaurants, travel and hospitality businesses, local markets and retail stores, as well as a myriad of other brick and mortars heavily reliant on foot traffic to meet their gross margin pressures. Some have found relief in online sales or curbside pick-ups but others are simply waiting it out or have already had to close their doors.

If there is any bright side to COVID-19, it is that it happened in 2020, a time when social distancing is not just possible, but easy, due to almost everything we need existing at our fingertips and inside our homes. This is what is making industries that perform most or all their services and solutions digitally fare a little better. And many businesses that specifically ease the logistics, performance or security of being remote are seeing an uptick. However, even though your company offers a product or service that could thrive in a virtual market doesn't mean you don't still have to get your message out there or utilize different and creative strategies to do so. Customers still need to find you, and more than ever, now is the time they are looking.

[CTA: Creating an impactful brand identity is another way your vertical can stand out. Download our Establishing and Evaluating Your Brand Identity eBook for a guide to updating or creating a unique brand identity.](#)

### Magnifying B2B Industries During the Crisis

Highlighted below are COVID-19 marketing considerations for B2B organizations that fall into one of the below industries and are also SaaS/web-based solution or services.

#### 1. SaaS

SaaS-based organizations are probably the most obvious companies that have a wide advantage during social distancing. [MarTech Today](#) noted that **70% of SMBs currently use at least one cloud-based service**. This number is expected to grow as businesses look to new tools for revenue creation during the crisis.

If your business platform is SaaS, now is the time to consider upping your marketing stakes and strategizing your messaging around the benefits you bring to the remote work and lifestyle. While your primary messaging does not have to change, your campaign messaging should incorporate the trends, workflows and emotions resulting from shifts caused by the pandemic,

or new normal. Showcase how your product can ease everyday work interactions, through performance, security or productivity and ensure that your marketing and content plans have also shifted to get the word out the right way at the right time.

## 2. Healthcare

COVID-19 has put much of healthcare in dire straits. Just because we are experiencing a pandemic does not mean that other health issues will magically go away. Per [Research2Guidance](#), **34% of healthcare organizations said COVID-19 would have a positive impact on their business**, while 31% predicted a negative impact. Digital healthcare companies expressed the highest hopes, with a 44% positive outlook.

Over the past year or so Teladoc services have become more mainstream and has become even more vital in light of COVID-19. Of course, Teladocs are just one service in the wide array of healthcare and medical services in the online solutions and products spectrum. There are numerous online solutions for processes, databases and workflows specifically designed for medical, pharma biotech and other science related fields. Whatever the niche in the healthcare industry, there is almost certainly a virtual solution for it. If your organization falls into that category, take a step back and think how your messaging and marketing plan can change to address COVID-19, remote work and how the two can intertwine.

## 3. Security

Security has become an affordable solution to protect your home, thanks to technology and SaaS-based services. According to [Gartner](#), enterprise spending on cloud security solutions is projected to increase from **\$636M in 2020 to \$1.63B in 2023**, with COVID-19 driving many to strengthen their digital and cybersecurity foundations.

Security companies that have a product and sales cycle that function remotely should pay extra attention to their messaging, especially as more people are staying home and want to feel secure. How can your messaging match the tone of the current environment? Safety and security are front of mind more than ever, so how can you update your messaging to emphasize that your product or service helps ease their mind?

## 4. Banking/Finance

When was the last time you wrote a check? Some of you may have never even used a checkbook in your adult life, and a few are thinking I wrote a check yesterday. Most of us do all of our banking and financial servicing online. Surprisingly, Fintech has seen a slight decline since the pandemic, which experts have linked to the economic crisis surrounding COVID-19. [PwC's COVID-19 CFO Pulse Survey](#) found that **70% of financial leaders in the US and Mexico say that a potential global recession** is one of their top pandemic-related concerns.

There are numerous strategies a B2B banking/finance organization can consider to help boost activity. Money is important to most people and can be the source of many stresses. Are there offers your company can extend right now to ensure people feel safe using your organization? Are there financial incentives or other deals you could offer that won't risk your bottom line but entice new enrollment? No matter what you decide to tackle in your marketing, [make sure your messaging is of extreme compassion](#) given the economic situation.

## 5. Audio and Visual Services

Traditional A/V services, that revolve around setting-up in-person conferences, meetings and events are unfortunately struggling right now. [AVIXA's new Impact Survey](#) is reporting that **87% of AV companies have been negatively impacted** by COVID-19, with cancelled projects, events, and decreased sales.

While unfortunate, this doesn't mean your company can't up the marketing stakes and think about how to position yourself during this precarious time. Does part of your business revolve around online audio-visual services? Are there ways to expand to help customers with virtual events? Many companies are struggling to come up with ideas on how to replace the numerous in-person events they attend each year. Are there ways you could update your services and solutions to help companies organize and present their virtual events, demonstrations, webinars or meetings, and then update messaging and marketing accordingly? [Thinking outside the box](#) is imperative for your company as well as theirs right now.

If you fall into one of these categories or you are a B2B organization that needs help navigating how to message and marketing during this time, Launch has compiled a set of helpful resources to get you started:

Visit our [COVID-19 Marketing & Strategy Resources Hub](#) where you'll find:

- A phased-approach toolkit for readjusting your current marketing strategy
- Steps to plan your marketing 3-months out, 6-months out and beyond
- Quick reads on digital marketing, adapting to new buyer expectations, creating compassionate communication and more...

### <CTA>

**Does your organization need help planning for the future?** The Launch team is here for you and can help via strategic consultation, messaging revamp, digital strategy, email optimization and more. Please do not hesitate to [contact our team](#) for more information.

---

Audience: Secondary

SEO Metadata

<title> B2B Audit Your Data Analytics Tools for a New Lead on Sales | Launch Marketing

<keyword(s)> B2B data-informed analytics

<meta description> Is it time to reassess your analytics practices? Tips to ensure that you are capturing every lead for your B2B.

## Part 2: How do Your B2B Data Analysis Practices Measure Up?

The basic concept of marketing has not changed much since its inception during the industrial revolution but how we market has drastically changed over time. With the introduction of the digital age we have seen a rise in the number of marketing channels, tactics and strategies you can use to target your audience and an increase in the tools we use to measure the success of campaigns. If you and your team are not analyzing your efforts, you may be losing out on valuable information and new sales.

**Pop up:** Take your marketing to the next level. Download our “Raising the Bottom Line with Next-Level Marketing” eBook. In part two of this series we explore the importance of collecting and analyzing the metrics from your campaigns to help shape your next steps, evaluate your messaging and inform your customer profiles.

**CTA:** Missed Part 1? Read “Audit Your B2B CRM for a New Lead on Sales.”

### Importance of Analysis

As you start to think about the tools you are using to generate interest, sales and awareness of your brand, product or service, it’s important to remember that it’s not just about having a presence but about monitoring the success of that presence. In today’s market, most companies know to look at email open and click-through rates but digging deeper can give you useful data to guide next steps. An Accenture survey found that [61% of B2B](#) transactions start online. In that same survey it was reported that 58% of organizations treat social media as one of their go-to research channels to find vendors. Therefore, if you are not capturing your data accurately on these platforms, you could be losing insight into these valuable leads that start online.

To further expand on the importance of capturing and analyzing data, [Accenture’s study](#) also found that 40% of companies not achieving their revenue goals didn’t know their click-through rate; 34% of companies not achieving their revenue goals didn’t know their open rate; and 74% of companies that weren’t exceeding revenue goals did not know their visitor, lead, MQL or sales opportunities.



Regularly monitoring and analyzing your marketing presence can better inform basic performance questions, such as:

- What tactics are working? Which ones are not?
- Who do you retarget? How do you retarget?
- Which are the leads that should be escalated to phone calls or more personal interactions? An abandoned cart or a lead who visited twice may just need an extra marketing push.

