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iFLUENCE
Marketing

2024

Marketing Plan

PREPARED FOR
valorglobal





Executive Summary

Summary

Valor Global is a business process outsourcing (BPO) call center with offices in the United States, Costa Rica, and the Philippines. This marketing plan outlines a comprehensive strategy for 2024 to increase brand awareness, generate leads, and drive sales for Valor Global. The plan includes email marketing, social media marketing, and content marketing, all aimed at attracting and converting potential customers.





SWOT Analysis

Summary

STRENGTHS

- Experienced and passionate team
- Strong reputation for providing high-quality call center services
- Global presence with offices in multiple countries
- Diverse clientele across various industries

WEAKNESSES

- Limited brand awareness compared to larger BPO competitors
- Reliance on traditional marketing channels
- Need for a more targeted approach to lead generation

OPPORTUNITIES

- Growing demand for BPO services due to cost savings and efficiency benefits
- Increasing adoption of cloud-based call center solutions
- Expansion into new markets and verticals

THREATS

- Competition from other BPO providers
- Changes in technology and customer preferences
- Economic downturn



Buyer's Persona





BUYER PERSONA 1:

Mid-Market Customer Care Specialist for Single-Geographic Needs

This persona embodies a professional focused on managing and optimizing mid-market customer care operations within a specific geographic region. They are dedicated to enhancing customer satisfaction and streamlining support processes while being mindful of the unique cultural and operational dynamics of their designated area.

DEMOGRAPHIC INFORMATION	
AGE RANGE	35-50 years
JOB TITLE	Customer Care Manager
LEVEL OF EDUCATION	Bachelor's Degree, likely in Business Management or a related field
GEOGRAPHIC LOCATION	Predominantly based in a major city within their operating region

PROFESSIONAL BACKGROUND	
INDUSTRY	Telecommunications or Utility Services
COMPANY SIZE	Mid-sized businesses, typically with a customer base ranging from 50,000 to 200,000
YEARS OF EXPERIENCE	10-15 years in customer service or related roles
KEYSKILLS	Strong regional market knowledge, customer relationship management, team leadership, conflict resolution

COMPANY INFORMATION	
TYPE OF BUSINESS	Service-oriented businesses with a strong regional focus, such as regional telecom providers or local utility companies
MARKET SEGMENT	Mid-market segment, serving a substantial but regionally contained customer base
GOALS	To maintain high customer satisfaction, optimize resource allocation, and sustain business growth within the region
CURRENT CHALLENGES	Balancing quality service with cost-efficiency, adapting to regional market trends, and managing workforce effectively

DECISION-MAKING ROLE	
ROLE IN BUYING PROCESS	Key decision-maker in selecting customer care solutions and partners
KEY FACTORS IN INFLUENCING DECISIONS	Cost-efficiency, scalability, cultural alignment, technology integration capabilities
PREFERRED COMMUNICATION METHODS	Direct, personalized communication; prefers face-to-face meetings or video calls for major decisions



BUYER PERSONA 1:

Mid-Market Customer Care Specialist for Single-Geographic Needs

This persona embodies a professional focused on managing and optimizing mid-market customer care operations within a specific geographic region. They are dedicated to enhancing customer satisfaction and streamlining support processes while being mindful of the unique cultural and operational dynamics of their designated area.

GOALS AND MOTIVATIONS	
PRIMARY PROFESSIONAL GOALS	Achieving high customer satisfaction scores, ensuring efficient resource utilization, fostering a motivated team
PERSONAL MOTIVATIONS	Career advancement, being recognized as a regional expert, making a tangible impact on customer experience

CHALLENGES AND PAIN POINTS	
SPECIFIC CHALLENGES	Navigating regional market fluctuations, managing a diverse customer service team, ensuring consistent service quality
IMPACT	management issues, balancing strategic

BEHAVIORAL TRAITS	
BEHAVIOR PATTERNS	Fragmatic and results-oriented, values data-driven decisions, emphasizes teamwork and collaboration
PROBLEM-SOLVING APPROACH	innovative, but practical solutions
INFORMATION SOURCES	regional business news

TECHNOLOGY USE	
FAMILIARITY AND USAGE	Comfortable with CRM systems, workforce management tools, and data analytics platforms
PREFERRED TOOLS	customer service management platforms
ATTITUDE TOWARDS NEW TECHNOLOGY ADOPTION	values the human element in customer service



BUYER PERSONA 2:

The Healthcare Appointment Innovator

This persona embodies a dynamic professional focusing on enhancing the efficiency and effectiveness of global customer care in healthcare settings. They are dedicated to streamlining appointment-setting processes, ensuring patient satisfaction, and maintaining high operational standards in a demanding healthcare environment.

DEMOGRAPHIC INFORMATION	
AGE RANGE	35-50 years
JOB TITLE	Customer Care Director for Health Services
LEVEL OF EDUCATION	Bachelor's or Master's degree in Healthcare Administration or Business Management
GEOGRAPHIC LOCATION	Predominantly urban areas in the United States

PROFESSIONAL BACKGROUND	
INDUSTRY	Healthcare
COMPANY SIZE	Large healthcare providers or networks serving a national or global clientele
YEARS OF EXPERIENCE	10-20 years in healthcare administration with a focus on customer service or operations
KEYSKILLS	Strategic planning, customer service excellence, process optimization, team leadership

COMPANY INFORMATION	
TYPE OF BUSINESS	Healthcare providers, such as hospitals or healthcare networks, offering diverse medical services
MARKET SEGMENT	High-volume patient care with a focus on efficiency and quality service
GOALS	Streamlining appointment setting processes, enhancing patient care, and improving overall operational efficiency
CURRENT CHALLENGES	prompt appointment scheduling, and maintaining high patient satisfaction in a rapidly changing healthcare

DECISION-MAKING ROLE	
ROLE IN BUYING PROCESS	Key decision-maker in selecting and implementing customer care solutions
KEY FACTORS IN INFLUENCING DECISIONS	Service efficiency, cost-effectiveness, scalability, compliance with healthcare regulations
PREFERRED COMMUNICATION METHODS	Professional meetings, detailed presentations, and data-driven reports



BUYER PERSONA 2:

The Healthcare Appointment Innovator

This persona embodies a dynamic professional focusing on enhancing the efficiency and effectiveness of global customer care in healthcare settings. They are dedicated to streamlining appointment-setting processes, ensuring patient satisfaction, and maintaining high operational standards in a demanding healthcare environment.

