



# Deck Title

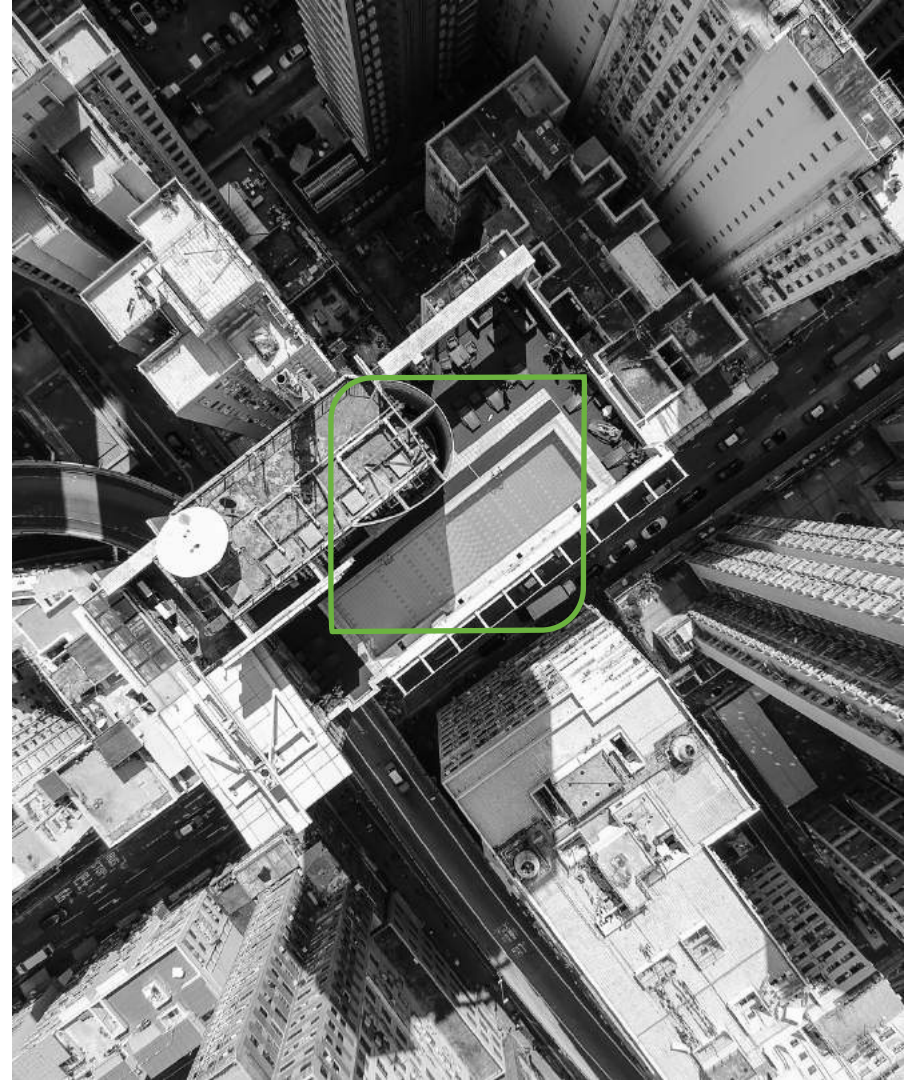
Prepared for (Client)

# CONTENTS

- 1 About
- 2 Approach
- 3 Experience
- 4 Team

# ABOUT US

who we are  
what we do



# We are B2B lead generation specialists.

We're invested in partnerships.

Building mutually beneficial, symbiotic relationships is at our core.

Our team serves as an extension of your team. And we take that responsibility seriously.

In-house lead generation specialists give your company the expanded sales and marketing capabilities it needs to thrive in today's rapidly-changing B2B world.



# Sales and Marketing is our thing.

Most companies realize they need to improve collaboration between sales and marketing, but they don't know how. Or, more importantly, they don't know how to make it produce results.

We are B2B lead generation specialists. We've spent our careers poking, prodding and picking up what works, why it works and how it can be sustained.

And that knowledge informs everything we do.

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We'll help you establish the foundation for sales and marketing success, then create and execute the plan to deliver it.

