

Playbook & Toolkit



Follow this step-by-step guide to develop and implement a **demand generation strategy** that provides a steady flow of **qualified**, **engaged leads** for your **sales team**.

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# DEMAND GENERATION

Framework

**Leverage the framework below** to quickly empower your organization's demand generation strategy.







**Click the buttons** below to access all related training, tools, templates, and other resources.



# **DEMAND GENERATION** Maturity Model





	CTACE 1 Undefined	STAGE 2 - Progressive	STAGE 3 - Mature	STAGE 4 - World-Class
Demand Generation  Orientation	No defined strategy or process for Demand Generation; Prioritizes Sales over Marketing activities	Defined strategy and processes for Demand Generation exist in the marketing organization as part of overall marketing strategy	Defined strategy and processes exist for Demand Generation within the Enterprise as a key sales and revenue driver	Defined, integrated strategy for Demand Generation exists across the Enterprise; Campaigns are tracked and measured by level of engagement and revenue impact
Leadership	No focused Demand Generation initiative; Focuses on Lead Generation rather than Demand Generation; Prioritizes Sales over Marketing	Demand Generation initiative in place; A dedicated program and Campaign Managers for Demand Generation exist	VP or Director of Demand Generation with budget, staff and resources; Long-term executive commitment	Views Demand Generation as a strategic, core capability for building a Modern Marketing Center of Excel- lence (MMCoE); Strategies, processes and KPIs for Demand Gen are in place
Tools & Platforms	Development stage with point tools for Email, Content and Social Media Marketing; Organization uses paid search or PPC advertising; Utilizes basic SEO for website & landing page optimization	Uses platforms that perform specific functions with coordinated tools, applications and workflows for email, content & SEO	Key platforms (content, email, online event, SEO and advertising) have been implemented and are connected to each other as well as to CRM, Marketing Auto- mation systems	All Demand Generation platforms are integrated into a comprehensive Digital Marketing platform with tight integration to CRM, Marketing Automation and other Enterprise-level systems

# **DEMAND GENERATION**Maturity Model





Demand Generation

STAGE 1 - Undefined

STAGE 2 - Progressive

STAGE 3 - Mature

STAGE 4 - World-Class

Demand Generation Relies on website landing pages with limited content targeting; No formal content, email or social campaign strategy exists; Organization uses paid search or PPC advertising and utilizes basic SEO; Focuses on traditional tradeshow marketing

Demand Generation campaigns feed Lead Generation through a coordinated lead qualification process through email, traditional & online events, content, SEO and Online Advertising Convergence of content, social, mobile and video experiences to create full digital experiences for conversion and sales opportunities; Mature SEO processes are in place; A solid investment in Online Advertising and virtual events exists An integrated, Enterprise-wide Demand Generation platform with personalized & localized content has been implemented and is delivered via email, SEO, Online Advertising and Marketing Apps; Manages the success of Demand Gen by measuring and improving ROI

Budget & Staff

No budget allocated for Demand Generation; Staff is contracted or at the Coordinator level and is focused on Lead Generation Budget has been allocated for Demand Generation; Defined roles and responsibilities have also been established for Demand Gen A budget supported by a business case has been developed to justify project & program spending; Dedicated Demand Gen roles have been established and are key to the marketing team and overall strategy

Demand Generation budget is connected to marketing goals; Organization is aligned for maximum impact of Demand Gen

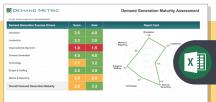
Metrics

No formal measurements are in place or metrics are focused only on paid search and PPC leads Operational metrics to monitor and track performance of SEO, Online Advertising, Email and Content Marketing campaigns; Metrics may include email click-thrus, content views & downloads, keyword performance, # links & backlinks, etc.