GOALS AND MOTIVATIONS

PRIMARY PROFESSIONAL GOALS	To achieve operational excellence in appointment setting and customer care services
PERSONAL MOTIVATIONS	Passion for healthcare innovation and commitment to patient satisfaction

CHALLENGES AND PAIN POINTS

SPECIFIC CHALLENGES	Integrating new technologies seamlessly, maintaining staff training and morale, and ensuring compliance with regulations
IMPACT	Operational inefficiencies, patient dissatisfaction, and increased operational costs

BEHAVIORAL TRAITS

TYPICAL BEHAVIOR PATTERNS	Analytical and data-driven, focuses on continuous improvement and innovation
PROBLEM-SOLVING APPROACH	Systematic, consultative, and open to adopting new technologies
INFORMATION SOURCES	Professional conferences, industry publications, and healthcare technology forums

TECHNOLOGY USE

FAMILIARITY AND USAGE	Highly proficient in the latest healthcare management software, CRM tools, and data analytics platforms
PREFERRED TOOLS	Advanced appointment scheduling systems, CRM software, and communication technologies
ATTITUDE TOWARDS NEW TECHNOLOGY ADOPTION	Proactive and open, always looking for ways to integrate technology to improve service delivery



BUYER PERSONA 3:

Enterprise-Level Customer Care for Global Clients

Primarily tasked with overseeing and enhancing customer care on an international scale. They focus on maintaining high customer satisfaction while ensuring service consistency across different regions. This role involves strategizing to meet diverse customer needs and adapting to various market dynamics.

DEMOGRAPHIC INFORMATION	
AGE RANGE	35-50 years
JOB TITLE	Director of Global Customer Service
LEVEL OF EDUCATION	Bachelor's or Master's degree, likely in Business Administration or related fields
GEOGRAPHIC LOCATION	Typically based in corporate headquarters, often in major global cities like New York, London, or Tokyo

PROFESSIONAL BACKGROUND	
INDUSTRY	Telecommunications, Financial Services, Healthcare, or Technology
COMPANY SIZE	Large enterprises with a global presence, often with thousands of employees
YEARS OF EXPERIENCE	10-20 years, with a significant portion in customer service or related areas
KEYSKILLS	Multicultural competency, strategic planning, leadership, data-driven decision-making, crisis management

COMPANY INFORMATION	
TYPE OF BUSINESS	Multinational corporations with a significant customer base spread across various countries
MARKET SEGMENT	Primarily B2C sectors, with high-volume customer interactions
GOALS	Achieving global customer service excellence, maintaining brand consistency, expanding market share
CURRENT CHALLENGES	Managing diverse customer expectations, integrating global service strategies, handling large-scale customer data

DECISION-MAKING ROLE	
ROLE IN BUYING PROCESS	Key decision-maker or influencer in procuring customer service solutions
KEY FACTORS IN INFLUENCING DECISIONS	Service quality, scalability, compliance with international standards, cost-effectiveness
PREFERRED COMMUNICATION METHODS	Formal presentations, detailed reports, and digital communication platforms



BUYER PERSONA 3:

Enterprise-Level Customer Care for Global Clients

Primarily tasked with overseeing and enhancing customer care on an international scale. They focus on maintaining high customer satisfaction while ensuring service consistency across different regions. This role involves strategizing to meet diverse customer needs and adapting to various market dynamics.

GOALS AND MOTIVATIONS	
PRIMARY PROFESSIONAL GOALS	Enhancing global customer satisfaction, ensuring service uniformity across regions, innovating customer service practices
PERSONAL MOTIVATIONS	Recognition as a leader in global customer service, career advancement, contributing to company growth

CHALLENGES AND PAIN POINTS	
CHALLENGES	Balancing global standardization with localized service, managing cross-cultural teams, integrating technology across diverse platforms
IMPACT	service quality and potential customer

BEHAVIORAL TRAITS	
TYPICAL BEHAVIOR PATTERNS	Analytical and data-driven, focusing on long-term strategies rather than short-term fixes
PROBLEM SOLVING APPROACH	Systematic, consultative, and iterative, often seeking input from diverse teams
FOR INFORMATION	networks

TECHNOLOGY USE	
FAMILIARITY AND USAGE	Highly proficient, relying on CRM systems, data analytics tools, and AI-driven solutions
PREFERRED TOOLS	Advanced customer service management software, communication tools, analytics platforms
ATTITUDE TOWARDS NEW TECHNOLOGY ADOPTION	proactive, often seeking to implement cutting-edge solutions for enhanced efficiency



BUYER PERSONA 1: **The Efficiency Innovator**

INDUSTRY	Primarily in service-based sectors like telecommunications or banking.
COMPANY SIZES	Large enterprises
CHALLENGES	High attrition rates, efficiency issues, and need for rapid scaling.
SOLUTION PREFERENCES	Comprehensive training programs, technology-driven solutions for efficiency, and scalable operational strategies.
DECISION-MAKING FACTORS	Emphasis on data-driven results, long-term scalability, and innovative approaches.
VALUED OUTCOMES	Reduced attrition rates, improved operational efficiency, and scalable growth.



BUYER PERSONA 2: **The Customer-Centric Leader**

INDUSTRY	Retail, hospitality, or consumer services.
COMPANY SIZES	Medium to large enterprises.
CHALLENGES	Customer satisfaction issues, high transfer rates, and repeat caller concerns.
SOLUTION PREFERENCES	Customized training modules, quality monitoring, and customer-centric process improvements.
DECISION-MAKING FACTORS	Strong focus on customer satisfaction metrics, agent performance, and immediate impact solutions.
VALUED OUTCOMES	Enhanced customer satisfaction, reduced repeat caller rates, and improved agent performance.



BUYER PERSONA 3: **The Strategic Optimizer**

INDUSTRY	Financial services, insurance, or collections.
COMPANY SIZES	Medium-sized businesses.
CHALLENGES	Low efficiency in collections, poor key performance metrics.
SOLUTION PREFERENCES	Data-driven segmentation, automated processes, and targeted uptraining.
DECISION-MAKING FACTORS	Revenue recovery, cost-effectiveness, and quick implementation.
VALUED OUTCOMES	Increased revenue recovery, improved Dollars Per Contact, and reduced delinquency rates..



