

Phase 1: Start fast with Sage Partner Marketing

For the best experience, download this playbook and open it in Adobe Reader.
[Get Adobe Reader here](#)

Sage



Let's work together!

Purpose of this guide

This guide provides an overview of the Sage Partner Marketing programme and resources for you to use to develop your marketing strategy.

Goal for this phase

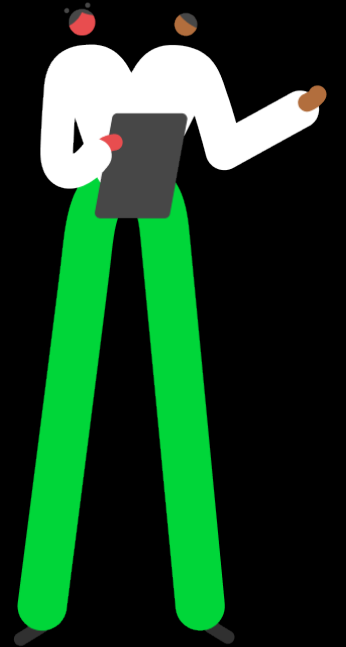
The goal of this phase is to develop a marketing plan to include with your Sage business plan.

Next step

After successfully completing this phase, you will sign a contract and begin the marketing onboarding process with Sage Partner Marketing.

Your marketing strategy is the foundation of your business plan.

Build it strong.



Milestones for the pre-onboarding phase

Day 1-7



Familiarise yourself with Sage platforms and tools

Day 8



Meet with Sage Partner Marketing team to discuss TAM

Day 9-30



Write your marketing plan using Sage resources

Day 31+



Review your marketing plan with Sage

Day 1-7

Day 8

Day 9-30

Day 31+



Familiarise yourself with Sage platforms and tools

Sage Advance

Run and track campaigns using this marketing automation tool with ready-to-use campaigns and assets.

[How to register](#)

Sage Highspot

Download and customise marketing and sales enablement materials from a comprehensive library.

[How to register](#)

Sage University

Create a plan to upskill and certify individuals on your team using these proven training resources.

[How to register](#)

Sage MDF

Apply* for marketing development funds and track your requests in one place through Ansira.

*Register in phase 2

Partner co-marketing guidelines

Learn best practices for building co-marketing materials with the Sage brand.

Day 1-7

Day 8

Day 9-30

Day 31+



Meet with Sage Partner Marketing team

[Schedule a call](#) with Sage experts from the Partner teams to:

- Validate your target audience and vertical, total addressable market (TAM), and market need
- Find ways to differentiate from the competition
- Develop your ideas for your GTM strategy
- Learn how to leverage Sage Marketing resources

Get a jumpstart
on success
with valuable
**insight from the
Sage partner team.**

Day 1-7

Day 8

Day 9-30

Day 31+



Write your marketing plan

Use Sage resources in the [Marketing Accelerator Education Series](#) to create a plan, allocate your budget, deepen your understanding of your customers, and improve targeting.

Find a [list of tactical activities](#) that will be required during the six-month marketing onboarding phase and consider how you will include them in your plan.

Additional Resources

- Return On Investment Tool**
Created with partners in mind. Before planning any activity, it's important to have sight of your Return On Investment (ROI). You'll need to know how many leads you need to generate in order to meet your revenue goals.
[View](#)
- Marketing Budget Allocation**
A common struggle is the art of budget allocation - what to spend your money on for your marketing strategy to work. By strategically spending your budget you will see the ROI you expect. Use this tool to tactically plan out your 12 month spend.
[View](#)
- Your Marketing Plan**
Structuring your marketing plan relies on three parts, the opportunity, the strategy, and the action. This handy framework will help you map out your plan with actions to drive growth and revenue for new customers, existing customers and potential new industries.
[View](#)
- Customer Segmentation Guide**
Looking at the art of segmentation, what makes customers tick and how do we know who we're selling too. Covering the purpose of delivering accurate messages to customer we want to reach.
[View](#)
- Interactive Marketing Planning Guide**
Marketing is the act of driving profitable customer action. It includes all strategies and tactics that organisations use to position their product and services offering. This guide brings this to the surface to help build an actionable plan.
[View](#)

Day 1-7

Day 8

Day 9-30

Day 31+



Review your marketing plan with Sage

Share your plan with the [Sage Partner Marketing team](#) and get their help reviewing it. Refine as necessary.

Add the final approved marketing plan to your business plan, so you can start using it day one.

Start **building your funnel day one** with an approved marketing plan.