Organization uses dashboard metrics by each Demand Gen platform, including online events; Limited CRM & MA integration exists; Analytics may include lead scoring and qualification metrics, webinar views, average time spent in virtual environments, etc. Enterprise-wide dashboard with visual representation of user acquisition, scoring and engagement by behavior, experience, brand reach, etc.; Metrics may include campaign conversion & ROI, contribution to pipeline, prospect/customer level of engagement, etc.

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Want to rate your organization's Demand Generation maturity with an interactive tool? Download our **Demand Generation Maturity Assessment** and get started today!



X VIEW RESOURCE

1	2	3	4	5	6
Initiative	Defining What	Plan Your	Technology	Organize	Measurement
Preparation	a "Lead" Is	Strategy	Selection	Distribution	

# What Is Demand Generation?

Demand Generation, at its most fundamental, includes the strategies, processes, tools, technologies, and activities used to create the need, desire or need in a customer or marketplace to purchase available goods or services. This comprises areas such as brand awareness, product/service interest & education, purchase intent, target population reach, audience discovery, and top of funnel sales activities.

More broadly, today's Demand Generation programs now support and optimize the buyer's entire journey throughout the attraction, conversion, fulfillment and loyalty stages of the journey.

Given that, it is important to be aware of the primary activities that comprise an effective Demand Generation initiative and the role Demand Generation plays in an overall Digital Marketing effort.

# **How to Use This Playbook**

This playbook consists of six stages, each with a description of steps, and action items. Action items include using our premium tools and templates. Our goal for your use of this playbook is to help you:



**Understand** Demand Generation to drive sales and revenue impact within your company



**Evaluate** and select the technology that will be the backbone of your Demand Gen strategy



**Plan** and craft a strategy to develop a steady flow of qualified leads for your sales team





1	2	3	4	5	6
Initiative Preparation	Defining What a "Lead" Is	Plan Your Strategy	Technology Selection	Organize Distribution	Measurement

# **Demand Generation vs. Lead Generation**

Some confusion exists between the functions of Demand and Lead Generation with some marketers believing that all Demand Generation is about getting leads. In fact, Demand Generation is a multistep process of which Lead Generation is one of the primary outcomes.

Demand Generation opens the market for a product/service, creates awareness, discovers new audiences, develops brand recognition, begins the engagement process, and nurtures target populations before they become real leads or prospects for sales.

In contrast, Lead Generation is the process of identifying specific prospects and customer types that are most likely to become customers by creating strategies, tactics, and campaigns that will provide engagement between the prospect and the company or brand.

In short, Demand Generation casts a wide net over a large potential population; while Lead Generation "fly fishes" for the best possible catch.

# **Examples of Demand Gen Activities**

Demand Generation can consist of various marketing related activities and channels including the following:



Online Advertising



**Blogging** 



**SEO** 



**Social Media** 



Content Marketing



Online Communities



Event Marketing



Public Relations



Webinar



CRM





1	2	3	4	5	6
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# **Outputs from This Playbook**



## **Stage 1 - Initiative Preparation**

Best Practices Report, Benchmark Report, Related Training Courses



#### Stage 2 - Defining What A "Lead" Is

Roles Matrix, Maturity Model, Demand Generation Maturity Assessment, Related Assessments



### **Stage 3 - Plan Your Strategy**

Demand Generation Solutions Matrix, Marketing Automation Solution Study, Vendor RFPs, Vendor Evaluations



## **Stage 4 - Technology Selection**

Strategy Workbook, Marketing Budget Template, Lead Acquisition Model, Marketing Funnel Template



## **Stage 5 - Organize Distribution**

Buyer Personas, Buying Process Stage Template, Content Mapping Template, Webinar Promotions Calendar



### Stage 6 - Measurement

Metrics Dashboard, Marketing Automation ROI Calculator, Online Advertising ROI Calculator







# Initiative Preparation

In Stage 1, you will focus your efforts around understanding your organization's strengths and weaknesses related to Demand Generation, documenting your goals and objectives, and developing a business case to gain buy-in from senior management for this initiative.

