

# THE MODERN MARKETING AGENCY PITCH

5 ways to use in-depth analytics, technical leadership, and marketing automation to win new business



**I**n the not-so-distant past, a successful marketing agency's client pitch would be a lot like putting on a really big show. You'd have a flashy presentation, imaginative props, samples of creative executions, and of course, an original story to tie it all together. One thing that was rarely included in pitches to prospective clients was hard data. There were no metrics demonstrating past performance or projecting future results. No charts illustrating potential upticks in key performance indicators. No mention of return on investment (ROI).

Of course, back in the day, it was often challenging to prove the value of marketing, especially for broadcast tactics like radio spots, billboards, and magazine ads. Marketers could point to a bump in sales for a target audience or a certain geographical region, but no one was really sure exactly which campaigns were driving results.

The rise of digital marketing changed all that. Websites, emails, banner ads, and paid search campaigns made it possible to track and measure successes and failures, and even tie marketing dollars directly to revenue. However, even

though these powerful measurement technologies have been available for years, some agencies have been slow to adopt them. Instead, they would rely – as always – on their instincts and their creative chops.

But things are changing once again. These days, potential clients still expect a storytelling approach in an agency pitch, but they often demand to see a clear link between the client-agency relationship – as well as the expected ROI for their business.

*Your potential client wants to see a combination of intelligence, specialization, metrics, and success stories that prove your value. That doesn't mean it can't be creative. But it does mean it has to be thorough and precise.*

**Here are five ways the modern marketing agency can create a pitch that will win new business and give your team the competitive edge in a crowded marketplace.**

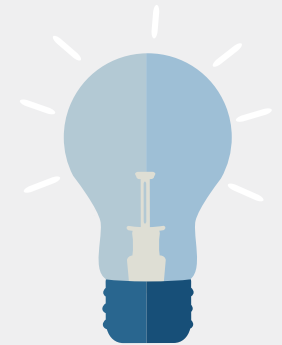


# 1

## Demonstrate a strong value proposition.

**T**he pitch is your chance to convey the value of your agency. During your meeting, you should be able to clearly and concisely articulate your areas of expertise. Provide examples wherever possible of how your marketing tactics will work together across channels to reinforce the client's brand presence and achieve their overall goals.

How do you illustrate your value proposition in the client pitch? It starts by going beyond the basic offerings of your agency – the same ones that every other agency out there can claim. Obviously your team is creative, strategic, and innovative. Instead of coming up with a list of generic features and benefits, provide a summary of the paybacks your client will get from working with you based on their relevance to a particular type of category or brand.



### **BACK IT UP WITH PROOF POINTS:**

- » Share your list of top clients, industry awards, or other accolades.
- » Corroborate your primary expertise and value with third-party research. Find statistics that support each value point you present in your presentation, or to keep in your back pocket for off-the-cuff remarks during the pitch.
- » With every value you pitch, ask yourself, “So what?” or “What does this mean to my client?”
- » Always position your value proposition within the context of your client's needs. Relate everything you present back to your client's primary business objectives.

### **ESTABLISH YOUR EXPERTISE – ASK YOURSELF THIS:**

- » What makes your agency truly different?
- » Which channels, audiences, and technologies do you know best?
- » What kind of expertise can your team demonstrate?

## VALUE PROPOSITIONS AND PROOF POINTS FOR AGENCIES

### DESIGN



**Value Prop:** We have an outstanding design team.

**Proof Point:** Two Clio Awards for corporate identity designs.

**So What?** Our potential client's industry (gaming) demands attention-getting graphic treatments to stand out from the crowd.

### GROW BUSINESS



**Value Prop:** We help businesses grow with marketing automation.

**Proof Point:** Aberdeen Group found that companies using marketing automation see 53% higher conversion rates than non-users.

**So What?** Our potential client has been struggling with decreasing conversion rates.

### MOBILE TECH



**Value Prop:** We specialize in mobile marketing technology.

**Proof Point:** Our work was showcased during a panel at the HOW Design Live conference.

**So What?** Our prospective client's target audience is a younger age group, so developing engaging mobile experiences is critical.

Marketing automation can deliver a key differentiator, but it's not really about the technology - it's about how you plan to use the technology tools to deliver superior results for your clients.



# 2

## Provide meaningful statistics and metrics.

Few things grab attention as effectively as interesting facts and figures that prove your points, so be sure to include them seamlessly in your presentation. Add compelling industry stats that resonate with your client and that are specific to their industry. If you have data about your other clients' successes, those hard numbers to prove the value of your agency very quickly. Case studies with concrete examples of work you've done for other clients with similar challenges are also useful.

You can demonstrate the kinds of reports that show key results your clients will achieve when engaging with you. Using marketing automation, these reports are easy to generate and can tell a compelling story. Here are just a few of the key metrics you can use to demonstrate the ROI your agency will deliver to potential clients.



### WEBSITES & LANDING PAGES

When you build a website for your clients, it becomes the face of their brand. Demonstrate that you'll be able to measure and track the all the important metrics for them.