Congratulations! You're ready for the next phase!

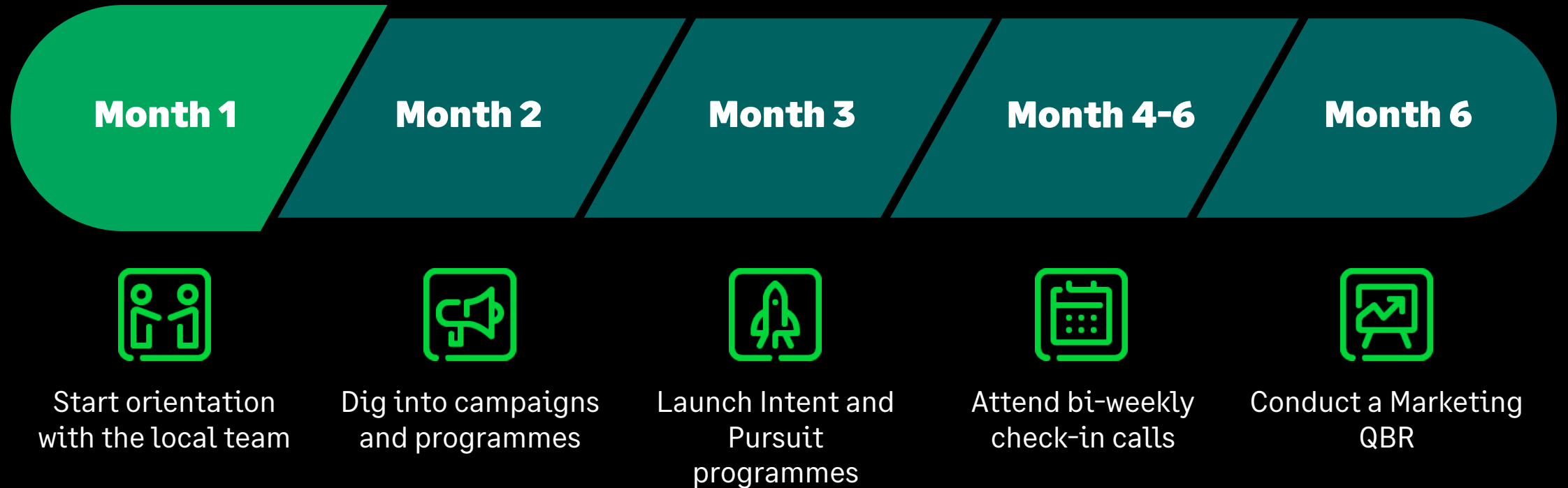
Checklist, by this point you have:

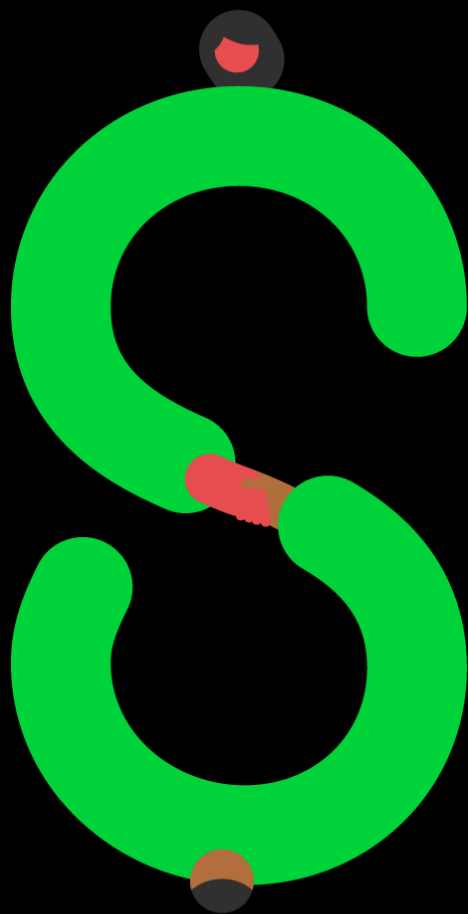
- A clear understanding of your target market and how you can differentiate
- A marketing plan for generating demand within your target audience
- A solid understanding of the Sage brand
- A login to the Sage partner platforms and familiarity with benefits
- A training schedule set for Sage University



Sneak peek! Phase 2 milestones

The Phase 2 Marketing Onboarding playbook, sent to you after signing your contract, provides guidance to help you implement your marketing plan. The goal is to become independent in the first six months.





