

**ARISE™**

**Go-to-Market  
Strategy**

**Customer centric. Data driven.**

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Nearly 30,000 new products are introduced annually -and 95% of them fail according to Clayton Christensen, a professor at Harvard Business School. Roughly one in five businesses in the US and UK fail in their first year and this jumps to 60% by year three.

# Introduction



As you can see, bringing a product or service to market is tough. One major reason: an incomplete go-to-market strategy.

A go-to-market strategy should fundamentally help your organisation understand:

- How you're different from your competitors - and how you convey that value to your target audience
- Who your target audience is and the marketing channels your potential customers operate in for lead generation
- The buyer's journey
- Customer pain points
- How to define the sales process
- What onboarding entails
- What your pricing structure looks like

**This eBook helps you build a go-to-market strategy that keeps you in that 5% of successful companies.**

# Product Marketing

# What is Product Marketing?

According to the Product Marketing Alliance (PMA) – **Product marketing can be summed up as the driving force behind getting products to market - and keeping them there.**

Product marketers are the overarching voices of the customer, masterminds of messaging, enablers of sales and accelerators of adoption. All at the same time.

## Product marketing

We start our journey with product marketing. If you are launching a new business, product or service and don't have a Product Marketing Manager (PMM), now would be a good time to hire one. They are the most valuable member of your team when it comes to launching a new offering. Let's dive into why (and how).

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## What are product marketing managers (PMMs)?

Product marketers sit at the crossroads of marketing, sales, product and customer success. A product marketer's responsibilities touch with other internal departments like finance, IT, the C-Suite and engineering too. They are also the voice of the customer within your business.

By deeply understanding the needs of that customer and being able to adopt the position of the user, they use their experience to knit your organisation together for faster growth and revenue generation.

Forget traditional marketing methods: once you establish product-market fit and your marketing strategy, your product marketing team will bring your product to market.



## How do product marketers help?

When your PMMs are set up for success, they help your business in several ways; these include but are not limited to:

- **Representing the voice of the customer** – before, during and after the launch
- **Unlocking new opportunities** and teeing marketing/sales teams up for success
- **Ensure what your company delivers is what your target audience actually wants** – and is willing to pay for it
- **Clearly articulating your product's value** in a way that resonates with the market
- **Driving customer adoption and advocacy** – and therefore the business' bottom line
- **Ensuring company-wide alignment**

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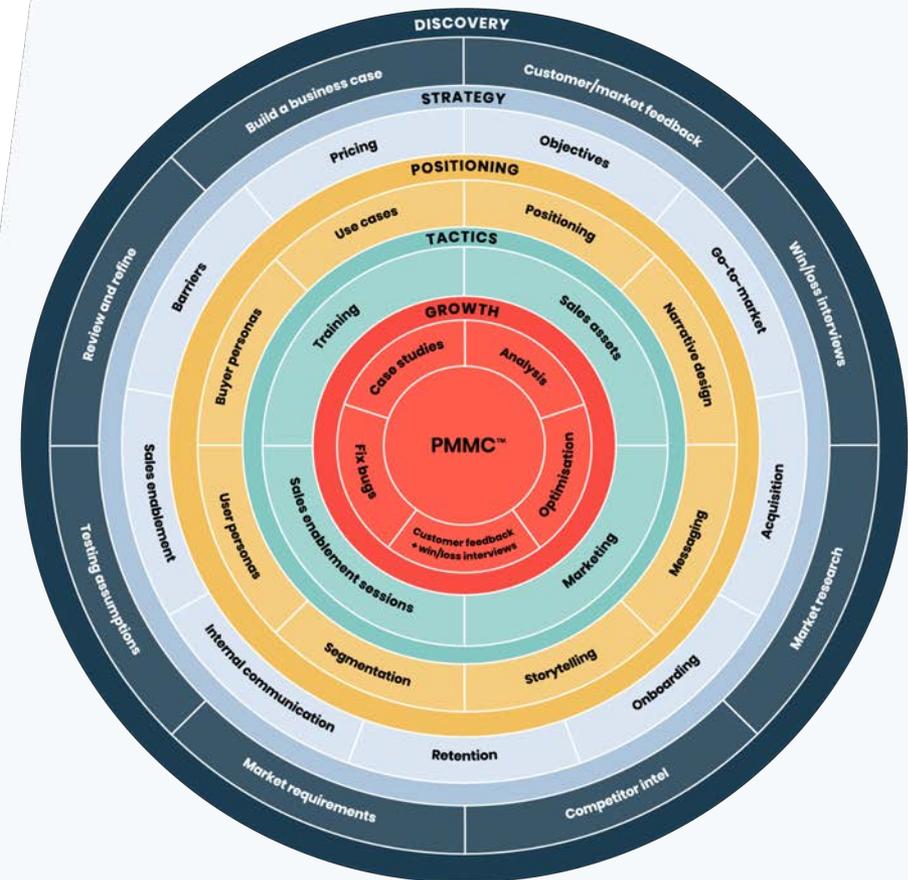
## And help some more?

And whilst they help your company achieve its goals in this way, PMMs often have a varied role and on a day-to-day basis you will find them performing any of the following tasks:

- Mastering product positioning and messaging
  - Crafting your product's story
  - Managing product launches
  - Driving alignment across the organisation
  - Creating and delivering sales collateral
  - Conducting customer and market research
- Analysing and optimising campaigns and products
  - Reporting on product marketing metrics
  - Contributing to the product roadmap
  - Onboarding customers and ensuring they're set up for success with your product
  - Content marketing initiatives - such as blog posts, landing pages, email copy, etc.

The depth of the role doesn't stop there though, and there's a lot of work involved in successfully launching a product - and making sure it continues to be successful over time.

**Here's a visual representation of the steps product marketers take when growing a product.**



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## Product marketers in product development

When your platform is in the development stage, product marketers come into their own. Along with other internal teams, product marketers will go heavy on research in this phase, taking the lead - and that includes competitor, prospect, customer and market research.

Their core focus here is speaking to the market, understanding what they want and defining those must-have requirements.

PMMs will spend a lot of time immersing themselves in the product during this phase to ensure they understand it inside and out and (as well as the Product team) are subject matter experts in it.

## PMMs help product teams deliver better products by:

- **Fuelling them with real prospect and customer insights** so they know what people do and don't like, what there's demand for, how users are using the product, etc.
- Ensuring all releases are **tied to organisational goals**
- **Fine-tuning existing products based on customer feedback** to ensure ongoing usage and revenue
- **Helping to build out product roadmaps** and bringing fresh ideas to the table
- Ensuring other internal business areas are **positioning products correctly**

# How PMMs enable your sales team

The role of your PMM in sales enablement is to help your sales team close more deals by providing them with the tools they need to increase revenue. They do this by:

- **Equipping reps with sales collateral** (like battle cards, product sheets and sales scripts) so they're able to deliver stronger pitches with shorter sales cycles
- **Ensuring reps aren't over or under-selling** your products through standardised sales processes
- **Delivering product training** – including the product's specifications, positioning, pricing, benefits, etc.
- **Providing key learnings and feedback** to help make all sales reps top performers
- **Optimising the buying funnel** and providing more, high-quality leads
- **Helping them personalise their pitches** to various personas, segments and markets, so every sales conversation is relevant

Because they understand how to align sales and marketing, **it's your PMM that should set the customer acquisition strategy and build your playbook.**

## Product marketers in customer success

Product marketers bring valuable insights and so help build better customer experiences. They achieve this by:

- **Providing in-depth data** on things like a customer's goals, pain points, drivers, traits, and so on, so they can provide tailored conversations
- **Ensuring their customer success colleagues are armed** with everything they need to successfully handle complaints and objections
- **Reducing the number of complaints** received by a) ensuring sales aren't overselling the product, and b) taking feedback on board and making changes based on customer requests/demand
- **Equipping customer success with the collateral and training** needed to up or cross-sell products
- **Providing customer-driven feedback** on how their processes can be improved

By working closely with sales, marketing and customer success, your PMM can deliver a great product line and a superb product marketing campaign.

**However, you mustn't confuse your PMM with a product manager; they are two totally separate roles. And although they often understand the product inside out, your product manager will be more technically aware of the platform.**

## The difference between your PMM and your product manager

We've worked with businesses where PMMs have continuously had to clarify their role to leaders across the company and push back on leading various projects.

Product leaders are often the perpetrators in these instances. PMMs may have the word product in their title, but they are not Product Managers. Namely, **Product Managers are the voice of the product internally, amongst developers and engineers specifically. PMMs are the voice of your product externally, ensuring your target audience understands what it does and why that's important.**

They often do not speak the language of your tech team, and it's your Product Manager's responsibility (not your PMM's) to translate and ensure customers' needs are understood and the product reflects them.

**They do not own the product strategy, roadmap or execution.**

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Marketing leaders, you're up next: Your PMM may know your company's personas inside out (after all, they created them), but that does not mean they are inbound marketers. **PMMs will indeed create some marketing collateral, but they are not full-time copywriting resources.** Utilising them as such will undermine the effectiveness of their original role.

In a Product Marketing Alliance (PMA) survey, only 5.1% of the product marketing respondents believed that the stakeholders in their company understood their roles thoroughly.

To get the most out of your PMM and prevent any confusion or time-wasting, ensure their role, responsibilities, access requirements and goals are clearly communicated to the business when they start.

## Where does product marketing sit in your business?

As you can see, PMMs have a unique cross-functional role within a company in that their expertise and responsibilities overlap with several teams.

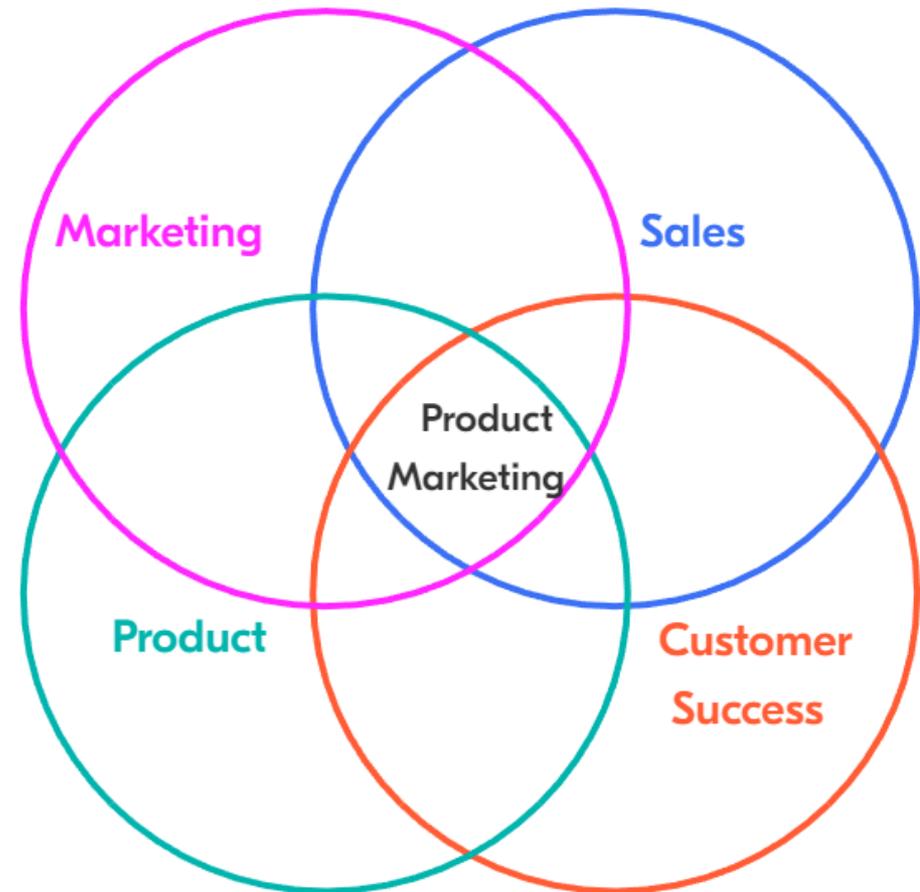
**Their role breaks down silos - and puts the customer at the forefront of operations. Who doesn't want that?**

This also makes them useful points of contact for senior leadership. They should have total access to the insights and systems used by marketing, sales, product and CS to enable them to deliver their outputs.

