Data-driven Marketing Playbook Template

[Insert Company Name]

Welcome!

This playbook is here to get you up to speed with working at the high-performance, lightning fast, well-oiled marketing engine at [INSERT YOUR COMPANY].

Here, we've documented a plan that sets the standards for cross-team collaboration, strategic alignment, and campaign execution.

This is not a set of rules, but rather a collection of tips, tricks, and lessons we've learned the hard way during our journey at the company. Take them with a grain of salt and make them your own—it's the end result that matters.

Mikko Honkanen
CMO

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Our marketing team

[Write the one clear objective for the the marketing at your company]

The overall purpose for marketing at [company name] is simple: to **maximize the amount of revenue** generated by the company through marketing tactics.

Your role

[Write the job description of a marketing specialist at your company. This will set clear responsibilities and goals. For example, the below describes the role of a Content Marketing Manager at Vainu.]

- You will work closely with your colleagues in sales and product development to create inspiring stories and articles on B2B sales and marketing.
- You'll be responsible for our content strategy and become the voice of the company.
- You'll streamline content creation by assigning work, setting deadlines, and managing our team of freelance writers and creators.

Our team

[Insert organizational chart.]

Global Marketing Team Team members Role of the department	**Local Marketing Team** Team members Role of the department	**Marketing Ops Team** Team members Role of the department

Marketing department

Global marketing engine

The marketing team strives to organize according to an "ideal setup", i.e. a team structure that, **when fully fleshed out and with the teams performing**, is well equipped to hit the objectives set.

[Your marketing team's structure and organization]

Marketing disciplines

[Explain here the main marketing activities to achieve your goals.]

Operations and analytics

Provides full transparency into how different marketing efforts are impacting our bottom line across all business units.

Communications

Manages the flow of information and provides exposure to our audiences on topics of public interest where we have expertise.

Paid acquisition

Runs paid campaigns across channels to acquire new customers, with a positive ROI.

Website Conversion

Successfully converts website traffic into revenue—as much of it as possible.

Lifecycle nurturing

Creates drip campaigns to nurture leads towards conversion.

Customer evangelism

Facilitates happy customers turning into fans that actively promote us across all channels.

Product marketing

Optimizes offered products and pricing to maximize revenue.

Content marketing

Consistently creates the right resources for each stage of the funnel to help contacts move forward in the sales process.

Objectives and strategies

[Write the common values that make your company thrive.]

To accomplish the **goal of maximizing revenue**, we incorporate two overall approaches:

1. Methodically **maintaining and developing the overall 'marketing engine'**: the brand, marketing database, assets, and processes that result in inbound leads or support the overall business objectives over time.

2. Using the marketing engine to **maximize the output of leads and revenue** in any given timeframe, but not at the expense of the engine's long-term output.

Routines

[List your day-to-day activities and main routines.]

1. Monthly reporting on key metrics: revenue, demo requests / no-touch signups, new contacts, website traffic.
2. Continuously optimizing the website for relevant keywords in search engines.
3. Producing new case studies as sourced by Customer Success.
4. Educating our customer base on updates to our product offering.
5. Routinely sharing new content: newsletter, blog posts, downloadable resources etc.
6. Routinely updating existing content to keep it relevant and boost SEO.
7. Uphold behavior-based automated email workflows for both prospects and customers.
8. Share different content types across our social media channels.
9. Run campaigns to get into other people's channels.
10. Run paid ad campaigns where it has a positive ROI.
11. Support internal stakeholders with how to communicate effectively and correctly.
12. Localize communications to best serve our local markets.

Brand consistency

[Your tone and voice. Ensure brand guidelines and your content style guide are clear.]

When it comes to building a memorable brand, it's all about consistency. Giving the audience a consistent experience builds loyalty and trust.

Our voice and tone expresses **[Insert your company]** values and way of thinking. It tells who we are as a company today.

