

Marketing Planning, Sales Team Management & Social Media Usage

Insights from the April 2022 PIPI Study

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Providing regional printing association members a printing
industry outlook view and actionable knowledge



***Marketing Planning,
Sales Team Management,
Social Media Usage:
Insights from the April 2022 PIPI Study***

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Are you planning your marketing approach effectively?

Are you managing your sales team effectively?

Are you using social media effectively?

These are vital, but tough, questions for most small business leaders. Many small business leaders do not have a deep background in these areas, nor do they have the resources to hire marketing managers. Furthermore, small business leaders' days are often consumed with operations issues, human resource matters, and making a profit (to name a few tasks on their desks). Consequently, do they have time to invest in marketing planning and sales management?

As our industry is changing, a printing firm's marketing approach and sales management are dynamic, continually changing. Indeed, marketing and sales management are much different from when I led a printing firm 10 or so years ago. We were all ink-and-paper. Now, most printing companies provide a plethora of products and services. Also, social media use is growing immensely, changing the marketing and sales management world. Therefore, the questions above are possibly more crucial to printing company success today... and tomorrow.

To provide actionable knowledge about marketing planning, sales management, and social media use, we studied these topics in our April 2022 PIPI (*Printing Industry Performance and Insights*) study.

Key Takeaways

- It appears higher-performing printing firms engage in marketing planning, sales management, and social media marketing more than their lower-performing counterparts.
- Planning and outcome assessment appears vital to marketing planning, sales management, and social media marketing.
- There are multiple tips for marketing planning, sales management, and social media marketing from the survey items and results presented below.

Marketing Planning

A marketing plan provides operational direction on how a business will target a specific market. Keywords include target, specific market, and plan. “Plan” is possibly the most important keyword. A marketing plan requires critical thinking and will consist of specific actions and objectives. In addition, leaders should continually assess and revise their marketing plan as needed.

To assess marketing planning engagement, we included in our survey these marketing planning elements:

- We have identified targeted customer groups.
- We have identified the value we bring our targeted customer groups.
- We have marketing objectives.
- We analyze the business environment.
- We study competitors.
- We have a marketing strategy with an action plan.

Our data suggest higher performers are more diligent in applying these marketing plan elements.

The areas where lower performers fell most behind include the following: “We have marketing objectives,” “We analyze the business environment,” and “We have a marketing strategy with an action plan.”

The last item, “We have a marketing strategy with an action plan” had the lowest engagement score for both higher and lower performers. There is a universal message for printing company leaders from the low scores for this element. *DEVELOP A MARKETING STRATEGY AND ACTION PLAN!*

A marketing consultant shared with me that decisions, small business leaders tend to grab the “low-hanging fruit” when making marketing – they apply what falls on the table and looks nice.

Here’s some tips that printing firm leaders might consider in effectively applying these marketing plan elements:

- Have scheduled leadership meetings to discuss the six elements listed above, maybe once a quarter.

- Consider the relevance of each of the six elements to your business.
- Apply a “whiteboard approach” – put as many options on the whiteboard as possible for addressing each element before weighing the merit of each option.
- Put your plan in writing.
- Continue to assess your marketing plan elements and revise as needed.
- Treat this as a process, not a one-time event.

Sales Management

Managing our sales team was vital in two of the three companies I ran. The third company targeted brokers and other printing companies, and we did not have a sales staff. I also saw sales management as very important in the printing firms I consulted.

When I talk with printing company leaders today, it appears sales team management is still crucial. Given the growing product and service diversity emerging in our industry, one may find managing a printing company sales team more challenging in the future.

We explored effective sales management from four perspectives: monitoring salespeople, developing salespeople, evaluating salespeople, and rewarding salespeople.

Monitoring Salespeople

Here are the items included in our survey to assess monitoring salespeople:

- We monitor each salesperson's development.
- We assess each salesperson's approach by making sales calls with them.
- Each salesperson provides call reports for leaders to review.
- We monitor each salesperson's daily activities.
- We closely monitor each salesperson's expense accounts.

Our data suggest higher performer firms engage more in salesperson monitoring. It appears lower performers engage less in each of the five elements.

The item with the most significant difference was, “We closely monitor each salesperson's expense accounts.” In pondering this result, I wondered if higher performers take a deeper look at each salesperson’s expenses. A deeper look might include more than merely looking at “how much they spent.” Higher-performing firms may assess how effective the costs were in producing sales. Not just “how much,” but also “is there a potential return for this expenditure.”