**Key steps in this stage include:** 



**STEP 1:** Understand Demand Generation

**STEP 2:** Review Marketing Automation Best Practices

**STEP 3:** Review the Levels of Demand Generation Maturity

**STEP 4:** Identify Your Organization's Level of Maturity

STEP 5: Build a Business Case



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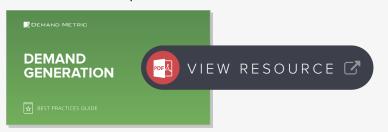
#### STEP 1

# **Understand Demand Generation**



#### Action Item

Read our **Demand Generation Best Practices Report** to learn about the practice area, obtain key insights for program development and implementation, and review the vendor landscape.



#### This Best Practices Report:

- Details the benefits of Demand Generation
- Describes the difference between Demand and Lead
- Reveals vendor research for six Demand Gen technologies

#### STEP 2

# **Review Marketing Automation Best Practices**



In this guide you will learn about:

- How to determine how advanced your program is
- The different levels of Marketing Automation maturity
- How to evolve your Marketing Automation strategy at each level





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#### STEP 3

# **Review the Levels of Demand Gen Maturity**



#### Action Item

Review our **Demand Generation Maturity Model** to learn how Demand Metric defines four stages of maturity based on the six key components of Demand Generation.



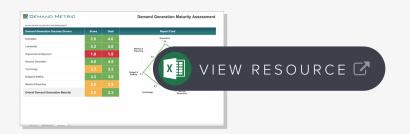
The six components of Demand Generation are:

- Orientation
- Leadership
- Tools & Platforms
- Demand Generation
- Budget & Staff
- Metrics

## STEP 4

# **Identify Your Organization's Maturity Level**





The four levels of maturity are defined as follows:

- Undefined
- Progressive
- Mature
- World-Class





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## STEP 5

# **Build a Business Case**



Use our <u>Business Case Template</u> to ensure senior management that Demand Generation initiatives align with current business goals & objectives.



Sections of your business case should include:

- Executive Summary
- Risk & Contingency Plans
- Recommendation
- Business Impact Analysis
- Assumptions & Decision-Making Criteria
- Opportunity Overview & Key Success Factors







# STAGE 2 Defining What a "Lead" Is

In Stage 2, you work with Sales to standardize the definition for a "lead." It is important to gauge your target audience and target "lead" in order to strategize for your Demand Metric programs.

Key activities in this stage include:



**STEP 1:** Understand Your Lead's Buying Persona

**STEP 2:** Define Your Lead's Buying Process

STEP 3: Agree on Definition of a "Lead"

**STEP 4:** Discover Lead Scoring Best Practices

**STEP 5:** Define Lead Scoring Parameters



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STEP 1

# **Understand Your Lead's Buying Persona**

Initiative

Preparation



#### **Action Item**

Use the **Buyer Persona Template** to document relevant information about the prototypical key players involved in making a decision to purchase your products and services.



Characteristics you will want to capture include:

- Background (Job Title, Income, Age, Education)
- Situation (priorities, pain points, motivation, needs, goals)
- Habits (likes/dislikes, trusted resources, research methods)
- Decision-Making (authority, budget, purchase process)

### STEP 2

# **Define Your Lead's Buying Process**



Use the **Buying Process Stage Template** to identify the messages and assets needed to align your sales process and actions with each buyer persona's progress through the buying process.



<b>Buying Process</b>	Sales Actions
■ Need ————	√ Provoke
Discovery ————————————————————————————————————	√ Educate
Consideration ————	√ Explain
Decision ————————————————————————————————————	√ Reassure
Review	√ Maintain





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#### STEP 3

# Agree on the Definition of a "Lead"

Initiative



#### **Action Item**

Use the **Qualified Lead Definition Tool** to agree with Sales leadership on the key criterion required for a lead to be considered qualified for sales.



#### Key qualification criterion:

- Company (size, industry, location)
- Contact (seniority level, decision-maker)
- Buying Stage & Needs
- Spending Authority
- Recentness of Activity (web visits, downloads, call, etc.)