Sage

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Description

Run and track campaigns using this marketing automation tool with ready to use campaigns and assets for Sage Intacct, Sage 200, and Sage X3 across all participating verticals.

Register through the platform directly first

You'll need to register first by clicking [here](#).

Explore resources and guides

- For help with Partner Hub and setting up your account, visit the [Knowledge Base](#)
- For Sage Advance resources like introductory videos, user guides, and FAQ documents, visit the [Training Centre](#)

Post-registration access

Once registered, you can access Sage Advance through Sage Partner Hub.

1. Click on Marketing from the top menu
2. Select Sage Advance (Campaigns)
3. A new window will open with the Sage Advance tool

Sage Highspot

Go back

Description

Download and customise Sage Intacct marketing and sales enablement materials from a comprehensive library.

Register through the platform directly first

Request access through [Highspot](#)

- Email [Sage Intacct Highspot](#) for support

Explore the resources and guides

- [Highspot User Guide page](#)
- [Sage Intacct Solutions for Onboarding Part 1](#)
- [Sage Intacct Solutions for Onboarding Part 2](#)
- [Sage Intacct Marketing & Sales Content](#)

Post-registration access

Once registered, you can access Sage Intacct Highspot through [Sage Partner Hub](#)

1. Click on Marketing from the top menu
2. Select Marketing and Sales Tools
3. Select Sage Intacct at the bottom of the list
4. From the Intacct Page click on Discover Highspot

Description

Create a plan to upskill and certify your team using our proven training resources. We've created an easy-to-use platform where you can find the resources you need.

Register through the platform directly first

To request access, create an account through [Sage University registration page](#)

Explore the resources and guides

You can find out more about Sage University [here](#). Sort information by product as well as the types of training and courses.

Post-registration access

Once registered, you can access Sage University through [Sage Partner Hub](#)

1. Click on Education from the top menu
2. Select [Training and Sage University](#)
3. Log into the Sage University Tool which will open in another browser tab

Note: Some materials on Sage University are only available with a Sage partner account number, which is granted after the pre-onboarding phase is complete.

Tactical activities

[Go back](#)

Activity

Considerations for writing your marketing plan

Add Sage offerings to your website

- If you use an existing agency, how much do you need to budget?
- If you use Dystrick, this work costs approx. £6,000 of which Sage sponsors half.

Maximise SEO results

- Are you planning to do pay per click? If so, what is your budget?
- Who will be the person in charge of SEO? Do you need to hire for it?

Publish a press release

- Do you have an internal PR resource to write and distribute this or will you need to hire an outside agency?

Personalise, schedule, and publish 6 blogs

- Do you currently have a blog? If not, what is your plan for starting one?
- How will these six blogs fit into your content pipeline?
- Who will write them?
- Is there a budget implication to any of these decisions?

Tactical activities, page 1 of 3

Activity

Considerations for writing your marketing plan

Maximise Sage campaigns in a box (CiB)

- What marketing automation tool or resource will use to run the campaigns?
- Will one of the existing campaigns work for you target audience, or do you need to modify the assets?
 - [Sage 50 to Sage Intacct Migration Campaign](#)
 - [Finance Professionals Campaign](#) (for customer new to Sage)

Confirm your UTM links and create a plan for using them

- How will you promote assets aligned with your UTM links?
- What is your process for working the leads that come back to from Sage through the UTM links?

Prepare for Intent Data programme

- What list of potential customers do you want the agency (Intent) to monitor for you? Do you already have one? Do you need to buy one?
- When the agency alerts you that the opportunity in one of these targeted accounts has matured, what will be your engagement strategy for moving them through the sales funnel?
- What do you need to budget in terms of time and funds to support this programme?

Tactical activities, page 2 of 3

Activity

Considerations for writing your marketing plan

Prepare for telemarketing programme

- Do you want to work with the agency recommend by Sage (Pursuit) or another agency for telemarketing?
- Who will work with the telemarketing agency to develop the call guide and supporting content that agents use to engage potential clients?
- How will you ensure a warm hand off between the agency and your sales team?
- What do you need to budget in terms of time and funds to support this programme?

Plan for MDF allocation

- How will your target tier of MDF help offset activities you've planned in your GTM?
 - Top-tier partners –
Pre-approved MDF available and invitation to quarterly best practice forum
 - Mid-tier partners –
Pre-approved MDF available and receive 1-1 support from Sage Partner Marketing team
 - Third-tier partners – Able to apply for MDF and access campaigns and assets through self-service portals (ex. Highspot and Advance)

Tactical activities, page 3 of 3