#### METRICS TO TRACK

- » **Visits** - Report the number of unique visitors as well as new vs. return visits.
- » **Traffic Sources** - Track the traffic sources, inbound links, referring URLs, and which companies are visiting the site.
- » **Site and Page Performance** - Count the number of conversions, and also how many visitors become leads and how many leads become customers.
- » **Website Engagement** - Report the average amount of time spent on site, as well as bounce rate.

#### PUTTING THEM TO WORK

- » Show trends over time and point out the campaigns you've created that drove traffic.
- » Help clients understand which sources are producing the best results.
- » Demonstrate the ways you can test and optimize poor performing pages.
- » Leverage pages that perform the best and improve those with high bounces.



## EMAIL CAMPAIGNS

Email continues to be a powerful marketing tool that delivers a variety of messages in an extremely cost-effective way. These are the main metrics likely to matter most to your clients. In fact, according to the Direct Marketing Association, **email has an ROI of 4,300%**.

### METRICS TO TRACK:

- » **Subscribe and Unsubscribe Rates** - Track the opt-in and opt-out rates as well as the numbers of forwards each email drives.
- » **Open and Clickthrough Rates** - Understand how many opened the email and more importantly, how many clicked on the links.
- » **Deliverability Metrics** - Track metrics like overall deliverability, number of suppressed or bounced contacts, and especially spam and abuse complaints.
- » **Response Rates** - This metric can include sales, downloads, event registrations, traffic, and much more.

### PUTTING THEM TO WORK

- » High opt-out levels after certain campaigns can help you identify poorly targeted content.
- » Help clients improve campaign engagement by using A/B testing to optimize open and click rates over time.
- » Identify potential issues and make sure your messages actually get delivered.
- » Get an overview of how well the entire campaign is performing and demonstrate the ROI to clients.





## SOCIAL MEDIA

Social channels are essential for amplifying messages and boosting brands, particularly when you align your social media strategies and tactics with your other marketing channels. When monitoring social campaigns, keep the following measures in mind.

### METRICS TO TRACK:

- » **Awareness Levels** - Track the total number of Likes, followers and subscribers.
- » **Overall Engagement** - Track how often people like share, pin, or retweet social content.
- » **Social Media Metrics** - Track metrics like overall deliverability, number of suppressed or bounced contacts, and especially spam and abuse complaints.

### PUTTING THEM TO WORK

- » Measure brand awareness and buzz.
- » Identify top-performing content.
- » Benchmark your client's web traffic, blogs, Facebook and LinkedIn traffic, tweets, and YouTube views against their competition.

### ADDITIONAL METRICS

- » If you're running **SEO campaigns**, you can deliver insights such as SERP rankings, organic traffic levels, the number of inbound links, and keyword rankings.
- » **Lead nurturing** programs should track the total number of leads generated, as well as how many visitors become leads and how many leads become customers.
- » **A/B test results** demonstrate how well you can optimize the performance of campaigns and properties such as emails and landing pages.

**Just about everything you do can be tied to ROI when you're using marketing automation.** It's easy to demonstrate results using customized reporting; your clients will see very clearly how their investments are paying off. That's why it's important to develop a reporting plan as part of every client engagement.

# 3

## Do your homework.

**B**efore you walk into the meeting room, you should have a clear sense of your prospect's business model as well as their goals for what they want to achieve by engaging with you. If you win the business, this information will be foundational to building your client's buyer personas and delivering content that will resonate with them. If you don't win the business, well, maybe there's another opportunity with a similar company in the same industry. You can always reuse the research you've done and put it to good use somewhere else.



### ADVANCE INFORMATION-GATHERING SHOULD INCLUDE:

- » Target audience analysis and personas
- » Survey and focus group research
- » An overview of the client's competitive landscape
- » Relevant market research and industry trends
- » Social listening insights
- » Historical benchmarks
- » KPIs and success metrics

In addition, you should have a clear picture of the performance of your prospective client's past campaigns conducted by previous agencies or internal marketing teams. Your research should also tell you which agencies you're up against, so you can play to your competitive strengths (like the automated capabilities and reporting that marketing automation provides), as well as which agencies you'll be working alongside should you get the business.

And remember to follow the instructions (or if you don't, be sure to have a really good reason for breaking the mold). Many clients will have specific requests about what they want, and if you don't follow them to the letter, you might find yourself losing out because the pitch isn't in the right format.



# 4

## Show – don't tell – what you will do.

Showcase the technology you will employ to best manage, optimize, and report on the client's programs and activities. This opens the door to marketing automation and primes the pump for potential upsells. Innovative marketing tactics like automated drip programs, segmentation, lead scoring, and social publishing can provide your clients the competitive edge while making you look good, too. When you look good to them, they look good to their bosses, and everyone wins.



### THE TACTIC



#### **Drip and Nurturing Programs:**

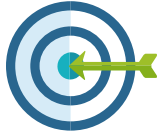
Engage prospects and customers with a series of messages delivered at scheduled intervals. Drip and nurturing email campaigns provide a reliable way to develop relationships. They create a rhythm of contact and keep the lines of communication open.