**However, if there's any question about where within the reporting structure your PMM should sit, it should always be within your marketing function, reporting to the marketing leader.**

This ensures that the business navigates towards being audience-focused instead of product-focused.

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If you are a start-up without a developed marketing team, and perhaps a product marketer is your first hire (smart move), it would make sense that they report to the CEO. However, as the organisation grows, ensure that this reporting line shifts over to marketing, as it's easy for a CEO to commandeer their PMM into pet projects unwittingly.

## Structuring your product marketing team by function

If you have a larger product marketing team, there are four key functions you can divide your team by:



Market  
intelligence



Messaging and  
positioning



Launch and  
go-to-market  
strategy



Sales enablement

However, as functions or topics when you have smaller teams, **the key thing here is that sales enablement must be recognised as an early adopted process.** It is not a maturing of the sales function at your organisation. In fact, we'd go as far as to say for many sales-led organisations, it's one of the key reasons you struggle for consistency in the sales process and why churn is high amongst business development reps (BDRs).

## Planning your internal product marketing team structure

The alternative to structuring your team by function is to do it by:

- Buyers' journey
- Industry or solution
- Function
- Line of business
- Objective or theme
- Feature and aligned with Product

Don't get too wrapped up in choosing one of the options and blindly following it. You should investigate alongside your product marketing team which works best and why. **By making this choice inclusive rather than delegated, you're likely to establish which is suitable faster and get powerful buy-in and support.**

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When you have the support it's easier to gain transparency on the technical capabilities of your PMMs. Here are some essential skills you should look out for and seek:

- Product/solution/industry positioning and messaging
- Managing product launches
- Creating sales collateral
- Customer and market research
- Storytelling
- Reporting on key metrics
- Onboarding customers
- Product roadmap planning
- Customer advocacy / customer success stories

Now that you have your go-to-market strategy leader taken care of, it's time to launch into the strategy itself.

**For a comprehensive list of questions you should be asking candidates during the hiring process, check out [this article](#).**

# Personas

## What's a buyer's persona?

Your starting point is personas. You must understand your customer to know how to position and build messaging and narrative.

**Buyer personas are a semi-hypothetical representation of the better part of your customer base. They should include things like gender, age, job title, business challenges and personal interests.**

You create them by learning what makes your customers tick. What makes them prefer you over a rival? What makes your product or service perceptually worse than your competitors?

No matter how many customers you have, you should always be able to box them into three clear categories...

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## The ideal customers

These clients typically are your “bread and butter”. They require nurturing and coaxing through your marketing and sales funnels, but they convert consistently, do not give you a lot of headaches and typically make up 40-60% of your customers. They know what they want, have been assessing your product along the way and potentially have already done the comparison with competitors/peer service providers.

## The perfect customers

These are the rare customers that simply engage and buy without hesitation. They are often well-educated about your product or service type and can be brand aligned or socially referred. These customers are infrequent but welcome and duly accepted. These often make up 10-20% of your client base.



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## The worst customers

Often, you get these clients because your initial messaging wasn't clear. They can occur as a by-product of reverse engineering your "ideal customer" to match your product or service. These often make up 20-40% of your current pre-persona client base.

They don't really know if your product or service is for them because the specifics haven't been explained. You may find that your product or service is a general solution, often bringing complaints: too costly, hard to use, not boosting success, not enough support, etc.

The ambition is to spend time really analysing the ideal customer. By doing this over time, those ideal and perfect clients will appear more frequently. This occurs as you start accurately creating the messaging that will resonate with that persona and speed up marketing and sales conversions.

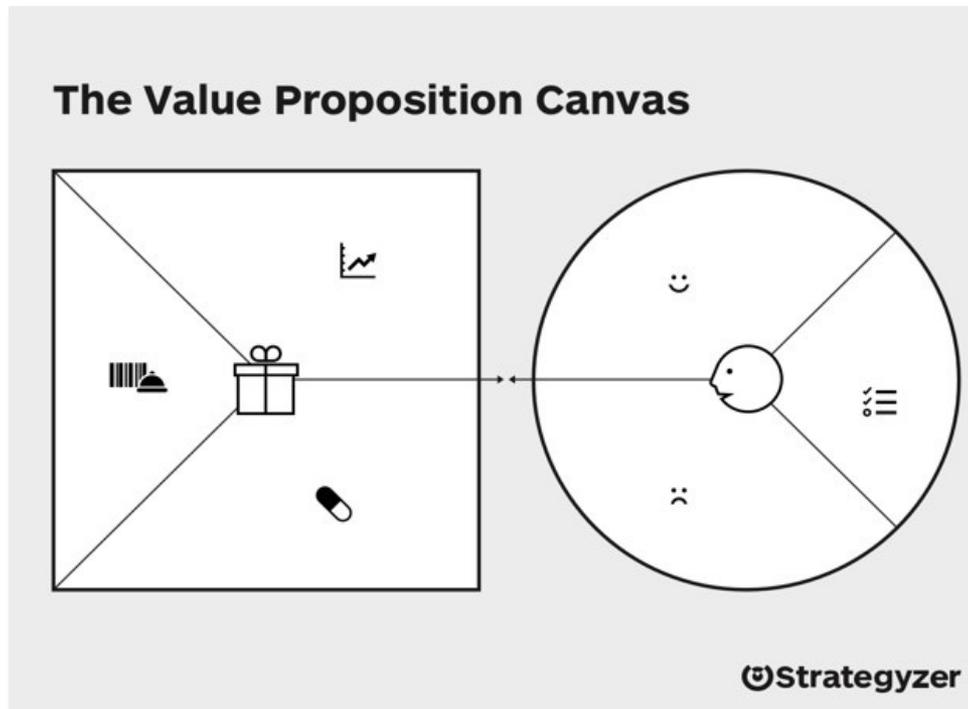
Winning, right?

**We have a whole other [eBook](#) that delves into how you can create personas for your business.**

# Value Proposition

## What is your value proposition? How do you define and validate it?

To do this, we suggest you use the value proposition template from Strategyzer as seen here.



### Define your value proposition

You may or may not be familiar with this template; **the value proposition canvas helps you map out how your product (or service) provides value to the potential customer.**

To help us break this down, please note the numbers 1-6 added to the canvas so that we can explain the purpose of each section. On the left-hand side of the canvas, you will list where you discuss your product/service and the gains from its use or the pains it solves.

## Value proposition

- **Products & Services (1):** This section identifies the product or service you are offering to your prospective customers.
- **Gain Creators (2):** In this section, please list the benefits that your product or service offers your ideal customers.
- **Pain Relievers (3):** In this section list the pain relievers that product or service offers potential customers.

On the right-hand side of the canvas, you discuss the product from the perception of your customer segment or persona.

## Customer segment

- **Gains (4):** List how your product or service provides gains for this customer segment.
- **Customer jobs (5):** List everything your potential customers have to do to feel the gains and relieve their pains.
- **Pains (6):** List all of the pain points your customer segment has.

To best use the canvas, you should print it out on A0 (UK) paper or 841mm x 1189mm or 33.1in x 46.8in and pin it to the wall or draw it on a large whiteboard. Then use post-it notes to complete the sections and take photos of each outcome for records purposes.

## Characteristics of a great value proposition

As a rule of thumb, there are 10 characteristics of a great value proposition. These are:



Meet these and you can maximise the potential of your SaaS platform's positioning within the marketplace for increased deal flow.

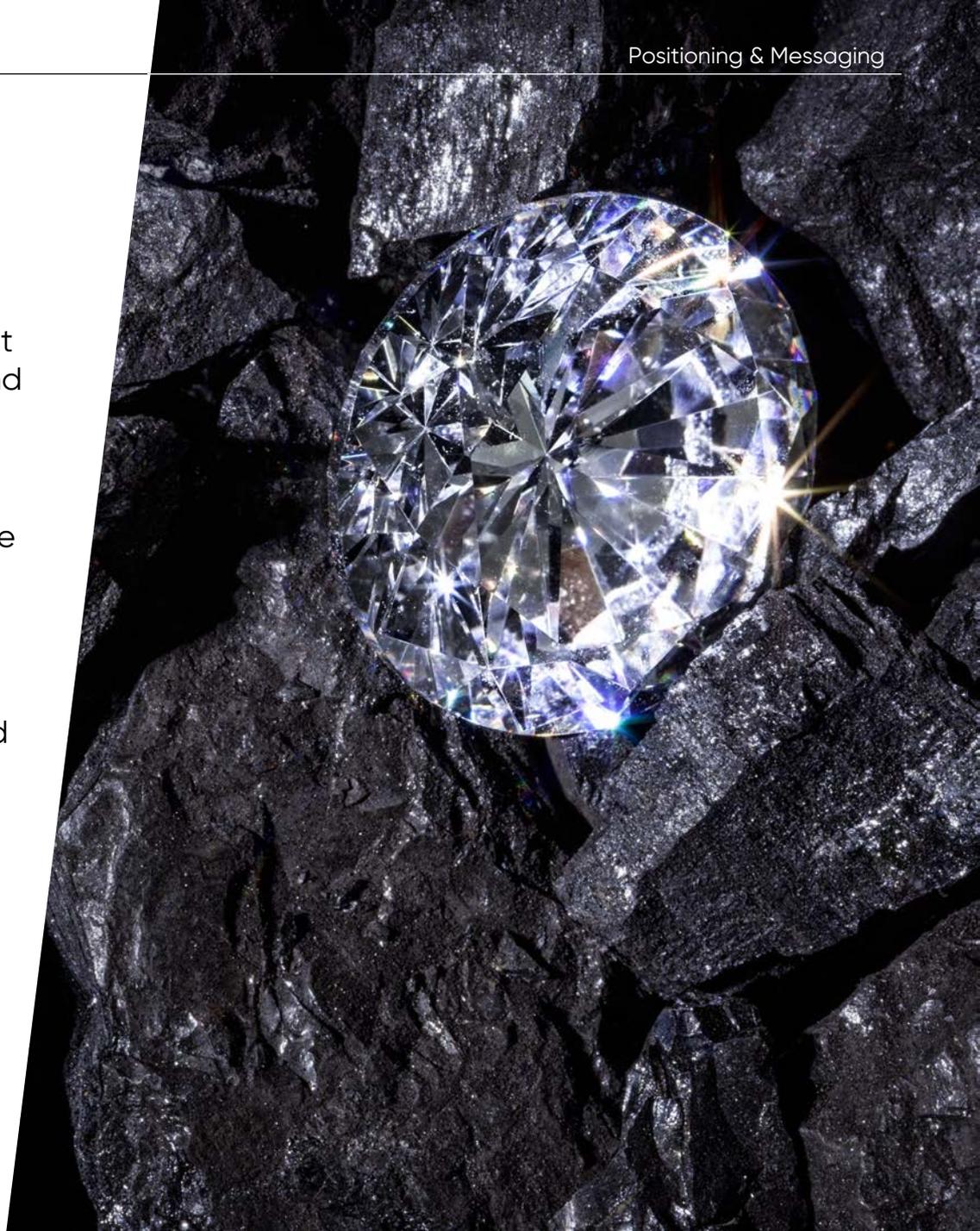
# Positioning & Messaging

## What is positioning?

**Positioning articulates your product or service's benefits to the end customer; how you change their world for the better. It is not a list of features.** It is not necessarily what the founder had in mind when they started the company either.