Our brand guidelines and content style guide provide clarification to everyone within Vainu on what content rules to follow in order to keep everyone's tone of voice on the same page.
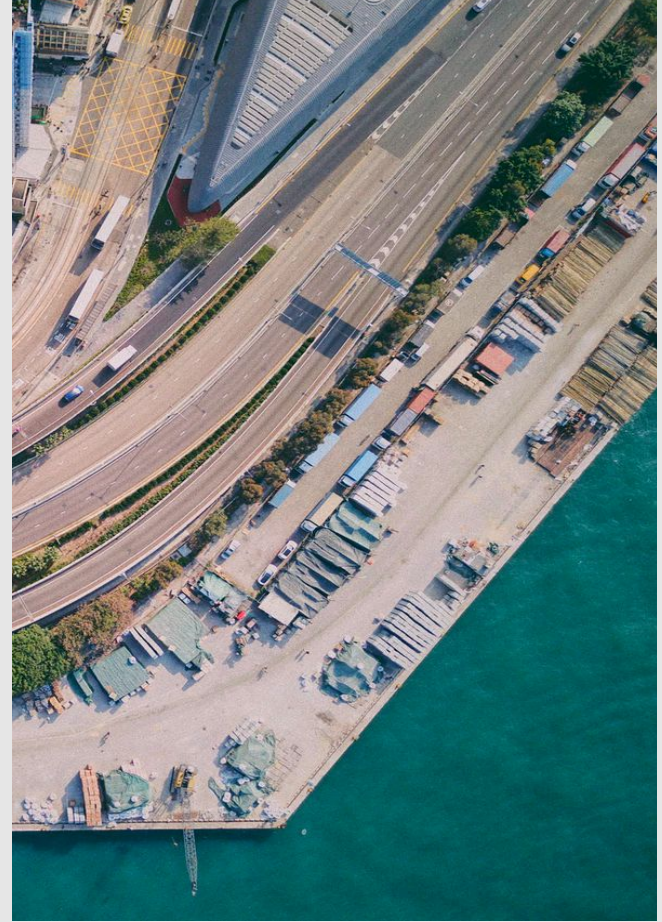
Our tech stack

We use a modern stack of digital tools to make sure we're efficient throughout the process. Here are your daily workhorses:

HubSpot

Our marketing automation platform—where we attract and nurture inbound leads.

ahrefs

Our SEO tool—where we optimize our content to get more traffic from search engines.

zoom

Our online meeting tool—how we present our offering remotely.

VAINU

Our sales intelligence tool—how we know who to target and when.

slack

Our communications tool—where we interact with each other.

Our offering

[Your company's mission in one sentence.]

Vainu is building a Sales Intelligence platform that helps companies achieve **personalization at scale** in sales and marketing through real-time company data.

Our offering

[Explain your offering, your product's features, and your unique selling points. Your marketing team must know your offering inside out and be expert users of your product.]

Vainu's *real-time company data platform* collects available information from open and public sources, transforms this raw data into meaningful company facts, and connects the data to our customers' business systems.

180M+	**195**	**400K+**	**30**
Companies in the database	Unique data points	Daily processed news articles	Days to refresh entire DB

Our services

[Describe additional services and up-sell opportunities.]

Onboarding

Implementation and training to ensure our customers get up and running with the platform as quickly and smoothly as possible.

Split into standard and premium onboarding depending on the complexity of the customer organization's needs.

Professional services

Additional services for purchase throughout the contract period to get even more out of your product's experience.

These include workshop facilitation, data or technical consultation, and sales training.

Our audience

[Summarize your target audience's goals and needs.]

Our audience wants to increase conversions, sales, and achieve **business growth**.

Ideal customer profile (ICP)

[A description of a fictitious account. Your dream, perfect-fit customer. Sales and marketing team must align over an ICP.]

Over the years, we've noticed that our best customers, i.e. the ones who see the most benefit from our platform and stick with us, have a common trait. We've decided to only sell to those who fit that criterion.

Buyer personas

[A detailed analysis of the people who buy from you.]

Within our ICP, we've identified these ideal buyer personas: people whose needs our solutions best solve.

Buyer persona 1

Buyer persona 2

Buyer persona 3

Persona:

Sales Director,
VP of Sales

Persona: SMB to Mid-market,
reports to the CEO

Goals: Increase sales, prevent churn,
manage the sales team

Challenges: Motivate the sales team, find
leads, speed up the sales cycle

Persona: Marketing Lead

Chief Marketing
Officer, CRO

Persona: Mid-market to enterprise,
Part of the executive team

Goals: Deliver highly converting leads
to the sales team

Challenges: Sales and marketing alignment,
data quality, lead conversions

Persona: Data Lead

Head of IT /
Operations / CRM
/ Analytics

Persona: Enterprise
Approves data decisions

Goals: Improving processes, driving
efficiency, security and compliance

Challenges: Data accuracy, data
management, data flow

Our strategies

[Include in this section a summary of your essential marketing plays.]

Our tricks and lessons learned. How we drive awareness, generate leads, and contribute to company's revenue.

Customer segmentation
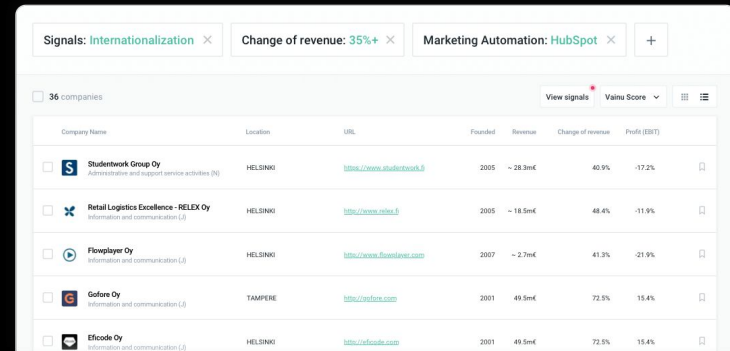
Micro-segments: Use the Vainu Custom Industry company property/data field to uncover unique customer segments based on the most relevant data points.

