



# Ace Your Sales and Marketing with Industry Intelligence

Learn how to incorporate Industry Intelligence to create A+ results

vertical IQ<sup>®</sup> 





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**THROUGHOUT LIFE, WE GET GRADED. THIS OF COURSE BEGINS WITH ASSIGNMENTS AND REPORT CARDS IN PRIMARY SCHOOL AND CONTINUES THROUGHOUT OUR EDUCATION. BUT IT DOESN'T STOP THERE. MANY BUSINESSES "GRADE" THEIR CLIENTS, RATING THEM AS AN A, B, C, OR D BASED ON CRITERIA LIKE PROFITABILITY OR VOLUME.**

And make no mistake about it: As a sales or marketing professional, your clients and prospects also are "grading" your work, including your presentations, proposals, collateral, and even your company's website.

**Are you producing A work or barely passing in the eyes of your clients and prospects?**

At Vertical IQ, we talk a lot about using Industry Intelligence for pre-call planning; but if your organization is stopping there, it's like you're doing only half of the assignment.

There are nearly endless ways to get extra credit and gain an edge with your sales and marketing initiatives by incorporating Industry Intelligence to produce customized, industry-focused collateral.

So, sharpen your pencil, and direct your attention to the front of the classroom – we're here to impart our wisdom about how to get additional benefits from Industry Intelligence to win more deals and grow more relationships!



Are you making  
the grade?

# A refresher course on ABM and ABX: Renewing the focus on the client

The pandemic disrupted nearly every aspect of life. But it also created new opportunities to learn more efficient and effective ways to work with clients and prospects.

More and more sales and marketing professionals came to realize that a one-size-fits-all approach would no longer get you a passing grade with most business owners. What clients and prospects want is personalization – solutions tailored to their business’s unique needs. This is one of the reasons account-based marketing (ABM) and account-based experience (ABX) concepts have become the star pupils of the sales strategy world.

## ABM

### ACCOUNT-BASED MARKETING

is a marketing strategy that focuses resources – dollars and time – on specific target accounts. Typically, in ABM, personalized campaigns are used to engage with those clients or prospects.

## ABX

### ACCOUNT-BASED EXPERIENCE

is a concept in which separate teams work closely with one another to ensure all interactions with their brand are client-focused, including incorporating messaging that addresses the specific attributes and needs of the target account. The goal is to create a cohesive, streamlined experience throughout each stage of the buyer’s journey.

In short, when creating tailored client experiences is the focus of your ABM, you're also practicing ABX.

But bear in mind: This is a group project! To successfully implement ABM and ABX as a unified strategy, effective collaboration between sales, marketing, and client success is a must. These groups have to be in sync on target account qualification, resource allocation, roles, responsibilities, and more.

72%

of companies say  
ABM delivers higher  
ROI than do other  
types of marketing.



Source: ITSMA and ABM Leadership Alliance,  
2021 ABM Benchmark Study, September 2021

# Now, on to Client Satisfaction 101: Sales engagement and enablement

Sales engagement and sales enablement should form the foundation for everything your sales, marketing, and client success teams do.

Why, you ask? Because these concepts provide client-facing associates with the precise tools they need to successfully engage clients and prospects throughout the buyer's journey.

**Put simply:** The nexus of these two processes helps your overall team meet their goals by enabling sales professionals to more effectively engage in a client-focused, value-added context.

## SALES ENABLEMENT

The sales enablement process is all about bolstering your sales team. It helps you boost sales by properly supporting and preparing sales professionals to improve their performance. At its core, sales enablement means providing your sales team with everything they need to efficiently close a deal – everything from effective training to technology tools to tailored marketing/communication resources.

## SALES ENGAGEMENT

Sales engagement, on the other hand, is about nurturing and maximizing client and prospect interactions via strategic communications, data analysis, and client feedback. Using sales engagement techniques to improve the buyer-seller relationship creates a value-added, client-focused experience tailored to their interests and needs. The inevitable end result is a higher lead-to-prospect-to-client conversion rate.



# Get on the honor roll with Industry Intelligence

You understand the importance of ABM and ABX, focusing on the client experience. You know why sales enablement and engagement must work in tandem to effectively engage with clients and prospects. You have the knowledge needed to apply these concepts and techniques to the real world of sales and marketing. But this is where the A students get separated from the C students ...

The average student – or sales and marketing professional, in this case – is content with run-of-the-mill client and prospect touchpoints. They create one pitch book, proposal, or other collateral piece, and they simply change out the client or prospect name and logo. That’s what they consider “personalization.”

