**ProVal Tech Marketing Tools**

(As of March 2024)

**Sales and Marketing One Note**

* 2024 Marketing Metrics
  + Blogs
    - Use Autotask to assign tickets
    - Canva to create a featured image
    - Post on WordPress
    - Make sure to be using SEO Best Practices
    - Add to social media & groups
    - 2 blogs a month (Around the 1st and the 15th)
  + Tech Tuesday (all tickets have been created for the year – this may need to be changed and updated if we add new employees to the team. All tickets are currently assigned to Kaitlin whoever takes this over will need to have this reassigned to them)
    - Use Autotask to assign tickets
      * How to assign Tech Tuesday Tickets in Autotask <https://www.loom.com/share/a54e3633934c4642a7fbaf42591ec89b?sid=605601f8-13c1-46bd-aa7d-b6c911eeb0e0>
    - Splash Pages PowerPoint to edit the Thumbnail
    - Movavi to edit video (make sure this is downloaded to computer)
    - Post to YouTube
      * SEO Best Practices
      * Use Tags
      * Add to Playlist
    - Schedule to Socials
    - Close out ticket in Autotask
      * Once Posted to YouTube, posted to socials, added to the compiled list of videos excel sheet, and moved into the ‘Posted to YouTube’ folder under the consultant
  + Social Media Content
  + Holidays
  + 2024 Plans
* Events
* Notes – Everything you need this should be your hub (the whole team will have access to this)

**Google Analytics**

* Website Analytics
* Vikram will give access

**Google Search Console**

* Website Analytics
* Maintain, Troubleshoot, or Monitor Website
* Vikram will give access

**Google My Business**

* Respond to Reviews
* Add Company Pictures quarterly after events
* Vikram will give access

**SEMRush**

* Position Tracking (Track this weekly, monthly, quarterly)
* Keywords
* Traffic
* Backlinks
* Competitor Analysis

**ZeroBounce**

* Email / Domain Verification

**Movavi**

* Video editing
* Have IT download program
* Password in IT Glue
* Use for:
  + Tech Tuesday (Splash Page Thumbnail) [Splash pages.pptx](https://provaltech.sharepoint.com/:p:/r/sites/SalesMarketing/Shared%20Documents/Youtube/Splash%20pages.pptx?d=w7b3a12ffc5b34d698ce622e776683442&csf=1&web=1&e=ok5fHc)
  + Webinars (canva thumbnail)
  + Scripting Solutions (thumbnail saved in scripting solutions folder)
  + Any video that needs to be edited (create thumbnail in Canva)
* Process for video editing will be the same for all videos as it is for the Tech Tuesday video 🡪 review that SOP for video editing rubric (you can use different music for the intro and outro but tech Tuesday videos will always use the sound ‘Awakening’

**HubSpot**

* Email Blasts
  + Monthly Marketing Emails
* Newsletters
  + Quarterly
* Social Media
  + Monthly / Daily
* Analytics
  + Weekly
* Website Call to Actions
* Website Live Chats

**Social Media Platforms** (can schedule all on HubSpot except Instagram – IG you have to do manually)

* Posting time 10:00 AM
* I spend 30 Minutes at the end of the day engaging with MSPs Social Media (likes, comments, etc.)
  + LinkedIn Following
  + Facebook
  + Instagram X
* If posting multiple in a day put some time in between the post (for ex: 10 AM & 1 PM)
  + Facebook
  + LinkedIn
  + YouTube
    - Tech Tuesday Videos, Webinars, Anything Internal or External we feel is good to add to YouTube
    - Tech Tuesday Videos – Create on Monday Afternoon, post on Monday Afternoon & schedule to be posted on social media
  + Instagram – To get full Analytic Insights have IG on phone
  + X
* Social Media SharePoint Folder [2024 Monthly Content](https://provaltech.sharepoint.com/:f:/s/SalesMarketing/EssZO-yyt0pDonvF-oKyHGsBXDSwxBG8uQ5PWggggz74jA?email=Kaitlin.Jones%40provaltech.com&e=cbneeI)
  + Includes Monthly Content Calendar
  + Use monthly content calendar for place holders in HubSpot
  + Add / Schedule Content to HubSpot