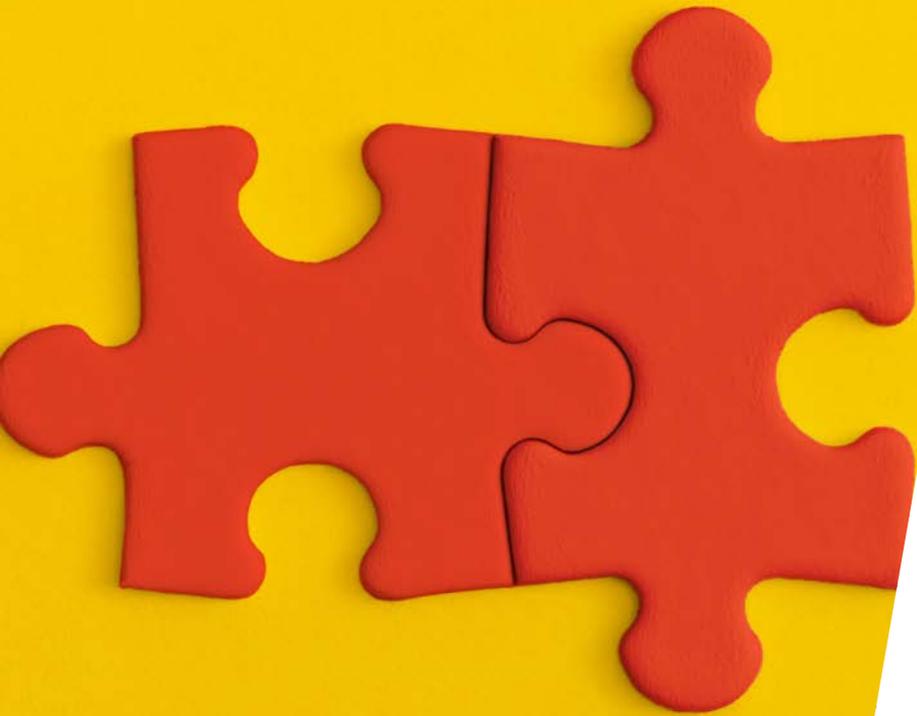
Great positioning makes your strengths obvious. It provides context and a frame of reference that makes it easy for customers to understand why they should care about what you do.

Your positioning always comes first, and it is very much an internal piece where you articulate, refine and pinpoint the unique benefits your product brings to the market.



*Positioning defines who your product is best suited for, what the alternative solutions are, and what value the product delivers for customers. These are inputs to a narrative – you literally can't write a story until we know who the heroes and villains are.*

- April Dunford, positioning expert



**Secondly, note that positioning can often be for multiple use cases and buyers, so you can create separate positioning strategies if the need arises for each product and user.**

Who you're targeting must make sense for your product and you shouldn't get stuck in vertical segmentation.

Discover the exact pain points your product solves per vertical, then look at whether you're competing against different competitors in each vertical. If there are numerous competitors, this will support the correct decision to adopt a horizontal approach to the different verticals you sell into.

What you never do is fill out a positioning statement form, which looks something like this:

# Positioning Statement Template

Use one of the below templates as a starting point to write your own brand positioning statement

**When you want to compare yourself to a competitor:**

**For** target customer/audience **that need** audience need your product addresses, name of your product/service **is**  
**a** define product category **that** how does your product solve your customer's need in a sentence?.

**Unlike** competitor, **our product** how is your product different from the competition?.

**When you want to focus on your customers:**

**For** target customer/audience, name of your product/service **is the** define product category **that will**  
problem your product solves for your customer **so they can** benefit your product brings to your customer.

## Positioning framework

To successfully build a positioning framework we assume that you have already worked out your customer segment or persona.

First out of the gate, you need to agree to the review date. This isn't a rigid, one-off exercise. **Before you get started you need to set a date that the document will be reviewed as over time your product, markets, or customer base may change.** As these grow and shift, your positioning should mirror them. Never be afraid to test and tweak as necessary.

### **Next, write up your product description.**

Keep this concise and include things like the name, key features, and problems you're solving. Aim to keep it within 1-2 sentences.

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**Then describe your category; think of it as an overview of your product marketplace.**

Outline the market you compete in and highlight any differentiators - i.e., unlike market X, our market is inherently anxious and cash-strapped.

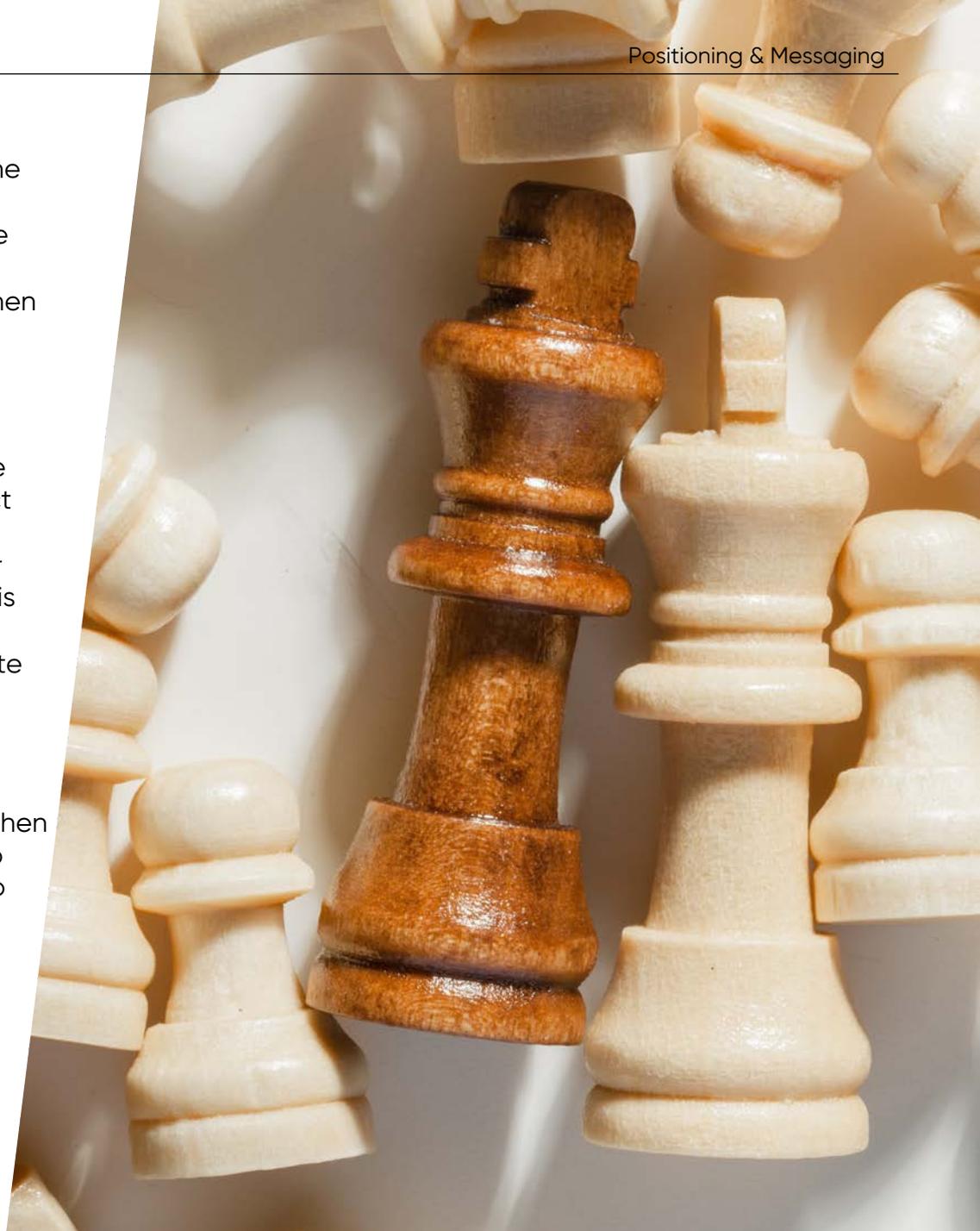
Following your category overview, **describe the competition. If customers aren't buying off you, who are they going to?** List the top contenders here along with their weaknesses in comparison to you. A thorough understanding of what you're selling and the competitor landscape is needed.

Once you have completed the above, describe your persona. If your personas are wildly different you may want to create separate positioning documents for each. If you do, this is your place to describe the persona in question.

To complete the framework, you need to define three more pieces of information. Create a spreadsheet (if you already haven't) with three columns. Title them as follows; unique differentiator, the challenge, and the value. Then answer the following questions:

1. **Unique Differentiator:** What about your product makes you stand out from the competition? The emphasis here is on the *unique*; if your competitor offers the exact same thing, it doesn't belong here.
2. **The Challenge:** What problem(s) are your customers facing because of a lack of this feature?
3. **The Value:** How does your unique attribute solve that challenge? Draw on emotion, utopia visions and real-life quotes where possible.

List as many unique features as you can and then answer the challenge and value questions. Do this periodically and you will always be able to position your platform to its target market or target audience.



## 6 crucial steps you need to take to begin your positioning exercise:

**1**

Establish internal alignment on what positioning is and can do for the company

**2**

Let go of the old, make way for the new

**3**

Identify what makes you unique

**4**

Identify the value of those features

**5**

Find out who really cares. You're looking to pin down how customers see your product in relation to other similar products

**6**

What market frame of reference makes you stand out?

## A note for startups

These are the main points you need to take away with you:

- **Establish what your leadership needs and wants from you straight away**  
– get that all-important understanding and buy-in around positioning before you start the bulk of the work
- **Use your persuasive skills backed up by solid data to make your case**  
when you're trying to convince leadership to steer the ship in a new direction
- **Go after the low hanging fruit first** – make sure you create enough revenue initially so that they survive past your start-up phase

## Market frame of reference

We previously mentioned your market frame of reference. This is important because:

- You need to be able to make it obvious that you can provide the same desirable benefits as your competitors and stop potential customers from thinking that someone else is the obvious choice over you
- When you know the marketplace (or places as the case may be) that you should be operating in, you can start to figure out what makes you different from the competition

### **Traps to avoid when building your market frame of reference:**

- One of the biggest mistakes is thinking that your product can only be positioned in one market
- If you're a start-up you need to watch out for the trap of thinking that you must remain in the same space that you originally envisioned or launched in
- **If you're established, don't become complacent and take your eyes off the shifting market landscape that you're in.** Remember, sometimes blindly sticking with the status quo is your biggest competitor



To create your frame of reference you need to identify:

- **Direct competitors:** Create a list of competitors that offer the same type of service or product as you. If very competitive, focus on the top three but clarify them as the specific alternatives that could close the deals you can
- **Indirect competitors:** Create a "one to watch" list, look for partnership opportunities, check G2 etc. for their customer feedback, both good and bad
- **Perceived similarities and connections:** Identify perceived alternatives and attack them there to help strengthen your own position

## Narrative design

Whereas positioning mainly focuses on the problem your customer has and how you can help them solve it, **narrative design draws the customer's attention to a change in the world and a new category that your product can help them succeed in.** It builds new markets, where you may not even need salespeople to close the deals. With narrative positioning you're choosing to lead with that change in the world - and your story and the descriptive part of the equation simply comes later.

By combining strong positioning with a strong narrative you will start to gain traction and resonate with your audience.

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**Your challenges here are that you must make it personal and emotional while keeping it simple and authentic.** A complicated blend of personalisation right there, but doesn't personalisation sit at the heart of every good strategy?

Once you manage to build a compelling narrative coupled with strong positioning, it's time to tell your story and build out your messaging.

