



The Complete Handbook to  
**OUTSOURCING  
MARKETING**





## TABLE OF CONTENTS

Part 1: What is Marketing Outsourcing?.....	3
Part 2: Why is Outsourcing Marketing so Hot Right Now? .....	5
Part 3: What are the Common Services Agencies Provide? .....	7
Part 4: Seven Signs You Need to Outsource Some of Your Marketing .....	11
Part 5: Business Case for Outsourcing Marketing.....	12
Part 6: Picking the Right Marketing Agency .....	15
Part 7: Purchase Process.....	16
Part 8: Catalyst Marketing Agency .....	18
Conclusion .....	19
About the Authors.....	20

# PART 1

## What is Marketing Outsourcing?

**What:** Marketing outsourcing is the art of handing over the marketing demands of a company to a third party. It's a lot like how companies hire outside accountants or attorneys.

**How:** Experts fill in the gaps for your team and develop and execute your marketing strategy and campaigns.

**Why:** So companies like yours can increase operational efficiency, focus on their core strengths and grow revenue faster.



### Who Outsources Marketing?

#### Company Size:

Companies of all sizes outsource their marketing. Larger companies with big teams often don't have all of the skills and could use the help of marketing specialists who will complete their team. And small and medium-sized companies benefit since they don't have to commit to the cost of an in-house, full-scale marketing team. An agency will supplement where needed, while meeting budgetary constraints.

#### Industries:

Whether you market to businesses or consumers, all types of companies leverage the many skill sets of a marketing agency. While each industry has different ways of reaching and engaging their customers, companies can benefit from an agency with experience in several industries. Agencies with varied experience can apply best practices from another vertical and challenge "standard" marketing activities while continually thinking out-of-the-box.

## Worksheet: Are You Ready for Marketing Outsourcing?

Factor	Disagree			Agree	
We don't have a strong strategy to generate leads.	1	2	3	4	5
Our marketing team doesn't have all of the necessary skills needed.	1	2	3	4	5
We just don't have enough bandwidth.	1	2	3	4	5
We don't have enough content.	1	2	3	4	5
I'm not sure we really know who the right buyer is.	1	2	3	4	5
We aren't sure what technology stack we need to be efficient and successful.	1	2	3	4	5
We have a hard time converting leads into buyers.	1	2	3	4	5
We need to drive more people to our website.	1	2	3	4	5
We're inundated with advertising and promotional offers and don't know which options make sense for our brand.	1	2	3	4	5
We can't demonstrate a return on marketing investment.	1	2	3	4	5

## TO INTERPRET YOUR RESULTS, TALLY YOUR SCORE.

# >35

If you scored > 35, you're ready for marketing outsourcing.

# 20-35

If you scored between 20 - 35, you're moving in that direction. You should start evaluating marketing agencies.

# <20

If you scored under 20, you may not be ready for marketing outsourcing quite yet. But that doesn't mean you can't keep reading!

Regardless of your score, you have options to choose from and ways to increase the efficacy of your marketing.

## PART 2

# Why is Outsourcing Marketing so Hot Right Now?

### TRENDS DRIVING MARKETING OUTSOURCING:

1. The 2008 recession permanently altered how companies approach revenue generation and measurement.
2. The old, cumbersome agency model doesn't work anymore. Nimble, results-oriented marketing agencies have emerged in its place. There are more right-size marketing agency options for companies of all sizes.
3. Technology has forever changed people's relationships with brands. It has changed how people connect with each other and how we connect with brands. It has also enabled brands to play different roles beyond their physical products and services.
4. Innovation within the marketing landscape continues at a fast clip, and marketers are inundated with choices. Seeking external help to navigate, vet, set up and execute new marketing tools saves internal marketing departments time and money determining what's right for them.
5. With the increased use of marketing technologies comes the need for marketing middleware. Marketing middleware allows different marketing technologies to work together and provides analysis of customer interactions across different types of marketing campaigns, while maintaining consistency in campaign management and reporting.