Analyzing data is not just important for the end of a campaign but also during the campaign for retargeting and course correction, as well as overall planning and determining which methods work best. As you map out your marketing campaigns, strategically set baseline goals and plan when you will evaluate how each component is performing against those metrics.

Another essential reason to monitor data is to see which messages and content resonate with your audiences. Analyzing the success of your promotions and campaigns gives you insight into the mind of your customer. The results of each push can better shape your customer profile and help define key messaging points for future interactions and the overall customer journey. Analyzing messaging will help you start [personalizing](#) your marketing efforts, which has become a key component of marketing success.

### The Right Tools for the Analysis Job

There are many free ways to monitor audience activity. Google Analytics is one of the most popular ways to monitor website activity. LinkedIn, Facebook, Instagram and Twitter all have a metrics overview page for business accounts. [64% of B2B marketers](#) generate leads via LinkedIn, 49% via Facebook and 36% via Twitter, so utilize those free tools to capture your leads and activity. You can also leverage premium tools like [Pardot](#), [Marketo](#) and [HubSpot](#) to help capture a more in-depth breakdown and analysis. If you haven't yet committed to a B2B marketing automation tool, find out the [benefits they bring](#) for your investment. In a sea of software, you can also find useful [resources](#) to help compare these different tools and determine which suits your needs and budget.

### Be Data-Informed with Your Leads

In the last few years, you have probably heard the term data-driven superfluously used in many different markets. While being data-driven is important, being data-informed is the key to success. Quality data and knowing how to apply it is vital. It helps you understand how your campaigns are doing, what is working and where your audience is finding value. Answers to these questions can help guide you to your next steps.

While data is essential in planning and analyzing your campaigns, you don't want your team to lose creativity or have paralysis by analysis. Over analyzing can hurt campaigns as much as under analyzing them. Ensuring that you are setting tangible goals, have the right tools in place

to measure that data, and are using those tools correctly, should eliminate running too many non-essential reports and over-analysis.

While you are reevaluating your CRM and analytics habits, check-out [Top 5 Sales Funnel Clogs](#) for more ideas to examine common areas that can lead to jams in the pipeline.

Need help reaching your marketing goals or evaluating the current state of your marketing? [Request a free marketing consultation](#) with a Launch Marketing expert.

**Audience:** Secondary

## SEO Metadata

<title> B2B Virtual Marketing Events | Launch Marketing

<keyword(s)> B2B events + event launch + webinars + B2B launch + Product Launch + COVID + presentations + B2B conferences + B2B expos + B2B tradeshows + B2B corporate meetings +B2B virtual events

<meta description> Help your marketing efforts adapt to 2020 by turning traditionally in-person events into successful and lead generating virtual events.

---

## How B2B Organizations Can Capitalize Off of Virtual Events

Events are a tried and true marketing method —and for good reason— [79% of US marketers](#) report that they generate sales via event marketing. Events are an excellent avenue for showcasing or launching your products and services for a myriad of reasons. The most common fundamental of these is that they gather people in the same place at the same time for a similar reason, giving companies exposure to prospects they wish to engage with, helping companies make a name for themselves in their particular industry. It also gives attendees an opportunity to network with people they may not otherwise meet.

**CTA:** [Use a virtual event to support your next product or service launch. Support its success by downloading our B2B Product Launch Kit.](#)

Unfortunately, COVID-19 has stopped most 2020 in-person events cold. Almost all events were cancelled, rescheduled, or changed to a virtual platform starting in March. This has continued through summer and many event organizations are wary of committing to events even later in the fall. In March alone, [the cancellation of 10 major tech conferences led to direct losses of more than \\$1.1. billion](#). As a result of this decline in in-person events, [virtual events have since gone up 1000%](#).

While in-person events are often beneficial, they can get pricey and don't always fall into every budget. The costs to exhibit, sponsor or just attend begin to add up, especially considering flights, hotel, food, and transportation expenses. In this year of uncharted waters, think about what you can control, including saving parts of your budget and reinvesting in other ways to promote your organization or next major launch using online and virtual events.

## Webinars

Webinars are a great virtual tool to replace an event presence and capture your audience's attention. [Outgrow](#) research finds that 20% to 40% of webinar attendees eventually turn into qualified leads. And [ZoomInfo](#) reports that 73% of B2B marketers and sales leaders say webinars are the best way to generate high-quality leads.

Did your event plans include team members presenting, being part of a panel, conducting a demo, or leading a workshop? It's likely that your plans did include at least one if not all of these, which means you already have most of the tools to hold your own webinar to address the same topics. Platforms like [BrightTALK](#) make it easy to transition your event from in-person to virtual. Just make sure to not compete with the original event if it too went virtual, but build off of it close enough to keep your focus relatable and top of mind.

In preparing for your webinar, be mindful of two components: the marketing campaign promoting the virtual event and the webinar itself. A thoughtful and intelligent campaign will draw prospects to your webinar. A properly executed and visually exciting webinar will meet or exceed expectations and entice attendees to come back for more. Keeping an audience's attention virtually can be more challenging than in-person, so it's crucial to

create a presentation that is engaging, exciting and incredibly informative. Learn more about [creating presentations in a virtual world](#). An attentive thank you and follow-up strategy will keep you top of mind, extend the dialogue, and may help to seal a deal. Finally, think outside your current database when you invite. Read our article [about finding your invisible B2B customers](#) for more tips and tricks.

## Virtual Events

When shifting to a virtual experience, keep in mind that you are switching from an experience that creates immense foot traffic, sometimes over days, to a much simpler and more succinct online experience that most likely will produce considerably less impressions. How should you participate? If at all? In general, B2B companies should not be afraid to reach out to the event lead and ask questions.

### Attending

Deciding if you should virtually attend will vary based on cost of attendance, number of attendees and networking possibilities. The goal of each virtual event will differ, considering whether it will be solely a learning experience or if it will have networking possibilities. Each individual company must decide what the overall worth is to them.

### Speaking

If speaker opportunities are still open for a virtual event you would like to attend, submit your best abstract. Make sure you have what you need to not just speak confidently, but to provide an experience that showcases your thought leadership.

Also, be prepared to answer questions. If possible, anticipate questions people might ask and keep those answers in mind. It never hurts to share your speech/presentation with people outside of your company and ask for feedback, as well as insight into what kind of questions they might have based on your topic. Finally, follow the advice from the webinar invite and follow-up here.

### Sponsoring

Smaller companies or start-ups may not have the budget to sponsor one of these virtual events. Think carefully before you sponsor: is sponsoring a virtual event the best way to make your presence known? If you are interested, talk to the event contact regarding how your sponsorship will be used. Get a clear understanding of how much “press” your logo and name will actually receive. Will your logo be crammed with 20 other logos in an email? Will your logo be on a virtual background? How will you be featured on the website and for how long? Will you be featured anywhere else?

## Virtual Meetings

For big events, sales leads have often been lined up for in-person meetings months in advance. Large events are a great place to connect with prospects and clients while you are all in the same place, at the same time, for the same reason. You can still create a memorable experience for a prospect or client with a well-planned out virtual meeting. Encourage sales to be part of the invite process, encouraging prospects they are advancing to attend and giving them a reason to connect after.

## Change to Meet the Moment

Don't let COVID-19 thwart your event, launch and exposure plans. Pivoting your in-person event into an online or virtual event is a great way to take advantage of the large digital community that has been forming for years. Thankfully, many people have become well versed in receiving online invites or knowing the best platforms to turn to when they need virtual expertise and at-home learning. Overall, look at this as an opportunity to expand your B2B organizations digital presence through the execution of top-tier virtual events.