### THE PITCH

#### **We can promote a free trial of your software with a series of emails:**

- » Welcome the recipients and ask if they need help or have questions.
- » Invite them to join an online community for support.
- » When the trial is about to expire, send a series of “ending soon” alerts.
- » If the prospects don't respond within a certain timeframe, send a special reengagement offer.

## THE TACTIC



### **Segmentation and Lead Scoring:**

When you segment a list, you slice it into pieces based on various attributes or factors. You can segment by demographics (job title, location, industry, company size), behavior (website visits, purchasing activity), or a characteristic like lead score. Lead scoring uses a points system to assign values based on pre-determined criteria. Points accrue over a set amount of time and the sum of these points is the lead score.

## THE PITCH

- » To target a segment of hot prospects, we'll create a lead score, and decide that anyone with a score that's less than 20 is in the top of the funnel. If their score is between 20 and 40, they're in the middle, and a lead score over 40 is somewhere towards the bottom of the funnel. Then we'll target each segment with a series of custom-tailored messages and content to bring them along the journey.

## THE TACTIC



### **Social Publishing**

Deliver key assets through your clients' social channels. Share links to landing pages, forms, and media, all at the same time.

## THE PITCH

- » We'll provide links to a series of how-to videos and share them to Facebook, Twitter, and LinkedIn through well-timed posts that will go out over several weeks – and it all happens automatically.

And of course, you'll want to demonstrate how these services will directly impact your client's top line. Show how you can measure multiple dimensions of marketing effectiveness across the entire revenue cycle, manage the lead lifecycle, and stay on track with their strategic goals.

# 5

## Chart the journey to success.

**D**uring the pitch, prove to your prospective client that you know where they want to go, and that you have a plan that can help them get there. Take it as far into the future as possible. If you can outline a five-year strategy (or more) that makes it perfectly clear what you can do for your clients and when you will make it happen, you'll have a better chance of keeping them loyal over the long term.

The role of marketing agencies has changed dramatically in the past few years, and this rapid evolution seems to be speeding up rather than slowing down. Look at the explosion of mobile and social marketing during the last decade. What new technologies and changes in human behavior will drive the next big trends? And how will your modern marketing agency adapt to these challenges and turn them into opportunities for growth?

To continue delivering the creativity and vision that gets results, it's critical to keep up with the latest marketing trends and innovations. During your pitch, you may want to indicate some "blue sky" approaches that take advantage of rapidly approaching changes in the marketplace, such as demographic shifts, technology breakthroughs, and new developments in volatile channels such as SEO, mobile, and

social media. The more you can demonstrate your expertise in not only today's but also tomorrow's marketing best practices, the more value your prospects will perceive in you.

The days of the flashy, story-rich but substance-poor pitch are numbered, because numbers are what matter now. But the right marketing automation vendor can help you show them the numbers, while also making it easier for you to stay current on best practices, insights, news, trends, and everything else that can add value to your engagements.



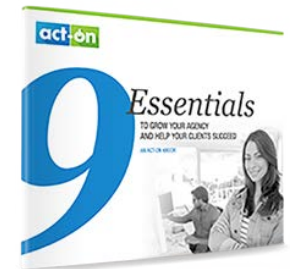
# Resources

## CASE STUDIES

- » Starshot saves time, delivers qualified leads, and manages nurturing campaigns for sales cycles up to three years long. [\[Learn more\]](#)
- » CoreElement redefined its focus and grew business 100%. [\[Get the story\]](#)
- » Circle S sees leads, opportunities, and web traffic soar. [\[See how it's done\]](#)
- » How Did NuGrowth Solutions sees 3X increase in leads? [\[Find out\]](#)
- » [Read more case studies](#)

## EBOOK

- » **Marketing Automation for Agencies**  
Get nine essential strategies to grow your agency and help your clients succeed. [\[Learn how\]](#)

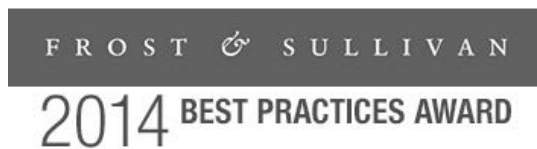


## TOOLKIT

- » **Structuring Agency Service Offerings**  
This toolkit gives you a step-by-step methodology for evaluating your current sales and marketing processes, establishing common metrics, creating buyer profiles, objectives, and more. [\[Get the toolkit\]](#)

There's more information about marketing automation for agencies available in the [Act-On Center of Excellence. Take a look >](#)





[See all of Act-On's awards and accolades](#)



## About Act-On Software

Act-On Software delivers cloud-based integrated marketing automation software. Marketers can manage all their online marketing efforts from a single dashboard that can be seamlessly integrated with CRM, giving sales access into various marketing functions. Act-On's fresh approach to marketing automation gives its users full functionality without the complexity other systems impose, and makes campaign creation and program execution easier and faster.

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