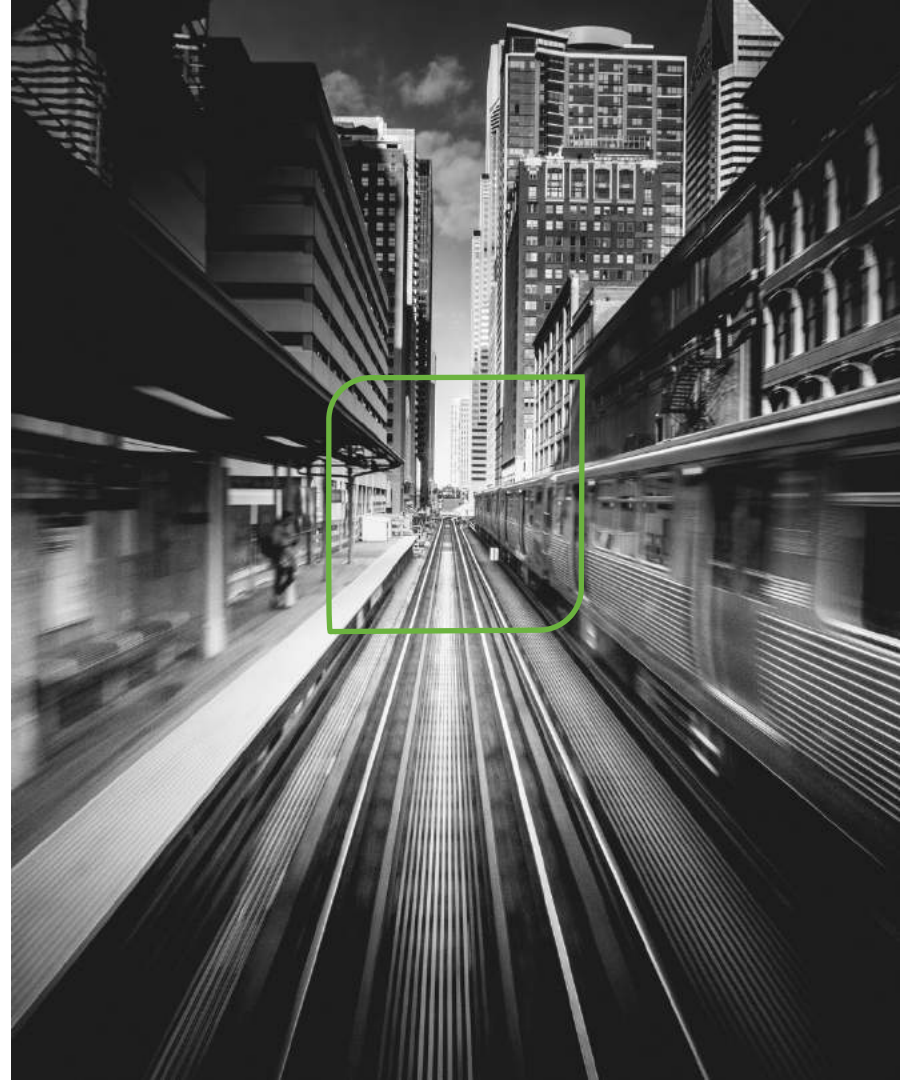


# OUR APPROACH

what we heard

what we do

how we do it



# Our understanding of client...

Insert here

# What do we do?



BRAND  
AWARENESS



SALES  
ENABLEMENT



FOCUSED  
CAMPAIGNS



OPERATIONS



# Brand Awareness



- + Marketing strategy, planning + execution
  - + Brand strategy + design
  - + Content strategy + development
  - + Social media marketing
  - + Search engine marketing
  - + Website design
- + Tradeshow marketing

# Sales Enablement



- + Market + customer research
- + Target audience definition
- + Value proposition development
- + Product + service positioning
- + Buyer personas + journeys
- + Email marketing
- + Landing pages + microsites
- + Sales collateral
- + Playbooks
- + Channel / field sales support

# Focused Campaigns



- + Campaign management
  - + List building
  - + Targeted sales outreach
  - + Outbound sales support
  - + Sales opportunity management
- + Reporting + analytics

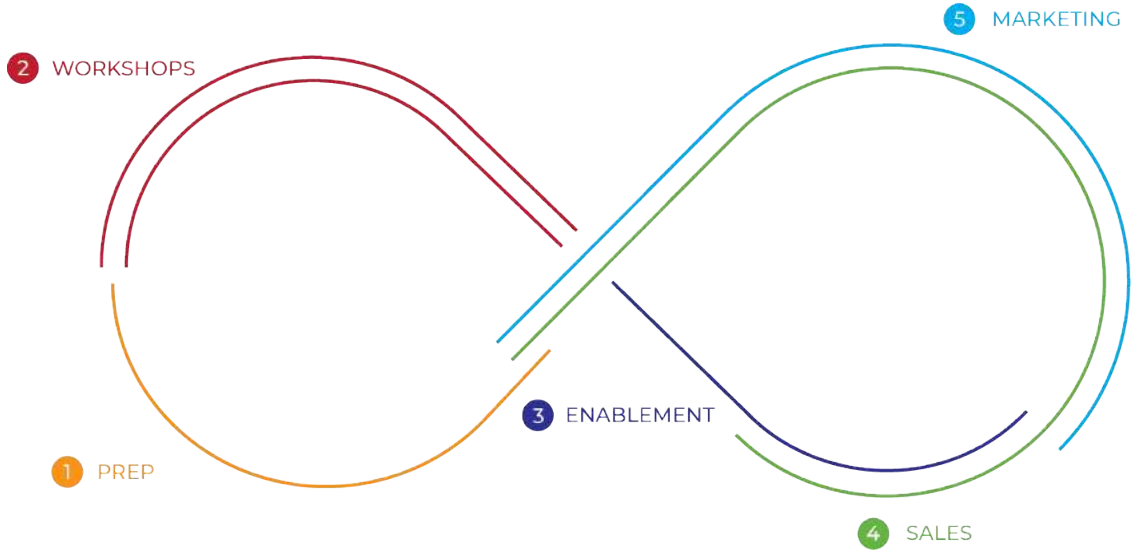
# Operations



- + Platform configuration
- + Integration services
- + Training + education
- + Audits + assessments
- + Operating models
- + Process definition
- + Sales change management
- + Marketing change management

# How do we do it?

At Symbiont, sales and marketing combine to form one lead generation super team.



# Your customer journey is our business.



1. Define awareness campaign for account acquisition (net-new) of targeted + opportunistic prospects
2. Identify applicable products / services + map competitive landscape for products / services
3. Assess content readiness with differentiated message + align messaging across all distribution channels
4. Refine content for the target personas + distribute across all appropriate channels

1. Define expansion campaign for targeted customers
2. Identify accounts in CRM + identify products / services for account expansion
3. Assess existing content for cross-sell / upsell
4. Align + socialize with sales / account teams
5. Develop messaging, design templates + distribute



# We test, measure and learn.

We collect and report various metrics to view engagement by channel and return on investment.

Digital marketing campaigns and outbound sales activities should drive revenue aligned with sales / account teams.

Without measurement we cannot improve campaigns, content or learn the best channels for target audiences.

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## EXAMPLE METRICS

- Email delivery + engagement
- Inside sales activity + lead quality
- Website activity + conversion
- Content distribution activity (inbound / outbound)
- Paid search activity + conversion
- Paid ads activity + conversion
- Social activity + conversion

# OUR EXPERIENCE

Kensium Solutions

Valtech

NovoScale

Czarnowski

S.W. Anderson

Culture Factors



“ The Symbiont marketing team provides the whole package when talking boardroom strategy to execution and beyond. Everything they touch is tied to a significant business objective.