Marketing Strategies

LEAD GENERATION

- Implement lead capture strategies across all marketing channels, including website forms, social media ads, and email marketing campaigns
- Nurture leads with personalized email sequences and targeted content that aligns with their interests and needs

WEBSITE MANAGEMENT

- Ensure Valor Global's website is up-to-date, user-friendly, and optimized for search engines
- Regularly publish fresh and relevant content on the website to attract visitors and establish Valor Global as a thought leader
- Utilize website analytics to track visitor behavior and make data-driven improvements to the website
- Implement effective calls-to-action (CTAs) throughout the website to encourage visitors to take desired actions

EMAIL AMRKETING

- Use HubSpot CRM to segment email lists and send targeted campaigns
- Send personalized emails that provide value to subscribers, tailored to their specific needs and industries
- Use email to promote Valor Global's call center services and case studies

EMAIL MARKETING

- Create engaging and informative content on Instagram, Facebook, and LinkedIn
- Use social media to connect with potential customers and showcase Valor Global's expertise

CONTENT MARKETING

- Write blog posts, articles, and social media content that is relevant to businesses seeking BPO services
- Develop case studies that demonstrate Valor Global's success with clients
- Create infographics and other visuals to make content more engaging

INTERNAL COMMUNICATIONS

- Highlight Employee Experience and Success
- Internal Emails: Birthdays, Welcome to the Team, Message from the President, The Valor Way Newsletter, LOV Awards
- Social Posts: Employee Experience Events, LOV Awards, Thought Leadership Blogs and Posts



Monthly Deliverables

MARKETING MANAGEMENT

- Review and approve all collateral requested by the client prior to sending it to the client for approval
- A marketing manager will attend two weekly sales meetings
- A marketing member will attend the weekly Global Support Meeting
- A marketing member will attend the monthly All Hands Meeting as needed
- A marketing member will attend the weekly Employee Experience meetings
- Weekly update of marketing request tracker
- Monthly marketing report
- Collateral purchases.

GRAPHICS MANAGEMENT

- All collaterals for the website, sales team, social media, communications, etc., will have the design and branding finalized by the graphic artist.
- Site Designs.

SOCIAL MEDIA MARKETING

- 20 social media posts comprised of:
 - 4-6 business posts on Facebook, Instagram, and LinkedIn
- The remainder will comprise:
 - LOV Awards Video
 - Holiday Posts
 - Announce Volunteer Opportunities
 - Photos of Volunteers Events
 - Culture Posts
 - Employee Engagement Activity Post

CONTENT MARKETING

- One piece of collateral each week for nurture emails
- One monthly external newsletter (content must be created and sent to the email vendor by the marketing specialist)
- Collaterals needed for the sales team including:
 - One-Pages
 - Sales Decks
 - Client Meeting Decks
 - In-Person presentation decks
 - Agendas, etc

EMAIL MARKETING

- The email marketing vendor will do 16 emails each month. All emails are done a month in advance.
- The will include:
 - Sending an external newsletter
 - Nurture emails
 - Cold email flows by vertical

COMMUNICATIONS

- The Valor Way Magazine
- Monthly Message from the President
- 4 Thought Leadership Blogs
- Weekly Welcome emails from the President
- 2-3 Award Applications
- Twice a week respond to all Reviews on the Reviews Pages
- Monthly Executive Birthday emails
- Employee Experience emails

WEBSITE MANAGEMENT

- Audit SEO
- Website maintenance



Content Plan

Goal: Increase brand awareness, generate leads, and drive 10% sales for Valor Global by providing valuable and engaging content that resonates with target audiences.

TARGET AUDIENCES

- Business owners and executives seeking to improve their customer service operations and reduce costs through outsourcing
- Industry professionals looking for insights into the latest trends and best practices in BPO and call center management
- Potential clients interested in learning about Valor Global's services, expertise, and success stories

CONTENT THEMES

- **The Value of BPO:** Highlight the benefits of outsourcing call center services, including cost savings, improved customer satisfaction, and enhanced focus on core business functions.
- **BPO Industry Insights:** Share expert commentary, research findings, and case studies on emerging trends, technologies, and strategies in the BPO landscape.
- **Valor Global Expertise:** Showcase Valor Global's experience, capabilities, and client success stories to establish thought leadership and credibility.
- Content will be broken down by vertical needs.



Monthly Nurture Emails

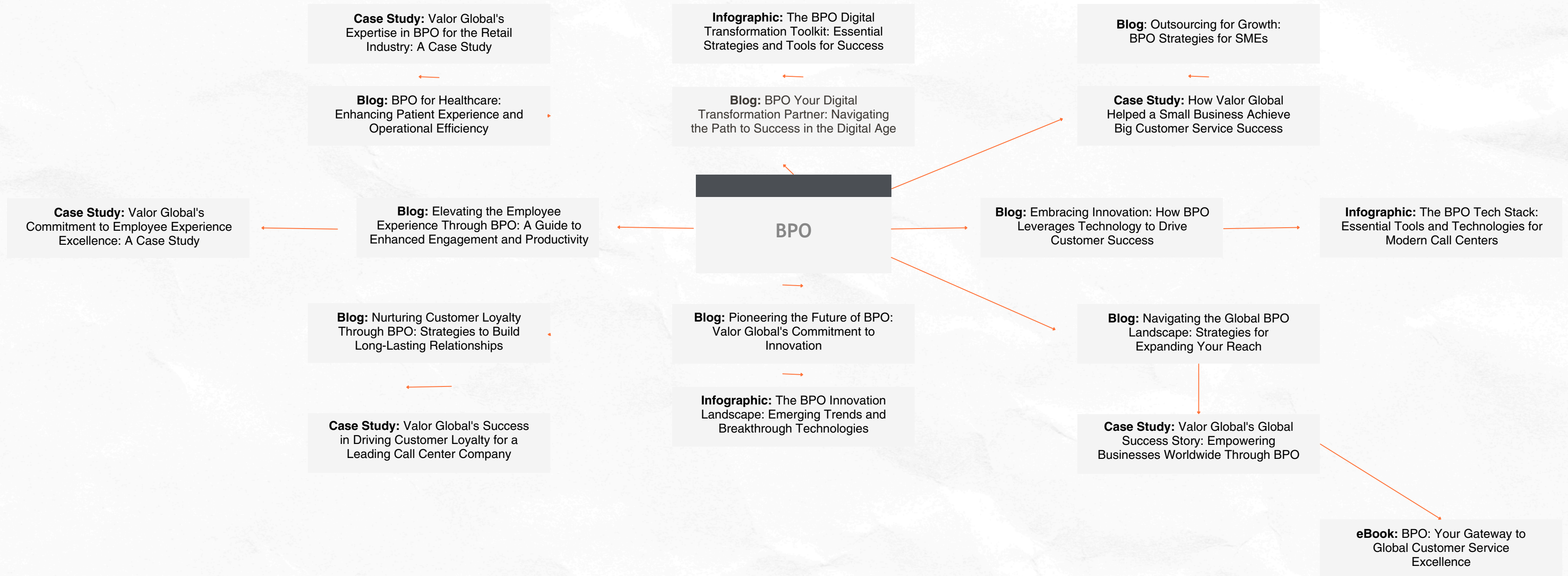
4 Nurture emails a month to the entire database that is generalized content on Valor Global successes and BPO Expertise. Emails to include:

- 1 External Newsletter
- 3 pieces of collateral



EXAMPLE

Content Spider-Nurture Campaign



Content by Vertical



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VERTICAL	ASSIGNED OWNER	TARGET	MARKETING COLLATERAL & EMAIL CAMPAIGNS THEMES	WHY
Telecommunications	Scott	Regional Cable, Internet and Wireless	FCR, NPS, Subscriber life cycle management collections, Save/Retention	Proven/Referenceable
Streaming/Subscription Services	Scott	Recurring Subscription Services Companies	FCR, NPS, Subscriber life cycle management collections, Save/Retention, Price	Proven/Referenceable
Healthcare Wellness	Kevin	Subset of large companies	HIPAA compliance, claims processing, collections, FCR, NPS	Proven/Referenceable
Insurance/Home Services	Kevin	Home security and warranty services	Inbound Sales, FCR, NPS, claims processing, collections, subscriber life cycle management, save/retention	Proven/Referenceable
Travel/Hospitality	Scott	Airline, Hotels, and Cruise Operators	Inbound Sales, FCR, NPS, claims processing, collections, subscriber life cycle management	Relationships and Growth Market
eCommerce/Retail	Brad	Mid-Sized Companies	Burstable capacity, FCR, NPS, Subscriber, Collections, Save/Retention	Relationships/Expertise
Gaming/Sports Betting	Kevin	Online Betting	Burstable capacity, FCR, Inbound Sales, Collections	Relationships and Growth Market

January 2024

Monday	Tuesday	Wednesday	Thursday	Friday
01	02	03	04	05 Metrics Due: eBook: Enhancing Customer Experience in Telecommunications
08 Metrics Due: Whitepaper: Strategic Subscriber Lifecycle Management in the	09	10 Content Due: eBook: Enhancing Customer Experience in Telecommunications	11	12 Content Due: Whitepaper: Strategic Subscriber Lifecycle Management in the Telecomm Sector
		Metrics Due: Blog: Innovative Strategies for Elevating Telecom CX		Metrics Due: Infographic: NPS Improvement Roadmap for Telecom Companies
15 Metrics Due: Whitepaper: Leveraging Net Promoter Score for Subscriber Retention: Insights and Strategies	16 Content Due: Blog: Innovative Strategies for Elevating Telecom CX	17 Metrics Due: eBook: The Art of Customer Retention in Debt Collection for Subscription Services	18 Content Due: Infographic: NPS Improvement Roadmap for Telecom Companies	19 Metrics Due: Infographic: First Call Resolution: Key Metrics and Industry Benchmarks
22 Metrics Due: Blog: Analyzing Subscriber Churn: Causes, Impacts, and Solutions	23	24 Metrics Due: Whitepaper: Navigating HIPAA Compliance in Healthcare BPO	25	26 Metrics Due: Blog: Enhancing Patient Financial Experience in Healthcare
		Content Due: Whitepaper: Leveraging Net Promoter Score for Subscriber Retention: Insights and Strategies		Content Due: eBook: The Art of Customer Retention in Debt Collection for Subscription Services
29 Metrics Due: Infographic: HIPAA Compliance Checklist for Healthcare Call Centers	30 Content Due: Infographic: First Call Resolution: Key Metrics and Industry Benchmarks	31 Metrics Due: eBook: Transforming Healthcare Experience: Leveraging AI and NPS for Enhanced Customer Satisfaction	01	02



February 2024

Monday	Tuesday	Wednesday	Thursday	Friday
29	30	31	01	02 Content Due: Blog: Analyzing Subscriber Churn: Causes, Impacts, and Solutions Metrics Due: Whitepaper: Maximizing Inbound Sales in Insurance: Strategies and
05 Metrics Due: Blog: The Role of FCR in Enhancing Insurance Customer Experience	06 Content Due: Whitepaper: Navigating HIPAA Compliance in Healthcare BPO	07 Metrics Due: Blog: Navigating the Subscriber Lifecycle in Home Services	08 Content Due: Blog: Enhancing Patient Financial Experience in Healthcare	09 Metrics Due: Infographic: Key Metrics in Insurance Customer Experience
12 Metrics Due: Whitepaper: Revolutionizing Customer Support in Travel & Hospitality	13 Content Due: Infographic: HIPAA Compliance Checklist for Healthcare Call Centers	14 Metrics Due: Whitepaper: Maximizing Subscriber Lifecycle Value: A Guide for Travel and Cruise Operators	15 Content Due: eBook: Transforming Healthcare Experience: Leveraging AI and NPS for Enhanced Customer Satisfaction	16 Metrics Due: Blog: Unlocking Growth with Net Promoter Score: Strategies for Hotels
19 Metrics Due: Infographic: First Contact Resolution: A Key to Customer Satisfaction in the Travel Industry	20 Content Due: Whitepaper: Maximizing Inbound Sales in Insurance: Strategies and Techniques	21 Metrics Due: Whitepaper: Maximizing NPS for eCommerce Success	22 Content Due: Blog: The Role of FCR in Enhancing Insurance Customer Experience	23 Metrics Due: Blog: 7 Customer Retention Strategies for eCommerce Success
26 Metrics Due: Blog: Key Call Center Metrics: Vital Insights for eCommerce Businesses Content Due: Blog: Navigating the Subscriber Lifecycle in	27	28 Metrics Due: Infographic: KPIs for Ecommerce Customer Service Content Due: Infographic: Key Metrics in Insurance Customer	29	01