## BENEFITS:

1. Companies get access to higher quality talent that they might not ordinarily be able to attract or afford into an in-house department.
2. Outsourcing negates the need for an in-house team, thus reducing overhead – clients can operate with a bare bones marketing team, or even none at all.
3. Outsourcing reduces or eliminates the need for multiple specialist agencies – all the marketing requirements are met by one centralized agency.
4. Outsourcing takes the pressure off of having to know everything. You can rely on a team of experts who can strategize, plan, implement and measure programs using the latest technology to increase efficiency and effectiveness.
5. Look smart. Having marketing ninjas at your fingertips that you can hold accountable for budget, deadlines and performance without the financial commitment involved in finding, hiring, training and onboarding a team of internal team members-- genius!



# PART 3

## What are the Common Services Agencies Provide?



### **Branding**

Are you unveiling a new product or service, or simply need a refresh to attract a new audience or stand apart from increasing competition? Marketing agencies can help you define and develop your brand positioning, tonality, value proposition and identity.



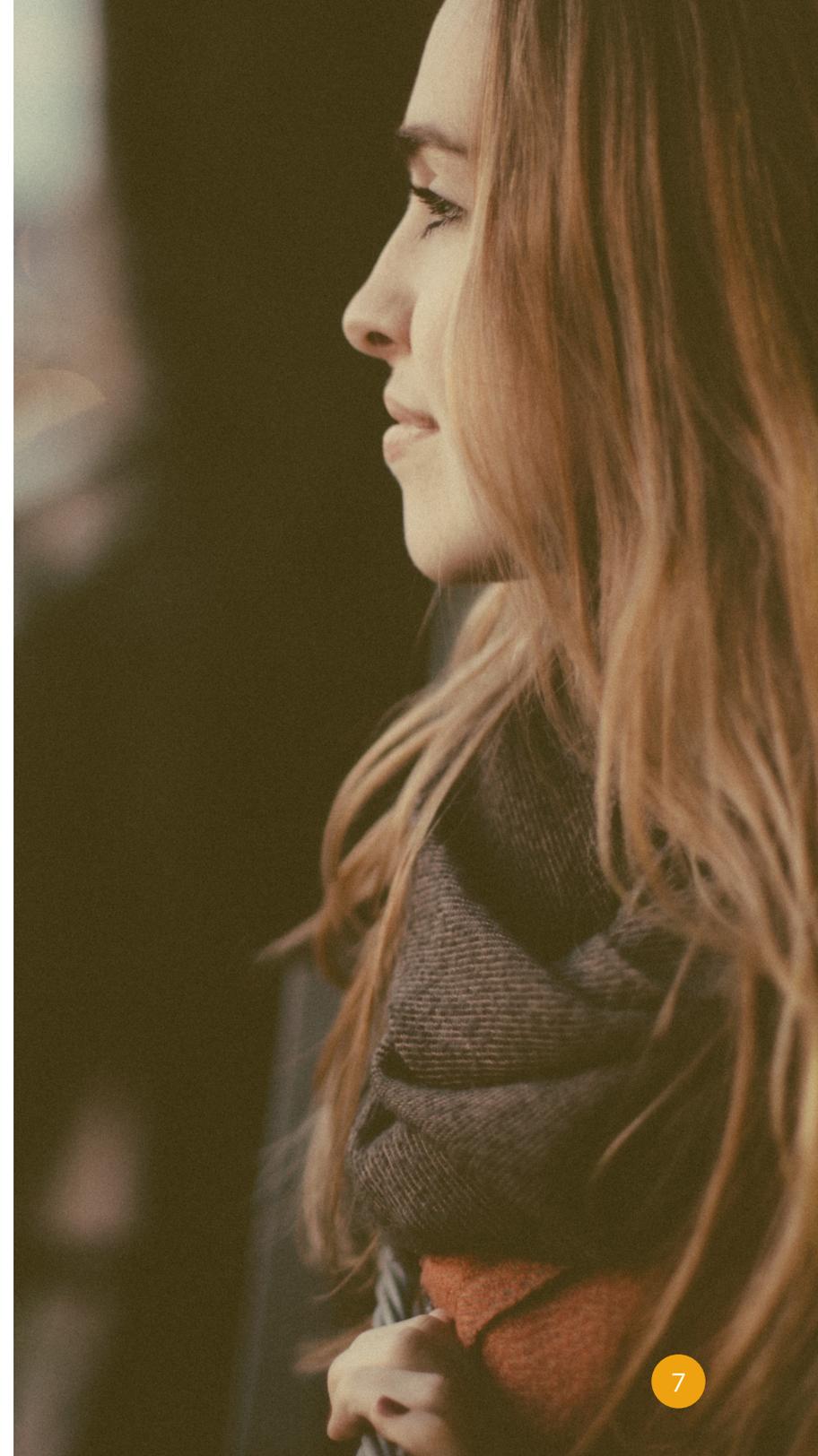
### **Buyer Personas and Buyer Journeys**

Marketing agencies can define what your target audience(s) looks like demographically, behaviorally, and psychographically, plus articulate what your customers are searching for at each phase of the buyer's journey: Awareness, Consideration, and Decision.