The item with the second greatest difference was “We assess each salesperson's approach by making sales calls with them.” I don’t see many printing firm leaders doing this. However, I have seen in small business research the value of top leadership visiting customers with salespeople. Leaders building relationships with a salesperson’s customers can help if the salesperson leaves the firm, or those relationships might provide a resource with whom leaders might discuss strategic ideas. However, don’t miss the focus of this item: “assess each salesperson's approach.” When making calls with salespeople, sometimes I dictated the conversation. That doesn’t contribute to assessing a salesperson’s approach.

“We monitor each salesperson's development” is a rich element and is related to the next section, developing salespeople. Consider framing it this way: regardless of how long this salesperson has worked in our industry or for us, is that salesperson continuously developing needed skills and knowledge?

We diligently search previous research for valid, reliable, and relevant survey items when preparing our PIPI surveys. Two elements we found and included in the survey caught my interest: “Each salesperson provides call reports for leaders to review,” and “We monitor each salesperson's daily activities.” Both higher and lower performers were relatively low in their engagement of this monitoring tactic. Related, I don’t see this level of daily monitoring in our industry, nor did we apply this much salesperson monitoring in our businesses. I often see printing salespeople acting as “free agents,” not accountable for daily activities. Is a higher level of salespeople monitoring applicable to our industry? I don’t know. But keep in mind, monitoring is more than controlling

what they do. It's watching what they do, so valuable and needed development opportunities surface.

Developing Salespeople

To assess developing salespeople, we included these survey items:

- We work with each salesperson to set individual performance goals.
- We provide on-the-job training for salespeople.
- We spend time coaching each salesperson
- We discuss with each salesperson their performance.
- We help each salesperson develop their potential.
- We employ sales-training resources from outside the firm.
- We establish sales-training objectives.
- We evaluate sales-training effectiveness.

Our data suggest lower performers engage less in developing salespeople than higher performers. Lower performers were less on all eight salespeople developing elements. There was a sizable difference between higher and lower performers for "We establish sales-training objectives." It sounds good to say, "We are conducting sales training." But knowing what you want to accomplish will enhance your return in a sales training investment.

Another element with a sizable difference was "We work with each salesperson to set individual performance goals." Typically, when we set individual salesperson goals, we focus on the revenue that the salesperson should generate. You might consider a broader array of goals.

Here's an approach I recently ran across. Consider having each salesperson develop three lists: a list of future prospects, a list of prospects with whom the salesperson is presently connecting, and a list of current customers. From these lists (which are referred to as "buckets"), one may set individual goals, such as the following: each week, research and identify one additional future prospect; each week, move one future prospect to the contacting list, and contact that prospect; and convert one prospect to a current customer each month.

In reviewing the eight developing salespeople elements, you might view them from two perspectives: individual or group. For instance, setting individual performance goals with each salesperson is individual-oriented, and establishing sales-training objectives is group-oriented. Those perspectives may prompt you to apply critical thinking and address these questions: What can we do to develop our sales team as a group effectively? And what can we do to develop individual salespeople effectively?

Here's another thought: When developing individual salespeople, is the same approach effective for all individuals? I would say "no." When developing individual salespeople, you should discern and address the area where they need to grow the most.

I have seen in research that often sales managers devote most of their time on new salespeople and under-achievers. Top salespeople often don't receive a lot of attention. *The big message, include ALL your sales team in development.*

Here's a true story related to salespeople development. I heard that a printing firm had hired a new salesperson. The new hire had zero experience in our industry. However, given his communication skills, demeanor, and sales success in another industry, they were excited about the new hire's potential. The new salesperson moved his young family from multiple states away. On his first day, they gave him a desk and computer. After that, they did *nothing* to develop the new hire or teach him about our industry. The new hire didn't last long. Developing salespeople is vital for your company, but it is also essential for the individuals under your wing.

Evaluating Salespeople

To assess evaluating salespeople, we included these survey items:

- We evaluate the number of calls and contacts made by each salesperson.
- We evaluate each salesperson's revenue contribution.
- We evaluate each salesperson's profit contribution.
- We evaluate each salesperson's value-add contribution.

- In addition to revenue, we use metrics to evaluate each salesperson (such as the number of prospects identified, percentage of wins, new customers landed, etc.).
- We evaluate the quality of each salesperson's sales presentation.
- We evaluate each salesperson's professional development.

Lower performers were less for all eight evaluating salespeople elements, and those indicators were considerably less for these three: “We evaluate each salesperson's profit contribution;” “We evaluate each salesperson's value-add contribution;” and “In addition to revenue, we use metrics to evaluate each salesperson (such as the number of prospects identified, percentage of wins, new customers landed, etc.).” This suggests higher performers take a deeper look and apply more metrics when evaluating salespeople. However, looking at more numbers might not help unless you look at relevant numbers.

Strategically choose which numbers matter!

Rewarding Salespeople

Here's the items we included to assess rewarding

- We use incentive compensation as the primary means of motivating salespeople.
- We compensate salespeople based on the quality of their sales activities.
- We provide each salesperson with performance feedback.
- We reward salespeople, outside normal compensation, for meeting individual performance goals.