If your team is struggling to transition marketing events to the digital space or isn't sure where to start, [reach out to the team at Launch Marketing](#) or [request a free consultation](#).

<Title Tag> B2B Industries COVID Impact & Marketing Strategies | Launch Marketing

<Keyword(s)> +B2B +marketing +Covid-19

<Meta Description> Get a brief but necessary overview of the current state of key B2B industries in light of COVID, including SaaS, healthtech, cybersecurity and more, as well as what questions your team should be using to assess current and future marketing strategies.

<URL> .../b2b-industries-marketing-covid

<Image Alt-Text> Industry Insights & Best Practices for B2B Marketing

---

## <Title> **In the Know: B2B COVID Industry Impact Update & Marketing in Response**

There are unfortunately numerous businesses still impacted by the COVID-19 pandemic. Restaurants, travel and hospitality businesses, local markets and retail stores, as well as a myriad of other brick and mortars heavily reliant on foot traffic to meet their gross margin pressures. Some have found relief in online sales or curbside pick-ups but others are simply waiting it out or have been forced to close their doors.

If there is any bright side to COVID-19, it is that it happened in 2020, a time when social distancing is not just possible, but easy, due to almost everything we need existing at our fingertips and inside our homes. This is what is making B2B industries that perform most or all their services and solutions digitally fare a little better.

Here is a brief rundown of some of the top recent statistics surrounding B2B industries during COVID:

- Software & SaaS: In March, 40% of B2B companies expected to spend more on software, while in May, that percentage quickly dropped to 16%. As of May, 44% of B2B companies now plan for no change in their software spend. (Trust Radius)
- Healthtech: Almost 50% of doctors are using telehealth services to digitally treat patients during COVID, which is 18% higher than it was two years ago. (Merritt Hawkins)
- Cybersecurity: 70% of organizations plan on increasing their cybersecurity spend as a result of COVID. (LearnBonds)
- Audio-Visual: At the end of April, 79% of audio-visual providers reported that their business had been negatively impacted by the COVID pandemic. (AVIXA)

Whether you are one of the B2B industries experiencing these statistics or not, utilize the questions below to help assess how your B2B organization can continue to adjust to and succeed in light of the changes that COVID has spurred.

[CTA: Creating an impactful brand identity is another way your vertical can stand out. Download our Establishing and Evaluating Your Brand Identity eBook for a guide to updating or creating a unique brand identity.](#)

### B2B COVID-19 Direct Impact

B2B businesses directly impacted by the COVID-19 pandemic may have seen an uptick in sales due to COVID-19, and it is imperative to keep momentum going. Some items you may want to start thinking about:

1. Can I gather feedback and quotes from my clients about my product and/or service?
2. Do they have any positive stories from use of my product or service?
3. How does my product or series make their day-to-day easier?
4. Where in our marketing could we incorporate quick quotes?
5. Is there a way to showcase feedback on our website?
6. How can we utilize feedback in a social media campaign?
7. Do we have budget that allows for testimonial videos?

## B2B COVID-19 Indirect Impact

B2B organizations not directly impacted by the COVID-19 crisis but still offer helpful products or services providing business continuity, remote work, or other ease to the new normal should consider how to alter parts of their marketing to address the recent changes. Helpful questions to ask include:

1. How does our current campaign address social distancing and the new normal?
2. What should our message be during this time?
3. Are there places we can easily weave in this new message?
4. What areas should we scrap our current plans and brainstorm new ones?
5. Does our website reflect new normal messaging?
6. What social campaigns could we run to emphasize our solution to the new normal?
7. How do we allocate budgets and timelines to put the right messaging at the forefront?

Of course, these sections can also be switched, and the direct impacts can ask the indirect questions and the indirect the direct. These are merely jumping off points to help you start positioning yourself as the go-to B2B resource now, and years from now.

If you are a B2B organization that needs help navigating how to message and marketing during this time, Launch has compiled a set of helpful resources to get you started in our [COVID-19 Marketing & Strategy Resources Hub](#):

- A phased-approach toolkit for readjusting your current marketing strategy
- Steps to plan your marketing 3-months out, 6-months out and beyond
- Quick reads on digital marketing, adapting to new buyer expectations, creating compassionate communication and more...

### <CTA>

**Does your organization need help planning for the future?** The Launch team is here for you and can help via strategic consultation, messaging revamp, digital strategy, email optimization and more. Please do not hesitate to [contact our team](#) or [schedule a free 1:1 consultation](#) for more information.

---

**Audience:** Secondary

### SEO Metadata

<title> Audit Your B2B CRM and Analytics Tools for a New Lead on Sales | Launch Marketing

<keyword(s)> B2B CRM

<meta description> Is it time to reassess your CRM and analytics practices? Read on for tips to ensure that you're capturing optimal leads for your B2B.

## Part 1: Audit Your B2B CRM for a New Lead on Sales

Most of us practice some sort of spring-cleaning ritual. We reorganize by cleaning out closets, drawers and garages to bring some order back to our homes and our lives. Purging what has become old and outdated helps make room for the new items we need to add. Much like spring cleaning your home, businesses should take time to make sure their CRM is updated and ready for all sales efforts, as well as confirm staff are properly using the analytics tools they have in place for informed reporting. These checks and balances on essential marketing and sales tools help ensure you are following best practices for outstanding results.

**Image CTA:** [Create your forward-thinking marketing plan with our latest eBook, "Raising the Bottom Line with Next-Level Marketing."](#)

In part one of this two-part series, we analyze the importance of your B2B CRM and maintaining it to showcase the most current and appropriate contacts for your marketing and sales efforts.

### Importance of CRM Maintenance

One could argue that the building blocks for your B2B sales lie within your CRM. A properly implemented CRM solution can yield an [ROI of \\$2.50 to \\$5.60](#) for every dollar invested. It is also found that [48% of sales teams](#) heavily utilize their CRM systems to improve overall operations. CRMs are no longer just a list of contacts but instead have become an essential business tool to improve process, strategy, analytics and lead strength. Most CRMs today can easily integrate with other programs to help with accounting, marketing, operations and more.

Of course, the CRM is still ultimately your modern rolodex. Without your leads, prospects and customers, you are left with only a product and a plan. An unkept CRM is the equivalent of broken blocks. Keep in mind that [50% of the average](#) marketing database is useless. This can stem from inactive or incorrect contacts, mislabeled information, duplicates or other problems that can generate inaccurate and ineffective lists.

One issue that can arise from an unkept B2B CRM is when potential leads are generated through channels that are not necessarily associated with the sales team. These leads could be coming by means



of a generic form on your website, a message from a company phone line or @info email. Only [56% of B2B organizations](#) verify leads before they're passed to sales. Confusion can happen if the info is simply added to a CRM without a salesperson following-up with the contact. Putting a system in place where a sales representative must vet all leads can help keep unwanted contacts from crowding your CRM.

It's not just you and your company that are positively impacted by a well-used CRM. [47% of polled CRM users](#) said that their CRM had a significant impact on customer retention, and an equal percentage said their CRM had a significant impact on customer satisfaction.

Your B2B CRM should have a standardized process like any other part of your business. While keeping a clean CRM may seem like a daunting task, a streamlined process will help keep overwhelming clean-ups at bay.

## CRM on the Go

Is your team making the most out of your current B2B CRM? If you are on a cloud-based CRM you are off to a good start. Many of our business software is now cloud-based and has a corresponding mobile presence. In 2008, only [12% of businesses](#) used cloud-based CRMs, but just over a decade later, it is at 87% and rising. For salespeople, especially those that are field based, being able to carry out the core functions of CRM on their phones is essential.