### **Content Marketing**

Is your brand positioned to attract and convert consumers at each phase of the buyer's journey? Marketing agencies can develop a content marketing roadmap outlining which content would be of most value to your prospects with the purpose of moving them towards the bottom of the sales funnel.





### **Creative Development**

Marketing agencies design, write, and produce collateral, videos, infographics, podcasts, white papers, checklists, blogs, FAQs, webinars, ROI calculators, templates, case studies, eBooks, SlideShares, logos, SWAG, packaging, signage, direct mail, out-of-home, point-of-sale materials, print and online ads, and sell kits.



### **Data Analytics and Optimization**

Marketing agencies can establish key performance indicators and track web traffic, conversion rates, cost per lead, cost per sale and revenue. Based on these data points, an optimization strategy is developed and implemented to maximize your return on marketing investment.



### **Email Marketing**

Marketing agencies can create and execute a lead nurture campaign, segmented by buyer persona, to continually touch your prospects and provide valuable content, so your company is top of mind when they're ready to buy. In addition, marketing agencies can develop a robust loyalty-building campaign targeted at your customers.





### **Lead Generation**

Want more leads? Marketing agencies can develop a lead generation engine to attract and convert strangers and prospects into leads your sales people can actually sell to. Marketing agencies find unique ways to attract people to your business and serve them up useful information that naturally interests them and keeps them coming back.



### **Market Research**

Wondering how your product or service will be received or how it should evolve to better meet current market demand? Marketing agencies can develop a qualitative or quantitative market research plan, outline a methodology, draft questions, conduct stakeholder interviews, deploy an online survey, then compile and analyze results.



### **Media Planning, Buying and Management**

Marketing agencies can determine the most effective and cost efficient way to elevate your brand exposure based on your target audience and their buyer's journey. After developing an integrated media plan, marketing agencies can negotiate and execute the media buy with several vendors, traffic assets and provide performance reports.



### **Public Relations**

Marketing agencies can develop and execute a holistic public relations plan to increase media coverage opportunities that build your credibility and support your company's thought leadership position in your industry. Services may include drafting press releases, developing a press list, pitching to the media, addressing media inquiries, setting up events, and crisis communications.



### **Search Engine Optimization**

Effective SEO is rooted in a sound keyword strategy and robust content marketing plan. Marketing agencies can develop both components to increase the efficacy of your SEO efforts. In addition, marketing agencies can perform SEO audits and enhance on-page and off-page SEO to attract relevant search traffic and increase your search ranking for target keywords.



### **Social Media**

Marketing agencies can identify the most appropriate social media mix to broaden your reach and influence. Then, develop a balanced content strategy consisting of curated, promotional and original content, and grow your audience of influencers, brand evangelists and prospects.



### **Strategy**

Marketing agencies can develop a comprehensive marketing plan outlining strategies and tactics that align with your business and sales objectives. Think of it as having access to the brainpower of a CMO without having to pay a large salary. Full-service agencies can provide the necessary services to execute the plan for you too.



### **Technology Consultation and Implementation**

Marketing agencies can evaluate your existing technology stack and recommend a technology mix (marketing automation, CRM, email marketing, and lead generation platforms) to increase efficiency, maximize marketing spend and demonstrate marketing ROI.



### **Web Development**

Marketing agencies can provide recommendations on the most appropriate website platform for your business, build a wireframe, select a template (or design a custom site), develop interactive content, Q/A and launch. Already have a website? Marketing agencies can refresh it with new offers, landing pages, images, blogs, whatever will attract and convert your target audience.



## PART 4

# Seven Signs You Need to Outsource Some of Your Marketing

1. We don't have a strategy in place to grow our business.
2. We aren't generating enough leads.
3. We don't have enough compelling content to engage our prospects.
4. We are stressed!
5. We aren't utilizing social media.
6. We don't know the stages of our buyer's journey.
7. We aren't communicating on a regular basis with our database.