”

- Dillon Nagle, Director of Marketing, Czarnowski

# Kensium Solutions

## INFORMATION TECHNOLOGY

- ✓ **Developed campaigns** to promote differentiators and increase overall brand awareness including direct campaigns with their software partner Magento
- ✓ **Delivered 8 sales-qualified leads in 6 weeks**, each with an opportunity to expand across multiple service lines
- ✓ **Strengthened Magento relationship** and increased inbound leads from Magento sales force
- ✓ **Aligned sales and marketing** campaign cadence and salesforce.com process to sales cycle

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### WORKSHOPS

buyer journey, personas, sales + marketing model, metrics definition, dashboard development

### SALES ENABLEMENT

metrics dashboards, CRM cleanup, company overview, magneto sales sheets

### CAMPAIGN STRATEGY + EXECUTION

channel + content recommendations, messaging, landing pages, sales emails

### SALES ACTIVITIES

list development + validation, prospecting, warm lead handoffs to field sales, opportunity pipeline follow up

# Valtech

## DIGITAL AGENCY

- ✓ Developed a complete top-of-funnel lead generation process to generate demand for Valtech's digital agency services in the U.S
- ✓ Created a new top-of-funnel message and executed a **targeted content plan** to build awareness of the new message via emails, blogs, white papers and case studies
- ✓ **Delivered 27 qualified leads** from a three-month outbound sales campaign, submitted two proposals totaling \$500k
- ✓ Used email to generate multiple in-person meetings at industry conferences and to set additional meetings with leads sourced from those conferences

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### WORKSHOPS

buyer journey, personas, sales + marketing model, metrics definition, dashboard development

### SALES ENABLEMENT

CRM recommendations, messaging, pay per click ads, landing pages, metrics reporting

### MARKETING STRATEGY + EXECUTION

channel + content recommendations, messaging, landing pages, sales emails

### SALES ACTIVITIES

list development + validation, prospecting, warm lead handoffs to field sales, opportunity pipeline follow up

## OUR EXPERIENCE

# NovoScale

## INFORMATION TECHNOLOGY

- ✓ **Developed a marketing and sales strategy** to generate direct client sales for NovoScale's ServiceNow consulting services
- ✓ **Created new company positioning and messaging** and developed foundational marketing collateral and content
- ✓ **Delivered 6 marketing-qualified leads and 3 opportunities** in a six-week inside sales campaign after delivering 3 marketing-qualified leads and 1 opportunity from a four-week pilot campaign
- ✓ **Built + executed an email campaign** to nurture leads from inside sales
- ✓ **Created a new website**

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### WORKSHOPS

buyer journey, personas, sales + marketing model, metrics definition, dashboard development

### SALES ENABLEMENT

virtual director of marketing, overview presentations, sell sheets, checklists, sales emails, redesigned website

### MARKETING STRATEGY + EXECUTION

channel + content recommendations, messaging, landing pages, emails, event booth development

### SALES ACTIVITIES

list development + validation, prospecting, warm lead handoffs to field sales, opportunity pipeline follow up, sales education + training



# Czarnowski

EXHIBIT + EVENT MARKETING

- ✓ Clearly defined marketing strategy and objectives
- ✓ Expanded marketing capabilities
- ✓ Improved awareness of industry-leading capabilities and expertise across an array of digital channels and offline
- ✓ Redesigned website which contributed to
  - Enhanced digital presence
  - Increased number of marketing-qualified leads by 275%
  - Increased average number of page views per visit by 25%
  - Increased average time on website by 15%

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### WORKSHOPS

marketing objectives, personas, buyer journey, competitive analysis

### MARKETING STRATEGY + EXECUTION

channel + content recommendations, messaging, content audit, content calendar, keyword audit, content distribution, social media strategy + maintenance, website maintenance

### CONTENT CREATION + DESIGN

blog posts, case studies, marketing guides, landing pages, web content, website design + development, marketing + promotional emails, social media posts

# S.W. Anderson

INDUSTRIAL DISTRIBUTOR

- ✓ **Identified scalable opportunities** to increase share-of-wallet within customer base
- ✓ **Refined go-to-market messaging** by highlighting service and product offering differentiators
- ✓ **Improved use of inside sales resources** as a revenue-generating channel
- ✓ **Provided education** on buyer journey framework and high-velocity sales and marketing model

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### MARKETING STRATEGY + EXECUTION

workshops, buyer journey, channel + content recommendations, messaging, website design + development, brand guideline creation, tagline, elevator pitch

### SALES ENABLEMENT

landing pages, sell sheets, line cards, emails

### CAMPAIGN MANAGEMENT

share-of-wallet, lead generation, product awareness

# Culture Factors

## MANAGEMENT CONSULTING

- ✓ Established brand identity and digital presence for new company
- ✓ Created a steady flow of inbound leads from Fortune 500 companies for a new company in a crowded market

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## WORKSHOPS

personas, buyer journey, competitive analysis

## BRANDING + COLLATERAL

logo design, brand guideline creation, powerpoint formatting + templates, event graphics + booth design