This on-the-go trend of using a CRM is not just convenient but can increase sales as well. [A Nucleus Research report](#) found that for companies using a mobile CRM, 65% are achieving their sales quotas, while only 22% of reps using non-mobile CRM have reached the same targets. The way we do business is ever-changing and utilizing mobile CRM is just one more way to make things easier for your team while still increasing your prospect list. Customers like it too, considering that organizations using mobile business apps can achieve an increase in customer satisfaction due to faster response to requests and inquiries.

## Keeping Up with the Right Contacts

When importing or manually adding a contact, take advantage of the form fields available. In other words, think beyond name, company, email and phone number. While you might think you will remember why you added that person, many people within your organization with touch your company's CRM at some point, meaning that contact may change hands at some point or you may simply forget why they were added. This doesn't mean your team should be bogged down with going down a rabbit hole for information they don't have. Use what you do have to your best advantage.

[CTA: Want ideas on how to maximize your CRM to create meaningful customer relationships and referrals? Check out our latest article, "How to Transform Your B2B Customers into Advocates."](#)

Events are one of the best ways to generate leads. Over the course of an event, a lot of badge scanning goes on, and you could easily end-up with looky-loos and competing vendors that are not actually interested in your product. When scanning a badge or entering information at an event, train your team to use the other field forms to take comprehensive notes on the most promising leads. Take note of

what you spoke about, what they seemed most interested in and when this lead should have a follow-up. Make sure the staff importing the event lists are checking for notes and actively engaging with team members that will follow up with the leads, if it is not themselves.

If you have been maintaining your CRM for a while without proper maintenance, you can use your entire database to run an informed interest campaign. This is a simple way to see bounced emails for contacts that you can now archive and remind other contacts of your brand, product and value.

## Keep in Touch

In the long run, B2B CRM maintenance and implemented processes won't mean much if you don't use your CRM on a regular basis to create thoughtful, targeted campaigns. Your CRM holds the keys to create awareness, establish engagement, share relevant content, pique interest and, most importantly, drive sales.

While reevaluating your B2B CRM, stay tuned for part 2 of this topic where we examine your campaign analytics habits.

Need some assistance with a full audit of your marketing automation tools and other key marketing services? Request a [free 1:1 consultation](#) with a Launch Marketing expert today!

<Title Tag> Compassion Communication: Practice the 4 R’s in Your Current Messaging | Launch Marketing

<Keyword(s)> +communication +messaging +coronavirus +Covid-19

<Image Alt-Text> Compassion Communication: Current Messaging and the Covid-19

## **Compassion Communication: Practice the 4 R’s in Your Current Messaging**

We all have recently entered uncharted times, in both our personal and professional lives. While our country has faced challenges before, most of us have never taken on such an unusual and formidable foe as the novel coronavirus (COVID-19) pandemic. It seems like the only certain thing right now is uncertainty. Even though our everyday lives have become a very not normal routine, we must keep moving forward and be grateful that many B2B industries can still operate and even be successful because they offer the digital platforms the world needs right now to work remotely.

Author Zig Ziglar once said, “Stop selling. Start helping.” It is essential during these uncertain times to keep in mind, now is not the time for messaging that reads like a sales pitch. We will all need to rethink how we go about our messaging in the next week, month and three months out. We have laid out the 4 Rs of compassion communication to reevaluate, reschedule, rewrite and reunify/reassess; this will help you prepare your content during this time.

### **1. Reevaluate.**

Most of us live on schedule, calendars and milestones. More than likely, your organization’s marketing plan is fully scheduled for the next 30 days, and probably the next six months to a year. While we all make room for small disruptions in our marketing calendar, nothing is quite as unprecedented as COVID-19.

There are a wide array of B2B companies in the market today, each with its own set of unique offerings and abilities. Revisit your company’s messaging and positioning and focus on how your product or service can help in the current circumstances. For example, does your product or service make working remote more convenient, secure and/or enhances performance? Now is the time to tailor your content to highlight how your company can help others during the current circumstances.

Business and customer strategy will become vital as you start to communicate with your customers, prospects and general audiences. Now could be a time to evaluate if you are able to offer any discount, promotion or other financial assistance to current clients. It is also a great time to consider free trials and promotions for new customers.

### **2. Reschedule.**

You and your team put a lot of care into laying out how your marketing campaigns would fall over 2020. It’s been carefully crafted to meet sales goals, generate the right market

awareness and targeted for key dates. While COVID-19 brings an unexpected cog in your plan, that doesn't mean you have to scrap everything and start over.

First, implement a new [4-week content calendar](#) that addresses the seriousness of the COVID-19 situation. There are numerous resources to help you create a [content calendar](#) if you need a refresher or need someone on your team to help that is not as familiar with creating one. Review your current content calendar and identify the key milestones that were planned in the next few weeks and months. You'll need to strategize which campaigns can move and what timeline makes the most sense for them. You'll also need to determine which content can be rewritten and still go out in the first few weeks.

1. Week one's focus should be on caring, shared empathy and offers of help. Review your marketing plans, content and social calendars.
2. Week two should address the pain points of your audience and how your product or service can help. Assess which of your campaigns still make sense to send during this time and move out the ones that don't.
3. In week three, reassess the situation happening in both your company and on the world stage. Begin rewriting the campaigns that you can send now.
4. During week four, keep an eye on current circumstances and start to operate under the new normal.

### **3. Rewrite.**

As stated in the previous section, any communications going out within the first few weeks of the onset of COVID-19 should read as a message of compassion first. If you have not yet done that, don't worry, it's not too late to start. It is advised not to slip in a sales message or CTA. Trying too hard or soft sell at this point could come off unfavorably with your audience and hinder your efforts. You are simply marketing a message of care and concern. If your company decided they can offer a financial promotion or extend other types of help in the situation, you could make that part of your communication.

After you've reevaluated your messaging and positioning to see how you could focus your content, your team should start to craft content on how your company's product or service can help. [Zoom](#) is an example of a B2B SaaS platform that has taken steps to keep their audiences thoughtfully informed, while still marketing their solutions. Prospects and customers will respond to the organizations that identify with what they are going through and help them meet the challenges they face.

Are you using [personalization](#) in your marketing? If you are not, now is a great time to start. Studies have found numerous benefits to personalizing marketing, including the [top five benefits of personalization](#) which are: increased visitor engagement (55%), improved customer experience (55%), improved brand perception (39%), increased conversion rates (51%) and increased lead generation and customer acquisition (46%). So,

personalize your COVID messages. It adds a personal touch that is appreciated now more than ever.

#### **4. Reunify and Reassess.**

Come together, albeit virtually, and keep coming together as a team on a consistent, possibly daily, basis. Because these are uncertain times, your plans and messaging may need to change more than once. It is imperative that leaders demonstrate flexibility and ask their team to do the same. Keep your finger on the pulse of what is happening in the world and in your company, as well as the needs of your audience and your team. Reassess each week the current conditions, tactics, metrics and messages and adjust them as needed to help your company move forward and continue to produce content that compels and enlightens your audience.

The COVID-19 pandemic will not change the foundations of marketing, but the fundamentals will just need to be adjusted to meet the current situation. To get a sense of what other marketers are doing, AdAge put a list together tracking [marketers' responses to coronavirus](#).

While we know this is an unexpected disruption to business as usual, how we face these challenges can help build our teams and our companies. Great leaders can step-up and use this as an opportunity to guide their team and company. Uniting regularly as a team and navigating through these tough times together can help provide many with the stability of work and knowledge they are providing value. To paraphrase author Shane Koyczan, if your marketing plan is now broken, create better marketing with the pieces.

---

<CTA>

Is your business uncertain of how to restructure your marketing messaging to face the current circumstances? Or how to rebuild your marketing plans? [We are here to help.](#)

**Audience:** Secondary

## SEO Metadata

<title> Transforming B2B Customers into Advocates | Launch Marketing

<keyword(s)> customer experience

<meta description> Thinking about your customer journey more critically will not only improve the customer experience, but will also help turn passive customers into active advocates.