**Let's look at the steps you take to build your narrative:**

**1** Name a big relevant change in the world

**2** Show there will be winners and losers

**3** Offer a glimpse of an ideal world

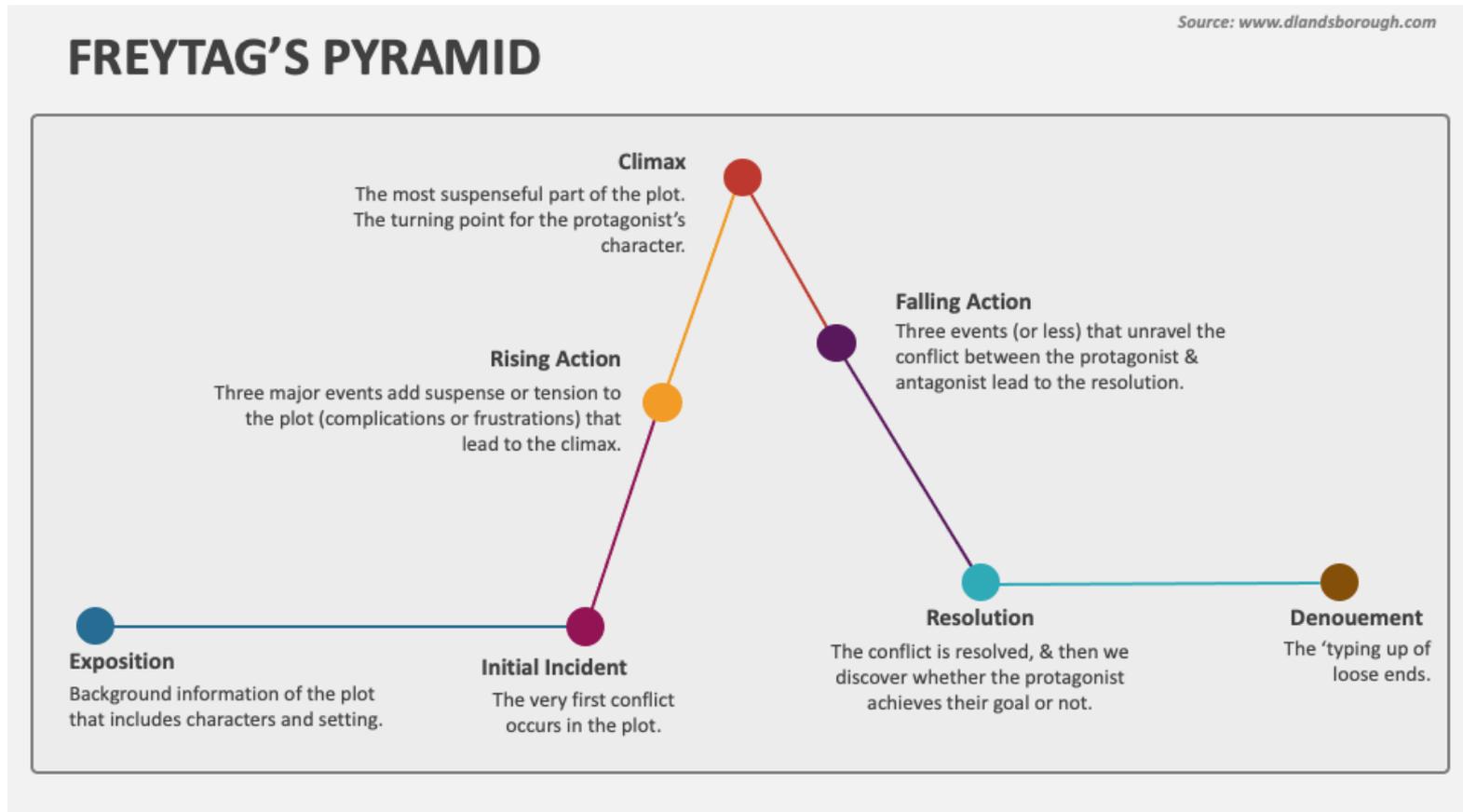
**4** Introduce your service/features as magic gifts for removing obstacles

**5** Present evidence that your story is true

**6** Build a storytelling framework

## Storytelling framework

A popular framework for building out your story is Freytag's Pyramid, which helps guide the writer through a series of steps in order to bring the reader from placid to tense and to the ultimate resolution of the tale. Try using this approach to nail the story behind your narrative.



- 1 Focus on what people care about, not what you want to say.** To tell a good story your content must remain interesting and relevant to the people you're trying to reach.
- 2 Keep the story personal to the target audience.** Your story can be entertaining, educational or inspirational, but your audience must connect to it personally.
- 3 Don't try to pique interest, aim to draw them into your story.** Think about how your brand improves their life, why they should invest time in this story and why they should pay attention to your story.
- 4 Make sure you capture and convey the right emotion in your story.** A middling storyline won't deliver the results. You have to lean into your positioning and narrative and tap into the reader's feelings. Here's how you make it emotional: A strong brand story is all about stimulating emotion and empathy. It's not just what you do, but how you affect people. Sure, your software may automate repetitive daily tasks or business processes, but it makes people's lives easier and stress-free. That's the emotional hook of the story.

**5**

**Keep the storyline simple and easy to follow.** The art of a good story is to have highs and lows. Freytag's Pyramid mentioned earlier in the article is one of many storytelling frameworks, but not the only one.

**6**

**Don't try to say too much.** Tell a simple story and maximise emotional attachment. You could tell a story about large-scale problems facing your industry, but showing how these issues affect a real buyer or adopter of your product gives the story a singular focus and makes it easier to connect to. In short, focus on one person or one problem at a time so you don't confuse or distract your reader.

**7**

**Maintain authenticity in your story for maximum effectiveness.** When your brand story is open, honest and transparent, it lets your personality shine through.

**8**

**You must be consistent in this message.** When you're consistent, people not only identify with you, but they trust your content. If your audience trusts your content, you will always have a community of people championing your efforts and supporting your platform. This type of social proof goes a long way to helping buyers decide on your product.

## Getting started with the leadership team

As mentioned, having the input of your leadership team is a key building block for your strategy's foundation. You want to speak to as many of them as possible, asking the following questions:

- What do you think of our/your vision and strategy? How does this impact your work?
- What are the biggest challenges and opportunities facing us/you in the short term (3-6 months)?
- What are the biggest challenges and opportunities facing us/you in the long-term (1-2 years+)?
- How can we improve how the team works together? Please share examples of what works well today and what didn't work.
- What resources could we/you leverage more effectively? Please share examples of what works well today and what didn't work.
- If you were in my position, what would you most want to pay attention to? Positioning, Messaging and Differentiation/ Analyst Engagement/ Product Launch/ Market and competitive Intelligence/ Other.

**Look for trends in the answers that can help you see how leaders see the business, priorities - and pinpoint the broader and widely acknowledged reasoning. It's important that the leadership is aligned** - if they aren't, this exercise can act as the basis of conversation for consensus.

## Marketing and sales feedback

For marketing and sales, you need to track the situation in real-time; if you haven't yet launched your product or are at an early stage and seeking product market fit, then you can pencil these metrics into your forward positioning and go-to-market strategy.

### Track these KPIs:

- Net Promoter Score (NPS)
- Customer Satisfaction Score
- Social Media Monitoring
  - Look for honest feedback whether it's positive or negative
  - Try and track your feeds in your CRM or a marketing automation tool you can query
- Win/Loss Interviews – what are the catalysts for customers onboarding/churning?

This should help you adopt a position and understand how/if that positioning resonates with your audience.

## Questions that you can ask during your review are:

- Has anything changed with our competitive landscape?
- Has our product changed and value offering along with it?
- Is there any evidence that our customers' attitudes and expectations have changed?
- Have we taken on new employees that are taking our positioning in a new direction?
- Does that new direction help or hinder us going forward?





## Positioning last steps

Now, how can you cement your messaging in one place? Here is where your trusty positioning documents come in! These are your bread and butter and should be the *“one source of truth”* that teams use to understand how you market **products**. Therefore, find a good template and stick to it. There are a wealth of good options out there to choose from.

Update your positioning documents with all your findings - what has changed? Be sure to keep track of all changes - both so you know what your former positioning was, your current positioning, and if you anticipate any more changes in the near future.

## What should be in your positioning documents?

- **Product name and category** - what is the product?
- **Positioning statement** (internal and external) - what is the overview?
- **Target audience** - who will use it?
- **Value Proposition** - what are the benefits, and what problems do they solve? Aim for no more than 3-4
- **Differentiator** - what sets you apart from others?
- **Messaging pillars** - what actual words will you use to describe your product?
- **Competitors** - what do they do, and what is their top-level messaging?

Taking all these steps and making sure you have the right tools in your arsenal will ensure you are one step ahead of the curve - and can handle upheaval if it arises.

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## A note on repositioning

Here's a guide to how you should go about repositioning an existing product:

- Become a detective
- Take stock of your existing documents
- Do a sales enablement check
- Assess if there's cohesion between marketing and sales (there must be - check out our [article](#) on how to achieve that here)
- Check the strategy
- Compare what's happening now with what you know from your research

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## Messaging

**This positioning work will then feed into your messaging, or the external way you talk about your product/service and compels customers to take action.** This underpins marketing and sales messaging. Which, by the way, must be the same. Everyone needs to be singing from the same hymnbook.

This alignment engenders trust. **Understanding your customers' values in relation to your offering fosters resonance, increasing lead gen and sales.**

# Customer Research

## Customer research

**Positioning also requires in-depth customer research (at minimum five current clients and five who have churned),** so you can hear about what's important about your product or service from the people who use it every day.

Customer feedback is a process whereby customers who have completed their journey through the sales funnel are quizzed about their experience with the product now that they have it and are (hopefully) using it.

- Ensure you have enough time put aside in your schedule to conduct proper customer feedback interviews.
- Make sure you utilise all the channels of communication at your disposal.
- Therefore, you should also make use of surveys that can be sent to larger sub-groups of people and analytical tools that show you how your customers are behaving – and of course, email and social media.
- Don't forget to take a close look at any existing feedback that perhaps hasn't been seen and used as much as it should have been.

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**When it comes to customer experience feedback you need to focus on three key areas:**

1. How and why your customers chose you and how they use your product
2. How they perceive your brand and like to interact with you
3. Their overall experience with your product, i.e. if it solves their pain points, if their reason for using it has changed and if they've ever considered leaving

**Moving forward:**

- Take a temperature check on how happy the clients are today
- Moving forward monitor how that changes over time
- Check back in with customers frequently depending on the length of the sales cycle
- Check-in after product releases

**Customer understanding is key to the culture of a successful product company. Over half of customers will never do business with a company again after one bad experience.** Make sure you set up regular customer check-ins and this becomes central to how you operate.

# Competitor Analysis

## How to build a competitor analysis checklist

Discovery, research and competitive analysis are all words associated with the process of gathering competitive intelligence for your SaaS platform against the competition.

**It is a must-have or must-do process - and it will enable your business to correctly assess the data to make smarter decisions.**

Next you need to build your first checklist. To the right we list a competitive information framework to build out, using Excel or Google Sheets.

You will need three fixed columns; Category, Activity and You. In addition, you can add an extra column for each competitor you analyse. Start with a minimum of three competitors, but feel free to go to five or six. Label each column by the domain of the competitor in question.

There are six categories:

- 1 Market**
- 2 Product**
- 3 Positioning**
- 4 Marketing**
- 5 Sales/ Customer Success Strategy**
- 6 Company**

Next, we list a set of questions for each category in turn, starting with market intelligence-focused questions.

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## Step 1: Market intelligence questions

To kick off, let's look at the key questions you should ask to gather the correct information. These questions aren't exhaustive, and you can add to them, but if you haven't done this before then they will get you started and help build your business strategy.

- **Who are their target customers?** Including segments *and* verticals.
- **How many customers do they have?** Some companies will have this published on their site; others might require a bit of digging.
- **Do they have any big-ticket businesses on their client list?**
  - Of these, which are referenceable case study
  - clients? They'll shout about it if they do, so this one should be easy to find.
- **What countries** do they operate in?
- What do their **positive online reviews** say? What do their **negative online reviews** say?
- **What negatives are included in their best reviews?** Consider using extracts from some in here, along with their star rating (if applicable).
- **Are there any trends among their online complaints?** And how have these trends changed over time?

Answering these questions will certainly help you plan your forward strategy, but they alone will not give you a competitive advantage.

