

SaaS MARKETING

An A-Z Guide

ClearPivot



Introduction

Software-as-a-Service, or SaaS, now accounts for **25% of all software**, and industry-wide revenue is projected to reach \$157 billion by 2022.

Are you getting your share of this business? Maybe you've hired an outside marketing team and are just not sure they're maximizing your potential, or you've got an in-house team struggling to decipher SaaS marketing best practices. Maybe you're a team of one, trying to keep a steady flow of qualified leads headed toward the sales team. In any of these cases, there are important fundamentals to get right before anything else, and even more detailed SaaS marketing must-haves you can't afford to overlook.

Have you developed your buyer personas? How about foolproof analytics and reporting strategies that measure where you currently stand and where you want to be? Have you thought about your specific strategies for social media, website

content, and advertising? How and when do you pass marketing leads to the sales team? What do you consider a marketing qualified lead or sales qualified lead? Is your CRM integrated with all the systems it needs to talk to and gather information from?

No matter where you are in the process, or how your marketing and sales efforts are configured, it's important to understand and explore the very best practices in SaaS marketing. This resource includes all the fundamentals, as well as plenty of advanced strategies and tools to help you get your SaaS marketing program firing on all cylinders.

VENTURE CAPITALIST, ELIZABETH YIN:

"If you want to win in the US software market, ironically, the best thing you can do for your company is to really ramp up your performance marketing knowledge. Marketing is eating the world."





How Can a SaaS Company Stand Out in a Saturated Market?

There is only one way your SaaS company can stand out successfully in this fiercely competitive environment.

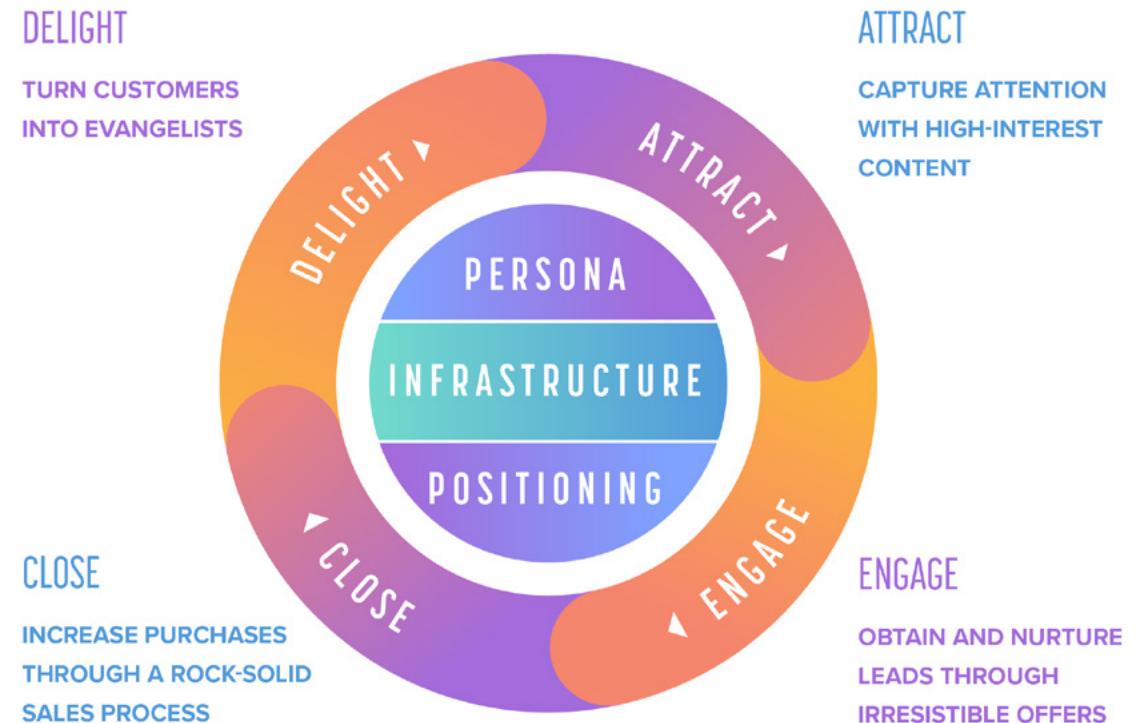
You have to develop a shrewd marketing strategy and implement it using the latest tools and techniques, all tailored to your unique business, products, prospects, and customers. This means understanding the powerful impact of [inbound marketing](#) for SaaS and making sure everyone in your organization is on board, from marketing to sales, C-suite, product development, and customer success.

The simplest way to understand Inbound is the concept of the flywheel. Rather than the traditional sales funnel that starts with leads and ends with sales, the flywheel starts by attracting and educating leads with strategic content and takes them through from the Attract stage into Engage, Close, and Delight. The reason it is a wheel shape rather than a traditional funnel is because delighted customers will naturally draw in more leads through

word of mouth and reviews, which will start the wheel process all over with your next cohort of prospects. These 4 stages are all essential pieces of the [inbound flywheel](#), with Attract and Engage primarily under the purview of marketing, Close primarily a sales phase, and Delight as a focus for your service team.

We approach SaaS marketing with a keen eye toward the holistic inbound flywheel, because all of the parts connect to attract, qualify, sell, and keep your subscribers.

INBOUND MARKETING FLYWHEEL



Start with a Smart Strategy & Draw in Leads with Inbound Marketing

Your product is at the center of this entire conversation.

It's useful, fun, profitable, or unforgettable. Essentially, your product has propelled you this far, and it is good enough to have attracted some users and created some traction for you. But in order to supercharge your sales efforts, you need a steady stream of good-fit leads. And, that's where inbound marketing comes into play. You need a well-crafted marketing strategy that makes the most of every dollar you spend to reach the right prospects, build trust in your company and specific

products, and clearly set you apart from competitors. Then you need an implementation plan that uses the right tools to send the right messages at the right time to attract attention and keep potential customers focused on you as they make their buying decisions.

To help you pull it all together, we've created this comprehensive SaaS Marketing Guide. It covers everything you need to know to build a strong, successful digital marketing strategy that pulls in traffic and vets leads for you, so your sales team can focus on growth goals.



Read on, to learn about all these essential marketing components:

1. FUNDAMENTALS OF SAAS MARKETING

- Introduction to the SaaS Flywheel
- Your Brand
- Your Tech Stack
- Your Website

2. TRAFFIC GENERATION FOR SAAS MARKETING

- SEO
- Blog
- Social Media
- Online Advertising
- Offline Advertising
- Events and Community

3. SAAS LEAD GENERATION

- Freemium
- Free Trial
- ToFu Offers

4. LEAD NURTURING

- In-App Nurturing
- Email Marketing
- Lead Nurturing Workflows
- Lead Scoring & Contact Segmentation

5. CONTACT SEGMENTATION AND LEAD SCORING

- Start with Data
- When to Use Lead Scoring
- CPA Per Segment

6. DELIGHTING CUSTOMERS TO BUILD BRAND ADVOCACY

- It Starts with the Solution
- Email Marketing to Customers
- Success Stories
- Educational Content
- Knowledge Base
- Service & Ticketing System
- Customer Experience Management and Measurement
- Encouraging Positive Word of Mouth

7. BUDGET PLANNING

- SaaS Companies are Different
- There's Good News
- Why Startups Spend More on Marketing
- Managing Your Budget



Ready to grow your SaaS business? Let's get started!

PART 1

Fundamentals of SaaS Marketing

Every SaaS Marketing program will be different, because each company and set of products has its unique attributes and goals.

However, there are fundamentals the every SaaS marketing department (and by extension sales and service) should know about. Whether you're brushing up on the latest techniques for yourself or your department, or learning more about how it all works so you can vet your next agency hire, this section provides all the basics. Let's start with the wide-lens view with the SaaS Marketing Flywheel, then move into your marketing foundation in the form of your brand, tech stack and website.

Attract

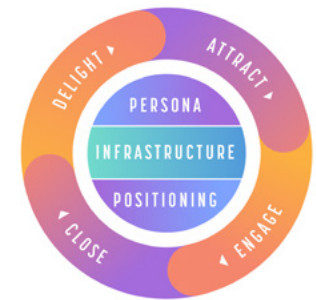
The first part of the SaaS marketing flywheel is Attract. In this piece, your goals will relate to getting brand new leads into your database. While each company will need its own specific strategy and KPIs, a few of the **most important SaaS marketing metrics to track** are:

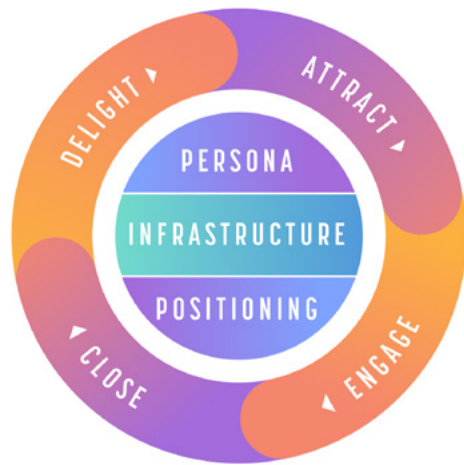
- Website Visits
- Bounce Rate
- Visitor to Lead Conversion Rate

Engage

Once you've attracted a potential customer and converted them on something small, like a content offer, your next step is to further engage that lead as a way to qualify, sort and segment them in your database, and prime them for a sale if they're a great fit.

- Conversion Rates and Details on Your Content Offers
- Landing Page Interactions
- Email Engagement (like open rate and click-through rate)





Close

Your sales team typically oversees the Close phase of your holistic inbound program, and, along with marketing leadership, pays close attention to metrics like:

- Customer Acquisition Cost (CAC)
- Customer Lifetime Value (CLTV)

Of course, this particular resource is focused on SaaS Marketing, so we don't go in-depth on SaaS sales here, but everything marketing does is meant to support sales and company growth, so it's important to remember just how intertwined the process of inbound can be.

Delight

The last stage in the inbound flywheel is to make your customers feel so included and happy they can't help but share everything they love about your company and solution. Typically overseen by your Service team, this part of the flywheel helps you strive for improvements in:

- Subscription Upgrades
- Reviews
- Survey Results
- Net Promoter Score (NPS)

Further down in this guide we go into a ton of detail of every level of this flywheel concept, specifically related to SaaS marketing. But before we get there, let's continue our exploration of the basic foundations for great SaaS marketing. Up next is more about your brand, tech stack and website.

Your Brand: What Impression Are You Making?

We don't have to tell you how important branding is, but when's the last time you evaluated the impact of your brand on your business goals? Does your original brand still resonate with your target audience? Is it time to refresh your look, the tone of your writing, or bring in something new to stay relevant? Especially in the world of cloud-based technology and software solutions, your brand is crucial. It's what differentiates your company from everyone else, and allows for a foothold for your audience to get on board. Let's get real about your SaaS branding efforts.

BRAND MESSAGING FOR SAAS

In the context of software, where there is not necessarily a physical product or

place, your brand is even more crucial than in other businesses. Building a SaaS brand is a unique experience, where personality, design, and messaging come together to guide your customers into believing in your solution. Before your leads ever get into the sales process, your brand helps them to build confidence in your company's knowledge, honesty, and helpfulness.

Remember, you're not creating your SaaS brand in a vacuum. You're creating it for people. Smart marketers create buyer personas: generalized representations that humanize each key segment of your target audience. Though they exist only on paper, personas embody typical traits of each prospective customer group: age, gender, income, job function, chief pain points and desires. They serve as "advisors" as you create your marketing tactics and messaging so you can speak to prospects as if you are having an in-person conversation.



HOW SOFTWARE COMPANIES USE STORYTELLING TO CONNECT WITH REAL PEOPLE


Building brand affinity starts with storytelling. Tell stories about how, exactly, your customers are using your SaaS product. Focus on the feeling it gives them, the accomplishments it helps them to achieve, or the bottom-line impact. Try sharing more about how your solution was created, and why. It's not just about the brand promise of what your solution can do. It's also about telling the human stories behind it to build trust and convey your core values.

Share the story of your founders, how they met, and what sparked the idea for your innovative solution. Tell your customer stories, sharing their unique applications of your products, interesting use cases, or API integration solutions. Making your technology and brand feel human is an important piece of your overall marketing goal, and storytelling

provides footholds for your leads to grasp that connection.

[Wistia](#), for example, prominently features stories of community, team experiences, and success on its blog. We like how it humanizes the company, and draws us further into its brand story.


See more of what we're up to at Wistia



Help During COVID-19

We want to cover hosting costs for educators, healthcare providers, or nonprofits relying on video to serve the public good.


[Get more info](#)



Listen to "Built to Last" on Demand

Check out these exclusive podcast episodes from marketers and creatives behind some of the world's most-loved brands.

[Listen now](#)



Watch "(Out of) Office Hours"

On our new live-streamed series, our Head of Production, Chris Lavigne, talks all things remote video production.

[Check it out](#)

Keep these basic tips in mind for messaging that speaks well about your brand as well as your products:

- Along with using conversational language, speak directly to prospects and customers using second person — you and we. Third-person (he/she/it) sounds stilted and creates a subconscious barrier between you and your prospect. You want them to engage with you, so be engaging.
- Be positive, focusing on what your company and products can do to help customers. Negative remarks and disparaging comments about competitors can backfire because they make you seem petty.
- Along that same line, misspelled words and poor grammar are sloppy and give the impression that your products may also be less-than-professional grade.
- Try and come up with stories about the ways in which your product has helped your current users. Tell the story of the problems you're solving and the transformative results you provide.



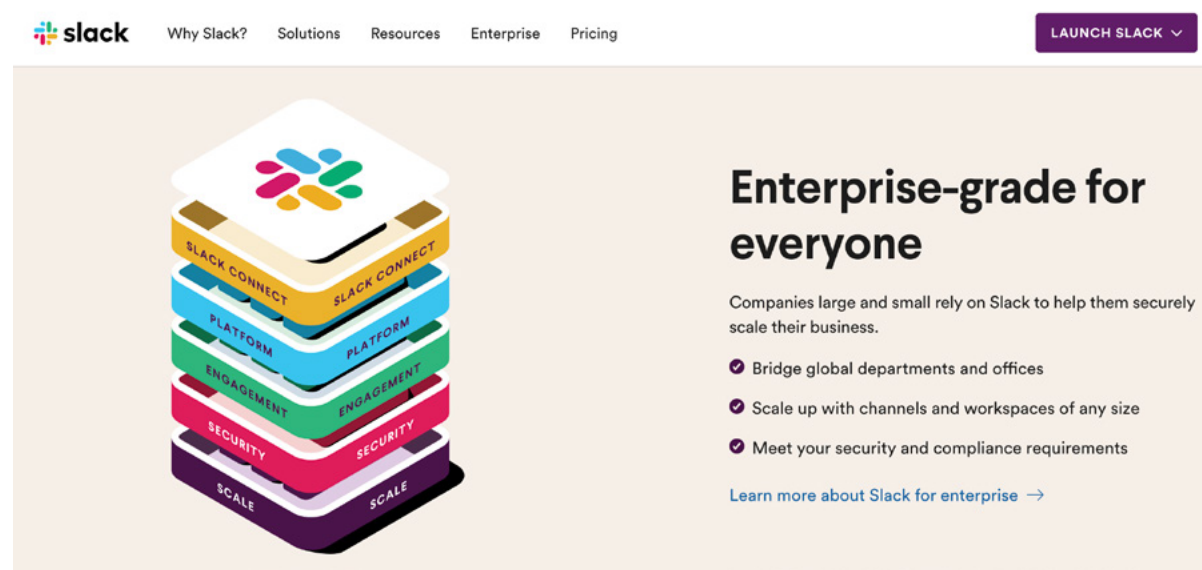
WHY VISUAL BRANDING IS SO IMPORTANT FOR SOFTWARE BUSINESSES

Now let's talk about the visual side of your brand. Since your logo is the most obvious symbol of your brand, all your other marketing visuals should reflect the same general look in colors and tone. This is especially true for your website. Consistency helps broaden and reinforce brand awareness, whereas a lack of consistency confuses prospects, creates a sloppy impression, and eliminates your ability to differentiate yourself from competitors.