## How to Transform Your B2B Customers into Advocates

The customer experience has become one of the most significant factors to help turn prospects into customers and customers into brand advocates. An optimal customer experience, or how your customers feel before, during and after any transaction or interaction with your organization can help or hinder future sales.

While sales drive your business forward and help support organizational efforts, they can only be achieved through positive interactions and a thoughtful customer experience. Keep in mind that one sale does not equal a lifelong customer, and in the same vein, a customer does not always equal an advocate. An advocate is a customer that actively shares information about your company, product and/or services on an ongoing basis, as they engage with your company on social media, grooms other leads and/or keeps an eye on new developments in your company. Considering that [91% of customers](#) say they'd provide referrals but only 11% of salespeople are actively asking for them, it's more likely than you think that some of your customers are ready to be converted into advocates for your business.

As you build your customer journey, consider these key concepts that help grow your customers into active advocates.

### Customers are More Than a Sale

Understanding your customer is crucial not only for a successful campaign but also to set the stage for eventually transforming your B2B leads into advocates. When developing a plan for reaching your target audience, consider that personalization has become increasingly popular, and for good reason. [Epsilon reports](#) that 80% of consumers are more likely to purchase from a personalized marketing experience. Even established brands need to convince potential audiences of their company's value. [89% of highly recognized brands](#), including Coca-Cola, Fabletics, Netflix, Sephora, USAA and Wells Fargo, are investing in digital personalization to meet changing customer demands.

This more targeted customer mapping combined with customer ingenuity and utilization of the internet and social media has virtually ended the days of the traditional one-way conversation and hard-sell. B2B customers can utilize the internet to research products and price their needs instead of relying on information they received from a salesperson. As customers become savvier and more prepared, marketing personalization has become an industry norm.

Properly identifying your customer, their pain points and how you can solve their unique problems puts you in the ideal position to begin bringing in the right leads to transform into customers.

## Making the Leap from Customer to Advocate

A satisfied customer can bring in additional revenue in several ways. Happy customers have a higher likelihood of making repeat purchases. Additionally, when a customer feels that a business has gone above and beyond, they are more likely to recommend the company to a friend or colleague.

This is one reason why referrals are a trusted and valuable way to gain new business. In fact, [84% of B2B buyers begin as a referral](#). Even more astounding, [97% of IT professionals](#) say they rely on peer recommendations and reviews to help inform their buying decisions. Plus, loyal customers are [five times more likely](#) to purchase again and [four times more likely](#) to refer a friend to the company. Companies that actively seek out a referral [earn 4 to 5 times more](#) than the ones that do not.

If you want to actively gauge how your customer experience is going, there are tools like the [Net Promoter Score](#) (NPS) that can help measure how likely your customers are to act as an advocate. The survey also gives you insight into how you are doing overall and across several customer focused areas. An NPS survey helps you proactively address and change areas that need improvement, as well as identify areas in which you are excelling and will want to use to your advantage going forward.

However, referrals usually happen because a customer was asked for a referral. Engaging customers in a more formal advocate role can turn one-off referrals into more active recurring engagements.

## 3 Fundamental Ways to Create Advocates

### 1. Cultivate Trust and Communication

According to a Forrester Buyer Insight Study, [only 13% of people](#) believe that a salesperson can understand their distinct issues and needs. So how does one cultivate enough trust to flip potentially wary customers to advocates? A foundational best practice to start with is to create one-to-one marketing, personalized correspondence and targeted efforts [based on a customer's profile](#). This is an excellent way to highlight your company's efforts to understand their unique requirements. To reduce friction that can breed detractors, ensure that each point along the customer's journey is part of a seamless flow. It's essential that everyone on your team has the same information and resources to share with customers. Transactions and conversations should leave the customer confident that you value their time, commitment and concerns, and that members of your staff are confident and knowledgeable.

Another way to appeal to customers is offering convenient ways to reach you as quickly as possible. If a customer tries to contact your business on numerous channels but doesn't hear back for several days, this can lead to distrust and frustration. Following up with customers and leads is vital, considering that [30-50% of sales](#) go to the vendor that responds first with quality information.

Outstanding customer communication creates a vital connection with your customers, which is a foundation for advocacy. Companies that provide an emotional connection with customers outperform the sales growth of their [competitors by 85%](#), while [49% of customers](#) will leave if they feel unappreciated.

## 2. Become Social Savvy

Social media is an excellent and easy way for customers to advocate for your business, so it is important to have properly managed social media sites. Social media should be used in two ways to keep customers active, loyal and advocating for your organization: a sales strategy, since [78% of salespeople](#) using social media outsell their peers, and a way to give customers a glimpse into your company.

Creating a strong social media presence starts with an engaging [content calendar and social media strategy](#). If you are not sure where to start, [there are excellent resources to help you get started](#). As you build out your strategy, share a good mix of pieces about your company or product/offering as well as content on industry news, trends, thought leadership and other industry think pieces. This way you are expanding your audience exposure by promoting other important industry content with which people can interact and engage.

Personal engagement with your social strategy is essential. A rule of thumb is to not just post content and leave. Interact with your audience, compliment them, ask them questions and answer their inquiries in a timely manner. If it feels like you are establishing a grounded and lasting relationship, that's because you are.

Want a complete guide to your digital marketing strategy? Check out our [Digital Marketing Guide for B2B Marketers!](#)

## 3. Recognize and Reward Loyalty

Rewarding your customers for their loyalty doesn't have to be reserved for B2C. While you probably won't be offering a free ice cream cone for their tenth visit, there are other ways you can acknowledge their business and any business they send your way.

Developing a [customer onboarding program](#) can be a crucial way to help customers feel valued and confident in their relationship with your company. If a customer does not see your value in the first week, [75% will drop off](#). A customer's journey should start with the first time they contact you, not when they make their first purchase from your company.

Other ways to reward customers is by featuring them in your content. Testimonials, case studies, social posts and more are great ways to give exposure to both yourself and your customer. Gathering customer quotes as you work with customers makes them feel valued and gives you vital and authentic testimony to the value of your product or service offering.

Finally, perks, like special discounts or exclusive first sneak peeks at new items, can help elevate a customer to think like an advocate. Offering a reward increases referral likelihood, but luckily, according to the American Marketing Association, the [size of the reward](#) does not appear to matter to most customers. In other words, it's the thought that counts. Leave your customer remembering that yours was the company that thought about them as a person and not as a number.



## Transforming Through Your Customer Journey

Reshaping and rethinking the way your customers experience your business will not only cultivate stronger relationships between your company and your customers, it will also help motivate current customers to active engagement and advocacy of your brand. Authentic and genuine customer recommendations and engagement are a strong indicator of how your business is delivering value to its intended audience. By using these steps as a jumping off point for remapping your customer experience journey, your organization will be better equipped to transform B2B customers into advocates.

Need help and marketing tools to improve your customer experience? [Contact us](#) or [request a free consultation](#) to get started.

9SEO Metadata

<title> Executive Team Expansion to Drive Global Sales for SaaS Enterprise Project Management Solution | Leankor

<keyword> Enterprise project management solution + Leankor + SaaS enterprise project management + industrial project management solution

<meta description> Leankor Announces Executive Team Expansion to Drive Global Sales for SaaS Enterprise Project Management Solution

## Leankor Announces Executive Team Expansion to Drive Global Sales and Customer Success Operations

*Two Vice President Hires Brought on to Support Ongoing Corporate Growth Initiatives*

**Calgary, Alberta, July 09, 2020** – Leankor, a SaaS enterprise work and project management solution developed to address large, long-running and complex projects for Industrial Organizations, is pleased to announce the hiring of two new Vice Presidents. Expanding their executive team, Mike Mayer has joined as Vice President of Global Sales and Ian Zipursky as Vice President of Global Operations.