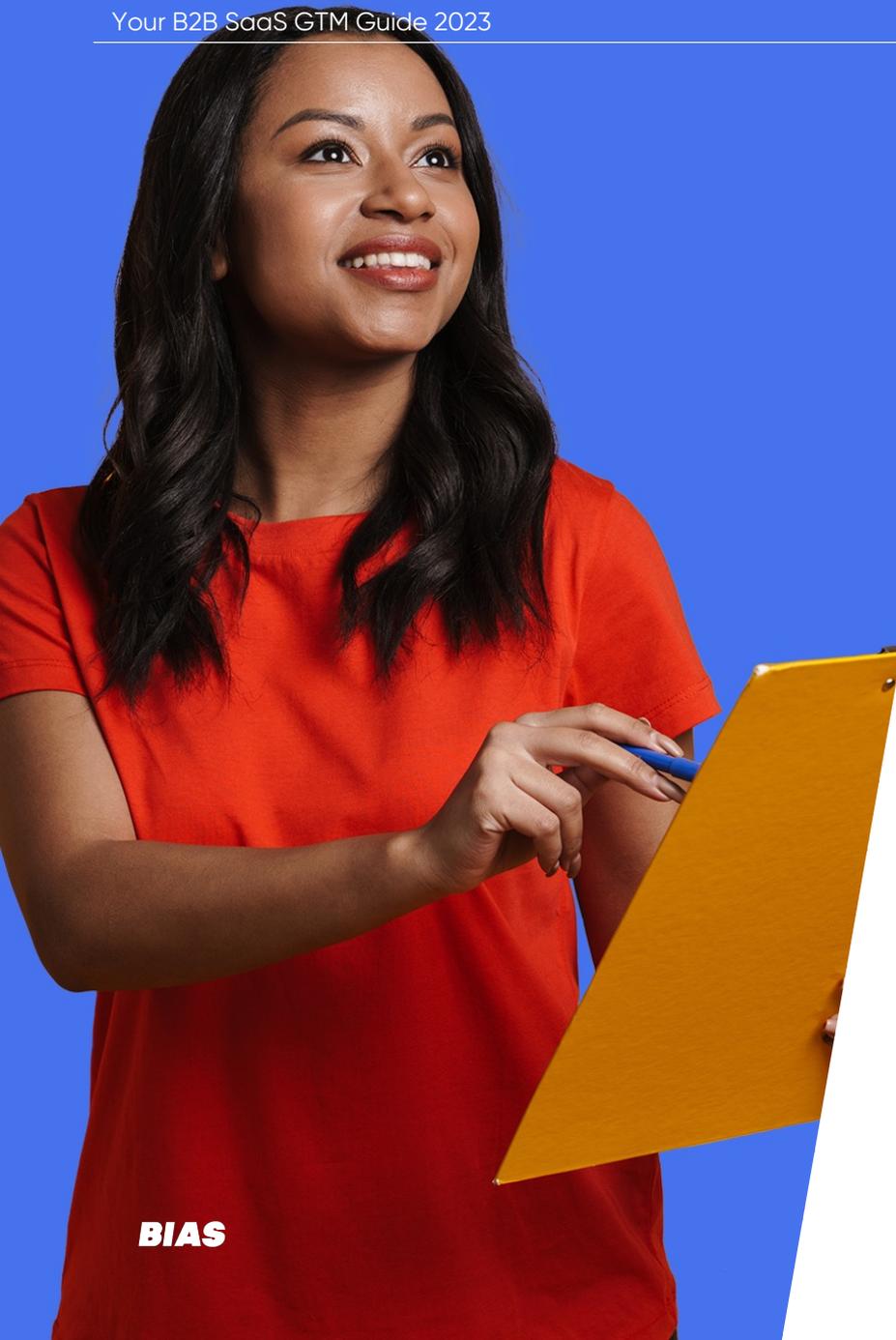
**Assessing the strengths and weaknesses of the competition requires a multipronged approach, so the next step is to build a set of questions for your product assessment.**

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## Step 2: Product assessment questions

**Product assessment is a key part of your competitive intelligence research.** Gathering the information that matters on the products or services of the competition requires a good set of exploratory questions.

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Below is a key list of questions to help you evaluate your competition.

- What suite of products do you and your competitors offer?
- What are the defining features of the products?
- What are the value drivers or intended customer outcomes of the products?
- How much do you charge versus how much do your competitors charge?
- What are their perceived strengths?
- What are their perceived weaknesses?
- Do they offer free trials? Or pilots?
- Are they currently running any discounts or promotional offers? And for enterprise sales scenarios, are typical discounts offered?
- Do they have any partnerships? If so, who with?
- Where can customers find help documents and articles?
- If you have access, what's their user experience like? Break down the pros and cons.

So far, we have discussed market and product intelligence questions; if you apply yourself to them, you will find the answers that you need. However, there are four more areas to cover.

**Next, we'll look at questions that talk to positioning.**

## Step 3: How to explore your competitor's positioning

Understanding the competitive landscape is intrinsic to building your marketing, sales and [product strategy](#). **Collecting real-time data allows your SaaS organisation to develop a measurable and scalable roadmap for further success.**

Utilise the questions below to kick off:

- How do they currently differentiate themselves from the rest of the market?
- What messaging do they use?
- What use cases do they have listed?
- If applicable, how does the messaging change between different segments, verticals or use cases?

Only a few questions, but by answering them in full and completing the in-depth research needed to complete them, you are now building a clear picture of the basis of your competitive intelligence (CI) programme.

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## Step 4: How to assess your competitor's marketing strategy

SaaS companies not leading with the product lean heavily on their sales teams, so understanding how they attract prospective customers is essential.

## Let's look at how you can utilise competitor intelligence in marketing to help build your competitive strategy.

- What's their tagline?
- How much activity is there on their marketing channels? Think about things like blogs, social media, webinars, eBooks, emails, podcasts, newsletters, etc.
- What types of content are in their three most important channels? I.e., thought leadership, practical how-tos, product-oriented, etc.
- What kind of marketing approach do they take? Do they target their industry as a whole? Or do they use account-based marketing (ABM)?
- What kind of topics do they talk about? And what kind of keywords do they bid on?
  - **Tip:** A spike in previously uncovered topics could be a clue they're bringing out something new.
- Do they get much engagement?
- How effective is their social reach? Split this by channel - i.e., Facebook, Twitter, LinkedIn, Instagram, etc.

- What are they saying in their press releases, paid campaigns, events, etc?
- Do they have any partnerships? If so, with whom?
- Do they run events? And/or attend trade shows? Which ones?
- How does their organic ranking compare to yours?
- How would you describe their website's visual identity? Have they recently had it redone?
- Do they have any cool tools, calculators, quizzes, apps, etc.?
- Do they currently/have they recently run any competitions or campaigns?

**By using this set of questions to open the strategy of your closest competitor(s) you have laid the foundations to capitalise on your own position in the marketplace.**



## Step 5: How to use the competitions' sales and customer success strategy against them

How your business rivals choose to manage their sales and customer success can be a key ingredient in your success. **By using what's good and bad against them and sharing that information with your sales and marketing teams, you can inform your go-to-market strategy and increase customer loyalty.**



Choose from any of the following questions to break it down:

- What does their sales process look like?
- How long does their sales cycle take?
- Do they provide things like live chatbots? If so, what's that experience like?
- Do they have any partnerships? If so, with whom?
- What types of sales assets do they use? (You may be able to find some of this online, or if you've recently hired someone from a competitor, pick their brains.)
- What's their response time like for customer requests/questions? If it's either really good or really bad this is usually something you can pull out from reviews/complaints.
- How do they escalate customer complaints?

**Now that you have the questions that you need to build your competitive intelligence strategy, let us share a couple of other frameworks that will help you succeed.**

## Porter's Five Forces - A competitive intelligence framework

Porter's Five Forces framework is a simple and effective way to scope out your business's competitive landscape and what your product is up against.

This isn't in terms of product specs or features but in a broader sense of industry or segment competition; **it helps you focus on the user's ability to switch from your product to competitors.**

By using this framework in addition to the competitive intelligence checklist you have a powerful set of tools to establish your CI strategy.

Focus area	What does it mean?	What to look for?
Threat of new entrants	How easy could a new competitor enter the market?	<ul style="list-style-type: none"> <li>• Time to entry</li> <li>• Cost of entry</li> <li>• Economies of scale</li> <li>• Technological protection</li> <li>• Other barriers to entry</li> </ul>
Bargaining power of buyers	How much power do your customers ultimately have?	<ul style="list-style-type: none"> <li>• Number of buyers</li> <li>• Purchase sizes</li> <li>• Price sensitivity</li> <li>• Ability to switch</li> </ul>
Bargaining power of suppliers	How much power do your suppliers ultimately have?	<ul style="list-style-type: none"> <li>• Number of suppliers</li> <li>• <u>Unique</u> capacity of suppliers</li> <li>• Your ability to substitute</li> </ul>
Intensity of competitive rivalry	How many competitors are currently in the market and how much is it growing?	<ul style="list-style-type: none"> <li>• Number of competitors</li> <li>• Difference in quality</li> <li>• User loyalty</li> <li>• Switching costs for users</li> <li>• Growth of market</li> </ul>
Threat of substitutes	How likely are users to switch to an alternative?	<ul style="list-style-type: none"> <li>• Performance of competitors</li> <li>• Cost of change</li> </ul>

## SWOT Analysis

Before you sign off, we want to add one more tool to the list and then you can wrap this up.

**SWOT Analysis.** The best way to build your SWOT analysis is to use a spreadsheet. You will need five columns with the following headings; Company, Strengths, Weaknesses, Opportunities and Threats.