## MARKETING STRATEGY + EXECUTION

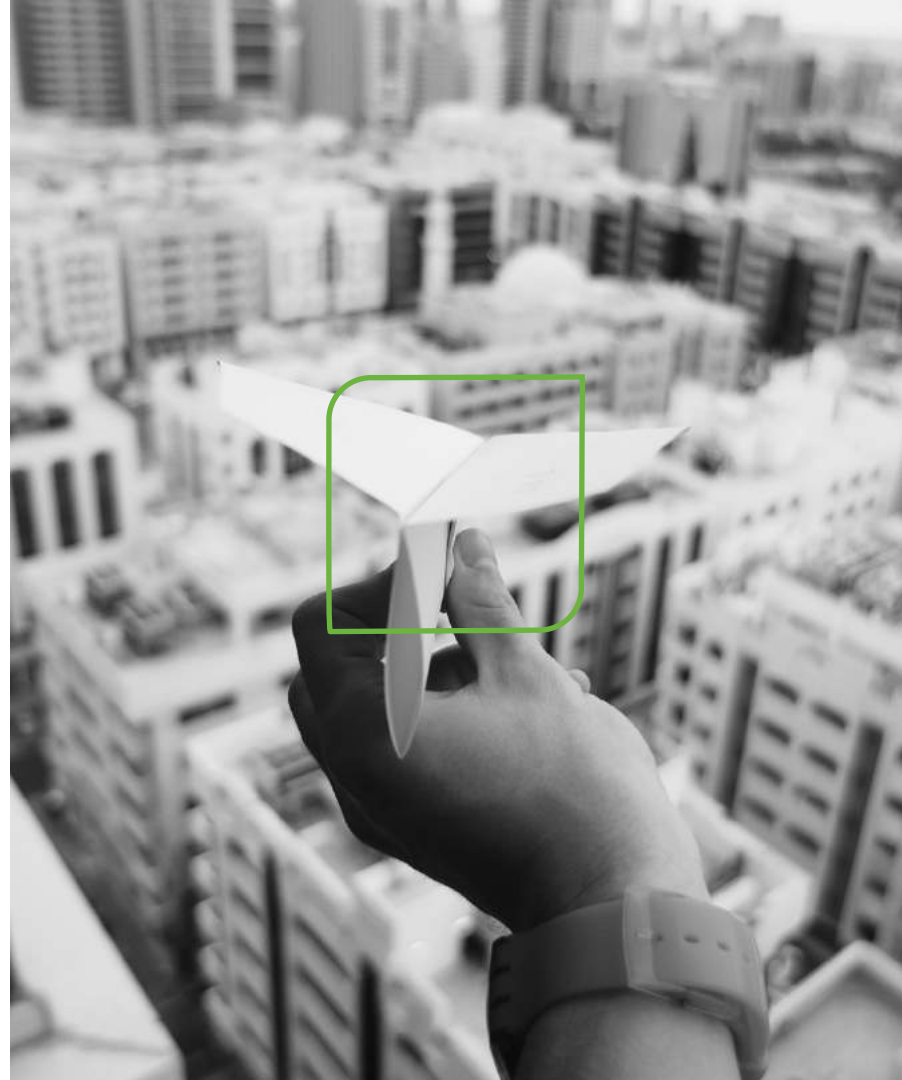
blog posts, case studies, white papers, landing pages, web content, website design + development, paid search research + copy development, social media maintenance

## CAMPAIGN MANAGEMENT

lead generation, product awareness, event promotion

# OUR TEAM

we've got beautiful minds



# Davin Gallego

CO-FOUNDER + HEAD OF DELIVERY

As Head of Delivery, Davin is responsible for the consistency and quality of services. He oversees sales and marketing technology implementation (ensuring what you bought operates properly in its environment), project management (managing the building of complex things) and organizational change management (convincing, educating and adopting those just-built complex things).

When Davin isn't busy rescuing companies from their digital dilemmas, he can be found singing karaoke. Or enjoying fine cuisine. He doesn't recommend doing both at the same time.



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2,306

passwords changed

84

Journey songs sung

3

jars of peanut butter  
consumed (weekly)

# Jon Borg-Breen

CO-FOUNDER + HEAD OF SALES

JBB has over 20 years of management consulting and digital experience, which he uses to advise companies on the role of digital in their organization and digital transformation initiatives. Having managed digital strategy and marketing teams, he's acutely aware that good ideas don't matter unless you have the ability to execute them.

When not challenging the status quo, JBB can be found playing with his wife and three girls. His personal credits include teaching a whole new generation "Hey Ho, Let's Go" and whatever "Gabba Gabba Hey" means.



---

12,407

Powerpoints created

11

bathroom keys stolen

3

mac n' cheeses  
consumed (today)



# Mandy Lewis

HEAD OF CLIENT SERVICES + MARKETING STRATEGIST

Mandy has worked with numerous companies over her career, such as AbbVie, Allstate, Discover Financial Services, Office Max and Waters—helping them wrestle their digital marketing, digital strategy and global digital governance.

As a lifelong marketer and Head of Client Services for Symbiont, Mandy Lewis is responsible for making sure client marketing strategy is on point, projects remain on track and that our clients are happy clients—as well as paying clients.

Mandy adores music. And she would have been a concert pianist too, except that she learned to play piano too late in life. Not that she's bitter about it.



**384**  
campaigns promoted

**1**  
Guinness World Record  
(seriously)

**5,100**  
bedtime stories read

# Albrey Nuss

CONTENT STRATEGIST + COPYWRITER

Albrey loves all content equally and has a strong background in writing copy for various mediums, including websites, emails, blogs, social media, newsletters, press releases and this bio.

But Albrey doesn't just release copy into the wild un-strategized. She helps clients establish brand tone and voice, identify audience and objectives for each piece of content created and ensure consistency of brand messaging across all channels.

As an avid cheese enthusiast, Albrey wishes every day was Pizza Friday. She also adores jewelry (actually anything that sparkles) and claims Iris Apfel as her spirit animal.



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2,163

Thesaurus.com lookups

4

snorts while laughing  
(this week)

171

pieces of jewelry owned

# Dorinne Hoss

CAMPAIGN MANAGER

Here at Symbiont, Dorinne is responsible for leading the creation, execution and measurement of campaigns. She works closely with both sales and marketing to create integrated campaigns with just the right mix of inbound, outbound, lead nurturing and sales enablement to ensure clients achieve their objectives.