For digital products, visual branding is even more vital. You can't fill your marketing with beauty shots of physical merchandise, so the visuals that are available to you must instantly convey your brand message and personality. Colors and typefaces can have tremendous impact, negative as well as positive, so professional design

is essential, both within your product as well as in your marketing assets. Don't forget beautiful, clean videos and photos of your software's features and functionalities. Even though you aren't taking photos of a widget in a lightbox, you are still showcasing your product, and the way you do so is all part of building your best brand.

We like the way [Slack](#) uses visual cues like color coding its benefits and using stacks to present options.



slack Why Slack? Solutions Resources Enterprise Pricing LAUNCH SLACK ▾

Enterprise-grade for everyone

Companies large and small rely on Slack to help them securely scale their business.

- ✔ Bridge global departments and offices
- ✔ Scale up with channels and workspaces of any size
- ✔ Meet your security and compliance requirements

[Learn more about Slack for enterprise →](#)

Your Brand: What Impression Are You Making?

So, you've got a great brand. It's updated, beautiful, relatable, and you know how important it is. How do you ensure you've got the right structure to turn those good feelings about your brand into profit? Seamless integration between sales and marketing is a very basic necessity for any company, and that happens not only in your business processes but also in the software you choose to run them.

Your marketing tech stack must integrate your live sales process — your BDR world — with your automated marketing software and other tools to provide a seamless experience internally and externally.

WHAT MARKETING SOFTWARE WORKS BEST IN THE TECH SPACE?

Every SaaS company needs to select some kind of software or platform for:

- CRM/Database
- Emails
- Sales
- Website Content Management
- E-Commerce
- Subscriber/User Management
- Customer Service
- Advertising

Here at ClearPivot, we especially like HubSpot as the central platform,

because it is a truly comprehensive solution for Sales, Marketing and Service, that is user-friendly. It serves well as a foundation for all your marketing and sales components, from CRM to chat to content creation and distribution to analytics, automatically ensuring integration wherever needed. That makes marketing and sales more efficient and far more effective. Some other common marketing platforms are Marketo, ActiveCampaign, Pardot, ConvertKit, or even MailChimp. Remember that marketing is a front-facing process that requires a different sort of technology toolkit than back-end business operations or product development. How things function for marketers determines the experience that prospects and customers will have with your brand, and that experience is supposed to turn into revenue, so careful selection of the right platform and consideration of how that flows into and integrates with the sales process is crucial.



Your Website: The Hub that Connects Your Marketing Spokes

Your website exists to clearly communicate two things:

1. Attract your most ideal prospects to it through high-interest content and smart advertising
2. Engage them with your company and start building a connection with them through irresistible offers

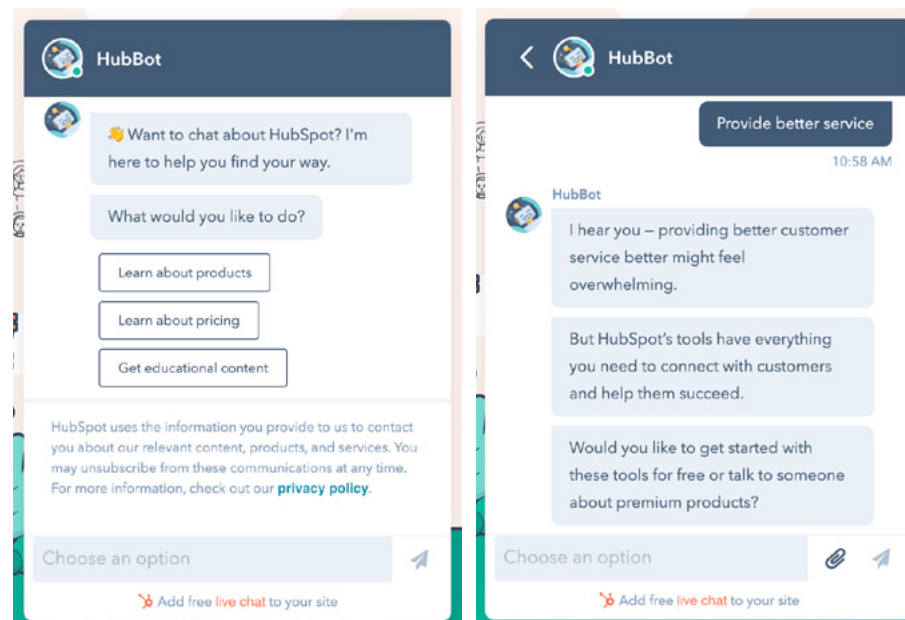
It's possible that your product is truly unique, but it's more likely that you have (or soon will have) competitors. And that's why the second point is so crucial. Website visitors want to know what your product will do for them that the competition's offering will not. Your software is more advanced, easier to use, cheaper, whatever. Your customer experience is second-to-none. Your company operates sustainably or gives back to the community in tangible ways. You get the idea. Your website is the hub for communicating that, and is the most important piece of the Attract and Engage stages of your business flywheel.

YOUR WEBSITE IS YOUR BEST TOOL TO ATTRACT AND ENGAGE

When your website offers content that is useful and easy to find and understand, visitors come to view your company as a reliable resource and they trust other communications from you more. You can augment that with third-party verification — logos of well-known companies that use your product, or even your integrations. Call out awards or other honors you've received, links to media coverage of your company or products, or short testimonial quotes from happy customers.

In addition to detailed information about how your products work and the value they deliver to customers, websites that perform best include features that inspire visitors to convert into leads, including:

- Landing pages that highlight specific products, enable visitors to sign up for your email newsletter or blog, or take advantage of your free trial
- A blog with regularly published content designed to boost SEO, attract new prospects, and keep existing customers engaged
- A live chat option that enables customers to message you in real-time, augmented by chatbots with targeted trigger messages. Live chat can be a good enhancement to your customer's experience, as long as it's executed correctly. [HubSpot Conversations](#) is a great example. Here's a conversation we started with the chat bot on HubSpot's home page.



- Calls to action on every page, because you never want to miss a chance to invite visitors to engage more deeply with you. [MailChimp's](#) home page is basically a well-designed series of CTAs. We like the way different benefits and features are highlighted in these bright, clear, CTA blocks.

We'll talk more about creating and organizing content in later sections.

Smarter marketing for big ideas

Mailchimp gives you the tools and guidance you need to build your brand and make things happen.

[Pick A Plan](#)

Email built to power your business

Email averages a \$52 ROI for every dollar spent. And our industry-leading tools—which work in tandem with the other channels in our all-in-one Marketing Platform offers—are designed to help grow your business faster.

[See what you can do](#)

Let them know you're listening with a survey

Responding to change starts with understanding what your audience wants. Create and send a survey today to see what's working—and what's not.

[Survey your audience](#)

What's your favorite flavor?

- Vanilla
- Chocolate
- Strawberry

Fans of Chocolate

WEBSITE DESIGN: VISUAL AND FUNCTIONAL APPEAL

No one knows better than you how rapidly technology is changing. That applies to your website in a big way. If it's more than two or three years old, it's probably starting to show its age, missing the very latest design and features that visitors now expect, especially when it comes to the mobile experience. In some other industry, problems like slow load times, a poor [CLS score](#), or amateur design might be merely irritating or amusing to visitors, but these types of UX issues will be deadly for your SaaS company. If your website is behind the times, what does that say about your app? (Hint: It ain't good.)

Responsive design is particularly important. Appealing visuals and on-point content won't matter if they don't appear quickly and sensibly on small device screens. Responsive design automatically displays website content in the proper way for each viewer.

Here's Mailchimp's [home page](#) on mobile. We like that it provides the same experience as their desktop site.



High-functioning websites need regular updates behind the scenes, too. You know this. Starting with the proper, robust back-end code facilitates updating as the marketing world changes, of course, but you'll also want to give your website the same ongoing technical attention as you give your own app. Your website is at just as much risk of accumulating technical debt as your app itself. And, by all means, don't forget the backup!

WARNING: YOUR MARKETING WEBSITE NEEDS ITS OWN PLATFORM

SaaS companies often assume it's simplest to build their website on the same back-end platform where their app is running. Don't do it! As noted earlier, marketers need ready access to your website. If it is running independently from your bread-and-butter app, it will allow your marketing people to implement all their campaign activities without having to pull your internal developers away from your product roadmap in order to build out the marketing team's requests.

PART 2

Traffic Generation & Inbound Marketing

Inbound marketing means your prospects find you.

Many of the smartest marketers in technology, software, and SaaS know this and make sure that inbound is an important aspect of the marketing strategy. The inbound approach helps you to meet your audience where they are comfortable. Most SaaS users are accustomed to solving their problems by seeking and vetting solutions then taking action without speaking to or consulting another human being. In the B2B SaaS context, the prospect usually has to advocate for adoption among fellow users and decision-makers. Your inbound marketing strategy should be based on content that helps with all aspects of this process. With proper

SEO planning and optimization — along with an effective Google search advertising effort — inbound means providing the guidance and knowledge your prospects need most.

Search Engine Optimization: Making It Easy for Searchers to Find You

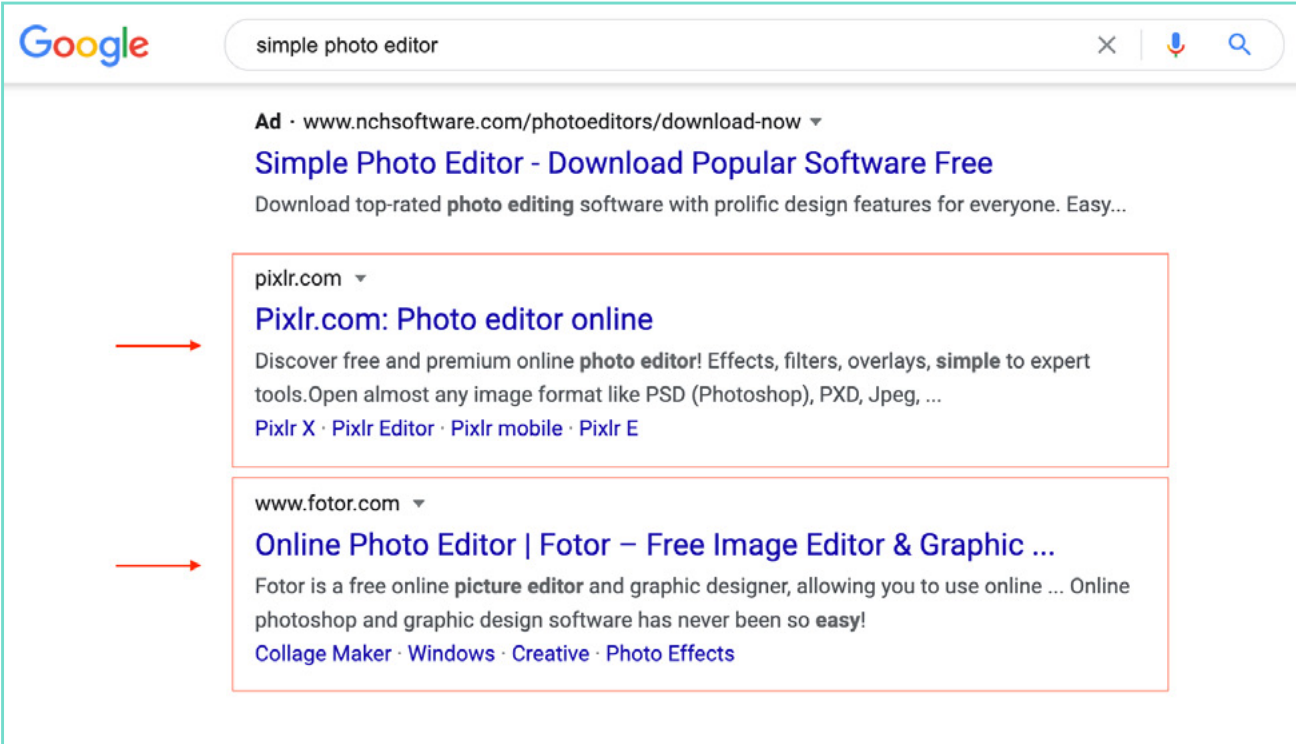
Search engine optimization, or SEO, is the strategy you use to ensure your content appears in top search results. [Study after study](#) has underscored the fact that searchers rarely look past the first page of search results (and you know this about yourself, too, right?), so achieving top-of-the-pack display on Google or other search platforms is imperative.



Highly sophisticated algorithms are constantly working behind the scenes to detect content and index it for quality — with specific scoring systems using natural language processing to reward rich, relevant, and meaningful content. To achieve excellent SEO on your key search terms now, you have to impress those algorithms. You have to produce quality content. This means you are providing insights,

details, help, how-tos, recommendations, entertainment, or nuance with every piece you post or release.

Here's an example of top organic search results for the term "simple photo editor." [Pixlr](#) and [Fotor](#) grab the top two organic search positions, showing the result of carefully-planned, consistent content.



The image shows a screenshot of a Google search for "simple photo editor". The search bar at the top contains the text "simple photo editor" and has a search icon on the right. Below the search bar, there are several search results. The first result is an advertisement from "www.nchsoftware.com/photoeditors/download-now" with the title "Simple Photo Editor - Download Popular Software Free" and a description "Download top-rated photo editing software with prolific design features for everyone. Easy...". Below the ad, there are two organic search results. The first organic result is from "pixlr.com" with the title "Pixlr.com: Photo editor online" and a description "Discover free and premium online photo editor! Effects, filters, overlays, simple to expert tools. Open almost any image format like PSD (Photoshop), PSD, Jpeg, ...". The second organic result is from "www.fotor.com" with the title "Online Photo Editor | Fotor – Free Image Editor & Graphic ..." and a description "Fotor is a free online picture editor and graphic designer, allowing you to use online ... Online photoshop and graphic design software has never been so easy!". Red arrows point to the titles of the two organic search results.

Google

simple photo editor

Ad · www.nchsoftware.com/photoeditors/download-now ▾

Simple Photo Editor - Download Popular Software Free

Download top-rated **photo editing** software with prolific design features for everyone. Easy...

pixlr.com ▾

Pixlr.com: Photo editor online

Discover free and premium online **photo editor**! Effects, filters, overlays, **simple** to expert tools. Open almost any image format like PSD (Photoshop), PSD, Jpeg, ...

[Pixlr X](#) · [Pixlr Editor](#) · [Pixlr mobile](#) · [Pixlr E](#)

www.fotor.com ▾

Online Photo Editor | Fotor – Free Image Editor & Graphic ...

Fotor is a free online **picture editor** and graphic designer, allowing you to use online ... Online photoshop and graphic design software has never been so **easy**!

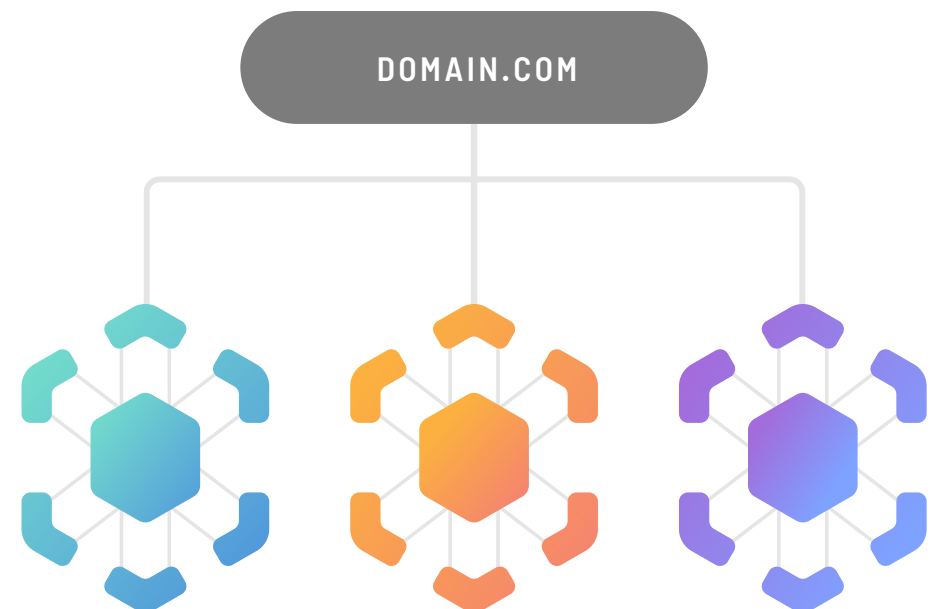
[Collage Maker](#) · [Windows](#) · [Creative](#) · [Photo Effects](#)

TOPIC CLUSTERS: THE BEST WAY TO BOOST YOUR SEO

How you present content on your website affects SEO as well as your site visitor's experience. Today, search engines look for more than a keyword match. Google, for example, focuses on [search intent](#). In other words, Google is getting a lot better at identifying the value of content and rewarding content creators who provide it.