#### STEP 4

# **Discover Lead Scoring Best Practices**



Use the Getting Started with Lead Scoring Best Practices Guide to help marketers score leads by showing how to set up a simple lead scoring system and then refine it over time.



Read this guide to learn about:

- The case for lead scoring
- Setting up a simple lead scoring system
- Refinements to improve results over time
- Companies that follow this process will quickly gain immediate benefits from lead scoring and have a solid foundation for future growth.





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## STEP 5

# **Define Lead Scoring Parameters**



### Action Item

Use the **Lead Scoring Template** to customize a framework for scoring leads on a manual basis. If you have a marketing automation system, automate this process with lead scoring rules.



#### Sample Lead Scoring Criteria:

- Company (size, industry, location)
- Contact (seniority level, decision-maker)
- Buying Cycle Stage
- Interest
- Actions (page views, pricing page visits, etc.)
- Recentness of Activity (web visits, downloads, call, etc.)







# STAGE 3 Plan Your Strategy

In Stage 3, you plan out your Demand Generation strategy, programs, and initiatives by learning the important aspects of the Demand Generation Framework and identifying key roles, responsibilities, processes, technologies, content, and metrics.

The key activities in this Stage are:



**STEP 1:** Define Roles & Responsibilities

**STEP 2:** Discover Which Marketing Channels Matter

**STEP 3:** Design Your Marketing Funnel for Leads

**STEP 4:** Create a Demand Generation Strategy

**STEP 5:** Identify Budget Allocations



5 4 Initiative Technology Organize Measurement Preparation Selection Distribution Plan Your **Strategy** 

#### STEP 1

Introduction

# **Define Roles & Responsibilities**



Action Item

Review our **Demand Generation Roles Matrix** to learn how all of the departments and components of an organization come together to develop, coordinate, and operate with Demand Generation best practices.



This framework defines Demand Generation efforts across six categories:

Roles

- Technology
- Responsibilities
- Content

Processes

Metrics

Also check out our Modern Marketing Department Structure.

#### STEP 2

# **Discover Which Marketing Channels Matter**

6



Action Item

Review our Marketing Channel Ranking Tool to evaluate your marketing channels based on their brand promotion quality, lead quality, and cost/event.



This tool helps you find your most profitable channels:

- Webcasts
- E-Newsletter
- Press Releases

Also check out our Lead Generation Prioritization Tool.





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#### STEP 3

Introduction

# **Design Your Marketing Funnel for Leads**



Action Item

Review our **Lead Acquisition Model** process diagram to communicate your lead generation and nurturing process.



This diagram provides you with a read-world example of a potential lead generation process. Your lead acquisition model should include Direct & Indirect Marketing Campaigns, Lead Scoring, Lead Nurturing Campaign, and Lead Assignment.

Also check out our **Marketing Funnel Template** for more ideas.

#### STEP 4

# **Create a Demand Generation Strategy**



Action Item

Use our <u>Demand Generation Strategy Workbook</u> to provide senior management with a document that clearly outlines your action plan for this project. This document will also allow you to track your strategy progress throughout the year.



Key information to include in scorecard:

- Objectives
- Programs & Initiatives
- Metrics & KPIs
- Timeframes and Goals
- Goal Achievement Tracking





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### STEP 5

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# **Identify Budget Allocations**



Employ our <u>Marketing Budget Template</u> to help you track the costs for your Demand Generation programs, initiatives, staffing, and resources in relation to your overall marketing budget.



The key components of this budget are:

- Technology, Implementation & Support
- Staffing
- Training & Education
- Promotions & Marketing Campaigns
- Content Development







# Technology Selection

At this point, you have learned about Demand Generation, identified your target lead definition, and developed strategies to properly interact with your audience. Now, you will evaluate the technology landscape in order to implement your strategic initiatives.