When she's not busy whipping up campaigns at work, Dorinne enjoys making complicated desserts in the kitchen. Her success rate is only about 50%, but it's more about the experimentation than the results. And she has an office full of guinea pigs to test her creations on.



---

1,040

marketing campaign ideas generated

45

dog accounts followed on Instagram

12

Vegas vacations taken

# Jackie Cassin

VISUAL DESIGNER

Jackie is an expert at encouraging and facilitating shenanigans. She's also an expert at making both digital and print stuff look good. And with more than a decade of graphic design experience, Jackie's creations are more than pretty. She incorporates strategy into everything she designs, taking into account factors such as audience, objective and user experience.

When not making strategically pretty things, Jackie is into bingeing tv shows. Some of her favorites include Friends, Mad Men and, of course, Game of Thrones. She's always been #TeamStark. Not that anyone asked.



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344

fonts saved

27

smashed pennies  
in collection

454

dog photos on phone  
(number guaranteed  
to increase)

# Gabriel Esuola

## BUSINESS DEVELOPMENT

Gabe is a connector and a communicator. When he's not playing Connect Four, he's busy connecting businesses to Symbiont's sales and marketing strategists. He also works with Symbiont's copywriter, designer and digital marketing manager, supplying insight that helps keep the sales and marketing teams aligned.

Gabe's specialty is uncovering new opportunities. If they are out there, Gabe will find them. His energy and passion helps push our business forward.

As our resident musician, Gabe is a highly coveted trivia team member due to his extensive music knowledge. A self-proclaimed "classic man," there's one thing Gabe can't do: swim. But he's taking lessons soon. He promises.



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200

contacts per week

347

songs played (this week)

0

swimming lessons  
scheduled (to date)

# Andrew Shubel

## BUSINESS DEVELOPMENT

At Symbiont, Andrew is responsible for identifying and nurturing sales leads for both our clients and our company.

His knowledge of different products and industries allows him to uncover a prospect's interests and get them talking. He's also an expert at overcoming objections and turning negatives into positives, which comes in handy. When he isn't chatting up prospects or looking on the bright side, Andrew plays a crucial role in keeping our team aligned by providing insightful sales feedback to our marketers.

If you've received a phone call from us, chances are it came from Andrew. And just because his voice sounds a bit higher on the phone than in real life, doesn't mean you can ma'am him. You've been warned.



---

**23**  
tabs open at a time

**8**  
sous vide meals cooked

**1**  
cars (and trying to keep it that way)



# Alfonso Azuaje

## BUSINESS DEVELOPMENT

Alfonso is responsible for reaching out to potential clients, following up on leads and driving new business. He enjoys meticulously researching prospects and uncovering the best ways to engage with them—it's his superpower.

When Alfonso isn't busy building bridges between himself and future clients, he shares his observations with the marketing team to help improve overall effectiveness.

Like most Symbionts, Alfonso dabbles in dad jokes. Unlike most Symbionts, he feels the need to hide it. But he's working through it, one day at a time.



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6

liters of water drank  
per day

11

countries visited

16

scars + counting

# Annie Reiman

## BUSINESS DEVELOPMENT

Annie is responsible for identifying sales opportunities, qualifying sales leads, building relationships with clients and prospects and finding creative solutions to complex challenges.

Her background is B2B, mixed with some B2C experience in high-end retail. Annie's strengths include building strong books of business and providing outstanding client service.

Her weaknesses include an affinity for sharks. While not a fan of meeting one in real life, Annie likes watching them on TV during Shark Week—a weeklong holiday at her house. We can't imagine that makes her two cats very happy.



---

**2**  
completed NYT Sunday  
crosswords (lifetime)

**6**  
adjectives in morning  
Starbucks drink order

**45**  
states road-tripped  
through

# Weldon Rogers

## BUSINESS DEVELOPMENT

Weldon is responsible for identifying opportunities, following up on leads and driving revenue by any means necessary. He also contributes to defining (and refining) sales processes and strategies. When he's not busy scouring the internet for new prospects, Weldon enjoys hiking, cliff jumping and other all-American boy activities.

You might also catch him apologizing unnecessarily. But hey, politeness goes a long way, especially when you're overdoing it.



**200,000**  
potatoes consumed

**4**  
mountains climbed

**3,293**  
in-office pushups

# Margaret Metobo

## BUSINESS DEVELOPMENT

Strategic communication is Margaret's area of expertise. At Symbiont, she is charged with using that skill set to uncover, qualify and build the sales opportunity pipeline for us and our clients. Margaret draws on her past experience as a field marketing strategist and visual merchandiser to identify unique opportunities to boost sales.

And while Margaret is a sales whiz, she doesn't let success go to her head—literally. She gets dizzy easily, so you'll find her celebrating with her feet planted quite firmly on the ground.



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**3rd**  
child out of six kids

**03/03**  
birth date

**4**  
states lived in  
(we're surprised it isn't 3, too)



Thank you.

CONTACT:

**First Last**

Title

312.757.4620

[first.last@symbiontgroup.com](mailto:first.last@symbiontgroup.com)

[SYMBIONTGROUP.COM](http://SYMBIONTGROUP.COM)