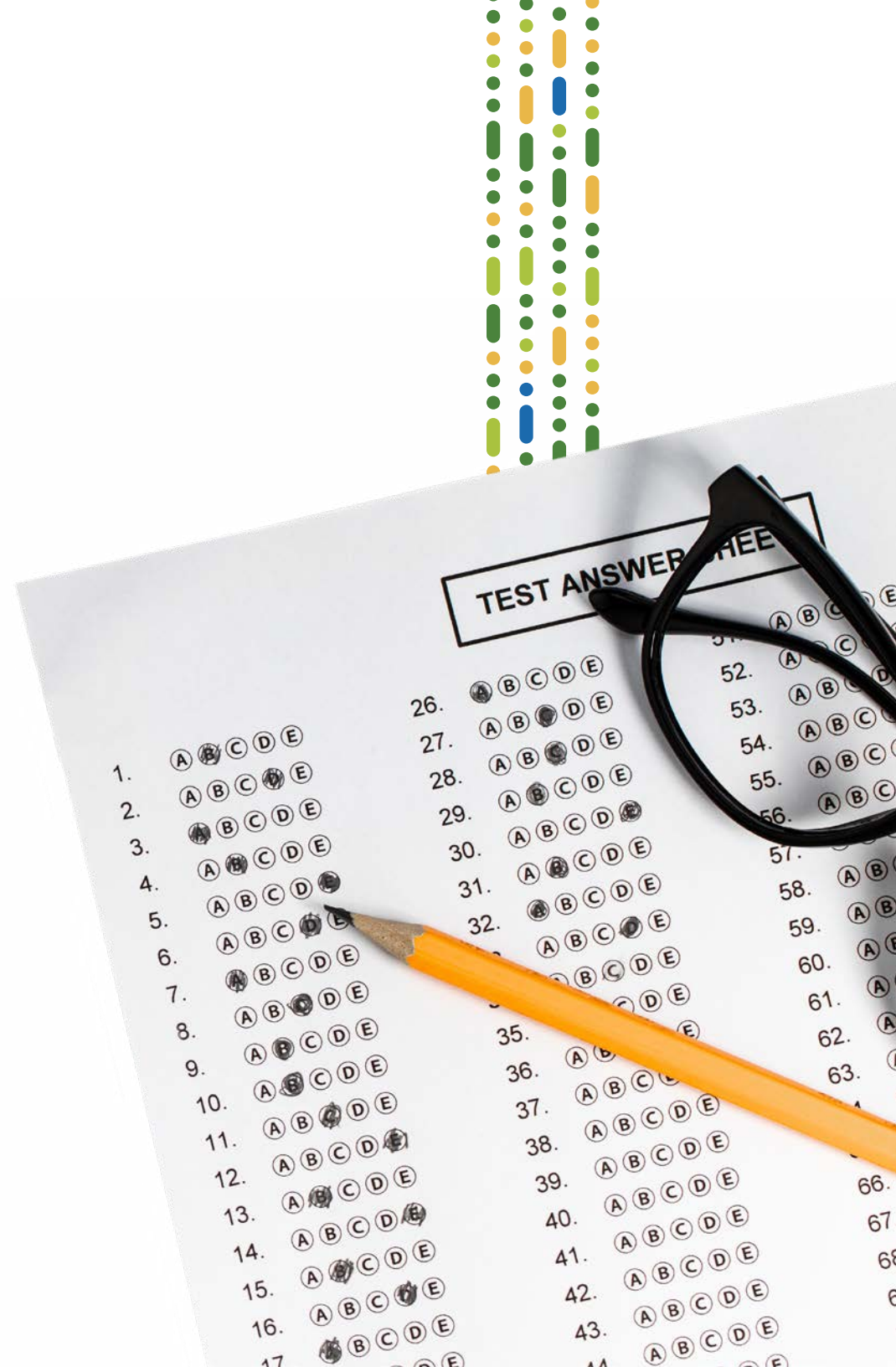


But today's business owners have much higher expectations for the companies they opt to work with.

They expect a truly customized experience – one tailored to their business's unique needs, challenges, opportunities. They are looking for someone who understands their industry and their business's place within the market. They expect you to be a value-added trusted advisor to them and their business.

And this is where Industry Intelligence becomes the great differentiator – setting A work apart from work that just barely gets a passing grade.