This stage includes the following steps:



- **STEP 1:** Review Core Tech for Marketing Automation
- **STEP 2:** Understand Additional Tech Required
- **STEP 3:** Evaluate Vendors and Create a Short List
- **STEP 4:** Submit RFPs to Short-Listed Vendors
- **STEP 5:** Conduct Evaluations and Make Decisions



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#### STEP 1

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# **Review Core Tech for Marketing Automation**



Review the <u>Marketing Automation Solution Study</u> and <u>CRM Solution Study</u> to bring you up to date on the best practices technology and solutions available to get your system ready.



#### STEP 2

# **Understand Additional Tech Required**



#### Action Item

Review the Solution Studies and Technology Overviews below to get an excellent overview of what is available to support your Demand Generation initiative.

Check out the following Technology Overviews:

- Online Communities Technology Overview
- Online Advertising Technology Overview
- Online Event Marketing Technology Overview
- SEO Technology Overview

Check out the following Solution Studies:

- Email Marketing Solution Study
- Content Marketing Solution Study
- Social Media Marketing Solution Study
- Video Marketing Solution Study





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## STEP 3

Introduction

## **Evaluate Vendors and Create a Short List**



#### Action Item

Use our <u>Demand Generation Solutions Matrix</u> to evaluate the over 50 vendors from all six technologies. Make a short list of the vendors you will be considering for implementation.



This matrix covers the following focus areas:

- Email Marketing
- Interactive Marketing Apps
- Online Advertising
- Online Event Marketing
- Predictive Marketing Analytics
- Search Engine Optimization (SEO)

#### STEP 4

## **Submit RFPs to Short-Listed Vendors**



#### Action Item

Use our series of System RFPs (listed below) designed specifically for Demand Generation to document your requirements for each technology and send off to your short-listed vendors to receive more information on their solutions.



The following additional RFPs are also available:

- Marketing Automation System RFP
- Email Marketing System RFP
- Online Advertising System RFP
- Online Event Marketing System RFP
- SEO System RFP Template





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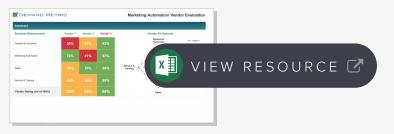
Measurement

### STEP 5

# **Conduct Evaluations & Make Decisions**



Use our series of Vendor Evaluations (listed below) designed specifically for Demand Gen to compare vendors against one another based on up-to-date technology requirements. After this exercise is complete, decide on your solution(s).



Use the following matrices to help your decision making:

- Marketing Automation Vendor Evaluation
- Email Marketing Vendor Evaluation
- Online Advertising Vendor Evaluation
- Online Event Marketing Vendor Evaluation
- SEO Vendor Evaluation







# STAGE 5 Programs & Activities

In Stage 5, you will be organizing your key lead generation programs.

Here are the three steps you will take in this stage:



**STEP 1:** Leverage Demand Gen Best Practices

**STEP 2:** Map Content to Your Leads Buying Process

**STEP 3:** Organize your Demand Gen Programs



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### STEP 1

# **Leverage Demand Gen Best Practices**



Action Item

Leverage our collection of related training courses, playbooks and frameworks (see below) to help you implement best practices in your Demand Generation program.

- Online Advertising
- SEO
- Content Marketing
- Event Marketing
- Webinar

- Blogging
- Social Media
- Online Communities
- Public Relations
- CRM

### STEP 2

# **Map Content to your Leads Buying Process**



Action Item

Use the **Content Mapping Template** to create a visual representation of the content for your lead nurturing plan.



Here are a few resources you can use when creating content:

- Case Study Template
- White Paper Template
- Press Release Template
- Business Case Template





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## STEP 3

# **Organize Your Demand Gen Programs**



Use our <u>Marketing Calendar Template</u> to plan and organize all of your Demand Generation activities and then provide to your sales team, to keep them updated on your campaigns.