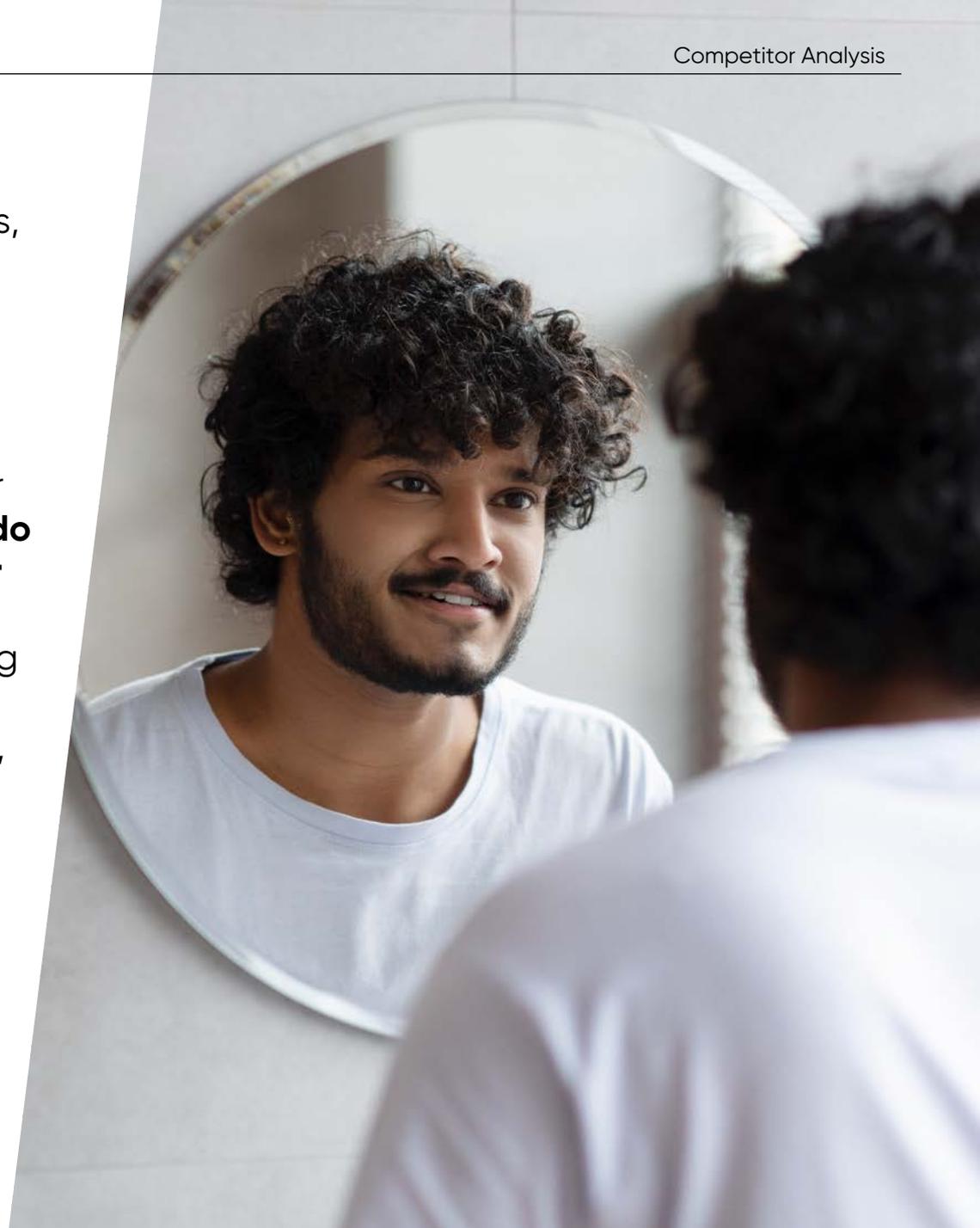
### Competitor SWOT analysis

Date last reviewed: DD/MM/YYYY				
Company	Strengths	Weaknesses	Opportunities	Threats
Your company	Out of everything you listed in your competitor intel worksheet, what do you outrightly do better than your competitors that distinguishes you? For example, industry-leading webinars that get engagement, skilled staff, a superior mobile app, customer traction, etc.	On the flip side, where did you lag behind your competitors? Remember, every company has weaknesses, whether that be customer service, wait time, lack of a feature, poor SEO rankings, etc.  <b>Tip:</b> when you're working through your strengths and weaknesses, remember to call out <b>perceived</b> strengths and weaknesses, too.	Based on your competitor and customer research, what trends or untapped markets are emerging that you could jump on? This could be anything from a new feature or market to press opportunities. Also, remember to look for areas of the business that can be optimized to open up/capitalize on an opportunity.	What could get in the way of your success either right now or in the future? Think about things like new competitors, a change in regulations, new technology, a shift in customer needs, areas where customer servicing costs can spike, etc.

Once you have answered all the questions about your own business, repeat the activity for your competitors but answer from their perspective about your own business.

Out of everything you listed in your competitor intel worksheet, **what do you outrightly do better than your competitors that distinguishes you?** For example, industry-leading webinars that get engagement, skilled staff, a superior mobile app, customer traction, etc.

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## Tech that can help

For many, tools like SEM Rush, Craft, Crunchbase, Google Alerts, Talkwalker Alerts and Feedly are great for data and analytics. Where SEMrush excels is with its inbuilt market analysis tool, which enables you to enter a single domain and return a lot of data which includes:

### 1. Market Overview

- Identify metrics for an industry of a queried domain
- See the market traffic size, industry leaders by acquisition channels, traffic trends, the share of visits, audience gender, age and interests
- Benchmark a queried domain against an industry; by traffic, trends, and audience demographics

### 2. Estimate competitor's market share

- Evaluate your market size and examine the key competitors
- Explore how competitors generate traffic to enhance your marketing strategy
- Uncover audience gaps to get a larger market share

### 3. Explore custom markets

- Discover general market trends
- Benchmark yourself against selected competitors
- Get high-level market insights for selected rivals and monitor their market dynamics

# Pricing Strategy

## How to build a pricing strategy

The first step to building a successful pricing strategy is to understand the different models available to you. There are six key strategies that you can adopt – and each are explained below.

- 1 Cost-plus:** This pricing strategy involves adding up your costs, adding percentage points on profit, and setting your prices from there.
- 2 Competitor-based:** Study your nearest competitors and base your prices on what they're charging. This is often a useful approach for start-ups. If you're unsure of your market value, see what your competitors are doing.
- 3 Value-based:** The process of looking out towards your customers. Although time-consuming, if you ask your user base what they expect from your products or services, then you can charge them based on their feedback. This can sharpen up your market value and make sure you're appealing to your audience.
- 4 Market penetration:** Here you'll ignore the real costs of your product, with the aim of choosing a competitive price. This can help you to launch onto the market and appeal to your audience immediately.
- 5 Premium:** Takes the approach that higher subscription costs mean better quality. So you charge above the market value for your product, with the explanation your product offers more to your audience than your competitors.
- 6 Skimming:** The opposite of market penetration strategy. Here you make your subscription price high. The belief behind this is customer demand will decrease the longer your product is available. So, you can lower the subscription cost over time—which makes it increasingly competitive in the market.



We've described the strategies available to your business: it's time to decide which of them would work best for you. But don't be forced into choosing a model and sticking with it.

**Always test ideas and talk to potential customers before making a final decision. A good exercise would be to write up all the models for your business and then eliminate them one by one until you have the best-suited model.**

Now that you have started your pricing strategy, you need to choose a suitable pricing model. In the next chapter, we will break down the pricing models your business can adopt.

## Understanding pricing models

There are 10 pricing models available for your business. We will break them down individually for you and discuss how they are best used.

### Usage-based pricing

Pay-as-you-go, essentially. The cost of your software is down to the amount a customer uses it. The more usage, the higher the bill.

- **Advantages:** It's fair to use—price scales alongside the time spent on the software. This means a customer can judge their use of your software for the right monthly fee. The model also removes big upfront fees, while charging heavy-cost users the right amount for their extra usage.
- **Disadvantages:** It makes it harder to tell what customer costs will be. In turn, that makes it more difficult to predict your revenue.

### Flat-rate pricing

You provide one product, one set of features, and a set price. It's the simplest model and a straightforward way to sell your goods.

- **Advantages:** It's easier to sell this way. You can focus all your marketing and sales on selling one offer.
- **Disadvantages:** It's not very flexible, so you often have only one shot at winning over customers. So you'll need to make that opening offer very tempting.

## Tiered pricing

Here you can offer packages featuring different features to cover different needs and budgets.

- **Advantages:** You'll appeal to many buyer personas and maximise the revenue from each type. There's also a great chance to upsell, as customers can easily move to a better package if they need to.
- **Disadvantages:** It can confuse some customers in the sales funnel, leaving them to drop out of the sale. Also, heavier-use customers can easily exceed their use on a top-tier package.

## Per seat pricing

Using this, a customer pays a fixed monthly price. If they add another user, then the price doubles. And third and it trebles. So, it's very clear to customers what their money buys them.

- **Advantages:** It's easy to understand and helps customers calculate the costs. In turn, your revenue scales alongside your customer's continuous extra users. And that means you can easily predict your revenue.
- **Disadvantages:** This model does let customers cheat with a single login between multiple colleagues. And that means it's easy for customers to churn at a low cost when they're done with the software.

## Per storage pricing

A combination of tiered and usage-based, here customers pick from the number of storage tiers. The more they need, the more you'll charge them.

- **Advantages:** You charge customers for exactly what they're using, so you can maximise profits. You also ensure customers don't overuse their quote with unlimited storage space.
- **Disadvantages:** There's a risk of excluding customers who don't fit into your storage tiers.

## Freemium pricing

You could provide your software in limited form for free. Around that, you can offer paid packages for those who want to improve what your software offers.

- **Advantages:** Can promote a high sign-up rate as customers try out your software. So, you get your foot in the door and have the potential for word of mouth to make you a success story.
- **Disadvantages:** Obviously, that may all result in no revenue if customers don't start paying. Churn rates can also be high. And you risk devaluing what your business offers.

## Freemium with ads pricing

You use the freemium model but rely on adverts to generate income. Then when a customer signs up for your paid service, you can remove the ads.

- **Advantages:** Guarantees you'll have an income source while you wait for your software to gain more paying customers.
- **Disadvantages:** You may annoy your customers with adverts, which could lead to high churn rates. As well as poor word of mouth.

Like many things in business, pricing strategies and combined models need testing before you can settle on a defined choice, but you can narrow down your risk by devising a pricing policy.

## Setting your pricing policy

To set your pricing policy you must first understand what it is. **The pricing policy is a price-fixing decision-making method for your products or services - a marketing strategy as part of the marketing mix.**

You will need a pricing structure as part of your policy. Before the product or service is introduced into the market, you must decide how the price will be structured (using various price strategies as mentioned previously). The pricing strategy should lead to buying incentives through a targeted setting of the sales price.

The policy also helps the achievement of corporate goals like securing the market share or maximising revenue.

**Overall, the pricing policy should be the guidelines that govern the pricing strategy and describe the internal and external factors that impact the delivery of pricing within the go-to-market strategy.**

By combining these frameworks your product or service organisation will put itself in the best position to hit its goals and smash revenue through its go-to-market strategy.



# Sales Enablement

## What is sales enablement?

**Sales enablement is the concept of providing your B2B sales team with the strategic resources it requires to succeed. These tools will be a [CRM](#), [sales automation software](#), [a standardised sales process](#), [LinkedIn sales navigator](#) and [branded content assets](#).**

Even if your sales reps are kicking butt in their results without these tools, imagine the uplift if you could automate some of the administrative tasks and heavy lifting, leaving them to do what they do best? Not to mention the visibility tools bring around forecasting sales revenues, deal pipeline and deal closures.

**Today's B2B sales organisations simply cannot compete without sales enablement technology solutions, manual or automated.** Successful sales teams plan, test, measure, and scale processes across groups using the right tools at the buyer's journey's correct stage. It's about removing friction and aiming for smooth interactions and a seamless buying experience.

Sales enablement, despite its name, is not solely attached to the domain of the sales department. **The best B2B sales organisations know that they *must* align with marketing for real success. Therefore, sales enablement must be jointly owned by both departments and ideally led by your PMM.**

Here are a few suggestions to help you integrate your organisational strategy:

- **Planning:** To kick-off, the sales and marketing teams need to have a meeting to discuss what resources and assets are required to build the enablement programme. Typical resources include content, conversation guides and training.
- **Product Marketing and Marketing:** Responsible for creating all content, creativity and assets needed - and training the sales team to use them correctly.
- **Sales/Product Marketing:** Takes ownership of the operational requirements associated with the sales enablement programme.
- **Sales management:** Must reinforce the new strategy from planning through implementation and continued adoption.

Check out our [in-depth how-to](#) for creating a successful sales enablement strategy.

Whilst the idea of complete synchronisation of the sales and marketing functions works on paper, it rarely works in practice. The standard rule is marketing creates leads, and sales close them.

However, what you want to do is work out when a marketing qualified lead (MQL) is ready to hand off to sales as a sales qualified lead (SQL). At BIAS we call this the MSQL, and this forms part of the KPIs we measure.

**By defining the point of handover through a mapped funnel from stranger to customer, you can identify what success for marketing looks like in the sales enablement process—therefore combining the goals that jointly benefit the sales organisation.**

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## Why is it imperative to your GTM strategy?

Five benefits of sales enablement:

1

**Scaling operations:** By standardising your sales process and providing your sales reps with the leading sales tools, **your organisation will become less reliant on superstar performers to bring home the deals.** You are helping the organisation improve underperforming sales reps and create a culture of success.

2

**Better sales data:** More than ever (thanks to the global pandemic) B2B commerce is taking place online. Sales enablement programmes have rapidly gained traction, and the critical driver of success is data. Organisations collect, organise and activate it into valuable insights and resources for the sales team to use for strategic advantage. **By converting this data into a buyer personas, reps know which preferences and pain points to use to tailor their approach during prospecting and sales calls.**

3

**Shorter sales cycle:** Whilst shorter sales cycles aren't the ultimate aim of the sales enablement process, they are certainly a welcome by-product. **When sales reps have better data, the right assets at hand and better customer intelligence, they tend to have more purposeful and powerful sales conversations.**

**4**

**Closer alignment with marketing:** Highly aligned marketing objectives drive optimal sales performance to sales goals. The use of content is often a key ingredient in sales success. **Teams are more successful when they can provide prospects with the right assets at the right time.** Therefore, aligning closely to marketing and working more collaboratively is a considerable aspect of sales enablement.