**Want to be the head of the class and wow clients and prospects?** Here's how to incorporate valuable industry insights and information into each communication, presentation, or touchpoint.







A masters-level class  
in tailored client and  
prospect communications



# Market sizing and planning



## THE TYPICAL MARKET SIZING AND PLANNING

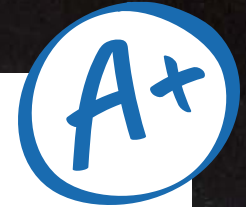
When planning target markets, you have to know how many prospects there are to go after and the size of those companies. To keep your sales pipeline full, accurate research is critical.

Basic market research usually includes intel such as:

- General background on the market
- Personas of ideal clients
- Product positioning
- Competitive analyses
- Budget

**But how can you gather such data without spending hours and hours doing research in the library (or rather, on Google)?**

## A+ MARKET SIZING AND PLANNING



**Leveraging Industry Intelligence to know the potential market for a particular space is critical,** bumping up your market sizing and planning from adequate to exemplary while saving you beaucoups of research time.

Using Industry Intelligence, you can answer questions like:

- How many competitors are there in the U.S. or even in a specific region?
- Is that number expanding or contracting?
- How big is the typical competitor in terms of employees and clients?
- Where are they located throughout the U.S. and the world?

**For bonus points,** you can even go beyond these types of stats, delving deeper into industry trends to tap and risks to avoid, all of which could affect the success or failure of your particular product in that segment.

# Website marketing copy



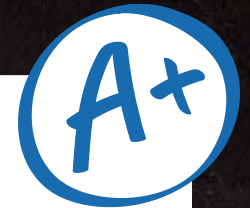
## THE TYPICAL WEBSITE COPY

Today, a company website is an essential part of your core curriculum! And there are several elements that all company websites should possess.

In addition to including copywriting that encapsulates your brand, a website should be:

- Scannable with headings and subheadings
- Easy to use with convenient hyperlinks and calls to action (CTAs)
- Mobile-friendly
- Rich with relevant keywords to boost your search engine optimization (SEO)

**But it's important to remember that your company website is likely the first impression you make on a prospect.** Be sure you're putting your best work forward so you'll pass that important initial test.



## A+ WEBSITE COPY

By incorporating relevant Industry Intelligence into your online presence, **you ensure your website resonates as you showcase your in-depth understanding** of your target clients' and prospects' niches.

To make sure your website gets an A+ grade, include information that educates, informs, and showcases your industry expertise in your target verticals – elements such as:

- Industry-specific whitepapers or case studies
- eBooks that cover a salient industry topic with insights and solutions
- Blog posts that discuss a common industry risk or trend and how your product or service can solve for it
- Client persona-specific webpages focused on a particular role or industry

This industry-specific content not only will drive SEO traffic to your site, generating new leads, **it also makes for great conversation pieces to share with prospects** as you nurture the relationship and is ideal for social media posts with inbound links.

# Social media



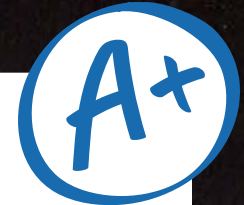
## THE TYPICAL SOCIAL MEDIA ENGAGEMENT

A robust social media presence offers your company a number of benefits at a relatively low cost.

The average company is utilizing social media to:

- Have a “conversation” and connect with their target audience
- Tap into client feedback or issues and respond as needed
- Boost their brand
- Drive traffic to their website

**But if this is all you’re doing with your social accounts, you’re missing a serious extra credit opportunity!**



## A+ SOCIAL MEDIA ENGAGEMENT

Another valuable but sometimes underappreciated perk of using social media effectively is the amount of analytic data you can derive about your clients and prospects. **The above-average “student” takes that data and synthesizes it to develop more tailored, industry-focused messaging in future social posts.** The tip-top student goes a step further still, sharing valuable industry-specific content to position themselves as a thought leader.

And Industry Intelligence makes it simple to get those bonus points, showcasing your connection to clients’ and prospects’ unique industry issues.

**For instance, you might share:**

- Salient industry trends for your top targeted niches and how your product or service can help them maximize that opportunity
- Local economic data that may be of use to clients and prospects operating within a certain geography
- Timely news articles that are relevant to your top prospects’ industries with an explainer of how you might solve for the topic

# Collateral



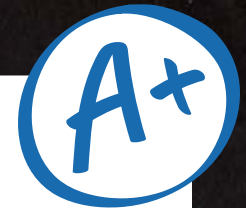
## THE TYPICAL COLLATERAL PIECE

Developing marketing materials that are visually appealing with compelling copy is a key marketing function. Brochures, postcards, email templates, eBooks, and more – the sales team requires these pieces to influence the buying decisions of your target clients and prospects.