By organizing your content in [topic clusters](#), you communicate your depth of knowledge and provide a variety of specified content to meet different search terms. The center of your topic cluster is a [pillar page](#), and your individual topic spokes are then deep dives into all the specific subtopics relating to your central pillar page topic. By linking it all together correctly and including basic SEO best practices on the content you publish, you allow it to be found and served appropriately.

You can picture this system as a hub (the pillar page) with spokes leading out to each subtopic. By producing concentrations of content around each topic, you demonstrate to search engines that you are an authority on the subject, not a website with some random information about it. Greater authority boosts SEO ranking.





HOW DO YOU IDENTIFY TOPIC CLUSTERS?

Content that will rank highest is the content searchers want most, right? So pick the topics you know your top prospects are most interested in. What are your strongest products or product lines? Which ones offer the strongest opportunity for sales growth? Using your personas and analytics data that shows your past website visitation patterns can also help identify valuable content clusters.

Most businesses can identify their main categories of products, services, benefits, or pain points, and start to create pillar topics out of those. For software companies and apps, some general categories to think about for core content are:

- Your Prospects' Pain Points
- Solutions/ Product Benefits
- Product Features

- Industry Verticals (for B2B)
- Buyer Personas (for B2C)

As an example, let's look at what this might look like for a company that makes online customer satisfaction surveys. They may focus on one of their core solutions — Customer Experience Management.

So in this case, “customer experience management” becomes the Pillar Topic, and you iterate from there on the different aspects of that overall topic that someone might be searching for. From the pillar, you then branch out into problems that people might be searching for and think about topics around the solution your app or platform provides. In this example, the customer survey software company might plan content on:

- How to measure customer loyalty
- How to measure NPS (net promoter score)

- Best practices for getting customer feedback
- How to improve your customer survey response rate

It also helps to ask yourself the question: “What does my prospect need to know in order to buy?” Or, put more deeply, “What does someone need to know about my solution before they’ll sign up for a subscription to our product? The answers to that question become your topic clusters.

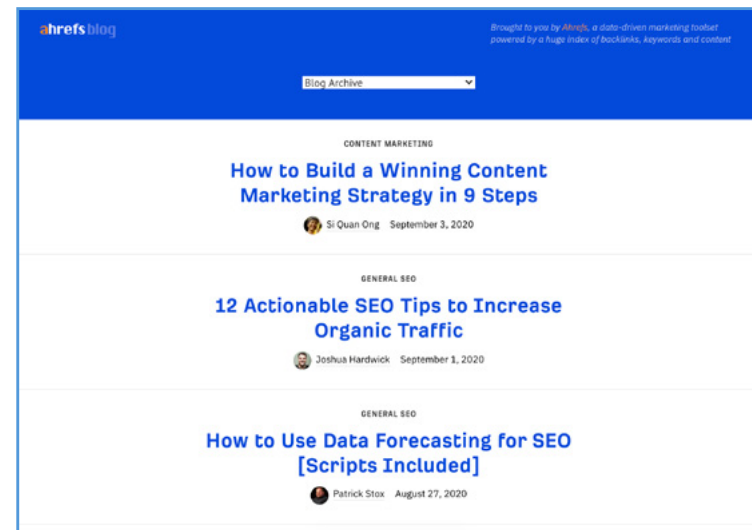
HOW TO BUILD A BLOG THAT ACTUALLY RESULTS IN LEADS

Your blog is where you will build out most of the subtopics in your Topic Cluster. Properly-built blog articles attract organic search traffic to your website, and by providing value, you have a chance to educate and serve your audience, and guide them into signing up for your solution. A blog is by far one of the most effective marketing tools for SaaS companies.

A quality blog can:

- Subtly introduce your brand and products to potential new customers who browse beyond the specific article that landed them there.

- Create better-informed prospects and leads, thereby shortening the B2B sales cycle.
- Establish your company (or key team members) as experts in your field. This “thought leadership” builds brand awareness. It also builds credibility and trust by highlighting your expertise.
- Help you stay engaged with current or past customers, to build loyalty and repeat business.
- One of our favorite examples comes from [Ahrefs](#), which has made itself a go-to source for industry insiders and SEO experts trying to stay informed.





A blog is meant to deliver value to readers, so content should be genuinely informative, and not just a thinly veiled sales pitch. It's OK to periodically highlight a product and talk about how your company and products support the specific topic — after all, it is your blog — but keep that to a minimum, and make sure your mentions are never overtly sales-y. In fact, your blog should always be conversational — friendly in tone as if you're telling a story or explaining a subject to someone in front of you. Wit and humor, used appropriately, can help build rapport with your audience.

There is no shortage of excellent, relevant, and interesting topics to write about in your blog. So what can you talk about that will attract and please readers?

- FAQs — anything prospects ask about often is obviously interesting (or concerning) to them, so pick a question and explain the answer
- Less-frequently-asked questions — don't overlook these! Any potential question or concern that prospects or existing customers may have is relevant
- Industry trends, especially as they affect your company or your customers
- Tips on best practices — how to get the most from a product like yours, why cloud-based services are the way of the future for businesses (or individual consumers), or even some general business management topics
- Give a glimpse behind the scenes — interviews with key team members, a “day in the life” of R&D, your team volunteering for a community activity, etc, all personalize your company, something that's critical for SaaS

businesses where you may never have face-to-face contact with prospects and customers

- Share customer success stories — case studies can be presented in a storytelling format in a blog, and nothing strengthens confidence in your products like the positive experiences of previous customers, so topics like this provide multiple benefits for you
- Pat yourself on the back — did your company, product, or a team member win an award? Did you get a great write up in TechCrunch? Be proud, tell the world! (And be sure to link to that article.)

You don't even have to write. For one thing, you're busy, so finding time to put pen to paper (so to speak) could be tough. And lots of people don't particularly like to write. No worries, you can team up with a professional writer to create great blogs on your behalf. Your marketing agency can help — in fact, they'll come up with the topics, too.

And here's a secret: some of the most successful blogs are actually videos. All you need is a couple of introductory sentences and the embedded video. Done. Infographics are also very popular, and you can treat them the same way. Done and done.





THE KEY TO CONTENT SUCCESS IS CONSISTENCY

We talked earlier about the importance of consistency in visuals and messaging. The same holds true for timing. Set a schedule for publishing blog articles, and stick to it. For a SaaS company, blogging weekly, bi-weekly, or monthly is best, especially when you are first launching or announcing lots of new features.

Create an editorial calendar to plan out topics in advance, mixing it up to keep things interesting, and keeping an eye toward your different buyer personas and their stage in the buyer's journey. You want to make sure you're building a library of content on specific and searchable topics, but be flexible as well. If something timely comes up — a special honor, a community disaster, etc. — you want to produce a blog that captures the moment. Every time you publish a new blog, share it with your

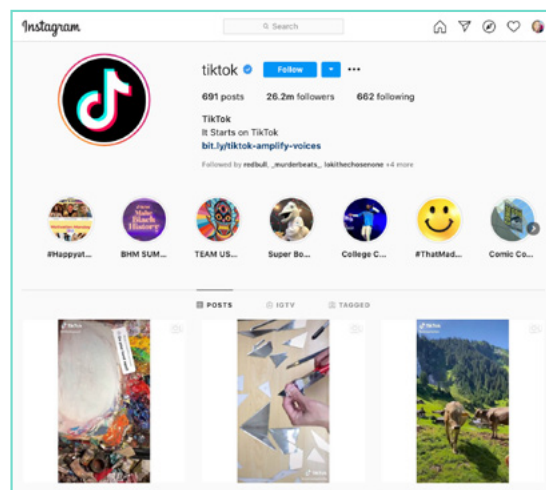
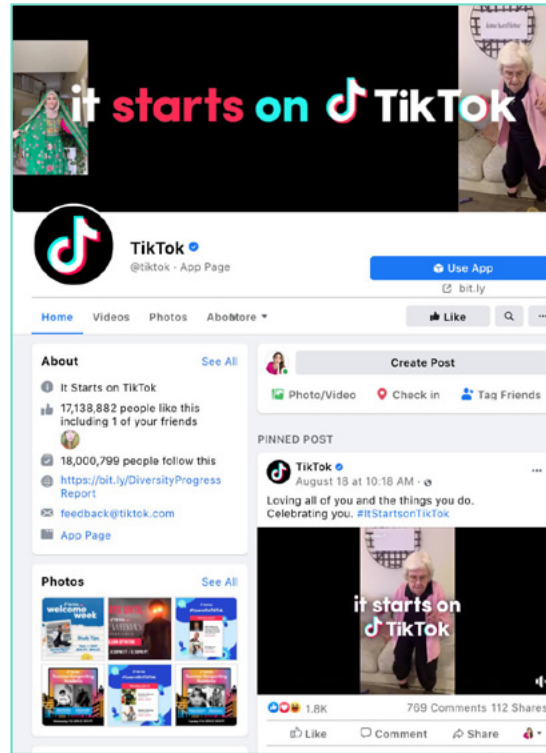
social media followers and email newsletter recipients to increase your reach. And be sure to invite website visitors to subscribe to your blog, by placing quick-click invitations on your home page, other key pages, and the blog itself.

Social Media: Meeting Customers Where They're Hanging Out

Everybody's on social media these days, most certainly your tech-forward prospects and customers. You'd better be there, right with them, or they'll wonder why not. Knowing your personas will help you decide which social platforms are most relevant for your SaaS company, but you'll probably want to focus on YouTube, Facebook, LinkedIn, and maybe Twitter. Several SaaS companies have found success with Facebook Groups. And forward-thinking B2C SaaS companies should also consider Snapchat or TikTok.

Like your blog, social media gives you a chance to converse with your target audiences, presenting helpful information that helps lead them down the path to sign up for a demo and get into your marketing funnel. That, my friend, is really the key for SaaS social media success: interacting genuinely, providing value, and using content to inspire action. Unlike your blog, social interactions can be much more intimate, especially if you're posting to a small niche group rather than all your followers. You can even carry on one-on-one conversations if need be. But of course your goal is outreach — and feedback. Two-way conversations that enable you to listen and learn from followers.

[TikTok](#) is a social network that keeps up on its own social networking. How meta. Here are two examples from TikTok's social media presence, on Facebook and on Instagram.



WHAT SHOULD YOU POST ABOUT? THE AGE-OLD QUESTION

- You should post about whatever is on the minds of your prospects or customers — essentially the same types of topics you blog about, only in brief:
- Answers to frequently-asked questions or concerns
- Answers to infrequently-asked questions or concerns
- “What do you think?” questions — ask what’s the one thing they’ve always wanted to know, then answer the question, or pose a question to solicit feedback and encourage discussion among your followers
- Responses to negative comments or complaints — no matter how wonderful you are, eventually you’ll



get some unfriendly posts. While you should take up problems privately with the poster, once you resolve the problem, share the “fix” with your entire audience. You can bet they saw the original post, and explaining (briefly) how you addressed it positively demonstrates to all that your company actually listens and cares. That can be a significant differentiator for a SaaS company in a crowded marketplace.

- Emerging trends in technology or your corner of the tech industry (especially those that affect you and your customers directly)
- Tips on best practices for business operations, using technology to become more efficient, etc.
- Invitations to join your company/team in supporting a specific cause, no matter where they’re located
- Customer success stories — getting

your customers to share their own product usage stories or tips allows others to sing your praises in an effective but non-salesy way

- Announce good things that happen to your company — an award, a fabulous new hire, media coverage
- Links to your website! Social media is just the thing to link to blog articles, videos, infographics, and landing pages for downloadable premium content, special offers and so on.

HOT TIP: don’t just post through your own company account; encourage team members to post about your company and industry from their personal angle to their own universe of friends and followers, especially on LinkedIn and Twitter. This can greatly extend your reach and “humanize” your company at the same time.

Social sharing is always desirable but responses are even better because they get the conversational ball rolling and encourage

others to get actively involved as well. This engagement builds awareness of your brand and products, reinforces your position as a knowledge expert, and helps establish personalized relationships that can lead to sales and loyalty down the road.

In the end, though, social media is most valuable for your company when it motivates people to visit your website and convert into leads that you can nurture individually. So, as you analyze social metrics, focus on conversions generated more than how many likes or shares you've accrued.

Of course, you can also pay to advertise on certain social networks such as LinkedIn and Facebook. We'll talk about that in the next section. Among other things, this is

valuable because it is an excellent way to drill down even deeper with targeting, to reach those in specific tech or leadership positions such as CTOs, CFOs, and CEOs. And if you're speaking only to tech professionals, you can use the tech-speak language that you know and love, with no worries about confusing your audience.

Online Advertising: Expand Your Reach Further or More Precisely

Inbound marketing is designed in many ways to reach target audiences "organically" by putting content you know prospects want right where they're looking. Because your content is relevant and

timely, it should attract attention and trigger a response (a visit to your website). Done right, this can be exceptionally effective. However, you can boost your results even more with paid online advertising.

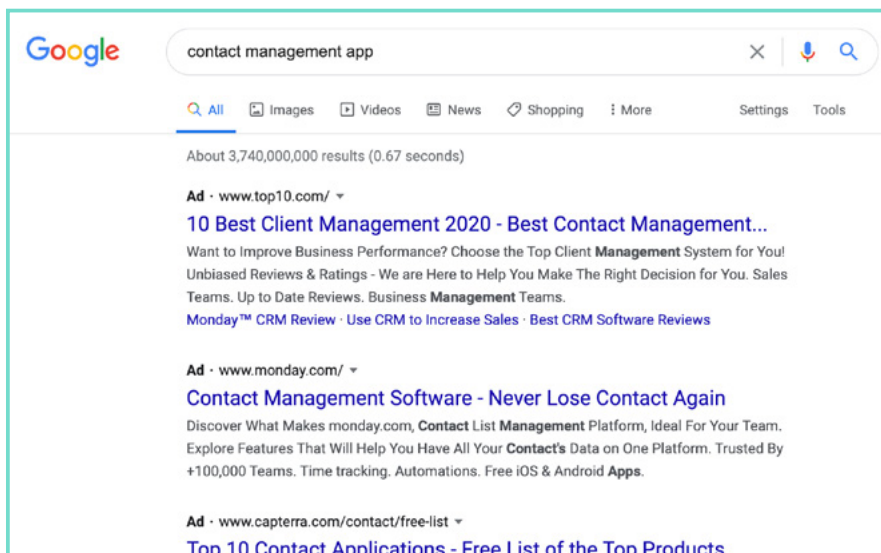
Online ads enable you to put your brand/message right in front of specific audiences — perhaps the C-suite folks we mentioned earlier, or any other group you want to home in on. Different types of ads allow you to reach different types of targeted groups most efficiently. Many modern ad platforms enable you to do targeting based on important traits such as industry, job title, or job function, which can be a real boon for SaaS marketing where you want to reach specific types of IT professionals or decision-makers.



