

**\*Financial Firm\***

**Working Capital Product**

**2024 Digital Advertising**

Cisneros

# 2024 WC Marketing Strategy Summarized

Find The Right People At  
The Right Time, In The  
Right Place

01

Make An Impression That  
Drives Conversion By  
Building Trust

02

# Marketing ICP Priority One

## Ideal Customer Profile (ICP) One: Prospect

Job Title: CFO

B2B Industry: Manufacturing,  
Transportation, Staffing.

Need: Need for cash now to  
continue operations or for  
growth.

Concern: Loan approval and  
trust with \*firm\*.

Annual Revenue: \$5M-1B

Business Growth Rate: 0-15%

Function of Role: Financial Team and/or  
C-Suite.

Personal Interests: Golf, food, vacations,  
etc.

Common Pain Points: Recapitalization,  
financial restructuring, need for growth.

# Marketing ICP Priority Two

## Ideal Customer Profile (ICP) Two: Referral Source

Job Title: Broker, Banker, or Accountant.

Industry: Finance, legal, accounting.

Need: Offload clients that are no longer an ideal fit.

Concern: Commission or loan product match.

Local vs. National: Several brokers target geographical areas.

Pain Points: Cannot take the loan due to size or client's credit worthiness.

# What is working capital?

**Functional cash flow of a business.**

Technical answer: current assets – current liabilities.

Having lack of working capital is a business problem. Working capital is not a product.

However, \*firm\* has a few products that solve the problem, which are grouped and referred to as “working capital” products.

Creative will focus on pain point solution messaging such as “cash being tied up in assets” and businesses “treading water.”

# WC Products

## **Asset-Based Lending**

Businesses can use their inventory, A/R, or industrial machinery as collateral for financing. This gives them the option of leveraging asset to receive additional cash flow. Loan range is typically between \$3MM-20MM.

## **Accounts Receivable Financing or A/R Financing**

Similar to factoring, businesses can sell their invoices to \*firm\* to get paid faster. These lending facilities are within the range of \$1MM-15MM. Transactions are not immediate, but they do allow clients to get paid before having to wait the full A/R time on their invoices.

# Marketing Strategy: Funnel Campaigns + Content

## Use Better Data

Utilizing ZoomInfo data + refined audience lists, digital advertising campaigns will be targeted.

## Use Better Creative

In tandem with our branding initiative effort to build out creative library, we will improve performance and reputation through improved creative.

## Funnel All Leads

Rather than throwing a big net and bringing everyone that it catches in, we will continue to nurture through email campaigns and then add more advertising levels to educate the leads.