Consistent with the other three sales management perspectives explored, higher performers engage more in rewarding salespeople. And in harmony with the above, lower performers were found less active on all four rewarding salespeople elements. However, one element was close: “We use incentive compensation as the primary means of motivating salespeople.” It appears when compensating printing company salespeople, applying incentives is commonplace.

Higher performers tend to reward salespeople using non-revenue-related measures, such as the quality of their sales activities or meeting individual

performance goals. One can see merit in rewarding salespeople for activities or goals that drive sales growth. That is why planning and providing the right goals to make everyone successful is so crucial. In sales courses, Randy (a coauthor) talks about measuring outcomes (sales, dollars, etc.) vs. behaviors (calls, follow-ups, visits, etc.). By measuring both, leaders can better manage the appropriate behaviors of their salespeople and therefore develop better and more consistent salespeople.

Again, we pull the sales management perspectives and related elements from previous research. It surprised me a bit that scholars had included “We provide each salesperson with performance feedback” in rewarding salespeople. However, providing performance feedback can deliver salespeople a reward: “Good job,” “I am proud of you,” “You are on the right path,” or “That’s what we do!” I have seen instances where top-tier salespeople were taken for granted and didn’t receive much positive personal performance feedback. Indeed, I regret that this happened a bit in companies I led.

Sales Management Closing Thoughts

There’s a lot of sales management stuff in the preceding sections. Our data consistently show high performers engage deeper in sales management elements than lower performers. You and your leadership team might look at each element in the four sales management perspectives above; consider what you are doing and what you are not doing; and think about which elements might affect performance, and act accordingly.

As mentioned above, the third printing business I led did not have a sales team. I was the primary seeker of broker and printing firm prospects. That’s not atypical in the printing industry. Sometimes printing company leaders are the “sales team.” In future PIPI studies, we might explore leaders’ roles in sales. Another area we may investigate is the application of emails and social media in the sales process, along with CRM application.

Social Media Marketing

General Information

We explored the extent printing firms apply social media and which outlets are applied the most. Table 1 lists our survey's 11 social media outlets from highest (5) to lowest (1) use for both higher and lower performers.

Table 1

	Higher Performers	Lower Performers
LinkedIn	3.68	2.87
Facebook/Instagram	3.45	2.88
Online videos	3.03	2.29
Google Adwords	2.77	2.20
E-newsletters	2.61	2.38
YouTube	2.42	1.97
Twitter	2.35	1.92
Mobile phone - text messaging service	2.26	1.80
Webinars	2.16	1.66
Pay-per-click service	2.10	1.94
Streaming Platforms (Hulu, ESPN, Paramount+, etc.)	1.13	1.11
Average	2.54	2.09

Interestingly, average usage for each of the 11 outlets was greater for higher performers. The order from greater to lesser social media outlets use was exactly the same for higher and lower performers. That was interesting! LinkedIn, at the top of the list, is considered an effective B2B marketing tool. However, the substantial use of LinkedIn might prompt one to wonder if printing company leaders are considering other outlets, or are they “sold” on LinkedIn? The social media outlets with the biggest differences in use between higher and lower performers include LinkedIn, online videos, and webinars. Online videos and webinars may require lots of time and resources to produce. Nonetheless, if you have a compelling story, you might consider those options.

Survey responses indicate higher performers are more active in revising and updating social media platforms and their websites. Also, it appears higher performers send E-newsletters more often.

We asked which social media outlets do printing firms purchase ads. It appears that neither higher nor lower performers buy a lot of social media ads. The three social media outlets on which *some* higher performers buy *some* ads include Facebook/Instagram, LinkedIn, and Google AdWords.

We also asked, “To what extent is each social media outlet or tool vital to marketing your company.” For this question, we added two social media marketing tools: search engine optimization (SEO) service, and pay-per-click service.

SEO optimizes websites, so they rank well on internet searches. With pay-per-click, advertisers pay a fee each time one of their ads is clicked. Pay-per-click is related to Google Ads. Table 2 lists the 13 social media outlets or tools included in this question survey from highest (5) to lowest (1) use for higher performers. Although they are close, the value rankings were a bit different between higher and lower performers.