We concentrate on acquiring specific high-value customers with highly targeted, personalized campaigns.

We add companies to our account-based marketing campaigns automatically as they go through significant company changes by following trigger events.

[How do you acquire and nurture new customers?

Explain your customer segmentation strategy.]

Ideal timing

We launch a new campaign wherever a new company matches our ICP.

We connect our CRM and marketing automations tools with Vainu to detect high buyer intent and when an account shows such behavior, we auto-trigger a customized workflow to nurture them.

[What's the best timing to launch a new marketing campaign?

Define what kind of behaviour by a company means high buyer intent for you.]

Content marketing strategy

3 main objectives: a) lead generation, b) drive conversions, and c) brand awareness.

We publish a new blog post every week and a long-form content piece every quarter.

Organic search is our primary distribution channel.

Our core topics are: **[insert your pillar content]**

[How do you plan, produce, and manage content?

Describe the essentials of your content marketing strategy.]

SEO

You'll find our list of keywords here **[insert link]**.

We optimize our content for search intent to attract the right audience.

We actively search for backlink opportunities.

[What's your process of planning and implementing steps designed to improve search engine rankings?

Explain how you aim for top placement in SERPs.]

Personalization

Behavioral data and insights from company information helps us personalize the message for the leads that matter the most.

We create different audiences based on relevant data points.

[What are your tactics to deliver personalized experiences?

List the tools to create tailor-made messages for your audience.]

Lead management

We enrich inbound leads with key data points from a sales intelligence platform and build rich profiles.
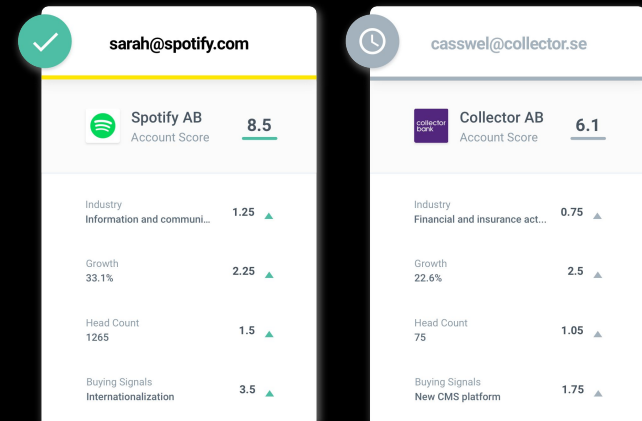
Company data points improve our lead scoring models and helps us prioritize.

We use real-time company information to enrich, score and qualify your leads on the basis of attributes that matter, like company size, growth rate, industry and activities that show high buyer intent.

We automatically route leads to the right reps back in our CRM by using those data points to create the right segments.

[How will you route leads to the sales team? How will you prioritize them?

Map out the key areas of your lead management process.]

sarah@spotify.com

Spotify AB
Account Score **8.5**

Industry	
Information and communi...	1.25 ▲
Growth	
33.1%	2.25 ▲
Head Count	
1265	1.5 ▲
Buying Signals	
Internationalization	3.5 ▲

casswel@collector.se

Collector AB
Account Score **6.1**

Industry	
Financial and insurance act...	0.75 ▲
Growth	
22.6%	2.5 ▲
Head Count	
75	1.05 ▲
Buying Signals	
New CMS platform	1.75 ▲

Targeted advertising

We amplify the reach of our content through ad spend.

We get in front of the companies that matter by building target lists based on very specific company attributes.

We draw insights from company information to craft relevant ads that resonate with our target audience.

[What's your ad strategy?

Describe your tactics to get the best bang for your buck.]

Smarketing

Our goal at [company name] is 100% sales and marketing alignment.

Sales and marketing alignment

We've established a service-level agreement with the sales team.

Marketing commits to generate X number of qualified leads each month.

Handoff occurs when **[insert your criteria]**

[How is the collaboration with your sales team? Have you established common goals?

Explain here how sales and marketing work together.

Arrange one-to-one meetings with a sales rep and encourage your new hire to join a sales call.]

Resources

Sales and Marketing Intelligence blog

Our collection of practical tips for using real-time company data to be more relevant in sales and marketing.

https://www.vainu.com/blog

Sales-marketing SLA template

Our basis for sales and marketing collaboration. Lead quality and quantity expectations.

[Get template]

Real-Time Sales Master Class

Our methodology for selling summarized in seven lessons and videos.

[Watch]

The Beginner's Handbook to ABM

Get started with account-based marketing with one easy-to-read guide.

[Read]

VAINU

Looking to supercharge your marketing with data-driven tactics?

Contact us at vainu.com to learn exactly how your team could be using real-time company information for customer segmentation, lead enrichment, personalization, and targeted ads.