In most cases, you would expect a typical collateral piece to include:

- Common pain points
- Details about your product or service
- Testimonials
- Calls to action (CTAs)

But if you create collateral pieces with only these details and call it a day, **you're not likely to score above average with your target audience.**



## A+ COLLATERAL PIECES

To get top marks on your marketing materials, you need to bring your A game! Instead of developing generic brochure-ware, showcase your smarts and differentiate your organization from similar competitors by using Industry Intelligence to create pieces that are customized to your top verticals.

Collateral pieces that fall on the right side of the bell curve will:

- Speak the client's or prospect's language by incorporating key industry terminology
- Highlight your experience working with other clients in that particular industry and the value-added benefits you brought to the table
- Note industry-specific issues your client likely faces and how your tailored solutions can address them

When your collateral addresses their unique industry issues and challenges, **your materials will capture their interest ... and dodge their recycle bin!**

# Email campaigns



## THE TYPICAL EMAIL CAMPAIGN

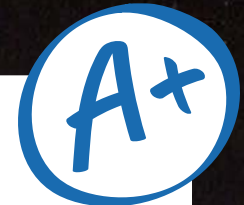
Email campaigns or cadences are a quick, simple way to stay in contact with clients and prospects. These email sequences are typically designed to touch base at certain points in the buyer's journey.

The average email within a cadence might:

- Pique curiosity with an engaging subject line
- Address an issue and offer a solution
- Promote your content or share other helpful content
- Offer a specific call-to-action (CTA)

The reality, however, is that **if your email is only average, it will likely remain unopened or get sent to the trash folder** – the virtual equivalent of a failing grade!

According to research from MailChimp, the average open rate for email campaigns is just 21 percent.



## A+ EMAIL CAMPAIGNS

For an email campaign to be successful, you first have to entice people to open the email and then properly incentivize them to take whatever CTA the email intends to achieve. Accomplish both of these things, and you will make the grade and defy the email open rate odds! The key is personalization.

Show that you understand the assignment when it comes to marketing email campaigns by incorporating Industry Intelligence that specifically matches the client's or prospect's interests or pain points – personalized content such as:

- Industry-focused news articles
- Benchmark data for their industry
- Industry-specific downloads like eBooks, whitepapers, or infographics
- The latest trends impacting businesses within their niche

Whether it is a cold email outreach or a touchpoint with a long-time client, make sure **your emails stand out in the recipient's mailbox by incorporating Industry Intelligence.**

# Call sheets



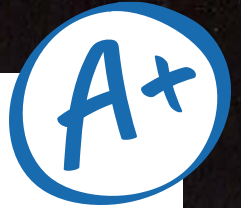
## THE TYPICAL CALL SHEET

**Did you ever use your friend's class notes to cram for a test?** Neither did we. :) But in the business world, call sheets – which are usually between one and three pages in length – are basically the time-saving study guide to help you prepare for the test, maximizing each opportunity with the client or prospect.

**A typical, run-of-the-mill call sheet might include details such as:**

- The goal for the call
- An opener or ice breaker
- A few of the “right” questions
- A list of the client's or prospect's competitors
- Common sales objections

But of course you want to be certain your team is using the notes from the star student and not from the class slacker!



## A+ CALL SHEETS

While there's nothing wrong with the specs of this typical call sheet template, it isn't exactly exemplary work. **To take your team's call sheets up a notch, choose the 20 or 30 top industries your company calls on and develop more focused “study guides”** that include the latest Industry Intelligence.