March 2024

2024

CALENDAR YEAR

MARCH

CALENDAR MONTH

MONDAY

FIRST DAY OF WEEK

Monday	Tuesday	Wednesday	Thursday	Friday
26	27	28	29	01 Content Due: Whitepaper: Maximizing Subscriber Lifecycle Value: A Guide for Travel and Cruise Operators Metrics Due: Whitepaper: Optimizing Customer Support for Online Betting Success
04 Metrics Due: Whitepaper: 6 Steps to Enhance Mobile Sports Betting Support with Customer Insights	05 Content Due: Blog: Unlocking Growth with Net Promoter Score: Strategies for Hotels	06 Metrics Due: Blog: The Importance of Sports Betting Customer Support	07 Content Due: Infographic: First Contact Resolution: A Key to Customer Satisfaction in the Travel Industry	08 Metrics Due: eBook: Staff Expansion Strategies in the Sports Betting Industry
11 Content Due: Whitepaper: Maximizing NPS for eCommerce Success	12	13 Content Due: Blog: 7 Customer Retention Strategies for eCommerce Success	14	15 Content Due: Blog: Key Call Center Metrics: Vital Insights for eCommerce Businesses
18	19	20 Content Due: Infographic: KPIs for Ecommerce Customer Service	21	22 Content Due: Whitepaper: Optimizing Customer Support for Online Betting Success
25	26 Content Due: Whitepaper: 6 Steps to Enhance Mobile Sports	27	28 Content Due: Blog: The Importance of Sports Betting Customer	29 Content Due: eBook: Staff Expansion Strategies in the Sports





Telecommunications

TIMELINE

CONTENT FOCUS

CONTENT

January

Target:
Regional Cable, Internet and
Wireless

KPIs:
FCR, NPS, Subscriber life
cycle management
collections, Save/Retention

eBook: "Enhancing Customer Experience in Telecommunications"

Whitepaper: "Strategic Subscriber Lifecycle Management in the Telecomm Sector"

Blog: "Innovative Strategies for Elevating Telecom CX"

Infographic: "NPS Improvement Roadmap for Telecom Companies"

January

Email Campaign
Flow - Telecomm

4 emails that utilize the above content



Streaming/Subscription Services

TIMELINE

CONTENT FOCUS

CONTENT

January

Target:
Recurring Subscription Services
Companies

KPIs:
FCR, NPS, Subscriber life cycle
management collections,
Save/Retention, Price

Whitepaper: "Leveraging Net Promoter Score for Subscriber Retention: Insights and Strategies"

eBook: "The Art of Customer Retention in Debt Collection for Subscription Services"

Infographic: "First Call Resolution: Key Metrics and Industry Benchmarks"

Blog: "Analyzing Subscriber Churn: Causes, Impacts, and Solutions"

January

Email Campaign
Flow - Streaming

4 emails that utilize the above content



Healthcare Wellness

TIMELINE

CONTENT FOCUS

CONTENT

January

Target:
Subset of large companies

KPIs:
HIPAA compliance, claims processing, collections, FCR, NPS

Whitepaper: "Navigating HIPAA Compliance in Healthcare BPO"

Blog: "Enhancing Patient Financial Experience in Healthcare"

Infographic: "HIPAA Compliance Checklist for Healthcare Call Centers"

eBook: "Transforming Healthcare Experience: Leveraging AI and NPS for Enhanced Customer Satisfaction"

January

Email Campaign Flow - Healthcare

4 emails that utilize the above content

Home Warranty Insurance Business



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TIMELINE

CONTENT FOCUS

CONTENT

February

Target:
Home security and warranty services

KPIs:
Inbound Sales, FCR, NPS, claims processing, collections, subscriber life cycle management, save/retention

Whitepaper: "Maximizing Inbound Sales in Insurance: Strategies and Techniques"

Blog: "The Role of FCR in Enhancing Insurance Customer Experience"

Blog: "Navigating the Subscriber Lifecycle in Home Services"

Infographic: "Key Metrics in Insurance Customer Experience"

February

Email Campaign Flow – Home Warranty Insurance Business

4 emails that utilize the above content



Travel

TIMELINE

CONTENT FOCUS

CONTENT

February

Target:
Airline, Hotels, and Cruise Operators

KPIs:
Inbound Sales, FCR, NPS, claims processing, collections, subscriber life cycle management

Whitepaper: "Revolutionizing Customer Support in Travel & Hospitality"
Whitepaper: "Maximizing Subscriber Lifecycle Value: A Guide for Travel and Cruise Operators"

Blog: "Unlocking Growth with Net Promoter Score: Strategies for Hotels"
Infographic: "First Contact Resolution: A Key to Customer Satisfaction in the Travel Industry"

February

Email Campaign
Flow - Travel

4 emails that utilize the above content



eCommerce/Retail

TIMELINE

CONTENT FOCUS

CONTENT

February

Target:
Mid-Sized Companies

KPIs:
Burstable capacity, FCR,
NPS, Subscriber, Collections,
Save/Retention

Whitepaper: "Maximizing NPS for eCommerce Success"

Blog: "7 Customer Retention Strategies for eCommerce Success"

Blog: "Key Call Center Metrics: Vital Insights for eCommerce Businesses"

Infographic: "KPIs for Ecommerce Customer Service"

February

Email Campaign
Flow - Ecomm

4 emails that utilize the above content



Gaming, Sports, Betting

TIMELINE

CONTENT FOCUS

CONTENT

March

Target:
Online Betting

KPIs:
Burstable capacity, FCR,
Inbound Sales, Collections

Whitepaper: "Optimizing Customer Support for Online Betting Success"

Whitepaper: "6 Steps to Enhance Mobile Sports Betting Support with Customer Insights"

Blog: "The Importance of Sports Betting Customer Support"

March

Email Campaign
Flow – Gaming,
Sports, Betting

eBook: "Staff Expansion Strategies in the Sports Betting Industry"

4 emails that utilize the above content



PLANNING SHEET

Vertical Topics



VERTICAL

Telecom

Target: Regional Cable, Internet and Wireless

Marketing Collateral and Email Campaign Themes:

FCR, NPS, Subscriber life cycle management, collections, Save/Retention

Why: Proven/Referenceable

COLLATERAL

eBook

1. "Enhancing Customer Experience in Telecommunications"

- Reference: [Does First Call Resolution Positively Impact Transactional NPS®?](#)
- Focus: How FCR impacts customer satisfaction and NPS scores in telecom.

Whitepaper: A white paper is an informational document issued by a company to promote the features of a solution or product.

2. "Strategic Subscriber Lifecycle Management in the Telecomm Sector"

- Reference: The telecoms customer lifecycle
- Focus: Strategies for effective subscriber lifecycle management.
- McKinsey & Company - Telecom customer experience: Keys to success
- MarketResearch.com - Telecom Customer Experience Management Trends and Use Cases in 2023
- OvationCXM - What's Happening in 2023 Telecom Customer Experience Management
- Startek - Five trends shaping customer experience in telecom in 2023
- WebEngage - Segmentation and Personalization Strategies in Telecom

Blog

1. "Innovative Strategies for Elevating Telecom CX"

- Reference: [Winning in telecom CX](#)
- Focus: Improving customer experience in telecom, with innovative strategies.