## PART 5

# Business Case for Outsourcing Marketing

Maybe you have a marketing team already. Or maybe you don't. But in either case, why should you consider outsourcing your marketing?

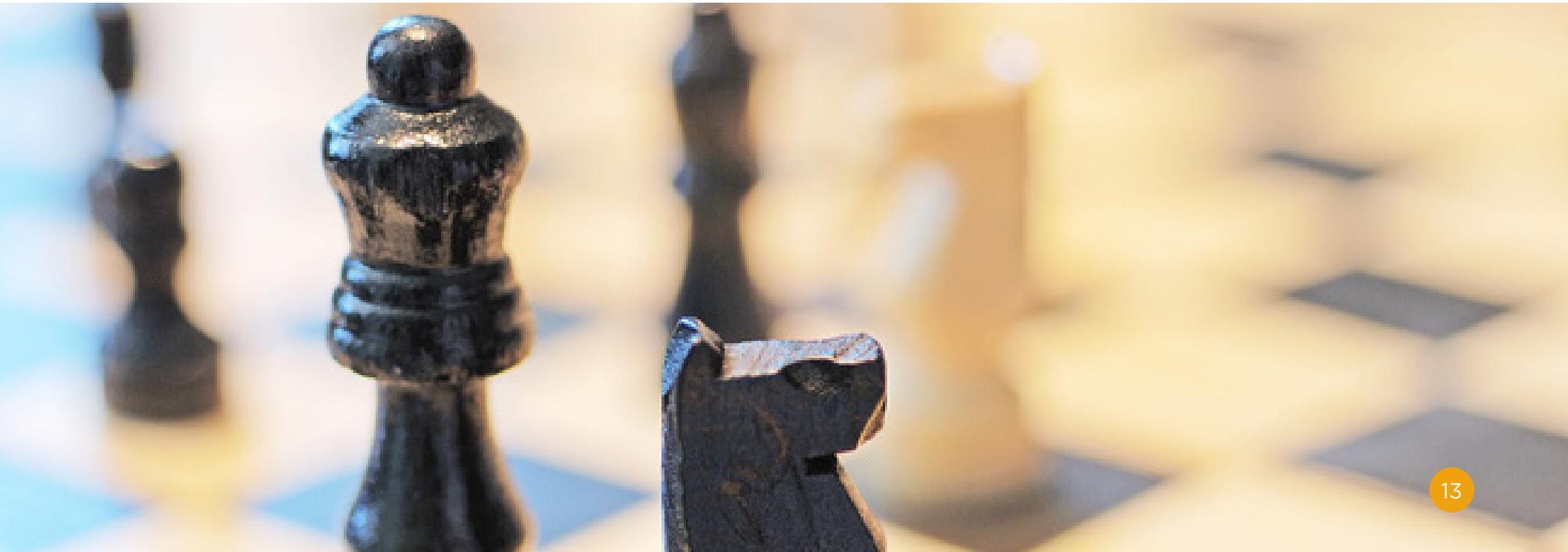
- **Agility** - If you outsource tasks that take too much of your team's time, you can free them up to concentrate on what they're good at.
- **Save money and time** - As your outsourced marketing team helps make your processes more efficient, you will save money in the long run. You'll also save time since the agency will design scalable campaigns that can be repeated if successful.
- **Measure and optimize results** - Your marketing agency should track all activities, investment, and results. ROI should be part of every conversation. As you see results coming in, you can adjust as needed.
- **Faster revenue growth** - With a solid strategy in place, more compelling content, more green field and nurture campaigns, you'll be able to engage your audience more effectively, moving your buyers through the sales cycle faster.
- **ROI** - A good agency is going to show you a strong return on investment. For companies marketing to other businesses, good points to measure are the number of quality leads, and the cost per lead. For companies marketing to consumers, the best way to measure ROI is to look at dollars invested against new sales.



## SELLING MARKETING OUTSOURCING INTERNALLY

So. You've decided you want or need to outsource your marketing. But you're not the final decision maker. How do you sell it up the chain?