# APPENDIX

high velocity sales + marketing

web redesign



# HIGH VELOCITY SALES + MARKETING

process

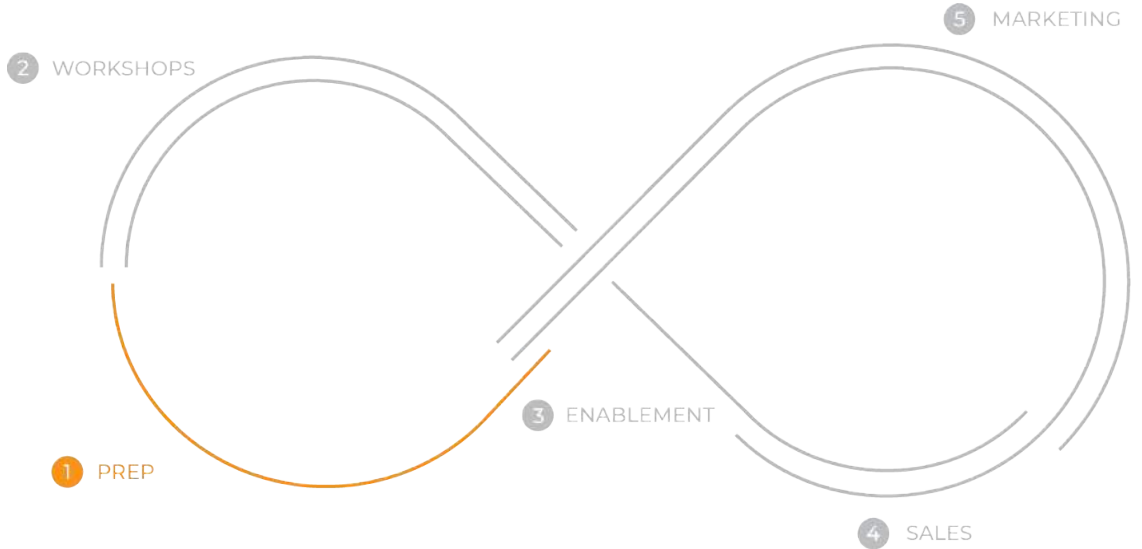
sales investment

support investment



# 01 Preparation

- + Market analysis
- + Persona development
- + Current state review
- + Corporate positioning
- + Content audit





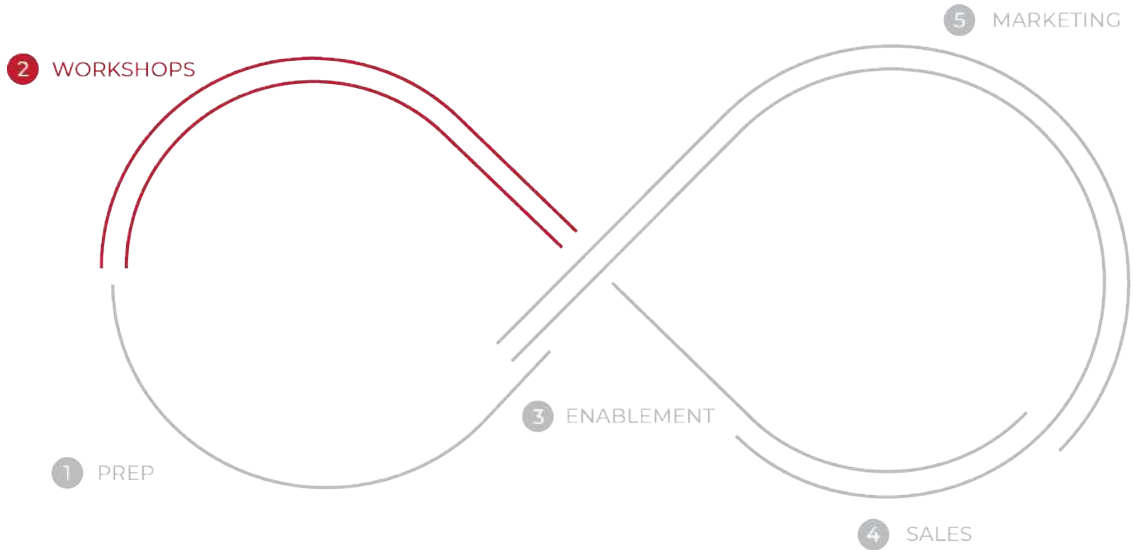
## 02 Workshops

### Workshop 1 - Marketing Strategy Definition

- + Target markets, competitors, target customers & positioning, go-to market options
- + Marketing planning & execution: review & refine market activities + identify gaps

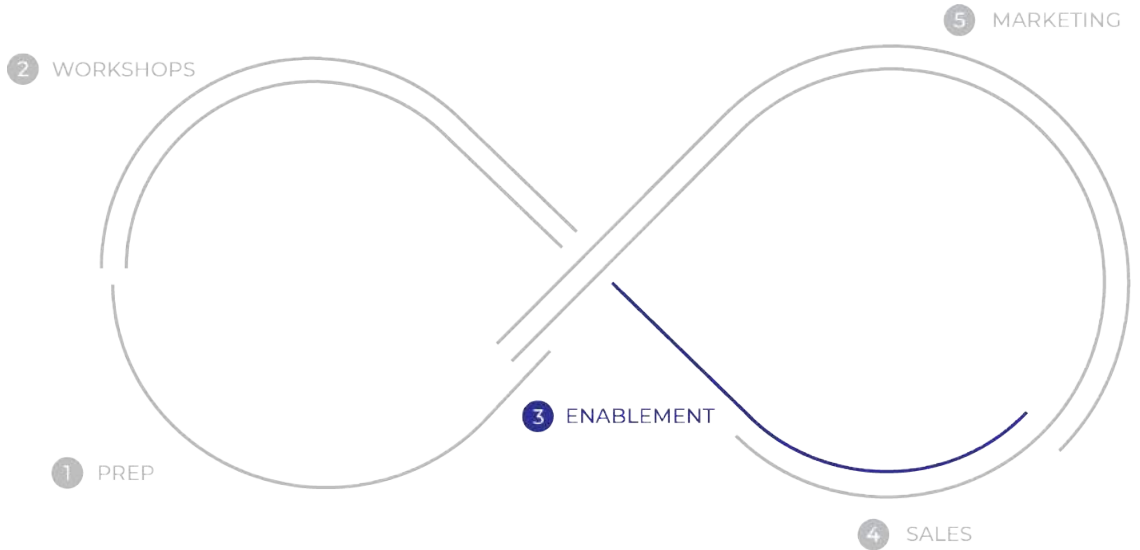
### Workshop 2 - Marketing Plan Review

- + Finalize positioning & messaging
- + Review & refine persona(s)
- + Review market execution plan