**You'll get high marks on your work when you incorporate details like:**

- Background information on how the client's or prospect's industry operates, key buyers, and mission-critical suppliers
- Common industry terminology, with the definition, which can be worked into conversations
- Key competitors, and the products/services most frequently used by those competitors ... and why
- Typical challenges faced by others in the industry and how your product solves for them
- A few current, relevant industry news articles, which can serve as talking points or as a printed/emailed leave-behind

# Pitchbooks/ Presentations



C

## THE TYPICAL PITCHBOOK/ PRESENTATION

You got your foot in the door and have an opportunity to present your case to a prospect or existing client – it's your chance to share your story and tout your product or service. **But what will you say?**

Almost all pitchbooks and presentations, regardless of the seller's industry, use a structure that looks something like:

- Situation or current state, which lays out the general details about your prospect's or client's business
- Risk, issue, or problem, which identifies the challenge your client or prospect is facing
- Hypothesis or solution, where you explain how your product or service can address their issue

But the truth is a **pitchbook or presentation that uses this cookie-cutter formula is unlikely to get top marks ... or win the deal.**

A+

## A+ PITCHBOOKS/ PRESENTATIONS

When you focus your pitch on the client or prospect's industry – instead of your product or service – you open the door to a more engaging, informative conversation. **Instead of you doing all of the talking, you can get the client or prospect sharing**, which will give you the reconnaissance you need to provide highly customized advice and solutions.

That's why an A+ pitchbook or presentation might include Industry Intelligence elements such as:

- A brief general description of the client's or prospect's industry, showcasing your knowledge of their niche
- Details about the economic landscape of the area(s) in which they do business and how data like real estate values, employment rates, or cost of living can impact them
- Important challenges or trends occurring within the industry, which your product or service might be able to address



# Sales proposals



## THE TYPICAL SALES PROPOSAL

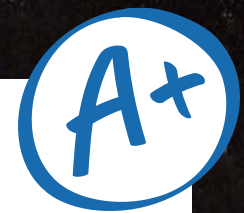
You've put in the work and the prospect has asked for a sales proposal – it's like your final exam!

The typical proposal seeks to make a closing argument as to why the prospect should choose your organization and sign on the dotted line, and often will include:

- An attractive, easy-to-digest design with compelling imagery
- A cover letter and executive summary
- Pricing information
- Proof points and reasons to buy now
- Outcomes data and testimonials
- Next steps

**But let's face it: If you're looking to seal the deal, cookie-cutter just doesn't cut it.**

A lackluster, "average" sales proposal is unlikely to get above-average results or convince the prospect that you will provide the tailored solutions their business needs in order to succeed.



## A+ SALES PROPOSALS

Yes, it's time to go back to your **ABCs: Always be closing!** And remember that a sales proposal is yet another opportunity to highlight your industry expertise to the prospect.

Remind them once again that you are a cut above the competition by creating a value-added pitch that showcases **Industry Intelligence**.

- Write a cover letter that speaks to specific trends and challenges within the prospect's industry and how you will solve them.
- Develop an executive summary that features industry-specific terminology.
- Include tailored content throughout such as:
  - Industry forecast information
  - Financial benchmarks
  - Business valuations
  - Local economic data

**When you've done your homework, it's easy to ace the final exam!** Industry Intelligence is like the CliffNotes to include industry-specific content within your sales proposals and make that compelling closing argument that successfully converts prospects into clients.

# Annual client review



## THE TYPICAL ANNUAL CLIENT REVIEW

When done effectively, an annual client review can be useful to both the client and your organization. It's an opportunity to proactively examine what is working well, shift your strategy if needed, and, ideally, consider ways to expand the relationship.

In most cases, such reviews will include:

- A review of wins in the past year
- Opportunities for growth in the coming months and years
- Goal-setting
- Open discussion time
- Next steps

By design, an annual review is tailored to the client's business, **but unless you bring value-added information to the conversation, you're unlikely to earn extra credit** (or extra business) from the client.



## A+ ANNUAL CLIENT REVIEWS

**Remember:** Business owners want to be top of their class too! But they are busy, so they might need a super-smart study buddy to lend them a helping hand.

Your team will get a gold star in the client's book when you take the time to include value-added Industry Intelligence in their annual review such as:

- The latest trends and risks occurring within their industry (and how you can help them tackle these issues)
- Thought-provoking, conversation-starter questions pertaining to their vertical
- Benchmark data to understand how they stack up to their competition
- Forecast figures to help plan for future ups and downs

**For even more extra credit and to stay top-of-mind, don't forget to follow-up periodically with clients**, providing useful touchpoints throughout the year – insights such as:

- Current news articles that pertain to their niche
- Valuation information to get a handle on their company's potential worth
- Industry insights on their buyers and suppliers

# Earn top marks with Industry Intelligence from Vertical IQ

Just as your teachers wouldn't accept sloppy or half-completed assignments, today's business owners won't settle for sales pitches that come across as generic, rote memorization.