Table 2

	Higher Performers	Lower Performers	Lower Performers' Ranking
<i>LinkedIn</i>	4.02	3.05	2
<i>SEO - Search Engine Optimization Service</i>	3.71	3.27	1
<i>Facebook/Instagram</i>	3.55	2.91	3
<i>Digital analytics (such as Google Analytics)</i>	3.48	2.84	4
<i>E-newsletters</i>	3.21	2.74	5
<i>Online videos</i>	3.17	2.64	7
<i>Google AdWords</i>	3.10	2.73	6
<i>Twitter</i>	2.64	2.20	11
<i>YouTube</i>	2.62	2.30	8
<i>Webinars</i>	2.43	2.21	10
<i>Pay-per-click service</i>	2.40	2.30	9
<i>Mobile phone - text messaging service</i>	2.14	1.91	12
<i>Streaming Platforms (Hulu, ESPN, Paramount+, etc.)</i>	1.48	1.36	13
Average	2.92	2.50	

We found two striking differences in the rankings. First, higher performers ranked LinkedIn highest in value and SEO second, and lower performers put the same two at the top, but in reversed order. And from the numbers, it appears higher performers value LinkedIn a lot! Second, Twitter was number eight among higher performers and number 11 for lower performers.

Below, we view printing firms' social media marketing approach from 30,000 feet by looking at social media marketing planning and support, measuring related outcomes, and how much firms value social media marketing.

Plan and Support Social Media Marketing

Here are the items we included to assess planning and supporting social media marketing.

- Our company has a digital marketing plan with clearly defined activities.
- Our company has a digital marketing plan with responsible executors.
- Our company has a digital marketing plan with a related budget.
- Our digital marketing plan is an integral part of our marketing plan.
- Our digital marketing plan is created following our marketing plan goals.
- We hold several meetings throughout the year to plan our digital marketing.
- Our company has adequate internal technical support to implement digital marketing activities.
- Our company employs outside specialized companies to implement digital marketing activities.

As is the norm from this survey's data, higher performers plan and support social media marketing more than lower performers. They differed greatly on the "Our company has a digital marketing plan with a related budget." Higher performers are much more likely to plan and budget their digital marketing. This reinforces a consistent message shown in all this survey's results (including marketing planning, sales management, and social media marketing) – *THINK and PLAN! Don't merely react!*

It was intriguing that lower performers had a higher average on one of these questions – “Our company employs outside specialized companies to implement digital marketing activities.” This was the first and only time in the survey in which we saw higher engagement by lower performers.

In contrast, higher performers had much higher responses to “Our company has adequate internal technical support to implement digital marketing activities.” This suggests that if you are engaging in social media marketing, you might strive to develop those skills internally. This is especially important if you are helping your customers in their marketing. Indeed, printing company leaders have shared with me that they were promoting their firms as “helping their customers in marketing.” Sometimes my first thought was, “but you don’t market your printing company well!”

Don’t take this as a negative toward seeking external social media marketing help. However, you might consider employing external social media expertise as a process to develop internal capabilities...albeit a planned process.

Related, our data indicate higher-performing firms are more adequately equipped to interpret/analyze digital analytics (such as Google Analytics). However, there was not a strong presence of this ability among either group of printing firms.

Measure Social Media Marketing Outcomes

Here are the measures we applied to assess the extent firms measure social media marketing outcomes

- *We have clearly defined parameters (metrics) for measuring our website's performance.*
- *We know what visitors are doing on our website.*
- *We know what percentage of those who visit our website came through various social media outlets (Facebook, Instagram, LinkedIn, etc.).*
- *We know how many visitors to our website become customers.*

As often was the case in our data, higher performers reported higher engagement in all four of the social media outcome measures. Assessing results is a vital component of planning, but keep in mind that not all measures are relevant –

choose the most effective measures to assess and *continually* monitor those measures.

Value Social Media Marketing

Here are the survey items we applied to assess how much firms value social media marketing.

- We believe it is strategically necessary to use digital marketing in our business.
- We encourage the development of new ideas and initiatives for digital marketing.
- We feel that our company should take advantage of the opportunities provided by digital marketing and Internet application.
- We cannot imagine our business without marketing through digital media and the Internet.

Higher performing firms' responses were higher for each survey item above. The biggest difference was for "We encourage the development of new ideas and initiatives for digital marketing." This suggests social media marketing is a team process in which putting new thoughts on the table is encouraged.

One might wonder if more social media marketing prompts higher performance, or if higher performance provides resources for more social media marketing. I would guess the former is most often the case.

Closing Thoughts

There is more to come from this study. For instance, we are exploring from this data the extent printing firms use print to market their forms. Also, we are exploring marketing planning as a mediator or moderator (we will explain this concept) of sales management and social media marketing. We will share articles with associations when those findings are complete.

Our April PIFI revenue analysis indicated growth among printing association members. From the multiple printing businesses I connect with, it sounds like business is good for printing firms. However, times change. We don't know what the macro-economic environment holds for the future. Even if business is

good, strive to build the foundations that connect your firm with potential customers. Again, building that foundation is more than grabbing “low-hanging fruit!”

Please email me with any questions, comments, or suggestions.

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