Infographic

2. "NPS Improvement Roadmap for Telecom Companies"

- Reference: [Telecom Companies: How to Improve Your NPS Survey for Better Results](#)
- Focus: NPS benchmarks and improvement strategies in the telecom industry.



VERTICAL

Streaming

Target: Recurring
Subscriptions Services
Companies

**Marketing Collateral and
Email Campaign Themes:**

FCR, NPS, Subscriber life
cycle management,
collections, Save/Retention,
Price

Why: Proven/Referenceable

COLLATERAL

Whitepapers

1. "Leveraging Net Promoter Score for Subscriber Retention: Insights and Strategies"

◦ **Resources:**

- MaestroQA: Offers a guide to Net Promoter Score (NPS) for customer service.
- CustomerGauge: Discusses Netflix's NPS score and strategies for securing exceptional customer loyalty.

eBooks

2. "The Art of Customer Retention in Debt Collection for Subscription Services"

◦ **Resources:**

- PDCflow Blog: Discusses creating a positive customer experience in debt collection.
 - URL: pdcflow.com

Infographics

1. "First Call Resolution: Key Metrics and Industry Benchmarks"

◦ **Resources:**

- Playvox: Details strategies to improve the First Contact Resolution Rate.

Blogs

2. "Analyzing Subscriber Churn: Causes, Impacts, and Solutions"

◦ **Resources:**

- Deloitte Insights: Discusses streaming video services and subscriber churn.



VERTICAL

Healthcare/ Wellness

Target: Subset of large companies

Marketing Collateral and

Email Campaign Themes:

HIPAA compliance, claims processing, collections, FCR, NPS

Why: Proven/Referenceable

COLLATERAL

Whitepapers

1. "Navigating HIPAA Compliance in Healthcare BPO"

- Reference: 'Comprehensive Guide to HIPAA Compliance For Call Centers'
 - Focus: In-depth exploration of HIPAA compliance challenges and solutions in the BPO industry.

Blogs

2. "Enhancing Patient Financial Experience in Healthcare"

- Reference: 'How the patient financial experience impacts loyalty'
 - Focus: The impact of patient financial interactions on loyalty and satisfaction.

Infographics

1. "HIPAA Compliance Checklist for Healthcare Call Centers"

- Reference: 'Comprehensive Guide to HIPAA Compliance For Call Centers'
 - Focus: Visual guide to HIPAA compliance in call centers.

eBook

"Transforming Healthcare Experience: Leveraging AI and NPS for Enhanced Customer Satisfaction"

- Focus: Utilizing insights from 'Unlocking new possibilities for debt collections with AI Chatbots and Voicebots' this eBook will delve into how AI technology and the Net Promoter Score can be used to dramatically enhance customer satisfaction in the healthcare sector.



VERTICAL

Insurance/Home Services

Target: Home Security and warranty services

Marketing Collateral and Email Campaign Themes:

Inbound sales, FCR, NPS, claims processing, collections, subscriber life cycle management, save/retention

Why: Proven/Referenceable

COLLATERAL

Whitepaper

- Title:** "Maximizing Inbound Sales in Insurance: Strategies and Techniques"
 - Description:** This whitepaper explores effective sales techniques for inbound call centers in the insurance sector, offering insights and training tips to boost sales performance.
 - Resource:** [Inbound Sales Techniques](#)
- Title:** "[The Role of FCR in Enhancing Insurance Customer Experience](#)"
 - Description:** A blog post examining the importance of First Call Resolution in improving customer experience in the insurance industry.
 - Resource:** [FCR in Insurance](#)
- Title:** "[Navigating the Subscriber Lifecycle in Home Services](#)"
 - Description:** Discusses strategies for effectively managing the subscriber lifecycle in home service industries, with a focus on retention and loyalty.
 - Resource:** [Subscriber Lifecycle Management](#)

Infographics

- Title:** "Key Metrics in Insurance Customer Experience"
 - Description:** An infographic detailing essential customer experience metrics in the insurance industry, including NPS and customer satisfaction scores.
 - Resource:** [Insurance Customer Experience Metrics](#)



VERTICAL

Travel/ Hospitality

Target: Airline, Hotels, and Cruise Operators

Marketing Collateral and Email Campaign Themes:

Inbound Sales, FCR, NPS, Subscriber life cycle management

Why: Relationships and growth market

COLLATERAL

Whitepapers:

1. **Whitepaper Title:** "Revolutionizing Customer Support in Travel & Hospitality"
 - **Description:** Learn how exceptional customer support can impact the travel and hospitality sector. This whitepaper delves into customer support best practices, call center KPIs, and their influence on customer experience.
2. **Whitepaper Title:** "Maximizing Subscriber Lifecycle Value: A Guide for Travel and Cruise Operators"
 - **Description:** This whitepaper offers insights into subscriber lifecycle management strategies tailored to the travel and cruise industry. Discover how to enhance customer loyalty and revenue through effective lifecycle management.

Blogs:

1. **Blog Title:** "Unlocking Growth with Net Promoter Score: Strategies for Hotels"
 - **Description:** Explore how Net Promoter Score (NPS) can be a driving force for growth and loyalty in the hotel industry. Get practical tips and case studies on utilizing NPS effectively.

Infographics:
2. "First Contact Resolution: A Key to Customer Satisfaction in the Travel Industry"
 - **Description:** Visualize the importance of FCR in the travel industry and how it impacts customer satisfaction. Includes statistics and best practices.



VERTICAL

eCommerce/ Retails

Target: Mid-sized companies
**Marketing Collateral and
Email Campaign Themes:**
Burstable capacity, FCR,
NPS, Subscriber, Collections,
Save/Retention
Why: Relationships/Expertise

COLLATERAL

Whitepaper:

1. **Title:** "Maximizing NPS for eCommerce Success"
 - **Description:** Discover the significance of Net Promoter Score (NPS) and First Contact Resolution (FCR) in eCommerce. This whitepaper provides insights into enhancing customer satisfaction and loyalty.

Blog:

2. **Title:** "7 Customer Retention Strategies for eCommerce Success"
 - **Description:** Explore seven intelligent eCommerce customer retention strategies designed to boost loyalty and profitability in your mid-sized online store.
3. **Title:** "Key Call Center Metrics: Vital Insights for eCommerce Businesses"
 - **Description:** Discover six essential call center metrics that are often underestimated but crucial for enhancing customer service in eCommerce.

Infographics:

1. **Title:** "KPIs for Ecommerce Customer Service"
 - **Description:** An informative infographic highlighting the key performance indicators (KPIs) that matter most in eCommerce customer service.