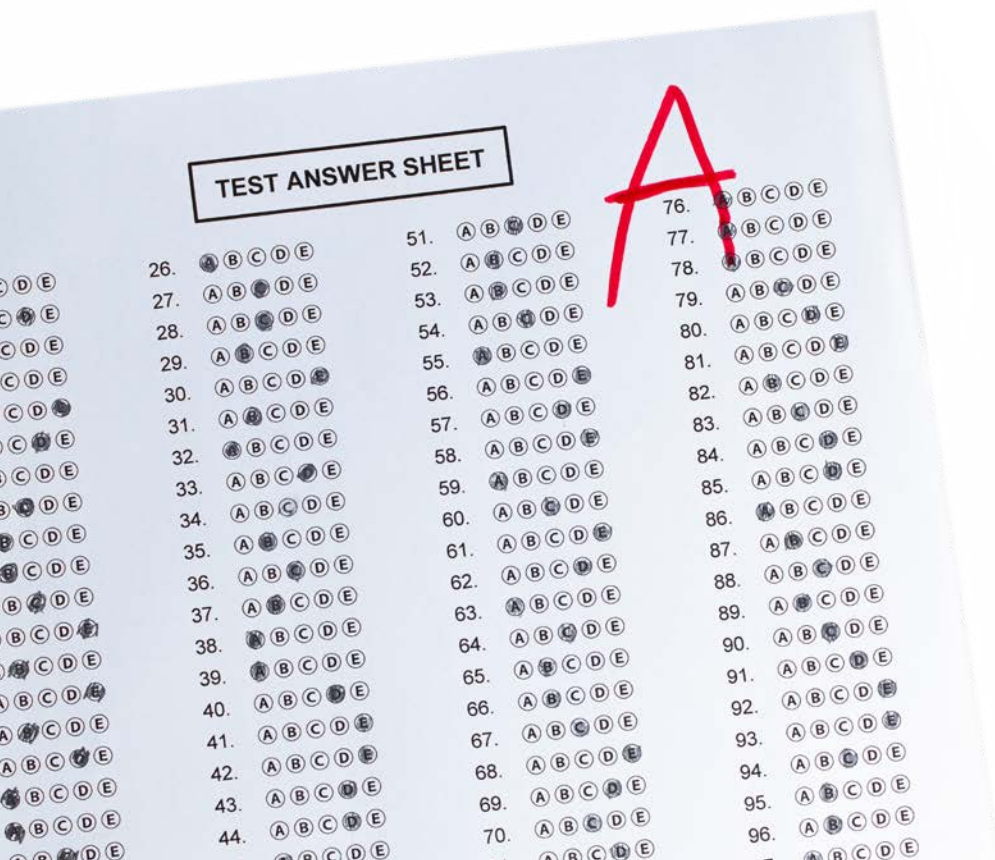
Mediocre marketing materials that give the same ol' spiel to every prospect also will get a failing grade ... and will fail to move the sale forward.

**Today's business owners want expertise; they want personalization; they want value.**

Industry Intelligence, like you'll find on Vertical IQ, gives you and your team the expert insights needed to channel your collective brainpower into A+ sales and marketing initiatives that are personalized to add value and focus on client success.

## VERTICAL IQ'S INDUSTRY INTELLIGENCE HELPS YOUR SALES AND MARKETING TEAM:

- Prepare quickly for client meetings
- Understand potential challenges your clients may face
- Incorporate industry-specific insights into each client communication or presentation
- Compile thought-provoking, tailored questions that will get business owners talking
- Save time and money by streamlining the research tools needed to create industry-focused materials and touchpoints throughout each stage of the buyer's journey





# Get started today!

## WIN MORE RELATIONSHIPS AND CLOSE MORE DEALS WHILE SAVING TIME AND EFFORT WHEN YOU TAP INTO VERTICAL IQ'S INDUSTRY INTELLIGENCE!

Our in-depth Industry Profiles covering more than 97 percent of the U.S. economy and Canada are a time-saving solution to help your team provide the expertise clients need to succeed within their niche.

On Vertical IQ, you'll also find over 3,400 Local Economies reports for cities and counties across the U.S. – a valuable resource for businesses considering strategic growth.

Make the grade with clients and prospects by harnessing the power of Industry Intelligence from Vertical IQ. **Now *that's* smart!**

VISIT [VERTICALIQ.COM](http://VERTICALIQ.COM) OR EMAIL [INFO@VERTICALIQ.COM](mailto:INFO@VERTICALIQ.COM) TO LEARN MORE.



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