Go-To-Market Planning Exercise
Does this landscape describe your revenue challenge?

- 80% of new customers today are from referrals and networking.

- Lack of defined customer acquisition model:
  - Process to cost-effectively acquire new customers; and
  - Making partnerships effective and revenue producing.

- Hiring, partnering with results-oriented personnel is difficult at-best.

- Overcoming committee buy and collapsing sales cycle is an issue.

- Lack of scale, measurement and metrics, and forecast pipeline.

- Unknown cost to acquire revenue across mediums? (Direct vs. referral vs. channel vs. acquisition)
Developing a Go-To-Market Strategy

Key Components

1. Highly Define the Value Proposition
2. Segment and Profile the Target Market
3. Goal Setting by Distribution Alternative
4. Define Tactics: Marketing, Partner, and Sales Support Programs
5. Establish Communications Rhythms
Highly Define the Value Proposition

Key Components
1. Sizable market opportunity validated;
2. Solves a priority customer pain/need;
3. Market and competitive research completed and niche or platform identified as #1 or #2 opportunity;
4. Make, buy, partner decisions clearly delineated; and
5. Unique competitive differentiators.
### Segment and Profile the Target Market

<table>
<thead>
<tr>
<th>METROPOLITAN AREA</th>
<th>IDEAL TARGETS</th>
<th>TOTAL POD SIZE TARGET BUS.</th>
<th>MARKET VALUE</th>
<th>TOTAL POD VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Houston TX CMSA</td>
<td>1,573</td>
<td>4,437</td>
<td>$14,043,744</td>
<td>$39,613,536</td>
</tr>
<tr>
<td>DFW</td>
<td>1,915</td>
<td>2,712</td>
<td>$17,097,120</td>
<td>$24,212,736</td>
</tr>
<tr>
<td>Aus/SA</td>
<td>949</td>
<td></td>
<td>$8,472,672</td>
<td></td>
</tr>
<tr>
<td>Miami–Fort Laud</td>
<td>1,487</td>
<td></td>
<td>$13,275,936</td>
<td></td>
</tr>
<tr>
<td>Tampa</td>
<td>691</td>
<td></td>
<td>$6,169,248</td>
<td></td>
</tr>
<tr>
<td>Orlando, FL MSA</td>
<td>534</td>
<td></td>
<td>$4,767,552</td>
<td></td>
</tr>
<tr>
<td>Atlanta, GA MSA</td>
<td>1,438</td>
<td></td>
<td>$12,838,464</td>
<td>$17,445,312</td>
</tr>
<tr>
<td>Charlotte, NC MSA</td>
<td>516</td>
<td></td>
<td>$4,606,848</td>
<td></td>
</tr>
<tr>
<td>Phoenix, AZ MSA</td>
<td>1,068</td>
<td></td>
<td>$9,535,104</td>
<td>$16,945,344</td>
</tr>
</tbody>
</table>

### Market Analysis:

- **Charlotte, NC MSA**: 516, $4,606,848
- **Phoenix, AZ MSA**: 1,068, $9,535,104
- **Atlanta, GA MSA**: 1,438, $12,838,464

### SME ERP Solutions Breakdown

- **SAGE**: 17%
- **Microsoft**: 15%
- **Oracle**: 7%
- **Intuit**: 4%
- **Agresso**: 3%
- **Custom**: 4%
- **Unsure**: 12%

### A Lead (Outsourced IT) B Lead (IT Handled by non-IT Professional) C Lead (Internal IT Professional) Total Emails

<table>
<thead>
<tr>
<th>MSA and Population Rank</th>
<th>A Lead</th>
<th>B Lead</th>
<th>C Lead</th>
<th>Total Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td>Houston – 10</td>
<td>301</td>
<td>931</td>
<td>820</td>
<td>2,052</td>
</tr>
<tr>
<td>DFW – 8</td>
<td>334</td>
<td>980</td>
<td>638</td>
<td>1,952</td>
</tr>
<tr>
<td>Austin / San Antonio - 34</td>
<td>204</td>
<td>424</td>
<td>425</td>
<td>1,053</td>
</tr>
</tbody>
</table>
### Goal Setting by Distribution Alternative