Mike Mayer joined Leankor as Vice President of Global Sales with responsibility for worldwide sales, technical presales and sales operations. Mayer comes to Leankor from Workfront, where he led sales teams in the Central US. Prior to Workfront, he spent 18 years at Dell EMC managing multiple specialty software sales teams focused on Dell's emerging technologies including Software Defined Data Center (\$40+million) and eDiscovery Compliance solutions (\$25+million).

Ian Zipursky leads Global Operations for Leankor, focusing on customer service and client onboarding. Zipursky comes to Leankor from Curve Dental, a cloud system for dental practices, where he acted as President and Chief Operating Officer. He led Curve Dental from a start-up to a private equity exit. During his time at Curve Dental, they grew the user base to serve over 20,000 dental professionals across North America, while experiencing over 100 straight months of customer and revenue growth.

Mayer brings over 25 years of dedicated experience in account management and sales and Zipursky has managed and run operation departments for over 20 years. Both executives have experience in software and cloud based, SaaS systems.

Leankor's Chief Executive Officer and Co-founder Emilio Bernabei commented on the expansion, "The joining of Zipursky and Mayer reinforces the incredible evolution that Leankor has been under in the last couple of years. Leankor is rapidly gaining recognition as a leader in the enterprise work and project management space, and we saw the need to bring on leadership that had the experience and drive to continue to move us forward." He expanded, "They both bring outstanding skillsets, integral knowledge, leadership, and most importantly, a customer first focus."

Geoji George, Co-founder and Chief Product Officer, remarked, "Leankor has been experiencing tremendous growth due to the overwhelming adoption and success of our solution in Industrial and Pharmaceutical

organizations. Combining Zipursky's ability to drive ongoing growth through customer satisfaction and Mayer's proven track record of success in high growth technology markets, the two will focus on advancing our already robust solution and world class customer success team to continue to address the unique needs of the industries we serve."

### **About Leankor**

Leankor is highly visual work and project management solution built on the Salesforce Cloud. Designed for the enterprise customer, Leankor helps companies execute complex projects at scale. A transformative solution, it links different styles of methodologies and processes, empowering people to work more effectively. Leankor enables teams to organize, manage, collaborate, and deliver better projects, helps decision-makers measure effectiveness and allows companies to deliver quicker revenue cycles. Leveraging the power of Salesforce, it brings together customer, project, and resource data extending the Customer 360 vision. Leankor is used by many of the world's leading brands with focused solutions for Manufacturing, Construction, Solar, Energy, Biotech/Pharma and Telecom. To learn how Leankor can help your company, visit [www.leankor.com](http://www.leankor.com)

## Building the Plane While in Flight: How to Remotely Tackle a COVID-19 Business Continuity Crisis in Your Enterprise

April 8, 2020

The novel coronavirus, or COVID-19, has come upon all of us swiftly and unexpectedly. Just a handful of months ago, no one could have foreseen a global pandemic threatening our livelihoods. However, the result is not an ominous post-apocalyptic world envisioned in science fiction; instead, it is one where, to help solve the problem, we are faced with social distancing on a massive scale. As business leaders, we are now tasked with keeping our organizations and workforce running, efficiently and profitably from thousands of remote, home-based locations, rather than a handful. If there were a positive to be said about this crisis, it is that we are living in a time that provides us technology that science fiction writers could have only once dreamt about. Right now, we can sequence and orchestrate many interlocking jobs and tasks remotely, efficiently and safely, while improving customer delivery cycles.

COVID-19 is unprecedented in the modern workplace and globally unparalleled in the last century. Organizations do not have the luxury of performing long, drawn-out research and analysis, hypothesizing if they should move away from workplan spreadsheets or project plan files trapped in hard-to-find file servers. COVID-19 has made that decision for us. Now is the time to acquire and strategically apply internet/mobile work management capabilities. The actions you take to preserve and protect your business during the next six months will not be the difference between achieving or missing quarterly projections; they will be make-or-break decisions for the survival of the business.

Even if your company has a business continuity plan, did they prepare for the type of disaster organizations are currently facing? Did they take into consideration the type of technology and Internet/mobile work management systems that are now available?

### **Making the Digital Transformation for Real-Time Work Orchestration**

Businesses need to be able to perform essential work remotely; organize workflows, orchestrate tasks, manage teams, as well as communicate and collaborate in real-time. The switch to remote processes needs to happen today, not next month and not next week. While some organizations quickly made the shift to digital platforms, it has not been as fast-moving for the deeply complex worlds of Industrial Manufacturing, Utilities, Solar, Wind, Telecomm and Construction that have long relied on spreadsheet formulas and printed out Gantt charts on walls. Your company cannot wait 3 or 6 months hoping COVID-19 will abate and the world will



go back to normal. As McKinsey & Co. experts have already pointed out, the normal we come back to will be a new normal.

### **Link All Organizational Methodologies. Don't Automate Islands.**

With [enterprise project and business management Software as a Service \(SaaS\) solutions](#), teams can now easily assemble virtually. Workstream leaders can effortlessly manage the supply chain and successfully orchestrate customer delivery projects, all while reducing timelines and saving money. Individuals and teams can continue to perform and organize work leveraging their different, preferred operational methodologies. Whether a department uses Agile/Scrum, Lean or waterfall, all methods can become unified in a virtual platform and communicate with ease, making the management and movement of projects seamless. This can all happen while each participant in the chain is physically isolated at their home offices or in clusters of teams in regional satellite offices.

### **Leading the Charge on Large-Scale, Orchestrated Collaboration**

Not all project management solutions are created equal. Leading the charge on the mission-critical functionality mentioned throughout this article is Leankor's [enterprise project and business management SaaS solution](#). [Leankor's platform](#) is one of the few solutions that recognizes and addresses the challenge of teams using different project management and organizational management methodologies. Leankor translates and adapts these different methods to ensure workflows are not compromised. From Kanban boards to Gantt charts it outperforms the competition by fluently enabling hand-offs to flow across individuals, teams, departments and third-party organizations in the supply chain.

Outside of the COVID-19 need to work remotely, Leankor saves valuable time and effort in managing your project and teams, leading to invaluable cost savings. Proven to deliver bottom-line results, Leankor has been implemented in some of the most renowned and reliable Fortune 500 companies in the world.

### **Ready, Set, Implement**

Many organizations rely on outmoded systems and processes because the time to implement had never been ideal and the ideology of "if it ain't broke" served them adequately. However, the pandemic brought a wake-up call. There is no more waiting; now is the time to establish reliable business continuity and successfully move forward in today's climate. Here is a recommended three-step accelerated approach to transition quickly.



Step 1: Identify your core customer acquisition and customer delivery business processes and the key people that make them function.

Step 2: Map out your core supply chain partners and which teams support acquisitions, as well as the external logistics partners that make it function. Identify gaps where there are inability to synchronize and orchestrate human activities.

Step 3: Implement an integrated, cloud-based work management platform that provides real-time collaboration, communications and, most importantly, orchestration and dependency tracking of hand-offs across individuals, teams and 3<sup>rd</sup> party vendors.

Implementing other professed enterprise business solutions can quickly become unnecessarily complicated and costly, sucking up valuable time and money. Leankor can be implemented as quickly as a few days, to a few weeks, depending on the complexity of your processes and how many teams you want to onboard concurrently. You do not need to have an IT datacenter installation or an extensive consultation process with numerous consultants. Leankor is securely hosted within the global [Salesforce.com](https://www.salesforce.com) business cloud, offering unparalleled security, dependability, extensibility and scale.