You can also make use of our other organizational templates:

- Advertising Calendar & Budget
- Content Marketing Editorial Calendar
- Events Database Template
- **Webinar Promotions Calendar**











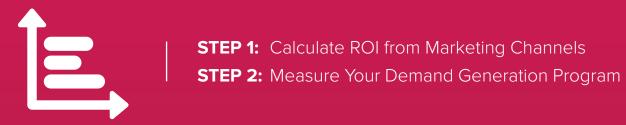




# **STAGE 6** Measurement

Now that you have executed your strategy, implemented technologies, begun running your programs & activities, you can start to measure the results of your Demand Generation program.

In this Stage, you will:





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#### STEP 1

# **Calculate ROI from Marketing Channels**



#### Action Item

Use the <u>Marketing Automation ROI Calculator</u> to calculate the overall financial impact that Marketing Automation can have on your business.



We also have other ROI calculators for specific channels:

- Online Advertising ROI Calculator
- Email Marketing ROI Calculator
- Webinar ROI Calculator
- Tradeshow Program ROI Calculator
- Online Community ROI Calculator

#### STEP 2

# **Measure Demand Generation Program**



#### Action Item

Use the <u>Demand Generation Metrics Dashboard</u> to track the Key Performance Indicators (KPIs) for your program. Update this dashboard on a monthly basis to generate high-quality graphs that will show your progress.



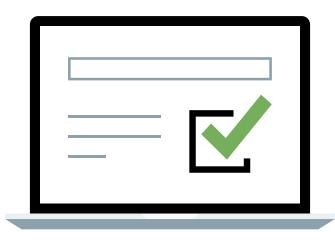
Some of the key metrics we suggest analyzing are:

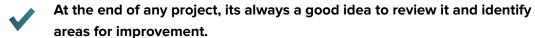
- # MQLs Created
- Cost Per Lead (CPL)
- SQLs v. MQLs
- Keyword Performance
- Webinar Views
- # Links & Backlinks

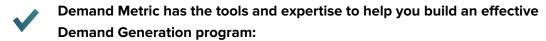




# Conclusion







- Create or audit your existing Demand Generation strategy plan
- Assist with using any of the tools referenced in this playbook
- Provide hands-on marketing assistance to accelerate achieving your marketing department's goals

To learn more, contact Demand Metric: info@demandmetric.com

# About ANA



The **ANA** (Association of National Advertisers) makes a difference for individuals, brands, and the industry by driving growth, advancing the interests of marketers and promoting and protecting the well-being of the marketing community.

Founded in 1910, the ANA provides leadership that advances marketing excellence and shapes the future of the industry. The ANA's membership includes more than 1,000 companies with 15,000 brands that collectively spend or support more than \$400 billion in marketing and advertising annually. The membership is comprised of more than 750 client-side marketers and 300 associate members, which include leading agencies, law firms, suppliers, consultants, and vendors.

Further enriching the ecosystem is the work of the nonprofit ANA Educational Foundation (AEF), which has the mission of enhancing the understanding of advertising and marketing within the academic and marketing communities.

# About Demand Metric



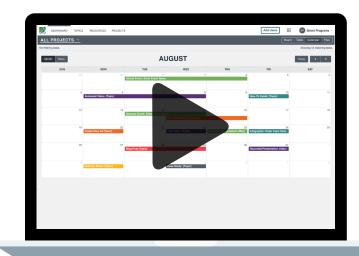
**Demand Metric** helps Marketing teams get stuff done with practical tools, training, and a simple, modern platform for managing work.

Our analysts identify best practices from fast-growing companies and build Playbooks & Toolkits, Guides & Reports, Training Courses, and Project Templates to help you optimize your processes, add structure to your department, and get your team punching above their weight class.

Manage your work visually with our easy-to-use platform, built for small marketing teams by design. See what your team is working on at a glance so you can spend less time managing projects and more time knocking stuff off your list.

Through strategic partnerships with the AMA, ANA, and AIPMM, our 1,000+ time-saving tools & resources have become the industry standard. Don't start from scratch!

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