**Lucky Orange (no longer active)**

**Groups:**

Use Groups to find what people are talking about in the Community

If it is something high-level or a technical question 🡪 reach out to a consultant to get the question answered

* Post with ProVal account if applicable
* Insert our website link
* Copy link into one note (sales and marketing tab)
  + Miscellaneous
  + Community Engagement Page
  + Go to Specific Tool
  + Add Link
  + Date Posted
  + New Addition: Add which consultant answered it

A screenshot of a computer

Description automatically generated

Groups to Join:

* Reddit (ProVal Tech Account)
* LinkedIn (Join with Personal Account)
  + - MSP Managed Service Provider
    - Managed Service Provider (MSP) Best Practices
    - Frankly IT Community
    - MSP Insights Community
    - 24/7 IT Service Providers – MSP Professional
    - Kaseya User Group
* Facebook
  + - ProVal Account
      * IT/MSP Entrepreneurs
      * All Things MSP
      * ConnectWise Tips and Tricks (a competitor owns this group – don’t post just use to see what people are talking about / education)
      * MSP Marketing
      * IT & MSP Business Owners Group
      * Everything MSP Group
      * The MSP Initiative

**HubSpot – Live Chat Box**

* Set up notifications in Teams to get alerted when someone inserts a chat question
* If it is a technical question reach out to the consultants
* If you don’t get a response asap get their emails and email them their response

**Canva:**

* Create All Social Media Content
* Business Cards
* Posterboards
* Mockups
* Lunch & Learn Presentations
* Onboarding Slides
* One Sheets
* Graphics
* (for the most part anything that has a design to it we use Canva)

**Onboarding Slides:**

* Create these in Canva <https://www.canva.com/folder/FAFFAa6Q780>
* There should as of now be one for ConnectWise Automate, ConnectWise RMM, and Kaseya VSA
* Please reach out to the team lead if information needs to be changed
* You will create / edit pages in Canva
* Save the images from Canva and insert them into the PowerPoint Template [Kick Off Call and Onboarding](https://provaltech.sharepoint.com/:f:/s/SalesMarketing/EsnivZ0AMTdLoneBwgaWqKoBywSMdoQAxU-nMtL5aE5Nxw?email=Kaitlin.Jones%40provaltech.com&e=HtPuxS)
* Share updates with Team as needed

**Website:**

* On WordPress (Vikram to give access)
* WordPress Admin login <https://www.provaltech.com/wp-admin/>
* Hosted on SiteGround (Vikram to give access)
* Plugin for Website Development: Elementor
  + Update Plugins (check weekly on this)
* If you need any additional assistance our past website contact was Chris Gaskill through UpWork
* Once a month backups of website
  + Do a backup sooner if there are changes to the site
* Call to Actions on Website are through HubSpot

**Upwork**:

* Have Vikram give you access to create an account
* Use for:
  + Backlinking
  + Graphic Design

**How to Find Data for Daily Scorecard & L10**

* Use Google Analytics & SEMRush
* View SOP on how to find each [Using Google Analytics for Scorecard Information.docx](https://provaltech.sharepoint.com/:w:/s/SalesMarketing/EeDUP2Bjt9RBsj5qjUHgSAQBQCRrCdgmMFdQd1uicOaeiQ?email=Kaitlin.Jones%40provaltech.com&e=XSsGyc)

**Photos & Videos**

* Event Images (download and save after each event so we always have graphics to use) Make a new folder for each event
  + Sales and Marketing
    - Marketing
    - Photos and Videos
    - Company Photos
    - US
    - 2024 Event Photos

**Webinars:**

* Create thumbnail
* Social media posts at least 3 promoting (month before, 1 week away, day before)
* Send email blast out
  + Partners & prospects
* Edit video with Movavi and post on YouTube
* Email Blast to those who viewed webinar with YouTube link
* Post Webinar to Socials (can schedule with the YouTube link)
* Add to Website

**Marketing Video Overview Video:** [Marketing Video Overview.mp4](https://provaltech.sharepoint.com/:v:/s/SalesMarketing/ESjf16S4Lt9Jj2hLJoRt8UQBJxCui9Pb9dJMSiOjRbYIpw?email=Kaitlin.Jones%40provaltech.com&e=YscBLX)