Today is the time to start. Request a consultation followed by a [demo](#) now, by calling 1.888.532.6567 or [email](#) us directly. You can also watch our instructional [video](#) to learn more.



## Plnar Blog, Part 2 of 4 – Cost & Time Savings

January 20, 2019

In all the time the Plnar team has been working together perfecting the components of our platform, we've known we built something truly great. The last year, however, has demonstrated to us more than ever the impact our cost-saving, process-streamlining, policyholder-pleasing has when it matters most. In this four-part blog series, our team reveals the real power Plnar has to help insurance carriers and policyholders alike respond to catastrophes, triage, re-inspections and building better virtual claims. In part 2 of this series, we are exploring how Plnar helps carriers deploy resources more efficiently and cut costs with virtual, self-service claims that policyholders will love.

Insurance is a necessity in this world; it buys us a little peace of mind for the unknown. Each year, about one in [20 insured homeowners](#) will need to file a claim and one out of 50 claims will be because of storm damage. When these unexpected events happen, the insurance claim process should not add complex, inefficient and expensive factors that could hinder agents and delay pay-out to the policyholder.

Plnar has helped revolutionize insurance by bringing the claims process into the digital age. The days of overbooked field agents, missing or incorrect information, ineffective communication, inconsistent data, and long waiting periods are waning. As the world of technology continues to grow, change, and become more innovative, Plnar has helped usher the insurance industry into the digital age, which is helping meet the needs of policyholders. In fact, 40% of policyholders now expect virtual self-service claims.

Meeting the new expectations for user experience is just one benefit. Cost reductions are one of the most significant advantages of using the Plnar SNAP app and software. Plnar helps reduce costly and unnecessary overhead for carriers by allowing the homeowner to capture the initial stages of the claim's process in the Plnar SNAP app; this simplifies the process by eliminating steps that are no longer needed in the digital age.

As insurance carriers know, a lot of claims do not require an onsite adjuster; therefore, digital processing is not just easier and more accessible but also reduces unproductive costs immensely. What once would require scheduling an onsite inspection, which could take days or weeks, can now be conveniently snapped with a policyholder's phone and submitted via the Plnar SNAP app, no appointment, or waiting, required.

Common types of claims that do not require scheduling an adjuster are:

- Water damage from wind-driven storms
- Pipe burst / sudden water discharge
- Water leak from appliances
- Sewer backup

- Low severity of smoke damage
- Low severity of electrical fire damage
- Ceiling damage from a leaking roof
- Vandalism

[visual callout] Plnar can reduce the overall expense per claim by an astounding 70%. [/] By Plnar offering self-service capabilities. Its sophisticated software creates a way for homeowners to photograph damage with their phone and then quickly send a report to their carrier through the same app. The app gives the homeowner all the tools they need to do the job accurately and with little effort. Plnar's adjusting tools provide a complete context of property damage to resolve the claim and homeowners can easily document interior and exterior property damage in real-time. Beyond the ability to photograph the damage, other tools include dimensions, 3D models, annotated photo sheets and other features and information that make the experience user-friendly, fast, and efficient.

Field and desk adjusters are still a valuable part of the insurance business, but with Plnar, their time is better focused on complex claims, data analysis and estimation. This is particularly helpful in markets with limited agents. Insufficient resources often cause agents to work with incorrect data or information, causing readjustments of claims—which can double the cost. And that is no small amount of money as the average cost per claim for an adjuster's visit is \$300, sometimes up to \$600.

Another advantage that Plnar offers is a better timeline from the start of a claim to the finish. The average amount of days it takes to resolve a claim is fourteen; however, with Plnar, the resolution timeframe can be reduced by three times that number. Because the app phases out the need for the agent to review the damage, the claim can start the minute the homeowner begins the process on their end in the app, saving days in the claims' cycle.

Plnar and its SNAP app are paving the way for insurance to seamlessly bring outstanding customer service and technology together. This digital innovation offers better opportunities for customer engagement and insight and has instated the ability to meet customer needs more effectively. It also helps carriers cut down on avoidable and unessential costs and can save days in the claim process. These savings ultimately benefit both the carrier and policyholder by providing faster, more consistent, data, productive communication and cut down on the need for re-inspections.



PLNAR: Allan Robinson, Board of Directors Blog

May 11, 2020

### SEO Metadata

<title> PLNAR Announces New Member of Board of Directors to Support Digital Transformation in Insurance Claims | PLNAR

<keyword> virtual + insurance + PLNAR + insurance claims + COVID-19 + Claims

<meta description> PLNAR Announces Board of Directors to Support Digital Transformation in Insurance Claims

## Leading the Digital Charge: Allan Robinson Joins PLNAR Board of Directors as Virtual Claims Become More Essential Than Ever

The first half 2020 may have been rocky, but the PLNAR team continues to grow and expand our vision for revolutionizing virtual claims. With that, we are pleased to announce that Allan C. Robinson III has joined our Board of Directors!

Allan comes to PLNAR from Horace Mann, where he acted as EVP of Field Operations and Sales Management, Chief Sales and Marketing Officer and Chief Claim Officer. He brings robust experience, vast knowledge and fundamental thought leadership to our passionate team of experts, as well as over 30 years in claims service management helping to shape, define and modernize claims management processes.

Myself and the team are excited that Allan came to PLNAR during the novel coronavirus (COVID-19) pandemic—even though many aspects of the future are uncertain, it has never been more clear how essential our mission is. In the past few years, many industries started shifting away from analog, in-office workflows towards digital, but COVID-19 has made those shifts top-priority and vital to everyday operations. Luckily, PLNAR had already forged a new path for the insurance industry by creating the technology, platform and processes to enable interior property virtual claims.

### [CALL OUT]

We helped revolutionize virtual interior property claims by allowing claimants to use their smart phone app to take photos and file a claim with a digital adjuster through the SNAP app.

### [/CO]

The insurance industry has seen devastating, historic events before COVID-19, like Hurricanes Hugo, Katrina and Andrew and the California wildfires to name a recent few. I've seen these events seriously hobble the claims process from a shortage of onsite adjusters to assess the sheer amount of damage, as well as the amount of time needed to design and accommodate safe onsite inspections.



While COVID-19 is a very different kind of event, it highlights the critical need for the insurance industry to prioritize digital transformation and innovation. Now, more than ever, the interior claims process must start virtually, from the homeowner, using their everyday devices. It has been advised that adjusters do not go onsite during the COVID-19 pandemic to inspect, due to social distancing and health concerns, and homeowners are understandably reluctant to have adjusters in their home. Even after the COVID-19 crisis is behind us--which is exceptionally hard to predict when that may be--PLNAR's helps carriers stay relevant and meet changing customer demands, avoid preventable wait times and be better prepared for the unexpected.


Allan, myself and the team recognize PLNAR's ability to resolve one of the biggest industry challenges—adjuster shortages and job satisfaction. By widening the funnel of claims that can be handled virtually, quickly and largely automatically, our technology gives adjusters more time to focus on larger, more complex claims and losses and better segment the types of claims they handle. These virtual tools also allow adjusters to step in and safely take action on claims more quickly during catastrophic weather events, emergencies and pandemics. Our technology gives adjusters more autonomy and better tools to manage their time and focus, key elements to creating better outcomes for customers and a sense of meaning and purpose for employees.

I've seen firsthand that companies that adopt our technology will lead the way in providing a distinct competitive advantage, reducing expense ratios, improving LAE, shortening cycle times and drastically increasing customer satisfaction. Thanks to PLNAR, customers can self-service their claim on their own time with the easy to use app, creating peace of mind during an otherwise difficult or traumatic time for them.

