| **Executive Summary** |  | This marketing and communications plan /roadmap will outline the goals and tacticsof various marketing activities to achieve the desired awareness and adoption objectives listed below. |
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| **Current Industry Analysis** |  | Explain the current market condition and the primary issues/challenges faced in relation to electronic invoicing and payment. |
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| **Target Audience:**   * **Primary** * **Secondary** * **Tertiary** |  | Identify the target audience(s) in relation to the marketing-communications plan. When executing the plan, who will the tactics impact the most?   1. Corporate (Buyers & Suppliers) /AP & AR departments (3 corner networks) not connected 2. Supplier orgs currently connected    1. Submitting invoices through their customers or their own portals/electronic invoices/3rd party networks    2. Submitting still manual invoices 3. Solution Providers    1. 3rd party solution providers ex. Ariba, Tungsten    2. Different associations - ex. Transportations, gas/oil/petroleum industry, auto industry - EDI standards, |
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| **Participants** |  | The Oversight Entity (Digital Business Networks Alliance) will execute the marketing plan/roadmap. |
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| **Key Objectives** |  | Questions for Oversight to address:  **Pilot Objectives**   * What has to happen in phase 1 for it to be considered a success? * In the pilot phase what level of participation do we need (C1, C2/C3, C4)? * What testing results do we want to see? * Are test/pilot participants to determine what success is or does the oversight committee decide? * Is the assumption that all test participants will roll into production after a successful test? * Is the Oversight Committee open to the market awareness team developing an overarching campaign/theme that covers all communications during pilot and production?   **Post Launch Objectives**   * What is success?   + Buyers, suppliers and solution providers (both in the pilot and not) proactively participating in the framework by EOY 2023.     - 15 - 20 Buyers (also to include gorilla corporates)     - Suppliers       * 5 Strategic suppliers       * 10 - 20% of suppliers of target buyers     - 5 - 10 Solution Providers (U.S. based)       * Non-industry specific       * Industry specific * Number of pilot participants (C1/C4) that go live at EOY 2023?   + 20 - 25% * What C1/C4 tiers/industries should we target to achieve desired volume? * What is the ideal/preferred before and after (in # or %) we are looking to achieve regarding invoice submission, payments, sharing of business documents from each of the 4 corners? * What % of awareness saturation should we target among our target audiences and how do we measure it? |
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| **Strategies** |  | Adoption Strategies:   1. Target the Pilot participants and B2B networks for early adopters to create a “bandwagon effect”. 2. Align with the payments industry and ride the instant payments adoption wave. 3. Leverage the challenges businesses are experiencing post-pandemic with retaining / hiring positions that traditionally supported invoice and remittance processing. 4. Adoption campaign to target audience mentioned above.   -Targeted communications for corporate adoption.   1. Create a presence at industry events/conferences to spread awareness. 2. Cross promotion of Fed’s promotion of the e-remittance pilot |
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| **Tactics/Deliverables/Channels** |  | **E-invoice Exchange Market Pilot Deliverables:**  *These are deliverables developed by MAAC and need further refinement prior to external publication.*   * **Key Message Reservoir**: Houses all key messages targeted to all 4 corner participants and their respective audiences. * **Business Use Case Guide:** Outlinesbenefits for supplier/buyer/solution provider. Internal talking points by audience. Incentives ("carrots") for adoption for supplier/buyer relationships. * **Market Pilot Toolkit:** Helps communicate about the e-invoice exchange market pilot with any relevant audience. (note: should review content and further evolve content for production stage). * **Participant List:** A list of market pilot organizations to give insight into participating trading partners. (note: should review content and further evolve content for production stage). * **Adoption Survey:** A survey designed to target pilot participants with questions on their adoption status to communicate results more broadly to achieve a “bandwagon effect”. Also, identify user stories and feedback for a future adoption campaign (see below).   **Recommended Future Deliverables (in order of importance):**  **Channels**   * **Email:** Establishing an email domain for entity communications to partners, members and leads should be a top priority. This will serve as the main point of contact to engage and connect with the entity. * **Website:** A top communications priority for the oversight entity is to establish a website to serve as the primary source for all other communication channels. Once a website is established, the oversight entity will have the ability to own the promotional strategy for the exchange framework to drive awareness and adoption via numerous communication channels. * **Social Media**: Recommended platforms are LinkedIn and Twitter and later YouTube if there is video content. * **Email Campaign Tool**: For mass-member email communications we recommend a subscription of this type. * **Survey Tool:** For member surveys we recommend a subscription of this type. * **Google Analytics:** To measure the level of engagement on their website. * **Service Provider Marketing Channels:** Leverage the service provider social media pages, blogs, etc. to increase adoption and get the word out.   **Tactics:**  The following tactics are listed and segmented by Launch and Post Launch Marketing:  **LAUNCH Tactics**   * **Blog/Article:** Announcement article/blog highlighting features and benefits of framework.   + FPI blog article. * **Landing Page:** While this may not make the final cut, a simple landing page to house helpful/instructional information and enable interested entities to submit a simple form. * **Announcement email:** Initial announcement regarding entity and its implications for each of the corners.   + Email to FPI and BPC community, segmented by individual corner.   + Draft email communications for adopters/members to share with networks. * **Marketing Member Toolkit**: A resource to help members develop their own messaging and marketing plans. * **E-newsletter:** e-newsletter to payments industry stakeholders   + FPI Pulse e-newsletter to 11K+ payments industry stakeholders * **Adoption Campaign**​: Leverage the reach/network of framework membership and oversight entity to execute on an adoption strategy. Identify user stories/feedback for adoption campaign. * **Blog and Social Media Starters:** Highlighting key message nuggets framework participants should incorporate into their (internal and external) communications. Also shares relevant news from the oversight entity on product updates.   + Organic and paid social media promotion.   + Links to Fed and BPC social media channels.   + Draft social media language - slightly different language for each corner (or buyer/supplier/provider.   + Draft social media graphic announcing the launch of the entity. * **Case Study/Use Case Template:** Allows pilot participants to complete and submit to MA group for case study creation and BPC/MA group distribution. Case studies to highlight all benefits 4-corner participants (and their target audiences) receive from the framework.   + This was not included in the Launch Communication Plan.   **Post Launch Tactics**  The following tactics while recommended may require more resources (time and budget) therefore are recommended for a later date:   * **Participant List**: Similar to what was created during the pilot stage, a list of organizations that are connected to the network to help members identify trading partners. This may also be needed for external communications to create a bandwagon. * **Content Calendar:** Create and manage a calendar of external-facing communications to ensure consistency of message and appropriate deployment timing. * **Onboarding email templates:** While more operational than promotional, it will be critical to establish communication templates that instruct members on how to onboard to the framework. * **Internal eNewsletter (Hot News):** Establishing an e-newsletter targeted at members, highlighting 3 things: what has happened, what needs to happen next, timeframe in which it will happen. * **Establish Presence at Industry Conferences:** Determine priority conferences.Attend industry conferences and establish a DBNA speaker and expert on this topic. * **Scorecard:** Tracking and identifying which participants are live, their progress, and the milestones reached - distributed to all participants and leveraged for external communication (see blog/SM primer). * **eBook/Instruction Guide:** Highlights all features and benefits for 4-corner participants and their target audiences. High-level overview that answers the most important questions for all audiences (this could also be a landing page/web page instead). * **Trade Publication Articles:** Submission to select trade publications, highlighting the work of BPC and touting specific milestones:   + Journal of Digital Banking   + Journal of Payments Strat/Systems   + Business Insider   + WSJ   + Fortune   + Inc.   + Payment publications   + PYMNTS   + American Banker * **Video Series/Clips:** Features pilot and production participants speaking to the benefits of the e-invoice exchange framework and how all 4 corners (and their target audiences) will receive value. * **Partner With Networks/Corporates/Seal of Approval:** Create co-branding opportunities with solution providers and corporates/AP buyers. Develop the “seal of approval” highlighting the e-invoice framework and the interoperability that benefits everyone. * **Creative Assets:** Partner with an agency to develop additional creative assets to drive awareness and adoption (videos, MP4 graphics, etc). |
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| **Alternatives** |  | What other methods of electronic invoicing and payment data, from an interoperability perspective, are available to our target audiences? |
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| **Theme** |  | Marketing Communications Campaign TBD |
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| **Anticipated Outcomes** |  |  |
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| **Determining Success** |  | Determining ROI - what should success look like? |
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| **Assets** |  | Please provide logos (in PNG format) or other relevant assets (photos, artwork, etc) for the creation of the case study. |
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| **2023 Priority Roadmap** |  | **March**   * Begin identifying and drafting content for website * **Establish an email domain** *(must happen before launch communications in April)* * Subscribe to email tool   **April**   * Establish contact form (determine what information is needed from new leads) * Launch oversight entity website   + Contact form   + Marketing Member Toolkit * Support for the Fed’s launch communications   + Cross promote through professional network or organization website   **May**   * Onboarding communications, e.g., new member welcome email and instructions for onboarding   **Later in 2023:**   * Establish social media channels (LinkedIn & Twitter) * Launch membership drive campaign * Support promotion of the BPC’s e-remittance pilot in social media channels   *What is the necessary resource plan to support the above timeline/ proposal?* |