PAY-PER-CLICK SEARCH ADVERTISING

Pay-per-click (PPC) search ads are the ones you see displayed with search results on Google, Bing, etc. They appear based on targeting criteria you set using keywords, which the search engine matches up with whatever the searcher types into their browser. That means your ad is automatically relevant. And if it's well-crafted, your prospect will click through to your website. You only pay when they do that — hence the name, pay-per-click.

Here's an example of the PPC ads that come up when Google searching for "contact management app." Interestingly, we see options for products as well as content focused ads from comparison and review sites.

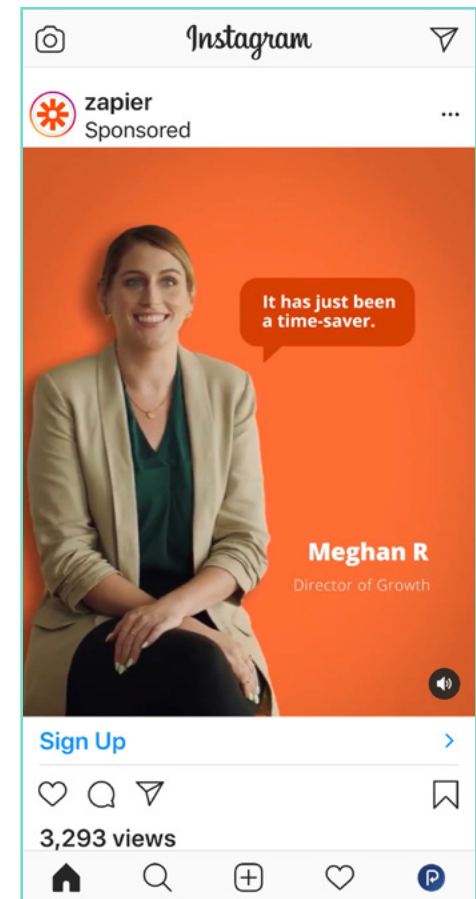


PAID SOCIAL

Social media ads are something we noted earlier, and they can be very effective in reaching a larger percentage of your target audience as well as your existing followers. (Many social users don't realize that everything they post isn't necessarily organically shown to all their connections.

In fact, non-sponsored Facebook posts typically reach only about 2-5% of your followers.) You can advertise simply to boost reach, and you can also increase results further by creating highly engaging ads that include video, slideshows, etc.

Here's a simple example from [Zapier](#), focused on one important benefit.



DISPLAY ADS

Display ads, also called banner ads, are the ones you see at the top, off to the side, or at the bottom when you visit a web page. These are typically very concise, like a billboard — an eye-catching visual and very short message — but also with a button to click to take action (visit your website).

Here are two examples of display ads from [SEMRush](#) that appeared on Wired.

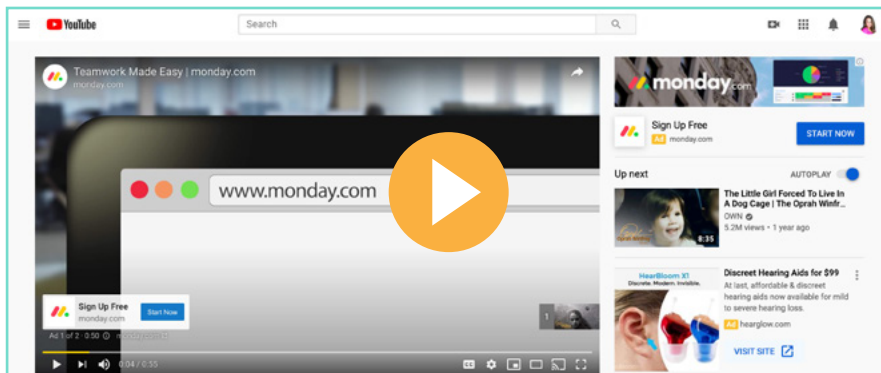
The screenshot shows a Wired article titled "The End of the Universe Will Probably Be Fairly Disappointing". The article features a space-themed illustration and text by Katie Mack. A SEMRush display ad is positioned on the right side of the article. The ad has a white background with the SEMRush logo at the top. The main text of the ad reads "Your Website is Not 100% Visible" in orange and black. Below the text is an illustration of a man in a suit holding a magnifying glass over a line graph that shows a sharp peak and then a decline.

This screenshot shows the same Wired article, but with a different SEMRush display ad at the bottom. The ad has a blue background with the SEMRush logo on the left. The main text of the ad reads "Do You Want to Skyrocket Your Marketing Like Our Clients Did?" in white. To the right of the text is an illustration of a woman in a blue jacket sitting at a desk with a laptop, with a rocket launching in the background.

VIDEO ADS

Video ads can be used across many of these platforms, but also specifically served on platforms like YouTube and Vimeo, or served via video-specific ad networks like Springserve or SpotX. These networks work similarly to the Google Ads network. One way that SaaS companies can easily create video-based ads is by using screen captures of their software or app in action.

Here's one of the video ads permeating our YouTube experience lately, a quick, straightforward message from [Monday.com](https://www.monday.com).

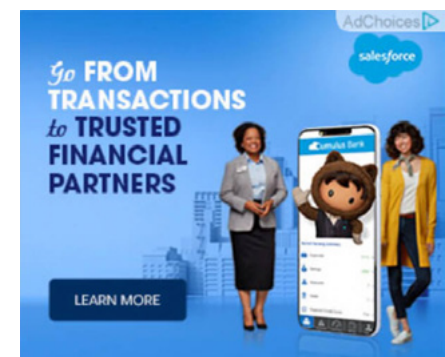
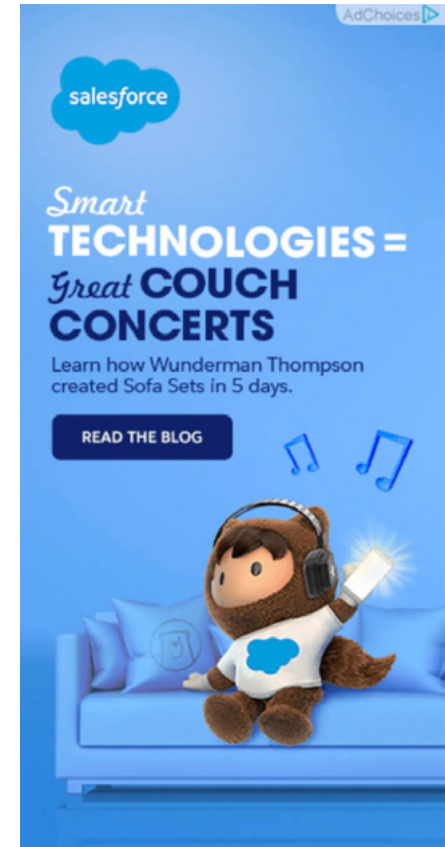


RETARGETING WEBSITE VISITORS

Retargeting ads seek out website visitors who left without converting by opting-in (subscribing to your blog, downloading premium content or a free trial, etc.) or making a purchase. The

ad that person sees reflects the content they were looking at before they left your site, keeping your brand and message in front of them and, hopefully, inspiring them to return to take further action with you. You can incorporate retargeting into any of the types of ads we've mentioned above (search ads, display ads, video ads, and social media ads).

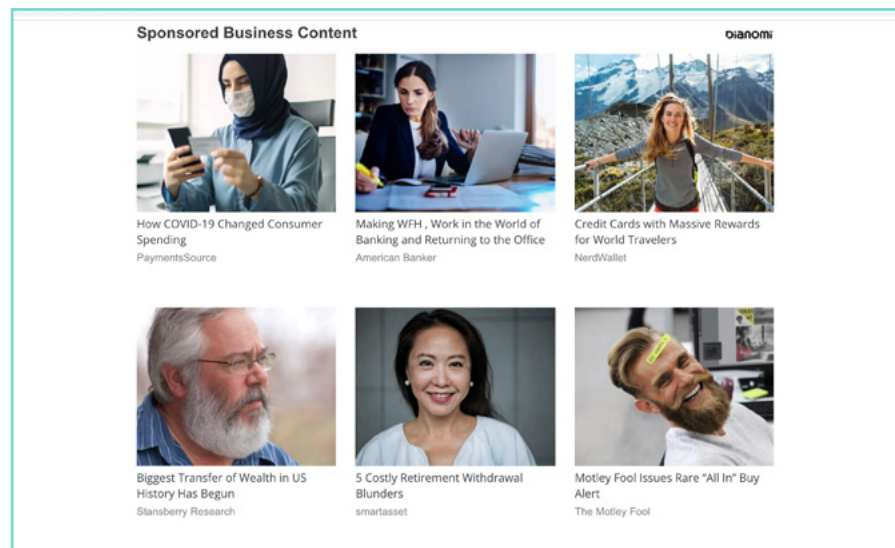
One company followed us quick with retargeting after we checked out their pricing page. We see you, [Salesforce](https://www.salesforce.com). Here are two display ads we encountered on the Washington Post website shortly after engaging with the CRM giant's website.



SPONSORED CONTENT

Native advertising (aka. sponsored content) is the online version of an advertorial you might see in the newspaper or a magazine — a guest article or blog post or infographic created by you and overtly promoting your brand or products, and which appears on someone else’s website. This content is called “native” because it is formatted in a similar way to the rest of the non-sponsored content on the site (though the native advertising still needs to have some sort of notification of your sponsorship of the content in order to avoid conflict-of-interest legal issues).

[Entrepreneur.com](https://www.entrepreneur.com) provides a good example of sponsored content with its selection of business articles.



Industry newsletter sponsorships can be particularly valuable for SaaS companies who need to reach “insider” audiences. Sponsorships can be pricey, though, so if your company is still small you might want to put this on your list of future marketing opportunities. Some examples of industry newsletters include theSkimm, the Hustle, and Product Hunt. Also, advertising on tech-specific web pages such as relevant categories within Capterra or tech review pages on G2 can also make sense for SaaS companies.

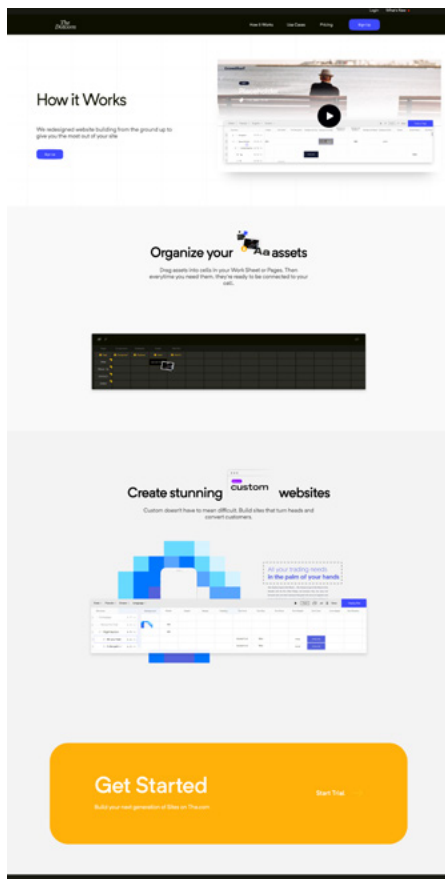
DIGITAL ADVERTISING SUCCESS

Online ads must attract attention and motivate the viewer to click through to your website, responding to whatever call to action appears in the ad. To ensure that, ads must be strategically created, considering factors such as:

- The content of the ad (video, graphics, copy)
- Ad targeting and placement
- Keyword choices and tracking
- Bidding prices and thresholds (for PPC)

- Overall campaign management, tracking, and analysis
- Associated landing page design and content (where those who click through will arrive and convert into leads)

Here's a good landing page example from [The.com](https://www.thecom.com), a new no-code website building platform.



Analysis and action are the keys to online advertising success. Being clear about goals, and then choosing the right metrics to measure them will make your campaigns most effective, because you will continue to grow from what you learn about your users' actions.

Online advertising platforms will give you hundreds of trackable metrics that you can use. If you're not sure where to begin, start with these four:

- Click-through rate
- Cost per click
- Conversion rate
- Cost per conversion

If your ad is getting lots of impressions but not many click-throughs, your targeting might be wrong. Or if you are getting lots of click-throughs but not a lot of conversions, it might be that your ad is working well but your landing page needs improvement. It all works together. That's why content planning, consistency and relevancy is so important.

A truly effective advertising strategy will pull in long term and short term KPIs, and intertwine business goals from both marketing and sales. So, in addition to tracking things like cost per click and cost per conversion, most SaaS advertising strategies will focus on specific goals like:

- Cost per free trial signup
- Free trial to paid user conversion rate by source
- Churn rate for paid media cohorts compared to other cohorts



Offline Advertising for SaaS? Don't Overlook It

Although an inbound marketing strategy based in strong digital best practices many times makes the most sense for SaaS companies, there may be times when you can effectively use certain traditional advertising channels as well. For example, you can leverage direct mail to gain the attention of higher-level executives who are often impervious to email approaches. However, since direct mail is expensive, campaigns must be carefully planned, targeted, and executed. For instance, a marketing automation platform once sent over a personalized art print to our ClearPivot team. It was nicely framed with an invitation for the entire team to enjoy lunch on them if we agreed to a demo of their software. It certainly got our team's attention!

Don't want to go that big? Send printed direct mail that appears to be hand-written — a nice touch that virtually

guarantees your mailer will get a second, closer look. You can also integrate automated direct mail campaigns with your CRM software, to achieve more precise targeting, even to pinpoint individual recipients. Add a unique personalized URL to each recipient's mailer, sending them to their very own personalized landing page. Talk about impressive.

Larger SaaS companies with larger marketing budgets are also re-discovering the value of billboards and other broad-based offline advertising options. If you want to reach influential software engineers on their morning commute, for instance, a billboard along I-280 in San Francisco is hard to beat. The nature of your product, scope of your business, and specific challenges and desires of your personas will tell you if and when the time is right to consider expanding your marketing in this way.

Industry Trade Shows and Events

If you were a traditional brick-and-mortar business, you could host special events at your store. SaaS companies obviously don't have a storefront. But so what if you don't have a physical location! You can and should still work events into your SaaS marketing strategy because events have special value. They bring you face-to-face with prospects and customers.

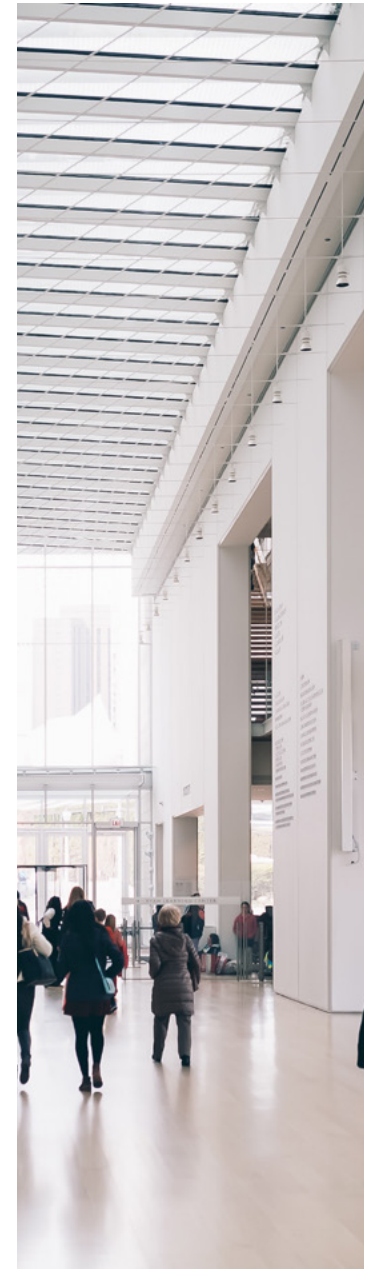
So get out there and mingle. Industry trade shows are an obvious choice. Exhibitor space is usually costly, so it can sometimes be better to reserve your budget for smaller niche shows where you can be most relevant and stand out better. Or wait to become a vendor until your marketing budget is bigger, and simply attend as a regular attendee at first. Consider taking multiple team members if the show is vast, so you can fan out and meet as many people as possible. Talk to people in the booths, on the show floor, in the seminars, and of course during those precious networking periods in the bar and over dinner. Remember themes

and common questions and make sure to compare those notes. Events can be a huge eye-opener for product development in terms of requested features, or a source of marketing ideas as you discuss common stories among the responses to your solution.