**5**

**Better brand recognition:** When B2B sales organisations create a great sales experience for their customers, word spreads, and the business is well-reflected. They are increasing the ability to close new business.

## Getting started

### Six valuable insights for implementing sales enablement:

**1 Culture:** Before you get way ahead of yourself with tools and software and process, think about culture change. For organisations that are new to sales enablement, have your pioneer group from marketing and sales sign an agreement to commit to the initiative's success. Maximise your cross-functional collaboration and ensure you have the right planning for the future down on paper.

**2 Management buy-in:** To make all the above worthwhile, you can only cement the enablement strategy by having complete buy-in from the management team. Leaders have to commit to dedicating time and effort to build, test, manage, train and scale the process as a continuous process.

**3 Planning:** Define your specific objectives for your programme. The overarching aim is to help your salespeople sell more efficiently. Underneath this main objective consider how you can empower your sales team with everything they need to engage and convert buyers. What would be the best practice? What can you learn from the top performers on your team? Training around delivering great sales presentations? These are suggestions you can use and develop your own.

**4 Focus on the buyer:** Make the buyer's experience the foundation of your programme, make the buying experience the focus of your strategy. There are two pieces to this process; the first is ensuring that you can define who the buyer is and where they are on their journey. The second is to tie the training and your sales playbooks to the same journey.

**5 Use high-quality content and assets:** Content that educates is fundamental to the marketing and lead generation process for all B2B businesses—things like blog posts, whitepapers, webinars, research papers, video, sales decks, etc.

**6 Choose your tools:** At the core of any sales team is the CRM. We advocate HubSpot CRM but choose something that works with your current technology stack. Finding the right solution would also depend on your business, industry and operational sales structure. The software we use here is HubSpot Sales, Marketing, CMS, Drift, Leadfeeder, LinkedIn Sales Navigator, Seamless.ai and Zopto.

These technologies sync with each other, so there is minimal friction between the systems, and we have a standardised sales process. But as a sales leader, you must break this down into component requirements:

- CRM
- Sales Intelligence Platforms
- Content Management Platforms
- Sales and Marketing Automation Software
- Sales Enablement AI and Analytics
- Customer Experience Management

## Five things you must consider when planning your sales enablement programme:

- 1 This process is not about the sales team;** it's focused on the buyer. It's about providing the sales team with the resources the buyer wants (case studies, content, testimonials etc.).
- 2 You must define the best practice or standardised sales process,** including research, assets, competitive analysis and the tools each team will use.
- 3 You must build a framework that can be measured, tested and scaled consistently.** Sales reps should be encouraged to continuously challenge the process in micro tests that can be easily integrated or discarded.
- 4 Make it easy to adopt.** Ensure resources are easy to find and apply - a central resource tool like HubSpot's Sales platform is ideal for this. By centrally locating files, decks and video assets, sales teams will benefit and find the change easy to adapt.
- 5 It is up to management to enforce and reinforce the adoption of the sales enablement programme.** They must track it and ensure the resources are appropriately adopted. Most importantly, they must optimise the future process based on what is and isn't presently.

# Onboarding

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Customer onboarding is a critical strategy of any sales or product-led software or technology organisation. It's an area of focus for your product marketing team that is key to SaaS sales and product development. The real issue to understand is that **the customer experience starts way before they get to the product so your onboarding process should start there.**

Onboarding is a key part of the growth strategy and customer success, therefore having a framework from which to operate will help your product organisation scale effectively with excellent onboarding experiences.

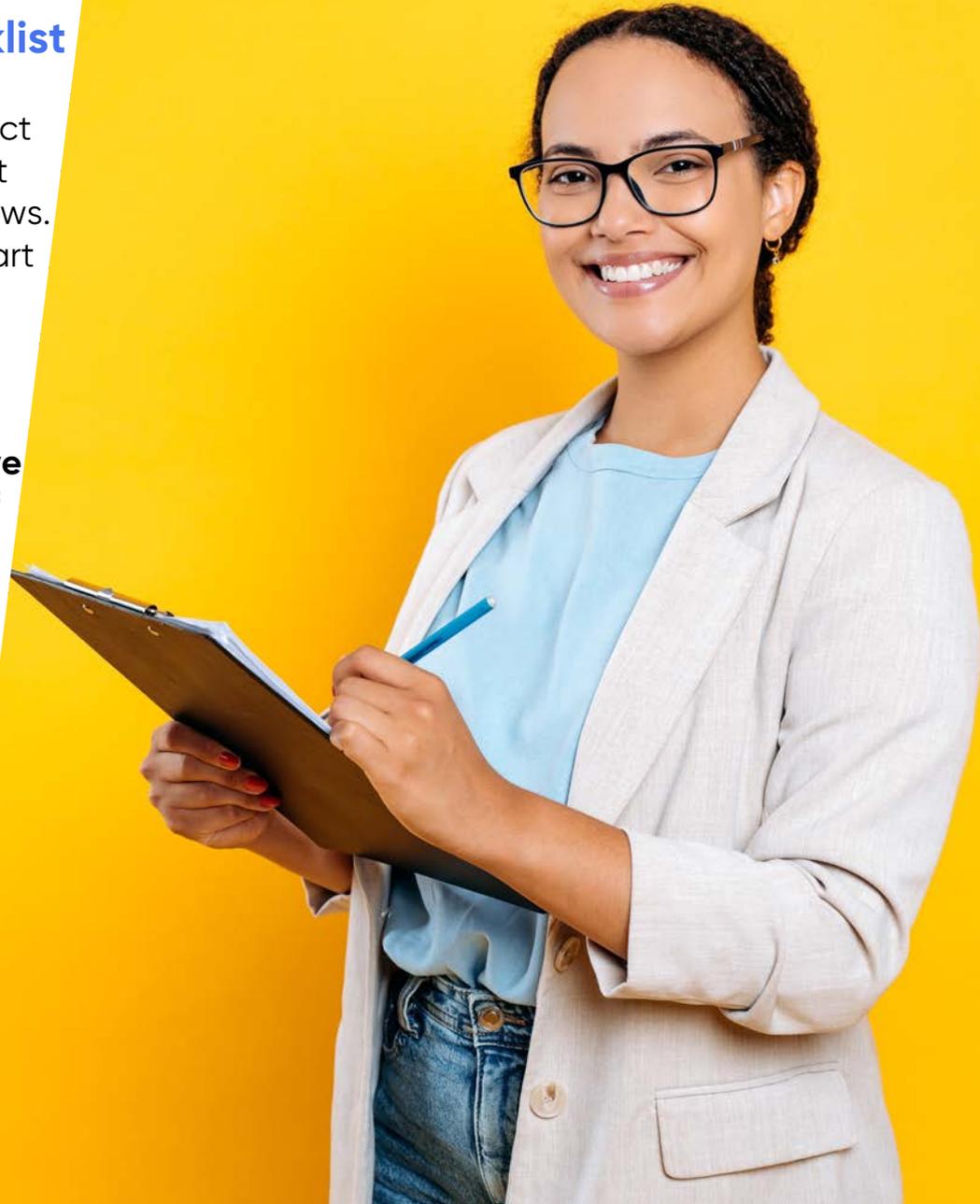
## How to build an onboarding checklist

Good onboarding is about more than product tours and wizards – it's about learning about guiding your users with great onboarding flows. This sets the tone and plays an important part in your product experience.

**But onboarding has to be part of your company culture, ingrained in your work environment so that your team members live and breathe it. It must be the truest form of customer centricity in a product environment.**

So let's look at how you build out your product onboarding process – a 12-stage step by step approach.

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## Stage 1 - Introducing yourself and your business

If you're reading this and your role as a demo expert for your business isn't as a salesperson, then your goal is to get your relationship off to a good start by introducing yourself (personally and professionally). Remember, first impressions count and last so make sure this is something that sets you off on the right foot.

In some cases, this might be a sales rep, in others it could be an Account or Customer Success Manager, for example

## Stage 2 - Give your prospect a warm welcome

Whilst it may sound like a given, your job is to guide people into the next stage of their set-up, so they know what's coming. Personalise this where you can - including the individual's name, company and type of plan (i.e., freemium, basic, premium, etc.).

You can do this by email, but a better way would be to create a personalised video using Vidyard or suchlike and share that with your prospect.

## Stage 3 - Hold your prospect's hand

Don't say hello and then leave your prospects to their own devices. Create a series of walk-through messages or a video tutorial to explain where everything is and how users can make the most of your features.

We believe you should lean heavily into video as you can record them in a way that lets you use them in [automated sequences in HubSpot](#) to guide your prospects down the right path. If you're not using video as a part of your sales and onboarding process - it's time to start now.

## Stage 4 – Make key information available

If your potential client is struggling and needs help, the last thing you want is them suffering in silence. Send a message letting them know where they can find useful resources and who to contact if they've still got questions.

Again, great tools to do this are email and video, however, you can also send a written guide in a blog post for example. If you use a tool like HubSpot, [you can set sequences and workflows to automate this process for you.](#)

## Stage 5 – Acknowledge user activity

To drive future usage, acknowledge when a new user's used feature X for the first time and list some more use cases for them to return to it again. **The aim here is to make sure they see the value in repeat usage.** There are several ways to do this; you can build it into your platform as a trigger event using something like Mailgun, but if you use HubSpot for your marketing and sales tools then their open API offers the same ability.

## Stage 6 – Send reminders as part of your strategy

For demo, new and test users who don't show any activity, follow-up to remind them you're here and use this message as an opportunity to demonstrate your value.

The type of messages that can be used for users who are active but just aren't making use of key features are - i.e. "Did you know you can also..."

**Remember your product must feel like it engages your user in the right moment so the experience feels intuitive**

## Stage 7 – Make sure you check in

Make sure new accounts have got everything they need to keep progressing with you. These types of messages can massage your new user deeper into the product and encourage the adoption of more available features.

## Stage 8 - Ensure you have tactical messaging about particular features

Encourage trial and/or freemium users to convert into paying customers and those who're already paying to maximise your product (and stay) by feeding them with relevant and contextual how-to content.

**These messages should be seen as ongoing, not one-off.** Just because someone's using your product today it doesn't mean they will be next week, which is why it's so important to drive ongoing adoption and continually deliver value.

If your platform has usage restrictions or upgrades, this is a perfect way to cross-sell and upsell on top of guidance.

## Stage 9 - Don't forget quiet or inactive users

Spending too much time focusing on what active users are doing can be productive but don't forget you can learn a lot from inactive users.

If you wait until someone's stopped using your product before acting to re-engage them there's a good chance you're already too late, so keep an eye on your users' activity; if engagement starts to drop, hit them with a re-engagement message.

Something like this:

"Hey, we noticed you haven't logged in for a while...

For more on how you can make the most of [product name] head over to our Help section - it's jam-packed with how-tos and use cases.

Or, if you'd like to speak to an actual human, give our Customer Service Team a call on [insert number]."

## Stage 10 - Ask for feedback on your onboarding process

Gauge how new users are finding your product and use the results to determine who to display the next two steps to.

You can do this on a timed released message, a usage released message, or you can adopt a [Net Promoter Score \(NPS\) approach](#). Whatever you choose to adopt, the data you gather from this can be integral to the future development of your product or service.

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## Stage 11 – Upsell and cross-sell

Although we have already touched on this, sales are still part of the onboarding process, even if it's about adding new features to a subscription.

Tease freemium and paid accounts with what else they could achieve if they upgraded with your current product/purchased a complementary one. Monitor this activity to see what sells and what doesn't, all of which will help you create a better user experience.

## Stage 12 – Ask for social proof, collect reviews

In today's world, there is nothing better than social proof and proof collected on external sites like G2, Capterra and other product and service review sites. [Gartner Digital Markets' 2022 Global Software Buyer Trends Survey](#) discovered that 85% of buyers trust online reviews as much as personal recommendations; they report using customer reviews sites as the top preferred channel to obtain information on software.