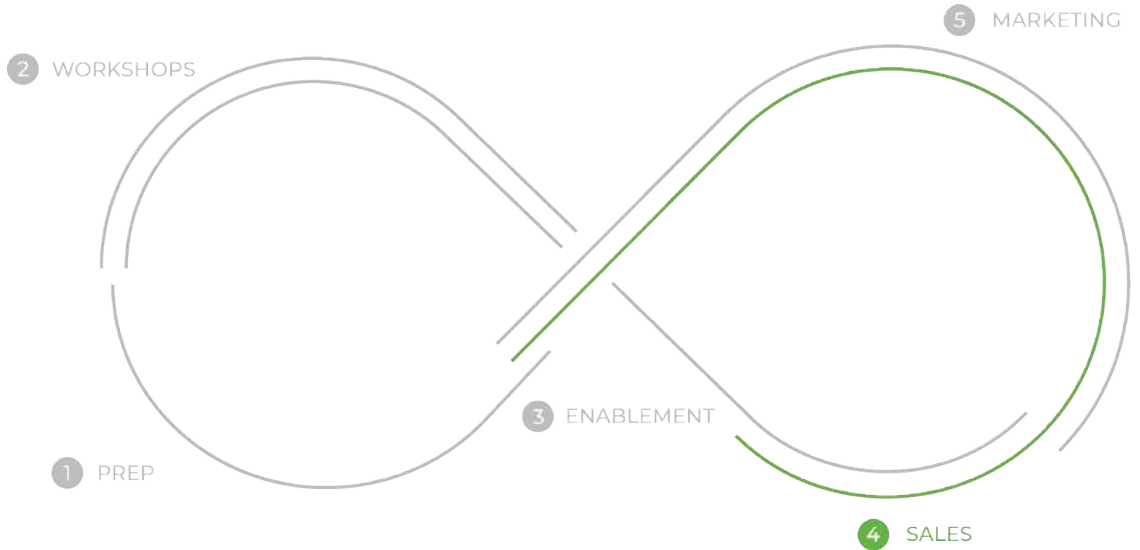
## 03 Enablement

- + Marketing strategy
- + Marketing budget
- + Execution tactics (campaigns & ongoing activity)
- + Content creation – blog posts, tip sheets, infographics, marketing guides, case studies, white papers



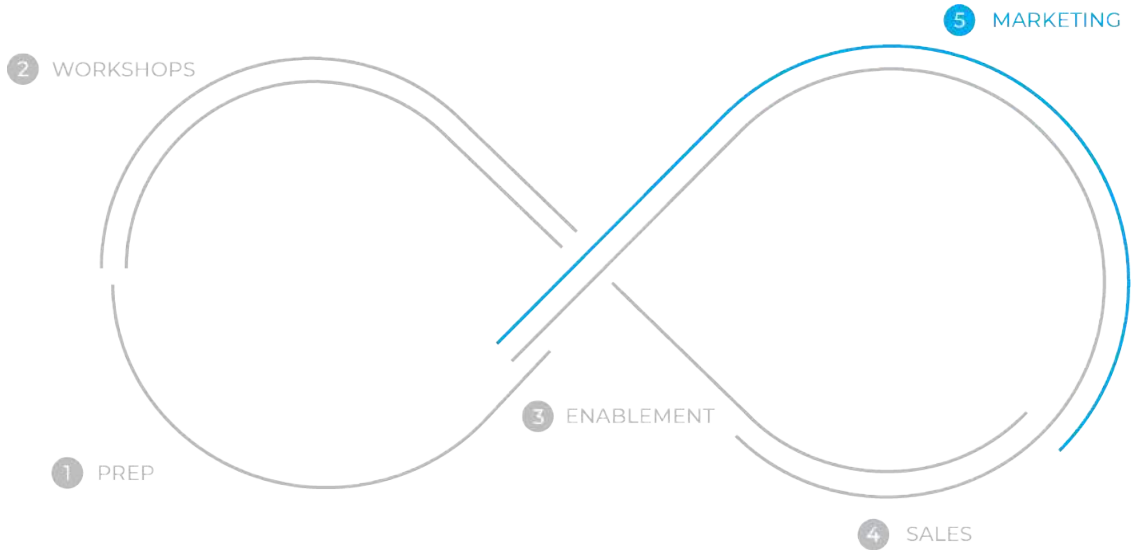
# 04 Sales Activities

- + List building + validation
- + Targeted sales outreach
- + Outbound sales support
- + Inside sales management
- + Inside sales training



# 05 Marketing Strategy + Execution

- + Campaign management
- + Landing page development
- + Lead nurturing
- + Email + content marketing
- + Social media marketing
- + Trade show + event marketing
- + Reporting + analytics