One place to find like-minded tech industry makers and marketers is [MozCon](#). Have you been?

WHEN IS IT TIME TO ACTUALLY INVEST IN A TRADE SHOW BOOTH?

Some events provide a more affordable, second-tier opportunity for companies that wish to exhibit but can't afford to go whole-hog with a booth. This comes in the form of static display tables placed in strategic areas such as reception space and lobbies. This can be a good way to introduce your brand to a new audience if expected attendees represent your top prospects. Whether you have a table or a booth, make the most of your time and monetary investment by:



- Collecting business cards or asking visitors to leave their name and email in return for a prize of some sort. It can directly relate to your SaaS product, or it can be something like an iPad that is sort-of relevant and highly desirable. Announce the winner before the show ends, to get your name in front of everyone one more time.
 - Set up laptops or tablets to run a product demo, or even better, project your main demo laptop onto a big screen in your booth so multiple people can watch at once.
 - Capture leads with your main call-to-action to sign up for a free trial of your solution at the booth. The idea is to get these people in your funnel, and start nurturing them toward a paid subscription by using your content plan to help them get the most your of your solution
 - If someone isn't ready to sign up, offer them event-exclusive premium content. This could be a tip sheet, whitepaper or eBook relating to the theme of the show, a video, or even a free 30-minute solutions call where one of your experts walks them through their own unique problem or question. Create a corresponding landing page for your website where folks can also register to get this special content, either before or after the show. (This is also a great way to promote your presence at the show ahead of time.)
- TRADE SHOW TIP:** Make sure you have at least multiple tablets if you're offering trials and premium content, in case your booth gets crowded. You will also want to use a form that resets any browser cookies after each submission to avoid people accidentally overwriting each others' submissions.

IT'S ALL IN THE FOLLOW UP

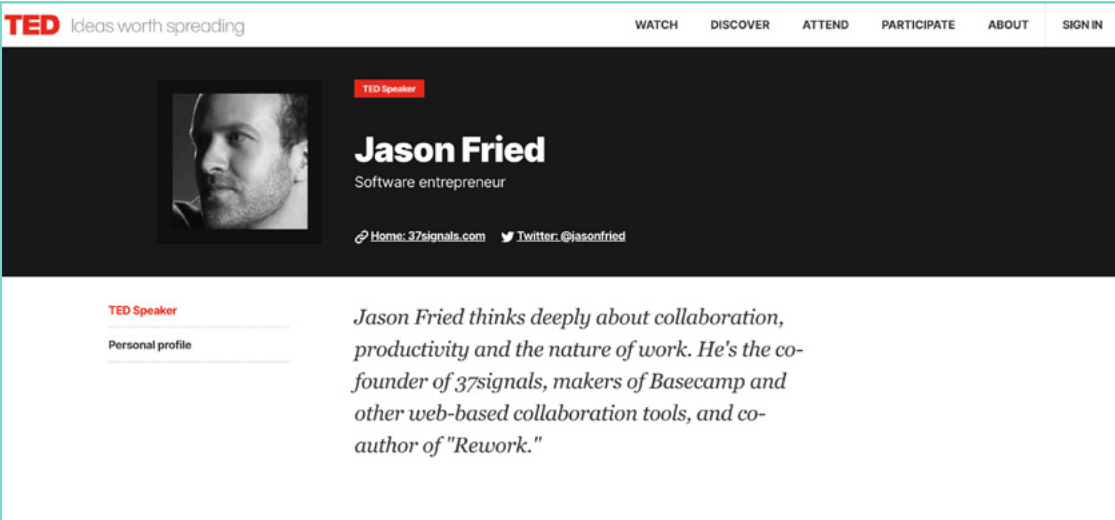
Your trade show sign-ups are collected through forms that should be linked to a CRM and marketing automation platform like HubSpot or Marketo. This allows you to create segmented email series to follow up, deliver premium content or special-access details, and then delight with the specific value that leads your prospects to the subscription checkout.

Don't wait too long to get started sending those messages. Once you deliver what the prospect signed up for, start a conversation by asking what part of the show was the most enjoyable or valuable for them. Be sure to include a call to action in each email — a reminder to download the premium content, an invitation to view a demo, or a link to sign up for a trial. Have your salespeople send personal messages to attendees to connect via LinkedIn, if that feels appropriate.

Thought Leadership and In-Person Networking

While direct mailing or printed messages might not end up in your lead generation plans, you may consider an effort toward thought leadership opportunities. Speaking at events or meetups with your potential user community is a great way to share your solution and generate brand awareness. The point is to create a personality for your CEO as an industry expert, generating faith in your expertise and, by extension, your solution.

One example is Jason Fried, co-founder of 37Signals and [Basecamp](#), who continually offers expertise as an industry leader. Here's a TEDTalk from Fried on why work doesn't get done at work.



The image shows a screenshot of a TED profile page for Jason Fried. At the top left is the TED logo with the tagline "Ideas worth spreading". To the right are navigation links: WATCH, DISCOVER, ATTEND, PARTICIPATE, ABOUT, and SIGN IN. Below the navigation is a dark header area containing a profile picture of Jason Fried, a "TED Speaker" badge, his name "Jason Fried", and his title "Software entrepreneur". Below this are links for his home page ("Home: 37signals.com") and Twitter ("Twitter: @jasonfried"). The main content area features a "TED Speaker" badge and a "Personal profile" section with a quote: "Jason Fried thinks deeply about collaboration, productivity and the nature of work. He's the co-founder of 37signals, makers of Basecamp and other web-based collaboration tools, and co-author of 'Rework.'"

Partnerships and Community: Yes, It Matters for SaaS

Whether your target audience is B2B, B2C, or a mix of both, there is another way to build brand awareness and endear your company to prospects and current customers: partnerships. You can team up with a complementary business to host an online event or participate at a live event, as well as co-promote using other inbound marketing means.

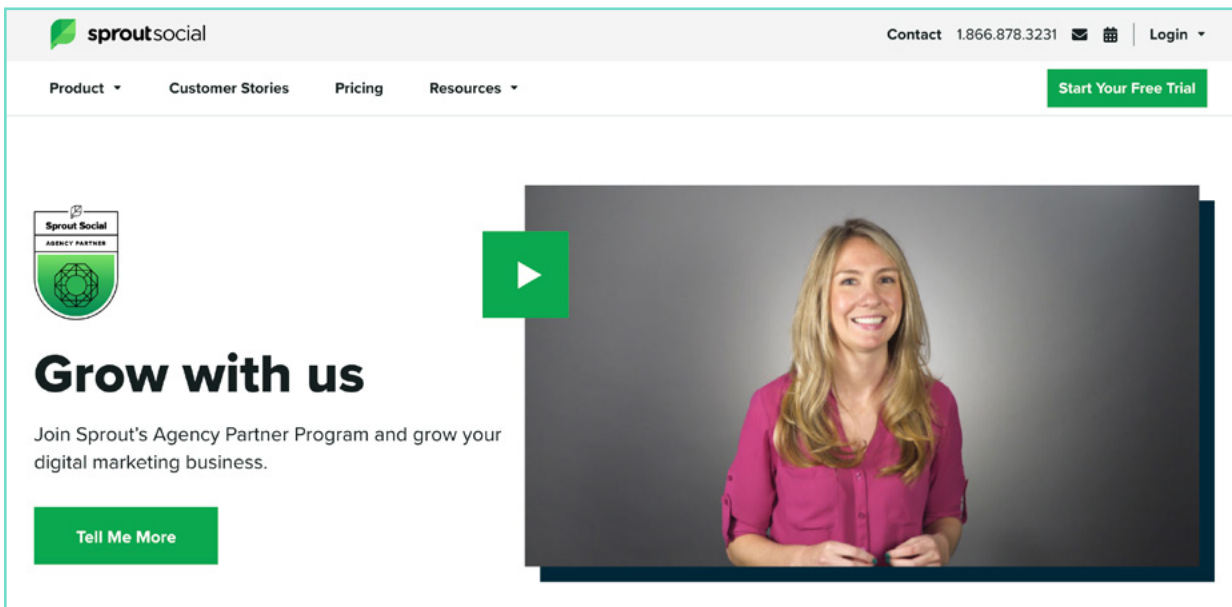
But the real surprise may be cause-related marketing. Today's customers want to buy from companies that prioritize sustainability and supporting their community — even when it comes to their platforms and apps. Whether you pick a

tech-based charity like Girls Who Code, a big national organization such as Charity: Water, or something in your own backyard where your team can get personally involved, aligning your brand with doing something worthwhile is smart business and a significant way to boost the spirits of your staff and customers.

Talk it up, in your blog and your social media posts, inviting readers and followers to join you or talk about what they're doing in their own community. Start a challenge, and match

donations. When you partner with a non-profit, they will be happy to publicize your support, too, increasing your marketing reach. Everyone benefits.

Here's an example of how [Sprout Social](#) highlights its agency partner program, asking partners to “grow with us.”



The screenshot shows the Sprout Social website's navigation bar with the logo, contact information (1.866.878.3231), and a 'Login' button. Below the navigation are links for 'Product', 'Customer Stories', 'Pricing', and 'Resources', along with a 'Start Your Free Trial' button. The main content area features a video player with a play button, a 'Sprout Social AGENCY PARTNER' badge, and the text 'Grow with us' followed by 'Join Sprout's Agency Partner Program and grow your digital marketing business.' and a 'Tell Me More' button.

Social Media Tip: Make sure your social branding efforts are genuine and align with your real-life practices as a company. Being disingenuous can come back to haunt you.

PART 3

Lead Generation

What's your main expectation for your marketing department?

For most SaaS leaders, the main expectation for marketing is bringing in new leads, qualifying them as good-fit customers and passing them forward into the sales process. The first step in this effort is lead generation.

Freemium

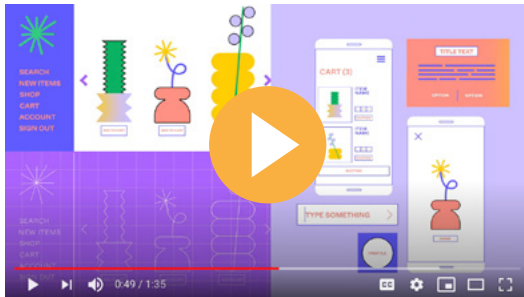
One of the most popular ways that SaaS companies are approaching lead generation now is through the “freemium” model. You know, free + premium. A freemium tier is a basic level version of your software that users can use for free indefinitely. One example is the Instagram app, Repost, where you

can use it for free with limited features and automatically-included branding that you can remove when you pay. The user can always elect to subscribe at some point in the future to take advantage of more features and the benefits that come from them. With the right marketing and usage adoption, they will.

One advantage of a free version is that users can take as much time as they want to make a purchase decision, rather than feeling constrained by a limited trial period. And, you still have ongoing opportunities to use in-app tools, email, and other lead nurturing tactics to promote eventual upgrades or perhaps a switch to one of your other products. Your job as a marketer is to make that upgrade or switch a no-brainer.



Figma offers a freemium version of its collaborative design app that's really useful, and the more you dig into it, the more you want to know. That dynamic creates demand for its paid subscriptions.



Before you decide to offer a freemium, think carefully about what to include or leave out. You want the no-cost tool to be useful enough to demonstrate clear

value, but not so wonderful that there's no clear reason to upgrade. Keep in mind that, although these users will generate zero revenue, they may be adding to your cost of service and overhead. On the other hand, SaaS marketers who use freemium pricing often find these users to be priceless brand advocates. The benefit of a freemium strategy will vary depending on the solution and specific business case.

Free Trials

Another common lead generation alternative to freemium is free trials. Nearly every SaaS product that doesn't have a freemium plan — except for the huge, enterprise-level, customized

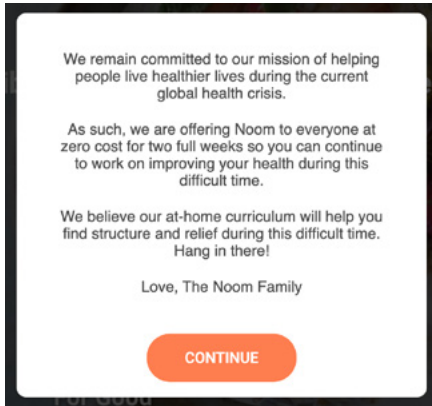
behemoths — offers a free trial of some length. The general market expects it, and the business consumer needs it. Your goal is to get prospects to see how your solution fits, and help them promote adoption internally. That's where free trials and freemiums come in. Your ultimate call to action for prospects is “sign up and see for yourself.”

Trials generally go for two weeks, but vary depending on the particular product, users and market. Trials are your chance to showcase the solution's most important features, demonstrate one-to-one the value of your products, and develop a relationship with your leads that makes them want to support your brand and your business. The best free trials hold nothing back, sharing most, if not all, of the solution's great functionalities, and giving a full picture of what it's like to work with the service. In the best cases, a free trial leads your prospects to adapt the technology and quickly want to rely on it. That's when the sign up process is a no-brainer.

One mistake SaaS marketers often make is offering a too-short trial period. Give your prospect enough time to really get the feel of the product, to understand what it can do for them and how comfortably easy it is to use. The more complex your product, the longer the trial may have to be. In our Lead Nurturing chapter below, we explain how you can help prospects get the most from their trial period, to generate more conversions into paid subscriptions.

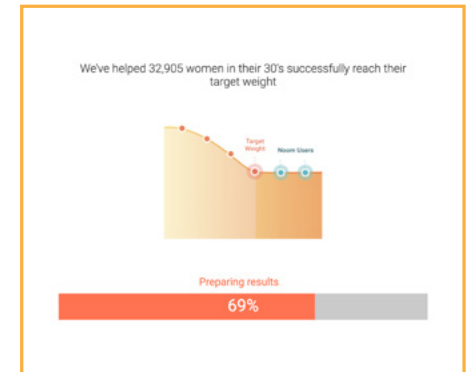
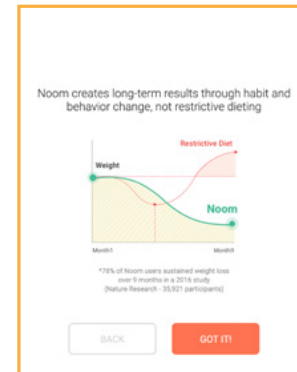
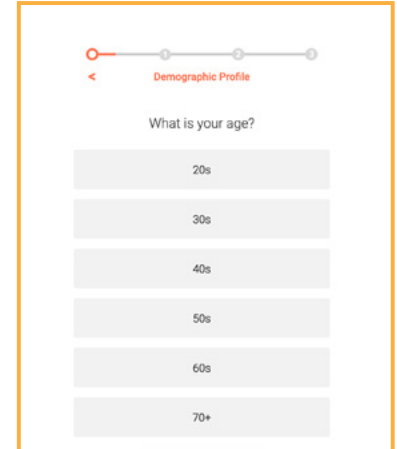
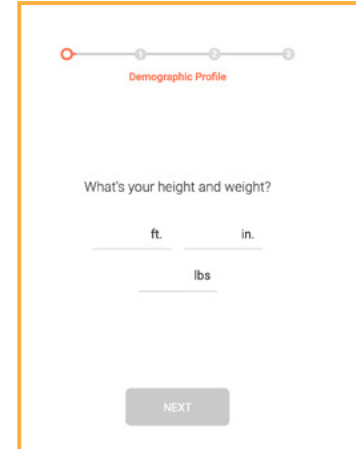
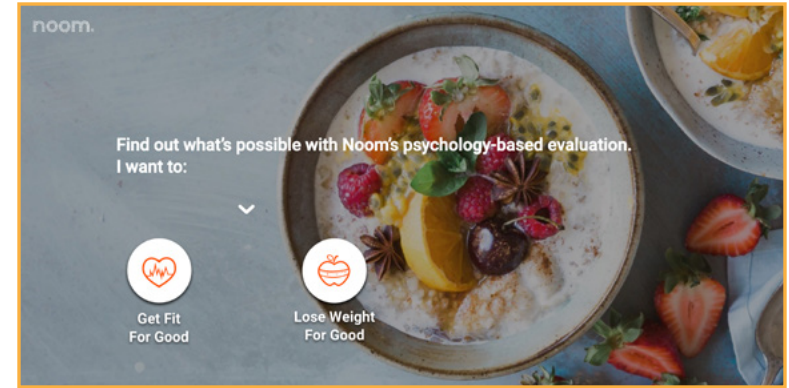
A free trial is also an effective means for gathering data that can help you better serve your potential customers. Weight loss app [Noom](#) takes full advantage of this approach with its well-designed free trial sign up process. What we like is the unique way in which Noom interjects with targeted educational tid bits to keep the user’s momentum through the sign up process.