It's surprising the amount of business we work with who aren't taking advantage of customer referrals. Particularly as software and [digital goods have one of the highest referral rates of all industries](#), at 4.75% (double the average). And this is despite the fact that during Covid, nearly 50% of B2B tech vendors agreed that customer referrals had been their most effective marketing tool.

So, the more reviews the merrier – they're great for both your marketing and customer research tactics, so see if you can squeeze one out of your new users. Just remember to exclude any that expressed evident displeasure in stage nine.

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## Summarising your onboarding process

In summarising how you evaluate your onboarding process, remember these essential ideas:

- Employees should feel like they own this process
- Social proof is essential for further sales and to add weight to your onboarding process
- Messaging is tactical as well as needful
- Having a checklist is essential

**Onboarding is a progressive element of your organisation; it should be guided with a clear framework and KPI's. It should be measured, recorded and iterated.**

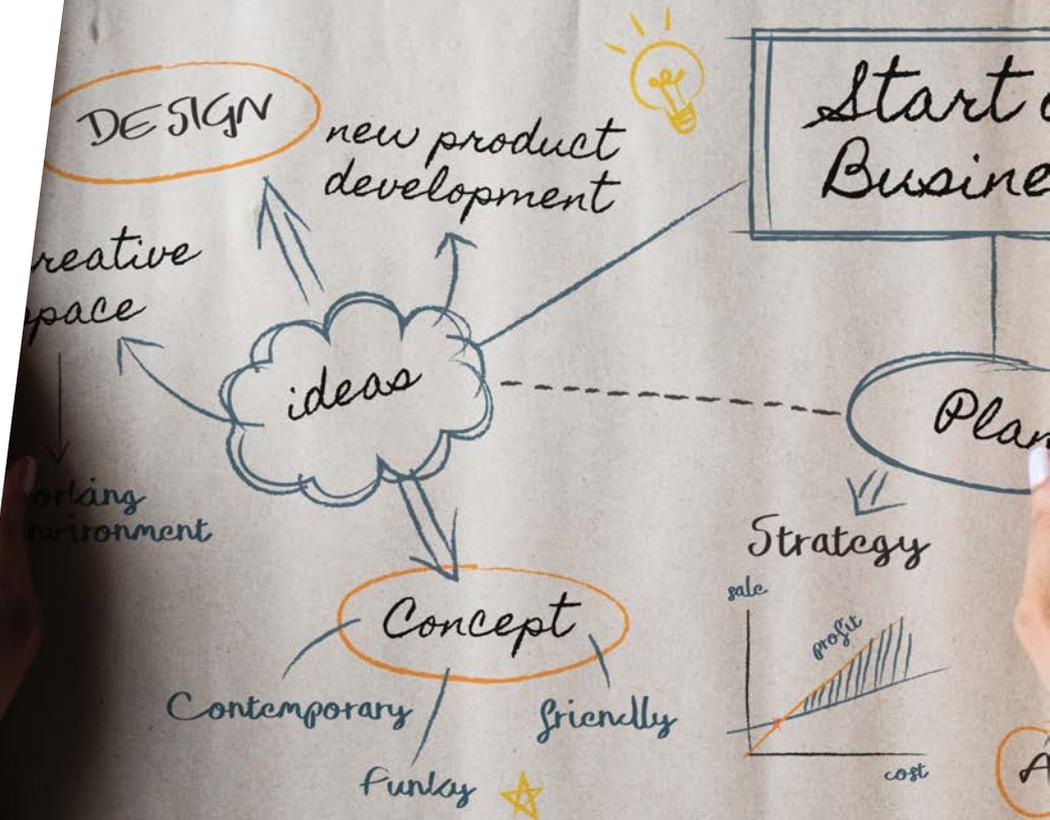
# Product Roadmap

## What is a product roadmap framework?

**A product roadmap framework is a visual representation of the vision and priorities of your platform's development over time.**

It considers the whole product development process, from discovery and inception to potential post-launch features. Given that most platforms are constantly releasing feature updates or running multiple products, aligning the business around the roadmap is essential to communicating impending value.

We're always astounded by the number of decent-sized SaaS organisations where internal teams or product managers guard the roadmap like the crown jewels and won't share until it's too late with their marketing, sales and customer success teams (don't do that).



## Cross-functional use of the roadmap

A lot goes into communicating new value propositions and feature releases beyond the simple act of new lines of code. Your marketing team needs to plan its comms strategy for new users, your customer success team needs to communicate that value to current users and if necessary, your sales team needs to be able to communicate that value in sales calls.

As you can see, without a cross-functional team, the roadmap is nothing more than a timeline for product development. **With a cross-functional team, the roadmap is a tool to drive revenue.** It helps the team create a product roadmap that supports the business goals, focusing on high-impact specific features that can be resolved in the short term and within a defined time frame.



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## Let's look at the four key elements of the product roadmap framework:

**Be  
goal specific**

**Identify your  
problems**

**Align  
internally**

**Define your  
metrics**

### How to be goal specific:

- Define your product goal/goals for a specific timeframe (month, quarter, etc.)
- Determine the who, what, how?
- Align these with the product vision for new and existing users

### How to identify your problems:

- Use the HEART framework to identify your problems, and define those that are easily solvable but also impact the defined goals on your roadmap the most
- Focus on key bottlenecks in select channels to simplify your approach; for example, competitive analysis, customer feedback or usage data

## Be cross-functional to align internally

- Use cross-functional teams and high collaboration to discover possible paths to achieve an outcome
- Collaborate consistently with your customers and customer-facing teams, to make the right market-driven decisions from start to finish

## Define your success metrics

- Use a clear set of KPIs to align your roadmap with defined outcomes
- Ask yourself:
  - What will the long-term impact be?
  - How will we measure this?
  - How will you communicate your product progress? Use the examples above as a rule, but not a definitive guide. Each organisation has its own roadmap and set of challenges to solve, so customise this for your specific needs.

Use tools like [Productboard](#), [Dragonboat](#) or [Roadmunk](#) which have freemium models to begin your product strategy journey. If a paid solution won't work, use a high-level option like Google Sheets or Excel.

## The three product roadmap models

There are three product roadmap models that teams use. These are the non-date model, hybrid model and timeline model. Let's look at each use case.

# 1

**This non-date model:** Companies that use the non-date model effectively have a roadmap devoid of a timeline. **Some organisations choose this model because it gives greater flexibility for early-stage products or products with constantly changing priorities.**

This model works particularly well for products whose priorities change on the information they have daily or weekly.

# 2

**The hybrid model:** Product teams that use the hybrid model are organisations that flex the roadmap monthly or quarterly.

**This model is highly efficient for future planning whilst remaining flexible for unseen circumstances.**

Plan your roadmap at monthly intervals, allowing your team to project expectations while remaining unconstrained around delivery dates.

# 3

**The timeline model:** Product teams that use the timeline model speak for themselves. They stick tightly to a plotted timeline of events or goals, which is highly effective for products with many moving parts.

**Those organisations that adopt this model are likely planning their roadmap years in advance,** across a number of cross-functional teams and deadlines with a long-term vision for success.

## Launch checklist

Below you'll find a checklist of micro-projects your cross-functional team will need to complete before launch. Remember, launches vary from release-to-release and no two are identical. For that reason, this template should be tweaked on a case-by-case basis to fit the circumstances of each.

Task	Tactic	Owner	Complete
<b>Market analysis</b>	Define the purpose of your analysis		
	Understand the market size and value		
	Compare the competition		
	Identify your target market		
	Analyse publicly available data		
	Speak to industry associations		
	Collate, analyse and act on your findings		
<b>Persona research</b>	Understand your aims		
	Put together a master list of persona questions		
	Conduct interviews		
	Complement phone/face-to-face interviews with web and social analytics		
	Run workshops with customer and prospect-facing teams to compare your findings		
	Collate your learnings and identify trends		
	Turn your qualitative and quantitative findings into personas		
	Share your findings with relevant teams/departments		

Task	Tactic	Owner	Complete
Pricing	Determine the business' goals		
	Conduct pricing analysis across the competition landscape		
	Analyse internal information		
	Find customer trends (i.e., how they purchase, length of sales cycle, critical points, etc.)		
	Speak to your target market		
	Work out associated initial and ongoing costs (incl. adding a value to features)		
	Decide your strategy and price point for new customers		
	Decide your strategy and price point for prospects		
	Create a framework for testing		
	Run a sales rollout workshop		
Positioning	Identify which problem(s) you're solving for your customers		
	Complete your positioning template		
	Complete your messaging framework		
	Complete your storytelling framework		
	Circulate frameworks with relevant people/teams/departments		
Goal setting	Refer to your business' objectives and set a clear goal that has a:		
	- Timeframe		
	- Specific and measurable metric		
	Tell relevant departments about your goal and their role in achieving it		

Task	Tactic	Owner	Complete
<b>Go-to-Market (GTM) plan</b>	Consolidate your persona, positioning and messaging work		
	Decide on a sales strategy		
	Conduct a sales and marketing material impact assessment		
	Create your marketing plan - incl. timelines and assigned tasks		
	Create your sales enablement plan		
	Create your post-launch plan		
	Fill in your GTM template		
	Update marketecture diagram(s)		
	Update competitor analysis tracker		
	Circulate your GTM template with relevant teams/departments		

Task	Tactic	Owner	Complete
Collateral creation/updates	Create a collateral calendar/timeline		
	Blog posts		
	Social posts - paid and organic		
	Whitepaper		
	Webinar		
	Press release		
	New web pages		
	Existing web pages		
	Video demo		
	Email copy - prospects		
	Email copy - customers		
	Push notifications		
	Guides		
	FAQs		
	User guide content		
	Map and define up/cross-sell messaging		
	Onboarding messages - either create new or assess the impact on your existing ones		
	Customer feedback survey/forms		
	Adverts		
	Customer testimonials (from beta version, if applicable)		

Task	Tactic	Owner	Complete
<b>Sales enablement</b>	Sales training content		
	Sales one-pager		
	Battlecards		
	Training sessions		
	Cheat sheets (if required)		
	Demo/training video		
	Email templates		
	Pitch decks		
	Playbook		
	Social selling aids		
<b>Internal launch</b>	Determine which people and departments will be impacted		
	Put a communication plan in place		
	Arm the right people with the right information - ideally face-to-face		
	Create and share a central and accessible location to store content		
	Ask for feedback		
	Keep a clear and open line of communication/support		
	If applicable, launch/test beta version		
	Make sure partners are aware of the launch		
	Create and document release notes		
	Make sure everyone has what they need <i>before</i> launch		

Task	Tactic	Owner	Complete
<b>External launch</b>	Stress test every customer and prospect touch point		
	Have a crisis plan in place		
	Stick to marketing tactics as per your marketing plan		
	Make internal contact point(s) known company-wide		
	Keep everyone up-to-date with any delays/issues		
<b>Analysis</b>	Monitor and optimise all marketing channels		
	Measure onboarding effectiveness - refine/change if necessary		
	Define your cost per acquisition (CPA) for each channel		
	Monitor website and usage analytics and act if/where necessary		
<b>Feedback</b>	Release a post-launch survey		
	Gather feedback from customer and prospect-facing teams		
	Prioritise tickets/change requests		
	Conduct win-loss interviews		
	Collect customer case studies		

## Don't go it alone!

You made it! There was a lot to cover and even more work to be done to set you up for success and growth. We understand that this can be overwhelming. But you don't have to go it alone. At BIAS we specialise in GTM strategy with our proprietary ©ARISE framework which includes some of what we've covered in this eBook. We also support via the following:

- Go-to-market workshop
- Dedicated product marketing specialists
- Buyer persona workshop
- Sales enablement consultation and workshop
- Customer success and onboarding consultation / workshop

Get in touch today to discuss your needs and how we can help.

[www.biasdigital.com](http://www.biasdigital.com)