## Drive Impact & Engagement

**The ultimate goal is to drive opportunities to the BDO team.**

## Channel Direction:

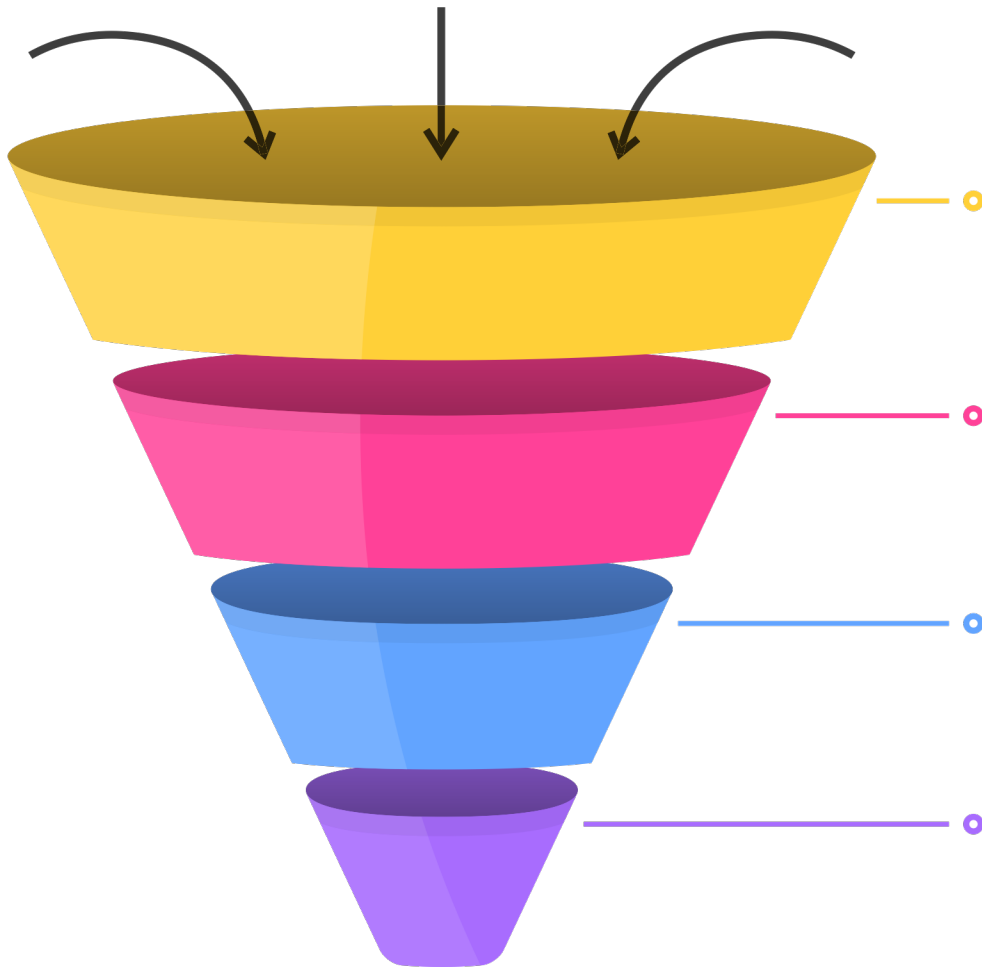
**YouTub**e to drive awareness and impact, prospecting.

**LinkedIn** for lower-funnel Account Based Marketing, drive leads from target accounts.



# ACCOUNT BASED MARKETING

Reach Market Through YouTube



**Awareness:** Introduce \*firm\* to accounts and contacts.

**Consideration:** LinkedIn ads, “lead” stage. Target specific accounts to educate and explain specific Working Capital products.

**Action:** Nurture emails + Content

Drive conversion through case studies and business application material. Connect to BDO.

**Engage:** Sales hand-off, “SQL” stage.

Continue to be top-of-mind as the lead enters the Sales Cycle.

# Account-Based Marketing (ABM)

Our team utilizes ZoomInfo MarketingOS for lower-funnel, highly targeted, account audience lists.

**Reason:** In-platform filtering has been useful and can still be used, however, during 2023 sales and marketing worked on finding more qualified leads which ABM campaigns delivered.

Investments have been made in building awareness audiences that should be retargeted.

**Funnel Level:** Consideration

**Channel:** LinkedIn

**Need:** Drive quality-leads that already know about \*firm\*. Higher friction form.

# Account-Based Marketing (ABM)

ZoomInfo Audience **Limitations**: 20k account ceiling for campaigns.

ZoomInfo **Intent**: We can create 100 custom intent signals, we currently have 43 developed.

## **LinkedIn List Names:**

Stage 2 – WC Awareness Plus Intent

Stage 3 – WC Consideration Plus Intent

WC Lower Funnel Audience

Awareness Audience 2023-24 Pool

# Prospecting: YouTube

All clients are B2B businesses. The decision circle includes the C-Suite, owners/founders, and the finance departments. POC are typically the CFO or financial controller.

**Need:** Drive leads, with a landing page that has a limited friction form. We will not use ABM lists for this channel.

(ZoomInfo is tagged on our website/landing pages and can track accounts that visit and engage, which ads to the ABM audiences).

# Expected Assets:

3, 15 second videos, 3 different concepts.

3 Static image concepts.

1 Document ad.

Ad copy.

# Additional Details:

**Budget:** \$200,000

**KPI:** 10-15 Loan opportunities. An “opportunity” is a qualified lead that has been handed to the sales team and has begun the screening process for a loan.

Sales cycle is typically a 6-9 month process per deal. Because of this, marketing focuses on sending quality potential deal “opportunities” to the sales team.

**Timeline:** Creative should be ready in June, we would like to start this campaign after \*Product\* Campaign 1 is launched.