1. Tie it to management's goals. Look at what the company is trying to do overall. Are they trying to drive loyalty with existing customers, or drive trial with a new userbase? Ask the agency to provide case studies that demonstrate their ability to reach these types of goals. Show management how other companies have been able to achieve similar goals with the help of an agency. Data and "been there done that" stories are always strong tools to have as you are selling in ideas.
2. Take these goals and turn them into numbers. A financial plan that shows investment as well as payoff (in terms of increased sales, additional leads, etc.) over time will help management understand when and by how much their investment will pay off. In business, numbers often speak louder than words.
3. As you're setting up the necessary meetings, position them as discussions, not presentations. The word "presentation" has a connotation that there is an ask or approval needed. Many people want to feel they are part of a large decision like this. Start by asking questions and getting them to talk more about what they want to achieve. Pick up on those goals and weave in support points from the case studies you have as to how those goals can be achieved.
4. Be prepared for approval. Have your next steps, roles/responsibilities, and timeline ready to go so that it feels almost frictionless for your management team to say YES.



## THE COST OF DELAYING

One of the biggest regrets of companies that outsource is that they didn't do it sooner. Here are common objections and how to overcome them.

Objection	Response
An agency will never understand our products and services like we do.	Not only are marketers trained to learn and understand a client's business, but they provide a unique, unbiased perspective that may bring new thinking to your organization.
We don't have enough content to get started.	Agencies specialize in creating engaging content. A good agency will create a strategic plan for you that includes a messaging track, an editorial calendar, and a timeline of deliverables.
The cost of outsourcing is too high.	Outsourcing is often less expensive than hiring full-time employees with salaries and benefits. There's also less risk associated with hiring contract resources.
We already have support for some areas of marketing, so I don't want to duplicate efforts.	Good agencies will collaborate with your current employees and resources, and provide help where needed.
I'm afraid an agency won't be able to replicate our voice.	Just as agencies are trained to learn and understand your business, they know the importance of using the right tone that reflects your company's brand.



# PART 6

## Picking the Right Marketing Agency

### WHAT TO LOOK FOR IN A GOOD AGENCY

There are myriad marketing agencies for you to choose from. They range from large, full-service agencies that serve enterprise companies with multi-million dollar marketing budgets, to small, specialized boutique agencies that focus on a particular marketing skill, like web development, SEO, brand building, or PR. Be sure that your marketing agency has the right stuff... for you.

Your agency should have:

- All of the skill sets needed to support and grow your business
- Experience in your industry
- Leadership you can trust
- Chemistry with you and your team
- Transparency in their process
- Costs that fit within your budget
- Easily understandable billing structure and invoicing schedule
- Reliable, ongoing service and support to meet your strategic and tactical needs
- Keen focus on accountability and performance



# PART 7

## Purchase Process

The best purchases require due diligence. Start by defining what you want to achieve so your team has a clear set of metrics to strive for. Here's how you build your framework.

### DEFINE YOUR GOALS

Use hard metrics. Consider naming quantities and goals for:

- Click through rates
- Conversion rates
- The number of quality leads
- Number of prospect meetings

Soft metrics are important to measure too. They may include:

- Improved sales-marketing alignment
- Better visibility into marketing ROI

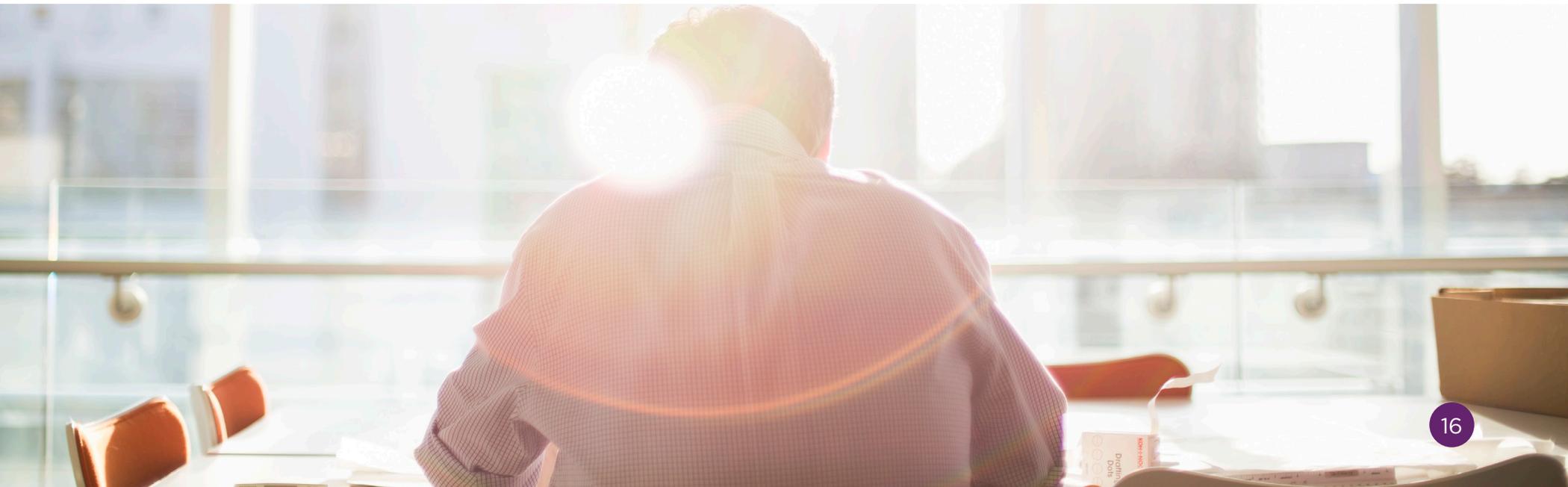
- Increased speed and agility to launch new campaigns and landing pages
- Reduced time to pull reports