VERTICAL

Gaming/ Sport Betting

Target: Online Betting
**Marketing Collateral and
Email Campaign Themes:**

Burstable capacity, FCR,
inbound sales, collections

Why: Relationships and
growth market

COLLATERAL

Whitepapers:

1. **Whitepaper Title:** "Optimizing Customer Support for Online Betting Success"
 - **Description:** Explore strategies and best practices for enhancing customer support in the online betting industry. Learn how to meet burstable capacity demands, improve First Contact Resolution (FCR), and grow your customer base.
Title: "6 Steps to Enhance Mobile Sports Betting Support with Customer Insights"
 - **Description:** Provide a concise visual guide to improving mobile sports betting support through the utilization of customer insights. It highlights the key steps and strategies to enhance user satisfaction and overall support effectiveness.

Blogs:

1. **Title:** "The Importance of Sports Betting Customer Support"
 - **Description:** Dive into the significance of customer support in the world of sports betting and learn why it's crucial for the growth and success of online betting platforms.**eBooks:**
2. **eBook Title:** " Staff Expansion Strategies in the Sports Betting Industry"
 - **Description:** Learn how to scale your online betting operations while maintaining excellent customer service. This eBook provides actionable strategies.



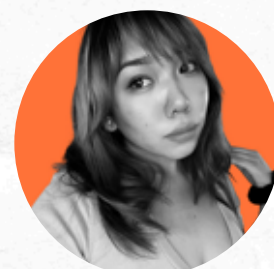
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Addendum



Verticals

Current Verticals previously listed with Simer

- SLED, Federal (MBE Focus)
 - SLED = State, Local, and Education
- Telecommunications (Scott's focus)
- Content (elaborate?)
- Fintech (licensing may be an issue here)
- Streaming
- e-Commerce
- Retail

Verticals currently in HubSpot "Lists"

- Airlines
- Education
- Government
- Manufacturing
- Nonprofit
- Shipping
- Technology
- Supplier Diversity
- Services
- Telecom
- Teleservices

Additions from Kevin

- Utility (MBE focus)
 - 50-400 seats, RFP's coming soon
- Automotive (not the big three)
 - Regional groups like Prestige out of SLC
- Gaming
 - Casinos, other – betting apps?
- Healthcare (MBE focus)
 - Big Doctor Groups