<table>
<thead>
<tr>
<th>Distribution Alternative</th>
<th># of Leads</th>
<th># of Opportunities</th>
<th># of Customers</th>
<th>Revenue Goal 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partners / Channel / Brokers</td>
<td>3,576</td>
<td>144</td>
<td>36</td>
<td>$1,408,572</td>
</tr>
<tr>
<td>Online Sales</td>
<td>596</td>
<td>na</td>
<td>6</td>
<td>$330,006</td>
</tr>
<tr>
<td>Telemarketing (Phone)</td>
<td>2,185</td>
<td>221</td>
<td>22</td>
<td>$1,347,148</td>
</tr>
<tr>
<td>Organic Field Sales (Location- Centric)</td>
<td>1,788</td>
<td>78</td>
<td>18</td>
<td>$1,285,866</td>
</tr>
<tr>
<td>National or Regional (Travel)</td>
<td>1,192</td>
<td>50</td>
<td>12</td>
<td>$1,104,648</td>
</tr>
</tbody>
</table>
E-Marketing Best Practices

How to generate interest, website traffic, sales leads and improved search engine rankings » » »

- **Buyer Purchasing Behavior**
  - More likely to ask a peer (40% of the time) or search online (25% of the time) than respond to an email, phone call, trade show contact, or a print ad.
  - Increasingly rely on the Internet as a trusted source of information when making purchasing decisions.
  - Participating in the growing popularity of blogs, podcasts and webcasts as sources of information.

- **HR Supplier Reaction**
  - Growth of direct marketing (especially Internet Marketing) and devaluation of advertising.
  - 2008: Although 60% of larger companies are cutting their marketing budgets, smaller companies are only cutting by 13% and 34% of marketers at smaller companies are actually increasing their budgets.
    - Sales cycles are lengthening so build your pipelines now.
    - Marketers shifting strategies from traditional to online tactics.
Holistic E-Marketing Process

- **1. Strategy**
  - Messaging/Boiler Plate “About Us”
  - Web Site SEO
    - Keywords
    - Title and Meta Tags
    - Body Copy and Keyword Links
    - Site Map
    - Natural Language URLs
    - HI’s and ALT’s
    - Additional Content
  - “Marketing” Web Site
    - Lead Generation Form(s)
    - Intuitive GUI
    - Prominent Branding
    - “Lead Capturing” Content Offers

- **2. Content Development**
  - White Papers/Articles
  - Case Studies
  - Surveys/Research Reports
  - Webcasts

- **3. Monthly Press Releases**
  - “Search Optimized” Releases
  - Media Releases
  - Media Relations
    - List Management
    - Editorial Calendar
    - Monitoring
    - ProNet Monitoring
    - “Pitch” Letters/Emails
    - Analyst Briefings
    - Direct Email Marketing

- **Measurable Results**
  - Online Visibility
  - Site Traffic
  - Sales Leads
  - Improved Search Engine Rankings

**Integration with Other Marketing Activities**
- Trade Show Exhibiting/Sponsorships/Speaking
- Direct Marketing - Print, Email
- Advertising - Print, Online, Pay-per-click
- Blogs/Podcasting
- eNewsletters
- Award Competitions
- Flash Demos
- Byline Articles

**E-Marketing Process** - a 3-step process that produces measurable results focusing on:

1. **Infrastructure** - your business strategy, messaging, website SEO and marketing website
2. **Content** - white papers, research reports, case studies, surveys and webcasts
3. **Promotion** - monthly releases, search-optimized releases and direct marketing
### Profiling Best Practices Overview

- $1 per contact email to acquire profiled
- $10 per “profile”