Here’s the CTA:



Then, up to 9 questions follow before the email request. It’s a treasure trove of data for future segmenting and personalized attention.

Notice how invested (and potentially, motivated) the lead is before even submitting an email address. For an app like [Noom](#), we love this approach to the free trial sign-up.





Top-of-Funnel (ToFu) Offers

Prospects who are just beginning their buyer's journey may not be ready to try your software yet, even if there's a freemium plan or a free trial. So offer what they do want — more information about how to solve the problems that they're facing in their lives. eBooks, a helpful newsletter, your blog, webinars, or use cases can all answer their questions, address their concerns, and move them closer to checking out your product for themselves. And since each of these offers has its own associated landing page, each presents its own conversion opportunity and allows you to gather valuable contact information and other data.

We talked in earlier chapters about developing traditional content offers that lead prospects to the ultimate “sign up” offer via your blog, web pages, social media interactions, and so on. But what about content topics? There's no reason to feel stumped by this question, as you are actually surrounded by meaty topic ideas:

- FAQs — any oft-asked question is guaranteed to be interesting to a sizable

portion of your audience. Tackle these questions one at a time to create content.

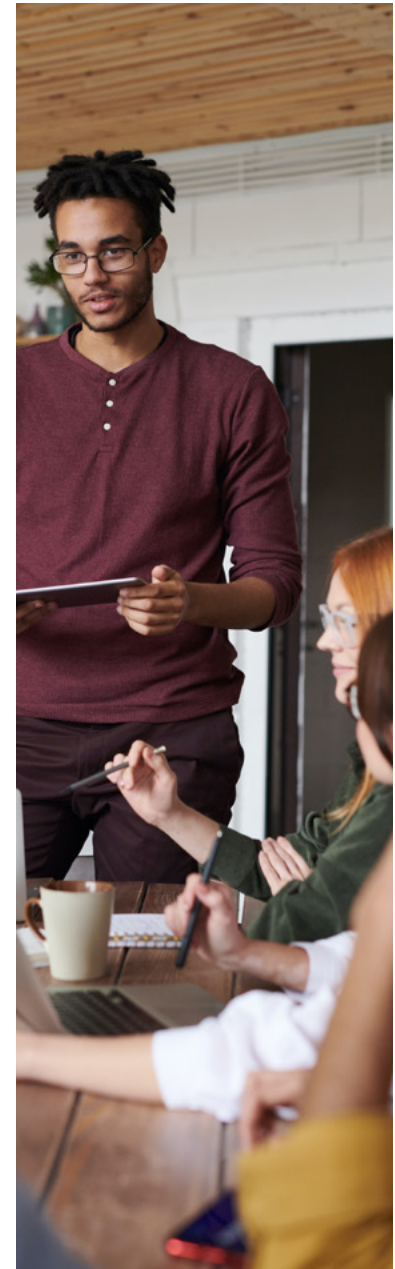
- Investigate your most popular blog articles, and expand on the topics for new posts, or repurpose the key points of the original blog for other channels, like social media.
- Industry trends or breaking news help prospects stay informed and remind them your business is a credible resource.
- Expand on your own value — how your app helps businesses boost efficiency, earnings, or customer love (case studies are ideal here), or tips and tricks to get the most from your app.
- Ask your prospects and customers what they want to know. Social media serves as an excellent listening post, but overtly posing the question shows

your company really is listening.

But you'll need other calls to action, too — interim actions that prospects can take on their way to signing up for a trial, if they're not ready at first. Interactive tools and activities are ways to engage prospects with your content so they heed your call to action toward a free trial.

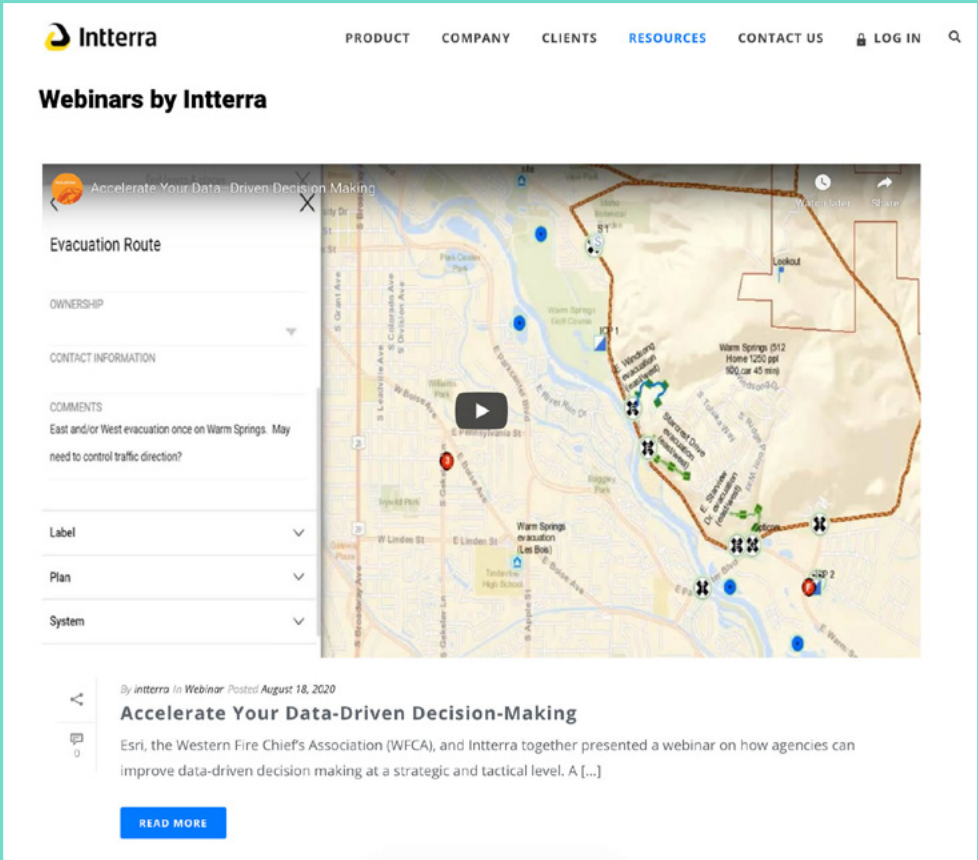
Before focusing solely on the pitch to download and trial, also try some of these ideas:

- Calculators that help them figure costs and ROI associated with adopting your solution.
- Interactive infographics that bring stats and data to life.
- Short quizzes that test and educate them on industry trends, or key benefits of your product. If you exhibit at trade shows, on-the-spot quizzes are a fun way to engage attendees in this setting, too.



- Self-assessments that go deeper to help prospects identify which benefits they're now missing or might have overlooked and how they can boost competitiveness (with your solution).
- Solution builders — if your product has multiple optional features, prospects can use an interactive tool to create a customized solution tailored to their specific needs and goals.

If your solution is specialized, or complicated, webinars are one method of offering ToFu content that's helpful for lead generation. [Intterra](#) is a cloud-based data visualization for fire agencies, and its library of webinars is one way the company educates potential leads.



The screenshot displays the Intterra website's 'Webinars by Intterra' section. At the top, the Intterra logo is on the left, and navigation links for 'PRODUCT', 'COMPANY', 'CLIENTS', 'RESOURCES', 'CONTACT US', and 'LOG IN' are on the right. Below the navigation, the heading 'Webinars by Intterra' is followed by a featured webinar card. The card features a map of a residential area with an 'Evacuation Route' overlaid in orange. A play button icon is centered on the map. To the left of the map is a sidebar with the following sections: 'Evacuation Route', 'OWNERSHIP', 'CONTACT INFORMATION', 'COMMENTS' (with a text input field containing 'East and/or West evacuation once on Warm Springs. May need to control traffic direction?'), 'Label', 'Plan', and 'System'. Below the map, the webinar title 'Accelerate Your Data-Driven Decision-Making' is displayed, along with the text 'By Intterra In Webinar Posted August 18, 2020'. A brief description follows: 'Esri, the Western Fire Chief's Association (WFCA), and Intterra together presented a webinar on how agencies can improve data-driven decision making at a strategic and tactical level. A [...]'. A blue 'READ MORE' button is positioned at the bottom of the card.

PART 4

Lead Nurturing

As much as we might hope for an immediate conversion into a free trial, the truth is, most prospects will not immediately jump, especially when [marketing SaaS in a B2B context](#).

You can use a multi-layered approach to lead nurturing to keep prospects engaged with you, encouraging them to sign up for the free trial later on, or share the solution with others in their department or company. Every lead nurturing effort should have at least two layers — immediate and long-term nurture — with segmented messaging for each specific group of contacts.

As with any product or service, lead nurturing is most successful when it relates to each prospect's area and level of interest. Use your content to help you differentiate your leads by offering several different CTA options. Track what your leads are interacting with, and respond with additional messaging segmented to where they are. For example, let's say you notice a lead opens one of your emails and clicks to read a case study about how your solution helped a customer in the healthcare field. Then, they click on a link within that case study to learn more about your data visualization feature for patient data. This behavior, along with other data you may be tracking, might show you that this particular lead is a good fit for your eBook on how your solution helps healthcare providers. This



is a very basic example, but you do want to view your website content, social media posts, and advertising as opportunities to track engagements and segment your leads, so your lead nurturing efforts actually lead up to sales.

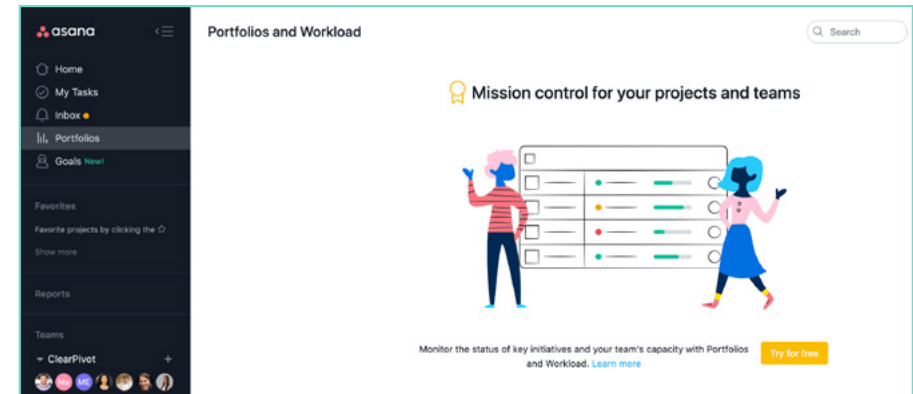
Let's look at some specific places your prospects can encounter lead nurturing:

In-App Lead Nurturing

Consider any trial period or freemium tier an opportunity to mentor your prospects into loving your solution. Use pop-ups and tooltips to enhance the in-app experience and guide your user to important features. For example, “Have you tried the XYZ feature yet?” could appear when first opening the app. Or, relate messages directly to user actions — for example, “Did you know you can do ABC with this feature?” or “Here's a shortcut you can try.”

In-app nurturing enables you to proactively point out and demonstrate the product's full capabilities. The user becomes fully educated rather than possibly overlooking benefits that may have special value for them, and they have the best possible experience using the app. When they love the trial, they buy the subscription.

Here's an example of how task management solution, [Asana](#), nurtures existing users in-app.



Email Marketing

Whether ToFu (top of the funnel), BoFu (bottom of the funnel), freemium, trial or otherwise, using automated emails is common in SaaS marketing. There are all sorts of other user actions or simple time frame specifications that can trigger a relevant, timely email from you:

- Downloading premium content such as an eBook, a report, or an infographic
- Clicking through on a link in a previous email you sent

- Viewing a specific web page or blog article
- Subscribing to your blog or newsletter
- Registering for a webinar
- Signing up for your freemium tier or free trial

All of these are golden opportunities to send a “thanks for doing that” email, which is good, because it builds your relationship with that prospect. But smart marketers always add more — a call to action that inspires the email recipient to engage with you in yet another way.

The design collaboration app, [Figma](#), which we mentioned earlier in this guide, does a good job of email marketing to nurture leads in its trial. Here’s an example from a message our team received while giving the app a try:



Email nurturing is a great way to get visitors into a trial and help trial users get the most from it, so you can prove your product’s value and excellent user experience. Then, you can use email marketing to nurture your existing customers into brand advocates. We’ll dive deeper on that in the next section. For now, let’s consider automated lead nurturing.

Automated Lead Nurturing Workflows

Workflows are marketing automation campaigns consisting of a series of messages that can be set to send when and to whom you select, based on your particular business case and timeline.

For example, for pre-trial prospects for a photo editing app, a message could be sent after someone fills out your form for an eBook on how to better edit their photos on a mobile device. That message could contain several pathways of actions, from learning more with your new video series on outdoor photography to signing up for a trial of your app. Depending on the actions your lead takes with that email, they may receive one of 3 tailored follow-ups 3 days later, and then based on their interests, geographic region, job title, or myriad other data points (as long as you’ve gathered them), you can send yet another specific message urging them

toward benefits that encourage them to get into a trial.

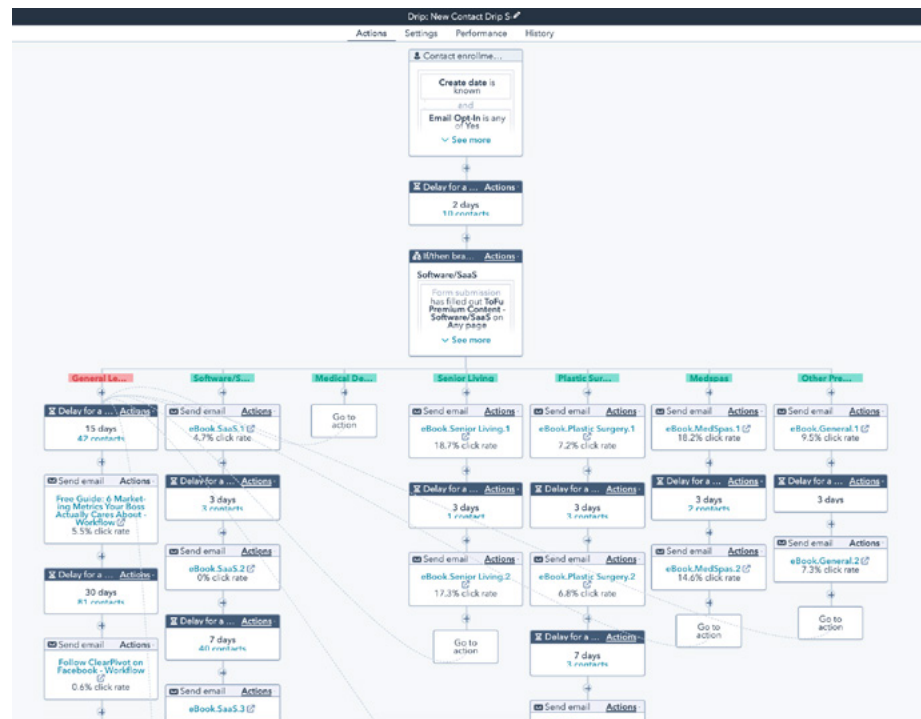
Let's take another example. In an email workflow taking a prospect from free trial into paid subscription, you will want to provide content that tells and/or shows the full story of your product even as the prospect is getting hands-on exposure to it via their free trial. Messaging should take on a more urgent tone as the end of the trial period nears, encouraging continued usage of the trial and, of course, encouraging the user to become a paying customer.