### PLAN YOUR TIMELINE

Next, identify the sequence of when things should happen.

Ask yourself, "When do I want to..."

- Start the selection process?
- See agency presentations?
- Make my final decision?
- Start the engagement?
- See first value?



## IDENTIFY YOUR REQUIREMENTS

Decide what is absolutely necessary from the agency that will support you.

- Do I need a large firm? Or is a smaller, nimbler team a better fit?
- Do I need a local agency? Or is it okay to work with a remote team?
- Does the agency provide an Account Manager that's assigned to my business?
- What skills sets are absolutely necessary for my agency to have?
- Will my agency be able to grow and scale with us?

## ASK FOR REFERENCES

A good way to gauge a company's value is to ask their clients. Ask questions like:

- Are they easily accessible?
- Are you happy with the results?
- Were they easy to work with?
- When they made mistakes, did they own them and do whatever it took to rectify?
- Did you see a return on investment?



## PART 8

# Catalyst Marketing Agency

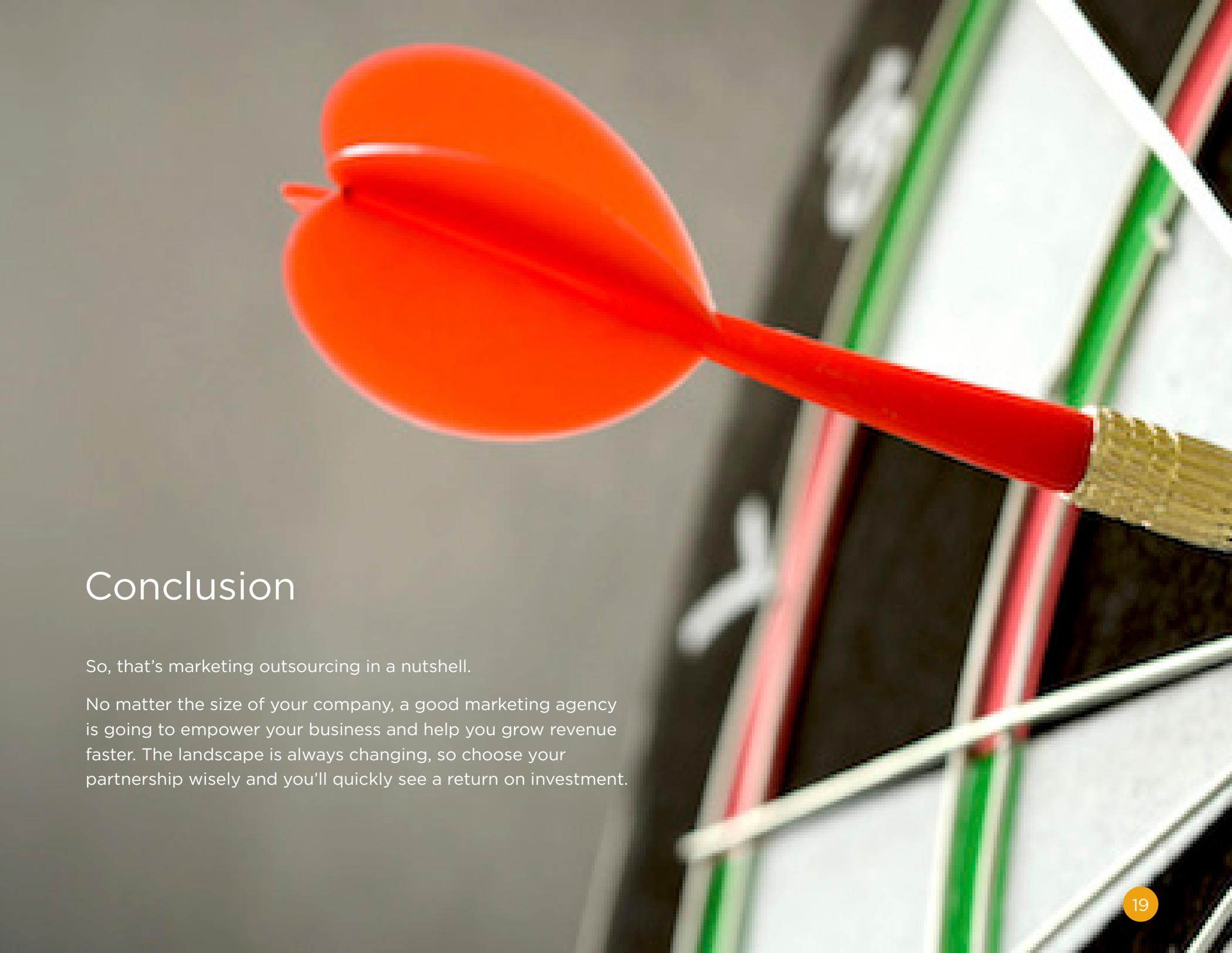
### WHY CATALYST?