<table>
<thead>
<tr>
<th>Size and Stage of the Market</th>
<th>TX</th>
<th>MW</th>
<th>SE</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target market firms (<em>detailed in investment thesis</em>)</td>
<td>573</td>
<td>949</td>
<td>1915</td>
<td>4437</td>
</tr>
<tr>
<td>Profiles (Email, Address, Title, EEs, LOB)</td>
<td>693</td>
<td>222</td>
<td>645</td>
<td>1560</td>
</tr>
<tr>
<td>Lost - Competitor</td>
<td>31</td>
<td>0</td>
<td>13</td>
<td>44</td>
</tr>
<tr>
<td>Lost - Cancelled App</td>
<td>5</td>
<td>1</td>
<td>10</td>
<td>16</td>
</tr>
<tr>
<td>Stage/Probability 20% - PBP (Prospective Business Pool)</td>
<td>151</td>
<td>9</td>
<td>36</td>
<td>196</td>
</tr>
<tr>
<td>Stage/Probability 30% - Mid-level</td>
<td>4</td>
<td>1</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Stage/Probability 40% - Appointment</td>
<td>19</td>
<td>16</td>
<td>22</td>
<td>57</td>
</tr>
<tr>
<td>Stage/Probability 50% - Decision Maker Met</td>
<td>7</td>
<td>0</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td>Stage/Probability 70% - Assessment</td>
<td>11</td>
<td>1</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>Stage/Probability 80%+ : Negotiation</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Stage/Probability 100% - New Clients</td>
<td>46</td>
<td>1</td>
<td>3</td>
<td>50</td>
</tr>
</tbody>
</table>
Tactical Clarity: Efficient Customer Acquisition Process

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>PROSPECT</th>
<th>LEAD</th>
<th>OPPORTUNITY</th>
<th>CUSTOMER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Awareness &amp; Contact Info Identified</td>
<td>Identify Decision makers and buying criteria</td>
<td>Map committee buy</td>
<td>Identify Customer Lifecycle Points</td>
</tr>
<tr>
<td></td>
<td>Title</td>
<td></td>
<td>Create sponsor</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Size</td>
<td></td>
<td>Build business case</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Geography</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interest/Pains</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Qualification**
- Build list of “Select Target Market” Criteria
- Drive Interest based on street message and convert to strategic benefits
- Demonstrate ROI, uniqueness of model and value-proposition
- Make Customer Purchase Decision Simple by onboarding clients with Project or Audit
- Customer Lifecycle Management
Nurturing Sales Process

Qualified Responses
0-10%
- Email marketing
- Research campaigns
- Integrated direct campaigns
- Online
- Canvassing
- Website

Setting Qualified Meetings &
Developing Business Value
10%-30%
- Webinars
- Qualified Appointment Setting

Winning the Opportunity
30%+
- Sales

Monthly eNews Nurturing

Integration (Technology & Data Management)

Direct Marketing

Inside Sales

Field Sales
## Summary Go-To-Market Roadmap

<table>
<thead>
<tr>
<th>Decision</th>
<th>Strategic</th>
<th>Operational</th>
<th>Tactical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dedicated resources (Full-time)</td>
<td>✔</td>
<td>✗</td>
<td>Partly</td>
</tr>
<tr>
<td>Realized, holistic customer acquisition model/plan</td>
<td>✗</td>
<td>Financial Needs to be developed</td>
<td>Partly</td>
</tr>
<tr>
<td>Productize the core and add-on offerings</td>
<td>✗</td>
<td>Financial / Strategic</td>
<td>YES</td>
</tr>
<tr>
<td>Expertise</td>
<td>✔</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Significant revenue from strategic alliances and channels</td>
<td>✔</td>
<td>Financial</td>
<td>YES NO</td>
</tr>
<tr>
<td>High volume lead environment supported by online sales team</td>
<td>✔</td>
<td>Depends</td>
<td>YES NO</td>
</tr>
<tr>
<td>30 raving fan, referenceable named accounts</td>
<td>✔</td>
<td>NO</td>
<td>NO WIP</td>
</tr>
<tr>
<td>Vertical concentrations</td>
<td>✔</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Vertical product managers</td>
<td>✔</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>
solving the value equation

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