Beyond time-based message flows, it's also possible to base messages on user actions in your app. For example, if a trial user hasn't logged in at all for a certain period of time — say, a week — that could trigger an email that asks if all is well. Are they stuck on some detail, or having some other challenge with the app? If this is the case, you definitely don't want them to languish thinking your software is hard to use or not the right product for them. Checking in personalizes your brand, reinforcing the fact that you care about each customer individually.

Post-sale, the tools you use for lead nurturing become tools for customer nurturing. This ensures they have a comprehensively positive experience with your app. Over the long term, that excellent experience and your ongoing communication predispose customers to renew or even upgrade to higher

subscription levels. We'll get into more detail post-sale customer nurturing in Part 6.

Here's an example of an automated email workflow in the tool HubSpot. Each branch of this particular workflow leads to an industry-specific content series. Depending on the intention of the automation, it could then include more offers, and be short - or long- term.



PART 5

Contact Segmentation & Lead Scoring

Not all leads are created equal, and you want to focus your resources on attracting your best customers.

The first step is understanding who those people are, through buyer personas and detailed analysis of your contact database. Then, you've got to segment your contacts and communicate very specifically with each of your contact segments. This means segmenting campaigns and messaging to reach the right prospects at the right time, but how do you know who they are and what they want? In a word, data.

Start with Data

Contact segmentation starts with what you know about your lead. You can't begin to sort your leads into any sort of usable groups until you have data. Gathering some details about your leads doesn't mean you're being obtrusive. The best source of

data is actually the user themselves.

There are a few ways to get the data points you need to segment effectively. One way is to ask for it. Include easily-selectable info on your forms, like a dropdown select with the amount of seats needed on your signup form, with the available choices aligned with your sales process thresholds. You can even customize fields in your CRM to capture "self-reported personas." This means you can use your forms to help you differentiate between end-users and decision-makers, or between different types of users.

You can also gain a lot of useful information from the interactions someone has with your digital content. What a person clicks on, watches, or reads on your website can answer questions like:

- Are they top-of-funnel, exploring the very basics of your field?





- Are they comparing solution providers, thus farther toward the bottom of the funnel?
- Are they reading all your content on process efficiency?
- The answers to these questions will help you to plan your sales strategy and create the right experience for every lead.

When designing your form, and how it integrates into the experience of signing up and engaging, remember that it's a key source of data for future marketing and sales segmentation.

When to Use Lead Scoring

If you want to further automate your segmentation processes, you can use set up automated lead scoring. With automated lead scoring, particular characteristics or activities are awarded certain levels of points. Let's say being

from a Fortune 500 company is 10 points, and downloading an eBook is 8 points. You can set points thresholds, or even particular actions to assign leads to categories, or pass them directly into a direct-sales process.

This practice is most effective for larger companies with large volumes of leads that need to be vetted, qualified and passed to your sales team. It takes a lot of ongoing tweaking and analysis to get the models to be effective, and you've got to have a sufficiently large contact database.

One way to use lead scoring to segment leads is to separate them into two groups: self-service candidates (those who will be expected to make the product purchase on their own with no involvement from your sales team), versus those who want or need more complex assistance and guidance from a live sales rep. You can identify a simple threshold for this: for example, self-service prospects might be anyone who represents less than \$xx/

month in revenue or who will require fewer than X licenses. You will find out which group your lead belongs to by asking them. Include a simple dropdown on your form that asks them to identify their situation or intentions. Just make sure the amount of detail you're asking for from a lead aligns with the value they are receiving by filling out your form.

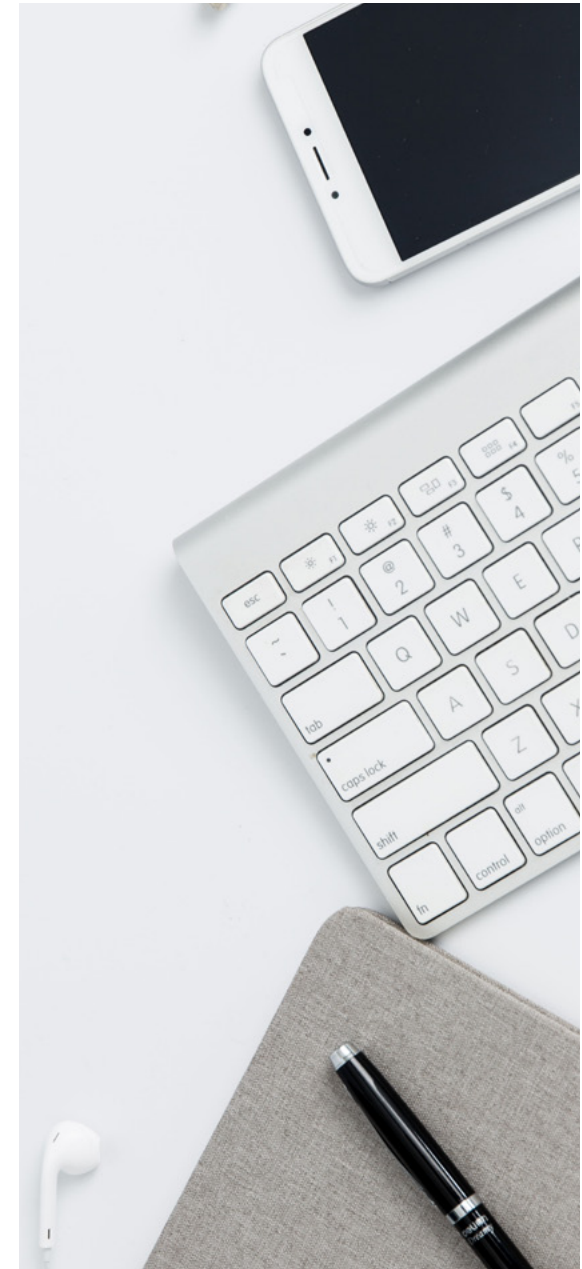
Another way to use data to segment your contacts is to use auto-generated fields like Number of Employees and Annual Revenue pulled in based on company properties in your CRM. Then, you can group leads into categories of service, or potential anticipated subscription levels, and even combine this data with self-provided data in your lead scoring system.

Calculate your Cost per Acquisition (CPA) for Each Segment

Many marketers think in terms of cost per lead generated. While that has value in evaluating your marketing, your ultimate goal is sales — customer acquisition. So the ultimate litmus test is what you're paying to secure each paying customer, not each lead.

Self-service leads commonly cost the least to convert, because they're doing the decision-making work themselves, aided and guided by your automated lead nurturing process.

Conversely, every time you assign a lead to a salesperson, the cost of acquisition goes up because you have to factor in the cost of the salesperson. It is imperative to consider costs associated with all relevant resources as you decide where to set segmentation thresholds, to ensure your customer acquisition process is truly cost-effective in relation to the product levels those leads are subscribing to.



PART 6

Delight Customers

We noted earlier that many of the same techniques you use to educate and convince prospects to subscribe to your product are also effective when used to ensure those customers remain impressed enough to renew, upgrade, and tell their friends.

As you know, it costs much more to acquire a new customer than to retain an existing one, and reduced churn is one of the top KPIs that you should be striving for. Taking good care of your subscribers inspires more renewals, which directly increases Customer Lifetime Value (CLTV). On the other hand, every time you lose a customer, you have to replace them, and it can have huge impacts on the effectiveness of the investment you

make in marketing, sales and service. An overly large churn percentage can greatly drop your CLTV and consequently become a huge drag on your CLTV/CAC (Customer Acquisition Cost) ratio. If your CLTV/CAC ratio flatlines or even inverts, it could be game over for your company.

So let's talk about customer success — the art and science of pleasing customers to the point where renewing (or upgrading) their subscription with you is a must-have for their business or personal life. Customers succeed when they know how to use your SaaS solution well enough to gain the benefits you promised. When your customers get exactly what they hoped for, and more, in a smooth and delightful experience, they will become brand advocates.



It Starts with the Solution: Usability and Functionality Are Square One

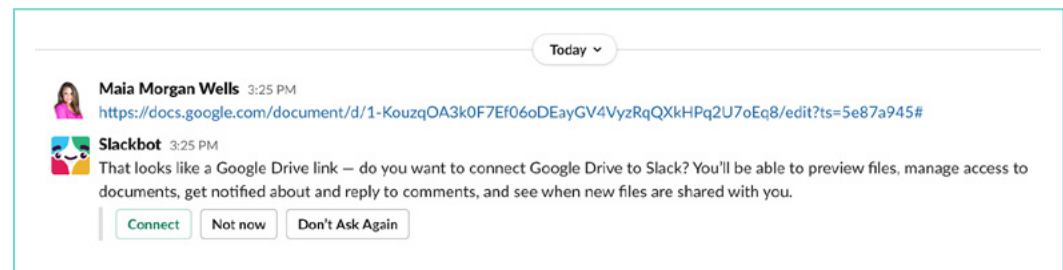
Obviously, if your product is less than stellar, you cannot expect to retain stellar customers, or build a brand reputation that brings you new interest. So it goes without saying that you must build your software correctly and make it work perfectly before you offer it up to the audience you seek. That way, customers have an excellent experience with your service right off the bat. This idea gets more [into product design](#) than marketing, so we're only mentioning it briefly here, because of the ways in which product quality affects brand reputation and customer satisfaction.

DON'T FORGET ABOUT IN-APP NURTURING FOR CUSTOMERS

Remember how we explained you can use in-app messaging and other tools to help trial users get to know (and love) your product more deeply? You can do the same thing with paid subscribers, helping them become “power users.” The easier to use and more versatile your software is, the more they will come

to see it as indispensable. And, adding in tooltips and in-app messaging is a great way to nurture your customers as they use your solution.

Here's an example from Slack:

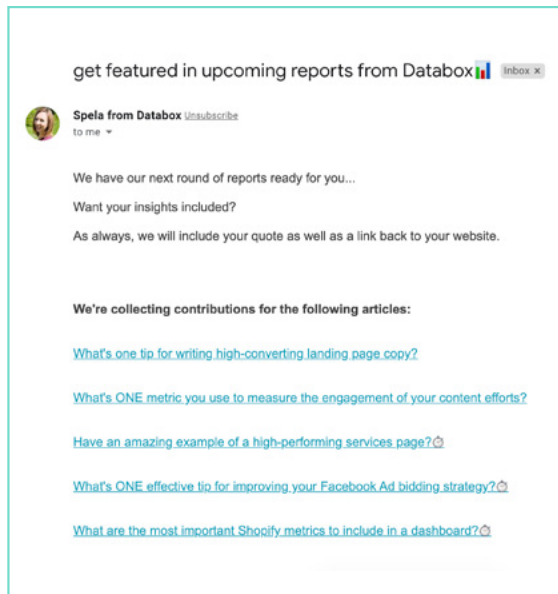


Email Marketing for Existing Customers

Here again, segmented emails and targeted, automated workflows are some of your best tools to keep customers engaged with your SaaS solution as a tool in their daily lives, as well as your brand as a whole. As with in-app nurturing, you can supply messaging that further educates your customers about how to use your product, inform them of new product/functionality announcements, and links to relevant content and customer success stories on your blog — all based on the demographic, interest, and behavioral

data you gather about each customer.

One of the world's best SaaS solutions for business analytics and visualization has an entire program built around emailing its customers. Each month, [Databox](#), writes a ton of content featuring quotes and insights from its customerbase. For Databox customers, it creates exposure and some goodwill. For Databox, it's great marketing, relationship building, and free expertise. It's truly one of our favorite customer email nurture programs.



You can schedule emails to announce a new product feature or user tip, for example. You can also use individual data to trigger specific types of messages. Has a customer not logged on to their software in some time (say, a week)? You don't want them to lose interest, so send an email that asks, "Are you unsure how to proceed? Our support team is here to help. Just call or click here and we'll get you on your way." Another message might also say, "We see you tried the XYZ feature. Here's more information about that (or some other feature you may like, too)."

Your customer support team is there to delight your customers, and bolster this type of email effort with open communication and helpful availability. The key to customer retention is supporting customer success and keeping them interested in your app. All aspects of the inbound flywheel work together, including this customer delight phase.



Share Customer Success Stories

Sharing case studies — how other customers have used your product to solve problems or make their lives easier — is a post-sales marketing tool that brings multiple benefits. There is nothing salesy about telling someone else's story. It not only verifies the value of your product, it can also show current customers new ways to get the most from their own user experience.

WooCommerce does a fantastic job of telling customer success stories that go into depth and help readers imagine the possibilities for their own online business.

WooCommerce Success Stories

WooCommerce is the perfect platform for online businesses that require customization. Below are some of our favorite customer stories from entrepreneurs, agencies, and developers in our global community.

- Tiny Wood Stove: From Blog to Million-Dollar Business**
Can a simple blog post make millions of dollars? Read the unique story of how a nomadic couple made a surprising discovery that changed their lives forever.
- How Four Food Businesses Started Selling Online During COVID-19**
From no store to 800 orders per day — see how 4 stores successfully moved their business online during COVID-19 to stay open and save jobs.
- Creating personalized adventure books with your child as the star — the story of Bang On Books**
Reading has the power to spark children's imaginations, transporting them to magical places where anything is possible. Taking this idea a step further, Bang On Books personalized adventure books fully...

Each case study is an opportunity to draw your current customers in, as much as it is a place to share your SaaS solution's value to new leads. In either case, your customer success stories should always include:

- Brief description of the customer or company and what they do
- Details about the problem they faced before using your solution
- The story of their implementation of your software
- Their inspiring results

It helps if you can use the customer's real name or business name as well as a logo or photo. Even better if you can get their testimonial or use case on video.

Promote Continued Subscription with Free Educational Content

We've already noted the importance of continuing to educate customers about your product and your company. This improves their experience but, even more importantly, it strengthens the customer's view of your brand as a go-to

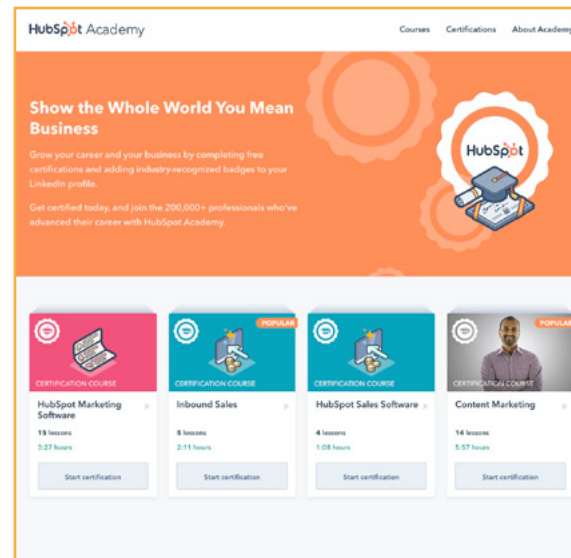
resource. There are myriad ways to educate customers:

- Blogs
- Videos
- Webinars
- Product pages on your website
- Infographics
- Social media posts (with links)
- Free certification programs

The goal is to make your SaaS product as useful as possible for your audience by presenting educational content on the platforms they use most.

Providing free educational content not only serves to strengthen your brand reputation, it also draws your users further into your solution. Knowing the

intricacies of your software and being able to take advantage of all its unique features is something that can bring a sense of accomplishment and loyalty to your customers. Becoming a power user of a particular technology is a badge of honor for some, especially in a business context. One example of this is the [HubSpot Academy](#). Our own staff competes to see how many current certifications they can achieve, and share them on their own personal LinkedIn profiles.