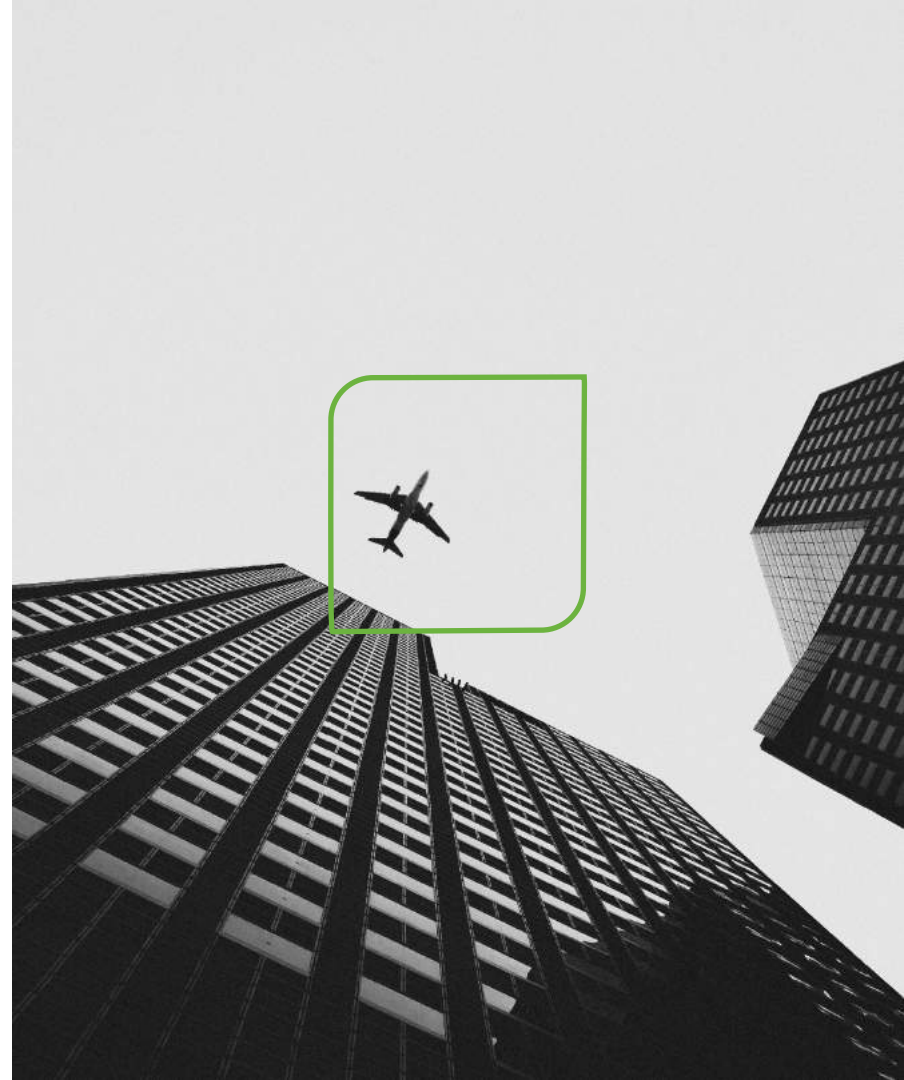


# WEB REDESIGN

process

timeline

investment



# 01 Define

## PROJECT ALIGNMENT

- + Define purpose of website
- + Identify business goals of website
- + Identify target audience types
- + Define site requirements
- + Define business requirements

---

## DELIVERABLES

Web Design Brief

## RESOURCES

Account Manager  
Project Manager  
Business Analyst  
Sr. Technical Analyst  
Art Director  
Content Strategist

# 02 Design

## WIREFRAMES + CONTENT

- + Develop Site Map + Customer Workflow
- + Identify design wish list + goals
- + Begin design concept development
- + Establish hierarchy of information on each page
- + Begin developing copy
- + Establish desired interactions, placements + annotate experience
- + Solidify user journey throughout website

---

### DELIVERABLES

First draft copy  
Site Map  
Customer Workflow  
High-fidelity Wireframes + annotations

### RESOURCES

Account Manager  
Project Manager  
Art Director  
Visual / UX Designer  
Content Strategist  
Sr. Technical Analyst

## 02 Design

MOCKUPS + FINAL COMPS

- + Begin utilizing wireframes, brand standards + business goals
- + Expand + polish copy
- + Review + revise
- + Source photography + digital assets, as needed
- + Pixel-perfect design comps of every page
- + Finalize Copy
- + Client sign off / approval of every page

---

### DELIVERABLES

Final copy  
Final design comps of every page  
(desktop + mobile)

### RESOURCES

Account Manager  
Project Manager  
Art Director  
Visual / UX Designer  
Copywriter



# 03 Development

BUILD CODE + TEST

- + Set up Development (DEV) environment
- + Complete all coding / front-end development
- + Develop Testing Plan
- + Conduct testing
- + Compile testing report to review + approve
- + Resolve any coding / site issues identified in testing

---

## DELIVERABLES

Developed site in DEV environment  
Test Plan

## RESOURCES

Account Manager  
Project Manager  
Front-End Developer  
QA Specialist  
Sr. Technical Analyst

# 04 Deploy

## SITE LAUNCH

- + Deploy to Production (PROD) environment
- + Review entire site in PROD
- + Repair any broken links / files
- + Ensure every page is in working order
- + Update any SEO tagging

---

### DELIVERABLES

Migrated site in PROD environment

### RESOURCES

Account Manager  
Project Manager  
QA Specialist  
Sr. Technical Analyst

# Approval Process

## DEFINE

Client Stakeholder  
Meeting + Validation

## DESIGN

Concept Client Review  
Iterate + Revise  
Client Approval  
Final Client Review + Approval

## DEVELOP, TEST, DEPLOY

Client Review  
Iterate + Revise  
Client Approval to Launch

# Timeline Estimate

PROJECT ALIGNMENT: 1 WEEK

WIREFRAMES & CONTENT: 2 WEEKS

DESIGN MOCKUPS + COMPS: 2 - 3 WEEKS

DESIGN FINAL: 2 - 4 WEEKS

DEVELOP + TEST: 2 - 3 WEEKS

LAUNCH: 1 WEEK

# Typical Effort + Cost

ACTIVITIES	ESTIMATED HOURS	STANDARD RATE	ESTIMATED PRICE
Account Management	#	\$x/hr	\$x,xxx
Project Alignment	#	\$x/hr	\$x,xxx
UX Strategy	#	\$x/hr	\$x,xxx
List activities here	#	\$x/hr	\$x,xxx
List activities here	#	\$x/hr	\$x,xxx
List activities here	#	\$x/hr	\$x,xxx
List activities here	#	\$x/hr	\$x,xxx
TOTAL			\$x,xxx