Virtual adjusting also opens the door for more partnership opportunities with various vendors including contractors, roofers, water mitigation companies and other first responders, who can capture measurements and damages when first on site. Whether the images are captured by a customer or a vendor, the opportunity to use simple smartphone photos to improve the quality and accuracy of estimating via the PLNAR SNAP app, measurement tools, 3-D modeling and other tools is the key to providing a total virtual solution for the customer, adjuster and claim organization.

Allan coming on board the PLNAR team ushers in a new era in our journey and solidifies the essential path we have been on for years to bring virtual adjusting to all interior property claims and the insurance industry as a whole. I look forward to working with him and the other members of our Board of Directors to strengthen our mission and grow our footprint in P&C claims and offer a vital solution to the many issues insurance companies are facing in the COVID-19 era and into the new normal of virtual claims.





# Seeing 20/20 in 2020

gettyimages  
Eoneren

planview ™

# Innovation Management



Innovation

Management

Seeing  
in  
20/20

planview™

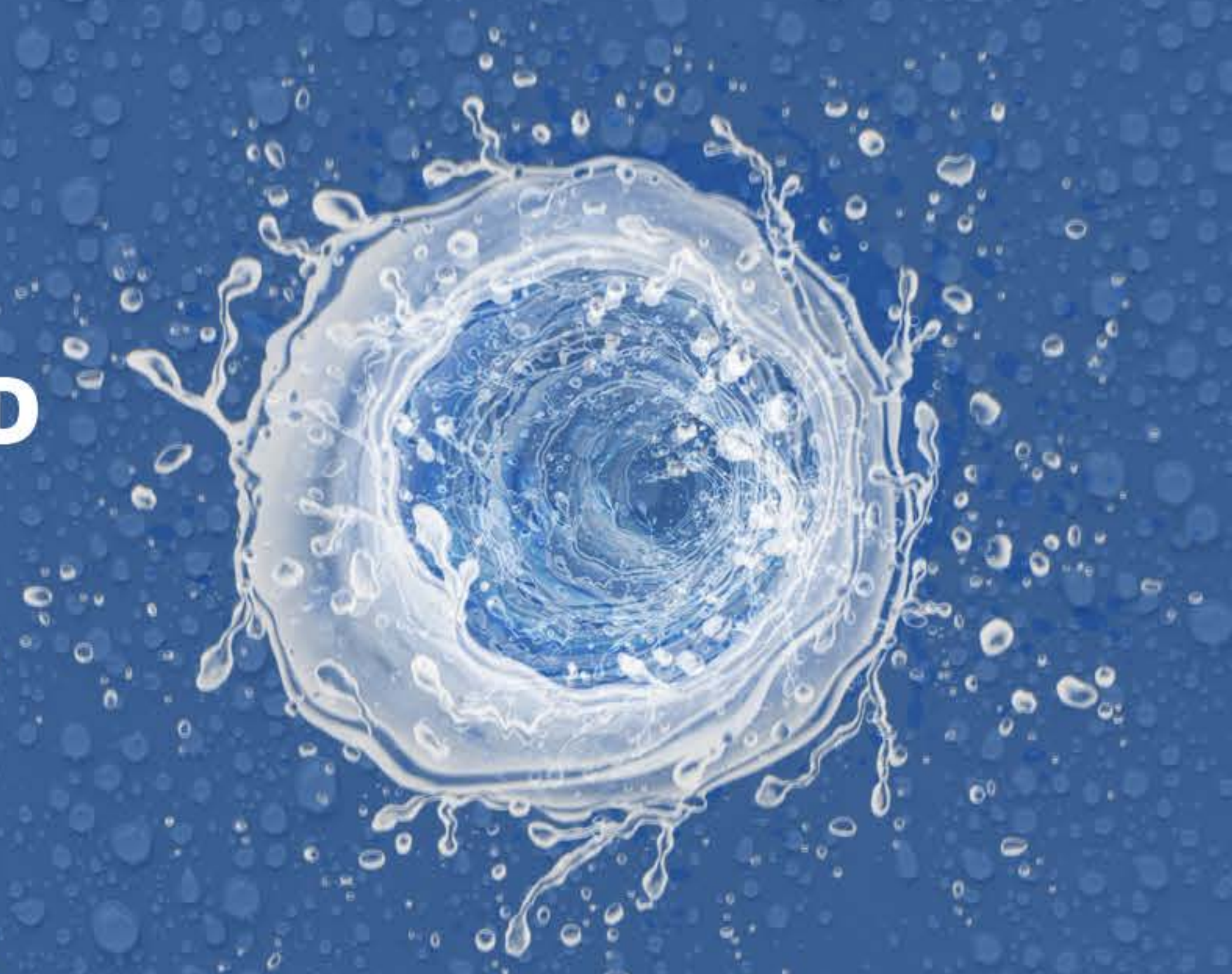
S  
T R  
A T E  
G I C P L  
A N N I N G

S  
E E  
I N G  
20/20  
i n 2020

# STAY AHEAD OF THE STORM CLOUDS WITH THE DATA CLOUD

Proactive stormwater asset management through predictive data analysis, real-time visibility and preemptive control.

[Explore the Opti Solution](#)



## THE OPTI ADVANTAGE

Lorem Ipsum sit Dolor

Eos in mutat audire aperiri, mel inermis inductum partiendo ut, dicta ubique vim ut. No ferri aliquam graecis nam. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duo at diam viris altera, eum autem nonumy sententiae ei.

**Economical**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

**Resilient**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

**Peace of Mind**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.



## SWM PLATFORM

Lorem Ipsum sit Dolor

Cu mei enim vitae, ex has vero moderatius. sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

## NEWS AND NOTEWORTHY

Lorem Ipsum sit Dolor

Cu mei enim vitae, ex has vero moderatius. sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.



### Cu Postulant Mea

Cu postulant pertinacia mea, rebum nostro repudiare usu at. Esse meis ne vis, ut postulant petentium pri.

[Learn More](#)



### Cu Postulant Mea

Cu postulant pertinacia mea, rebum nostro repudiare usu at. Esse meis ne vis, ut postulant petentium pri.

[Learn More](#)

## TESTIMONIALS

“Cu mei enim vitae, ex has vero moderatius. sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.” -- George Washington

## TRUSTED PARTNERSHIPS

Lorem Ipsum sit Dolor





Stay ahead of the storm clouds with the data cloud

1-800-XXX-XXXX



- [Solutions](#)
- [Partners](#)
- [Company](#)
- [Resources](#)
- [Newsroom](#)
- [Contact](#)

### The Opti Advantage

Lorem Ipsum sit Amet Dolor

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.



#### Economical

Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

#### Peace of Mind

Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.



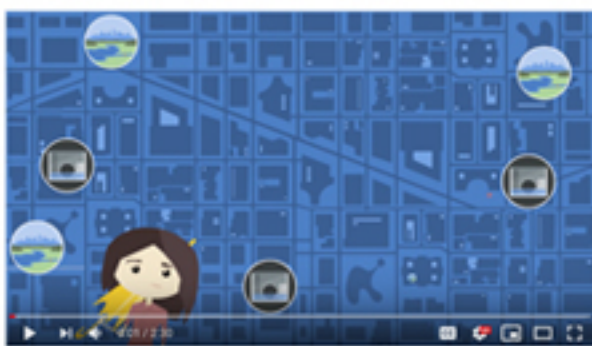
#### Resilient

Ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

### SWM Platform

Lorem Ipsum Dolor sit Amet Labore

Opti's SWM Platform lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco



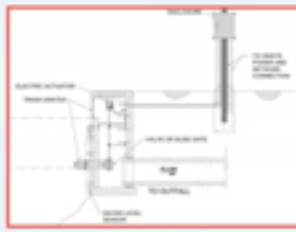
### News & Noteworthy



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

### Testimonials

"Stormwater lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat." - Jane Smith

### Trusted Partnerships



Start Your Watershed Transformation Now