Create a Fantastic Self-Serve Knowledge Base

Your Knowledge Base is a section of your website that serves as a self-help resource library. We live in a world of instant gratification, and your Knowledge Base can help your customers get answers they need and continue using your app. Most people today prefer to search for solutions on their own whenever possible and solve their technical issues without submitting a support ticket or calling a phone number. Knowing they can come straight to your website increases a customer's engagement with you while feeding their need for information or assistance.

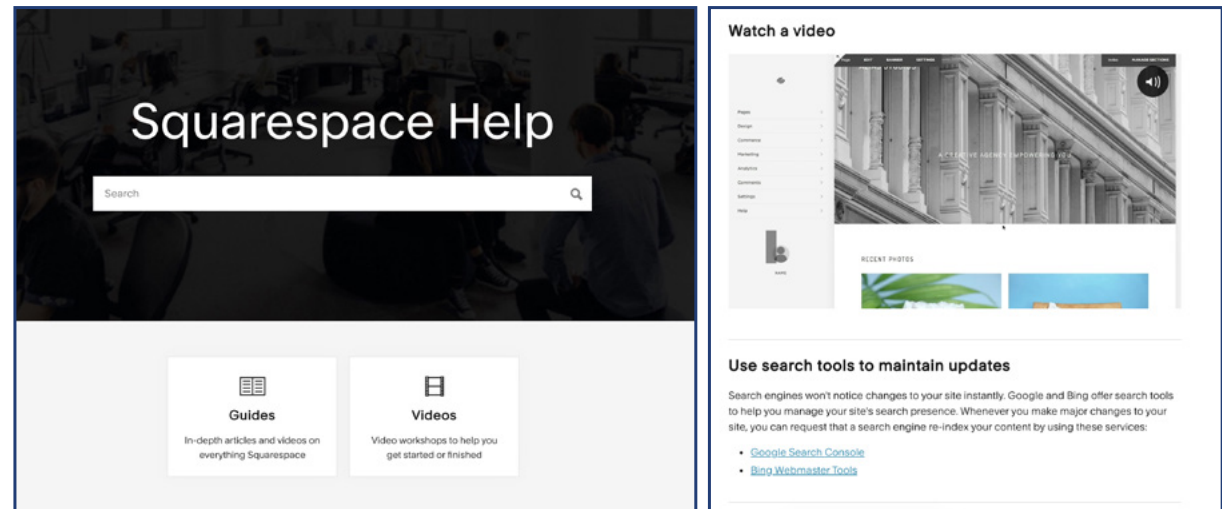
Your Knowledge Base should be:

- Thorough
- Organized
- Searchable

It helps to involve your customer success and product teams in outlining your Knowledge Base, because you'll be able to quickly focus on the most important topics to cover. They will be able to tell you the most common questions they receive, and you can write knowledge base articles answering each of those questions. Providing easy-to-digest information on popular help topics not only aids your customers in achieving success with their use of the solution, but also helps to ease the burden of individual customer service.

Once you've outlined a thorough list of offerings for your Knowledge Base, figure out the best ways in which you can present the information. Most SaaS companies use video for at least a portion of their educational content. Screen shares of exactly where to click, or video explanations of important configurations are very important audio visual additions to your Knowledge Base.

Squarespace relies heavily on its Knowledge Base for engaging customers and service provider/partners with support content.



Have an Efficient, User-Friendly Ticketing System

Whether or not you offer self-help options, traditional customer support is a crucial piece of customer retention. Make it easy and responsive, and you will be repaid with long-term customer loyalty. Create a formalized support ticket system that assures consistency as well as customer care, including a way to check the status of an inquiry. And give them options — live chat and/or an AI-driven app such as Intercom as well as a live support team available via phone or email.

Many SaaS companies use external partners like [Zendesk](#) to deliver customer support via email, chat, phone and your knowledge base. They call it “omni-channel support.” HubSpot also offers [Service Hub](#), a robust ticketing system and support platform that is available alongside HubSpot Marketing and Sales, for 360° complete customer experience.

WordPress plug in WPBakery has a pretty serious ticketing process, wherein users “apply” for support after choosing a

specific category of need and submitting account data. Needs are usually solved within a day or two, and it’s always easy to submit or review tickets.

The bottom line is, when a customer has a problem, they get a quick solution. This can be in the form of self-serve education, chat support, a phone call, or an in-app support ticket, and it can be executed internally by your own teams, or via a partner.

Customer Experience Management and Measurement

Your job doesn’t stop at building a great SaaS solution, getting people to subscribe, and keeping them happy. You must measure your customer’s experience (CX), and use that information to keep improving it. These days, customer experience measurement goes far beyond the widely-used Net Promoter

The screenshot shows a web interface for 'APPLY FOR SUPPORT'. On the left is a navigation menu with categories: LICENSES, SUPPORT, FAQ, KNOWLEDGE BASE, and DOWNLOADS. The main content area is titled 'APPLY FOR SUPPORT' and features a list of six categories: 1. INSTALLATION & UPDATE, 2. ACTIVATION & LICENSE, 3. CONTENT ELEMENTS AND LAYOUT (highlighted in blue), 4. FRONTEND & BACKEND EDITORS, and 5. OTHER. To the right of this list is a vertical list of six support topics: 1. I have a problem with specific content element, 2. I don't see element in my element list, 3. Getting notification: "You are using outdated e...", 4. After update my margins has been changed, 5. "You have an outdated version of WPBakery P...", and 6. Other.

The screenshot shows the 'APPLY FOR SUPPORT' form with the following fields and instructions:

- License verification ***: A dropdown menu with the instruction "Select license and product you have question for".
- Type ***: A dropdown menu with the instruction "Select type of your support ticket".
- URL**: A text input field containing "http://", with the instruction "Enter URL of your site where problem is displayed".
- Environmental details**: A large text area with the instruction "Enter browser version, WordPress version, plugins, addons, etc".
- Theme in use**: A text input field with the instruction "Enter theme title and URL".
- Temporary site credentials**: A large text area with the instruction "Enter temporary site credentials (login password) for our support team access for quicker ticket solving".
- Title ***: A text input field with the instruction "Enter short description of your ticket".

Score (NPS). In fact, if your analysis of the customer journey stops at NPS, you are missing out on an incredible opportunity to learn and improve.

Measuring NPS is only one piece of the customer satisfaction puzzle. It tells you how likely a particular respondent is to recommend your solution to another person, but it doesn't tell you why. The NPS is a very limited view of your customer's experience, because it

assumes a one-time reaction to a macro customer journey. In reality, most of the time, customers have many micro journeys with your brand. Doing an in-depth [customer journey analysis](#) can provide insight into the phases of your customer's experience.

Your detailed understanding of the customer journey allows you to choose the optimal time and channel for requesting feedback. Paired with data

about average spend and demographics, you can even determine where to best focus your CX efforts, and can provide more robust statistics to guide your customer satisfaction efforts.

Encouraging Positive Word-of-Mouth

Word-of-mouth was and still is the best marketing channel that exists, only now,





it's usually mediated by online platforms and social media. We respect the word of the people we connect with online, in the same way we would a recommendation from someone in-person. The closer the relationship, the more weight we give to that person's recommendation.

Whether in a business or personal context, most people rely on reviews and ratings as they evaluate purchases. Encouraging positive word-of-mouth on software review sites as well as within offices or even on social media is an essential piece of the Delight stage of your [inbound marketing methodology](#). Most SaaS companies have some form of campaign or messaging around leaving a review, or sharing your opinion. The message and medium changes based on your analysis of the customer journey.

Many SaaS companies use automated emails to thank customers for their subscription and ask for a review. There are a few key points to emphasize here:

- Understand exactly how you're triggering your automated request for a review and where that request fits in with the flow of your other email sequences.
- Make sure your automation is sophisticated enough to understand someone's readiness to receive your request in real time. There's nothing worse than asking for a

review from someone who just had a bad experience with your brand.

- Include a specific request and specific link to exactly where you want them to go. The less steps or ambiguity in your request, the better!

Again, it's crucial to understand how and when to trigger these requests, and to be very specific. Make the process simple with a clear CTA, like:

- Use this link to recommend us to your friends.
- Rate this App — we want your five stars!
- Leave our podcast a five star review & be entered to win X.

There is a myth about [offering incentives for a review](#) — that it's a big no-no. That's not true. What's important is to offer them an incentive regardless of whether they leave you a good review or a bad review, and to be transparent about your rewards with your audience. In your profile settings on review sites, or when using your reviews in marketing, simply share what the benefit was for leaving a review. It might even be a subtle way your brand shines through to potential customers.



PART 7

Budget Planning for SaaS Marketing

We've given you a lot to think about so far, on how to strategize your marketing, which tactics to choose, and how to put them into play. But there is one more vital component to any successful marketing effort: money.

Marketing is not a luxury, nor is it merely just one more cost of doing business. It is a key investment — the most critical investment you will make beyond developing your product — in your company's future.

SaaS Companies Are Different, and Require Different Levels of Marketing Spend

In most industries, you could simply look to

overall business spending trends to get an idea about smart and reasonable marketing budget allocation. Research reveals that most companies typically spend between [7% to 10% of their gross revenue](#) on marketing.

However, SaaS is in a league of its own. Barriers to entry are dropping and competitors can spring up quicker than ever., whether they will directly compete with you or not, other SaaS companies add another sound to the noisy environment. Prospects must hear your voice before they can be

VENTURE CAPITALIST, TOMASZ TUNGUZ:

"In the first 3 years, public SaaS companies spend between 80 to 120% of their revenue in sales and marketing. By year 5, that ratio has fallen to about 50% where it remains for the life of the business."

intrigued enough to listen to you.

Successful SaaS marketers [spend 40% up to more than 100% of their annual revenue](#) on marketing programs, depending on the company's life stage and goals. The newer you are, or the more aggressively you hope to grow, the more you need to invest in capturing attention and telling your story.

Some amount of customer churn may be inevitable, but well-targeted marketing spend will significantly reduce churn and increase customer lifetime value. If you're a startup with venture capital backing, you can allocate 100% of revenue, or even more, to get your marketing up and running. If you're self-funded, you likely should still budget 50% or more of expected revenue to build awareness and establish an initial customer base.

Here's the Good News: You Can Afford to Spend More

Traditional businesses that make physical products are limited in what they can spend on marketing, because they have high costs in other areas; notably the Cost Of Goods Sold (COGS), which can be as high as 80%. To serve new customers, they have to make more widgets, or shoes, or candy bars, or airplanes. You do not. Once your SaaS company has created the software solution or app you offer, you have your product in

hand with near-unlimited inventory — all you have to do is sell it.

Yes, you will have some expense to maintain your cloud computing infrastructure, provide customer support, and for R&D as you continue to innovate and upgrade, but you will still be able to devote considerable spending toward marketing and revenue growth because your gross profit is much higher.

Consider the example of [Salesforce](#), a pioneer powerhouse in the SaaS industry that has been in business for 20 years. Here's what their numbers look like for FY 2020:

- Total Revenue: \$17 billion
- Cost of Goods Sold / Cost of Revenue (COGS): \$4.2 billion (25% of revenue)
- Gross Profit: \$12.8 billion (75% of revenue)
- Marketing & Sales Spend: \$7.9 billion (46% of revenue)

And here's what [HubSpot's](#) 2019 marketing spend vs. total revenue looks like:

- Total revenue: \$674 million

- Cost of Goods Sold / Cost of Revenue (COGS): \$130 million (20% of revenue)
- Gross Profit: \$544 million (80% of revenue)
- Marketing & Sales Spend: \$340 million (50% of revenue)

Here are [ZenDesk's key stats](#) for the 2019 fiscal year:

- Total revenue: \$816 million
- Cost of Goods Sold / Cost of Revenue (COGS): \$234 million (29% of revenue)
- Gross Profit: \$582 million (71% of revenue)

- Marketing & Sales Spend: \$396 million (48% of revenue)

And here are [ServiceNow's](#) 2019 key stats:

- Total revenue: \$3.46 billion
- Cost of Goods Sold / Cost of Revenue (COGS): \$3.25 billion (23% of revenue)
- Gross Profit: \$2.66 billion (77% of revenue)
- Marketing & Sales Spend: \$1.5 billion (44% of revenue)

Note: these total revenue and gross profit numbers include these companies' SaaS subscription revenue as well as their



Why Spend So Much More at First?

These stats above are all from well-established, publicly traded SaaS companies, and we can see that they usually spend 40-50% of their revenue on sales and marketing. So why do startups need to spend a higher percentage? There are three reasons that SaaS startups need to spend more of their revenue on sales and marketing than more mature companies:

- Building market awareness from scratch takes resources. Very few people are aware of you yet, so it can be a long road to get the word out into the market.
- You are also building up your entire marketing asset library from scratch. In the context of a SaaS startup, every single asset needs to be built, from your branding to your website and content like

landing pages, emails, premium content, nurturing workflows, and social media.

- When you're just getting started, your revenue is naturally low. So, if you based your marketing spend on your revenue, your marketing spend would be low too. After all, 50% of zero dollars is still zero.

In order to make an impression in the SaaS world, you have to pull out all the stops. Gradual growth based only on word of mouth and referrals won't cut it in SaaS. You have to establish yourself quickly, and to do that, you have to market your company and product broadly and deeply to reach as many prospects as possible. That takes money, and that's why successful young companies keep up the spending pace throughout all of their early years, sometimes upwards of 120% of revenue.





Managing Your SaaS Marketing Budget

You cannot just pick a dollar amount and assume all will be well. As you implement your marketing plan, you'll need to continuously assess results. How many customers are you getting? What is your customer acquisition cost (number of customers divided by total sales/marketing budget)? Which sources and campaigns are bringing you the best return? Which types of customers are sticking with you the longest? By analyzing what's working and what is not, you can eliminate weak activities and redirect that money toward doing more of the things that produce leads, sales, and renewals. After all, no matter what your budget, you want every dollar you spend to generate the strongest ROI.

Especially in your fiercely competitive SaaS marketing environment, taking timid marketing steps and hoping for the best will leave you in the dust. So plan your budget as if you mean to grow (we know you do!), then put that money to work increasing your customer base and profitability. Of course, that's not so easy.

Partnering with an experienced, SaaS-savvy team such as ClearPivot can give you confidence knowing your marketing is being handled strategically and efficiently, so you can expect to see effective results. While we're using our expertise to help build your business from the outside, you can stay focused on building it from the inside — building product innovations and long-term customer relationships.

Conclusion

Creating your SaaS marketing strategy is not simple, as demonstrated by the scope and length of this guide.

On top of that, the marketplace and customers themselves are constantly changing, regardless of whether your SaaS is primarily B2B or B2C. It is imperative to understand your prospects and customers in depth so you can clearly explain to them how your software will solve their problems and make their lives better, at home or at work. When prospects know why they should choose you, they will.

Following the holistic inbound marketing process we've described in this guide works so well because it is customer-centric and uses data to segment and connect with specific audiences, serving them the right message at the right time on the right channel. With your website and every blog article, email campaign, social media post, paid ad, and landing page, you are telling prospects what's in it for them when they choose to use your product. That attracts interest, transforms visitors into leads, leads into buyers, and builds long-term relationships that keep customers coming back for more.



Next Steps

Just as it takes skill and experience to develop must-have software, it takes skill and experience to design and implement a profitable marketing program.

Just staying on top of the latest trends and best practices in SaaS marketing can be incredibly tough. Thankfully, you don't have to do this yourself. ClearPivot is here to help. Our team comprises experts who know marketing

and know the SaaS and tech industry. So let's talk about how we can work together to market your technology, so you can grow your business.

- Our SaaS Marketing Services:
- Go-to-market strategy
- Content strategy
- CRM implementation
- Email marketing
- HubSpot implementation
- Marketing automation implementation
- PPC ad management
- SEO strategy
- Social media
- Target persona development

Ready to bring your marketing to the next level?

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