Catalyst was formed by three passionate women who saw how the marketing agency model could be drastically improved. We help clients by acting as your virtual CMO and the supplemental resources for your marketing team.

Our process starts with an analysis of your buyer personas, systems, and goals. Then we devise and execute a strategy that is continuously monitored and optimized. Our approach makes you efficient, so you can scale quickly and generate customers faster.

We are the catalyst for your revenue growth.





## Conclusion

So, that's marketing outsourcing in a nutshell.

No matter the size of your company, a good marketing agency is going to empower your business and help you grow revenue faster. The landscape is always changing, so choose your partnership wisely and you'll quickly see a return on investment.

# About the Authors



## **GEM SWARTZ, PARTNER, CATALYST**

Gem is a performance-driven marketing executive with progressive experience shaping and executing strategic marketing programs that effectively position powerhouse brands in achieving accelerated growth in market share. She successfully developed and managed integrated campaigns with an eye towards predictive analytics and measurable objectives coupled with creative vision to maximize return on marketing investment and consistently drive revenue forward.

Gem is skilled at building and leading industry-leading B2B and B2C brands to exceed expectations in outreach, performance and profitability, including CPG, healthcare and retail clients, such as Duraflame, Kelly-Moore Paints, Catellus, Hill Physicians, Sutter Health, Siemens and Covidien, among others.



## **AMANDA GREGORY, PARTNER, CATALYST**

Amanda is an innovative leader with a passion for brands and branding. For 15+ years, she has cultivated a strong track record of client partnership, strategic agility, and growth at agencies like J.Walter Thompson, Leo Burnett and Integer.

As a champion of big ideas, she believes truly effective marketing must begin with a real insight. She takes pride in building collaborative relationships and strong teams. Her entrepreneurial spirit drives her to obtain above target results on behalf of past clients like Pepsico, Procter & Gamble, Mars and Allstate. She loves living in colorful Colorado with her family, and as a graduate of the University of Kansas, is a diehard Jayhawk fan.



## **ROBIN EMILIANI**

Robin has almost 20 years of experience helping high tech B2B companies generate quality leads and drive revenue. She is an entrepreneurial executive with experience at the intersection of technology and marketing, including a strong background in lead generation, marketing technology, customer experience, and cloud services.

She specializes in marketing to industries such as healthcare, retail, higher education, public sector, transportation and oil and gas. Her marketing support has helped accounts such as Google, General Electric, Salesforce, United Healthcare, SAP, Oracle, IBM, Cisco and Microsoft, to name a few.





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