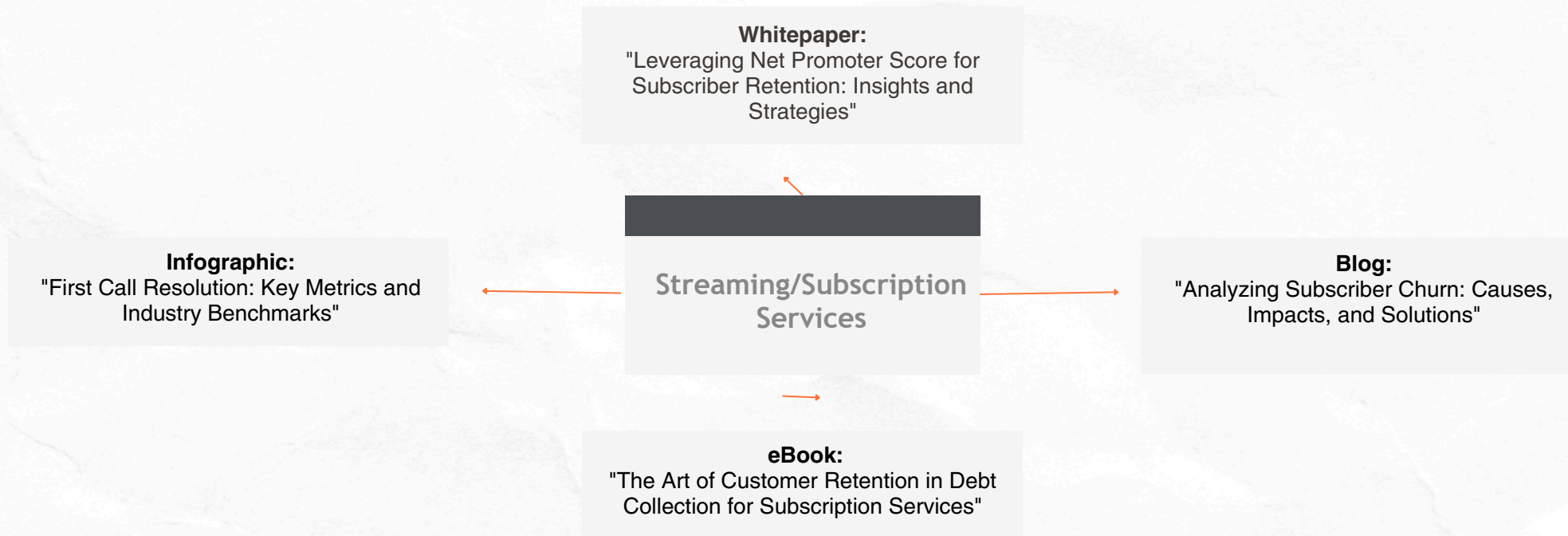


VERTICAL Telecommunications





VERTICAL Streaming/Subscription Services



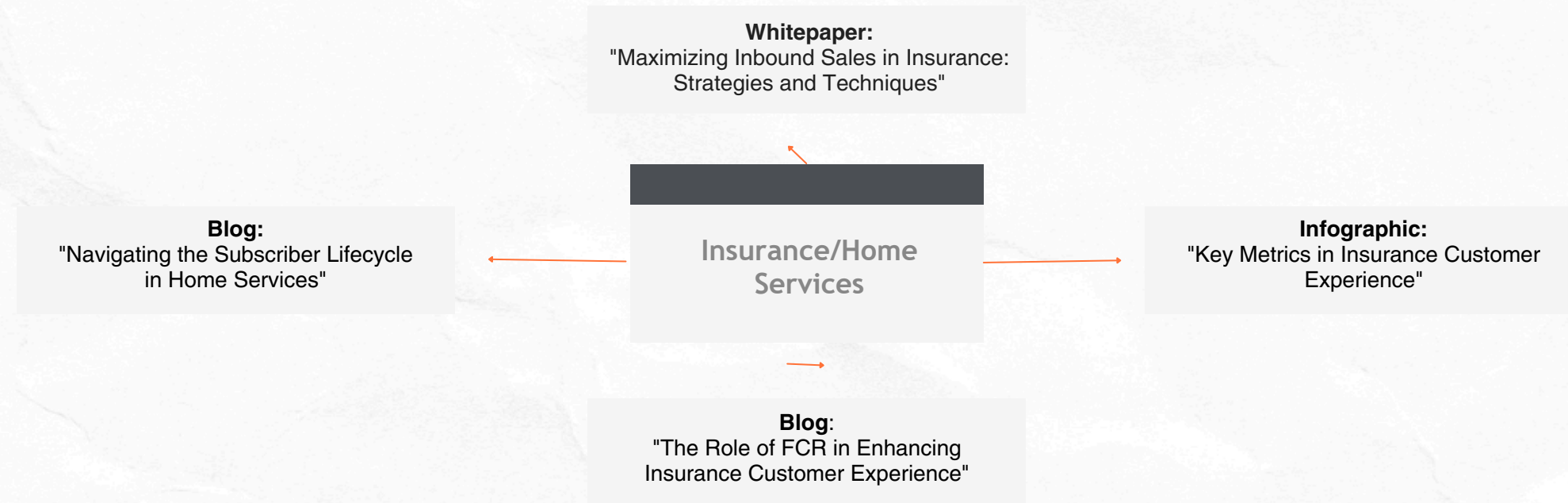


VERTICAL Healthcare Wellness



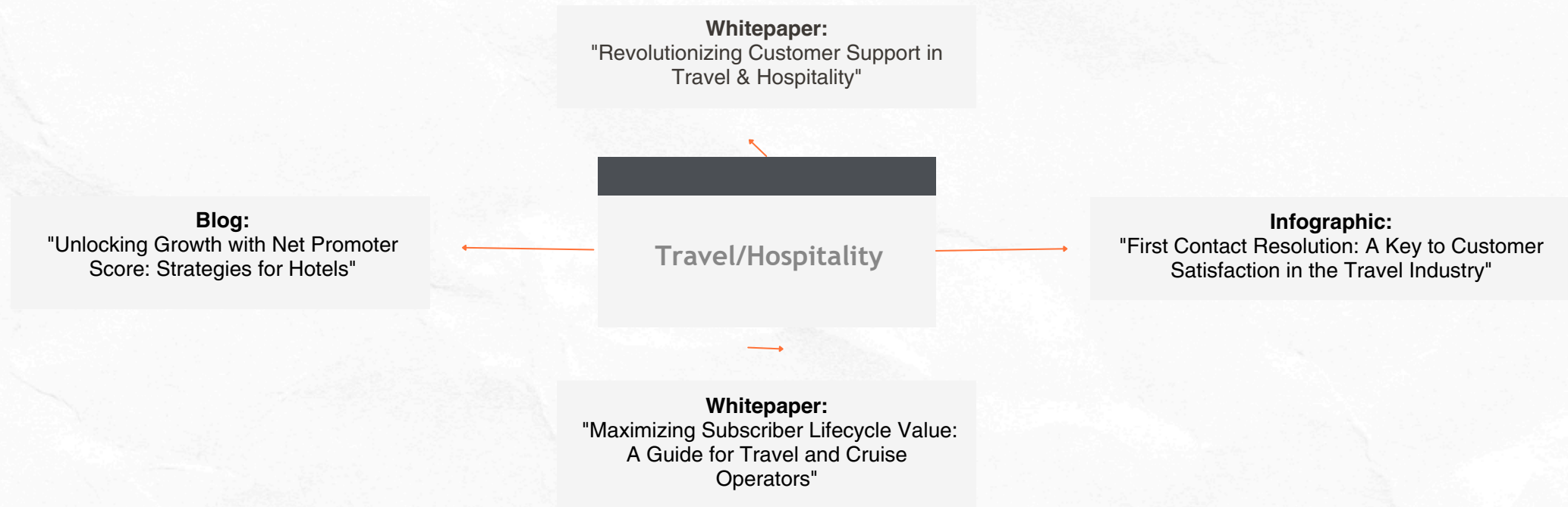


VERTICAL Insurance/Home Services



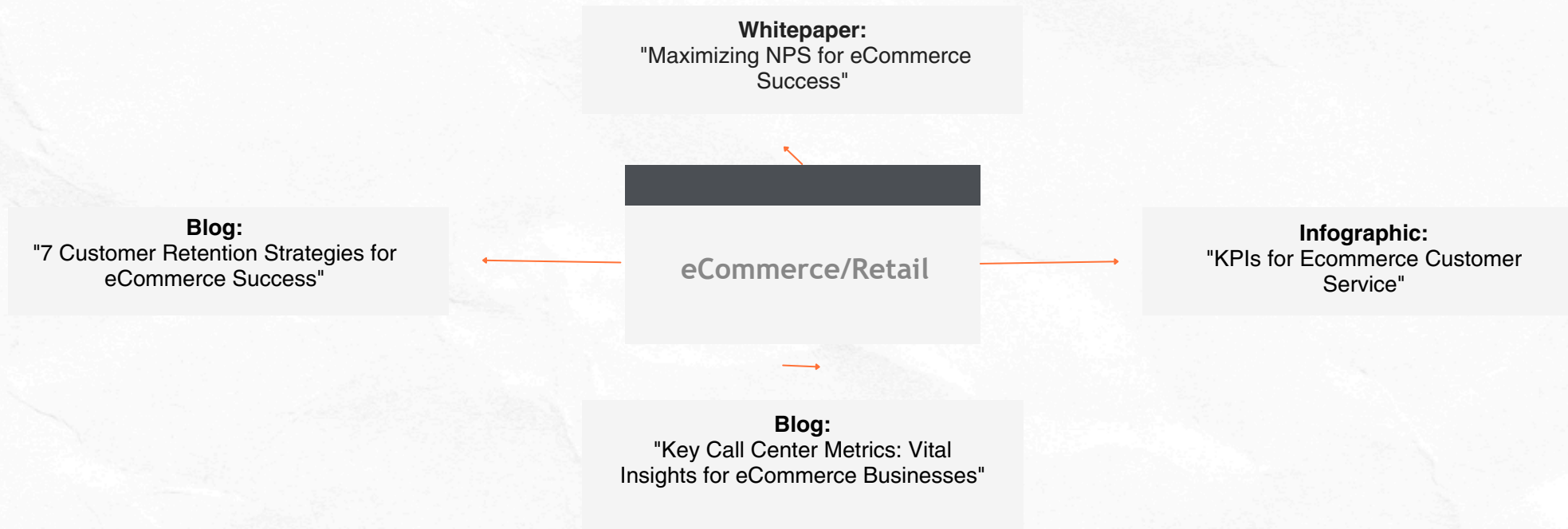


VERTICAL Travel/Hospitality





VERTICAL eCommerce/Retail





VERTICAL Gaming/Sports Betting

