

# 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.](#)



# Let's work together!

## Purpose of this guide

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

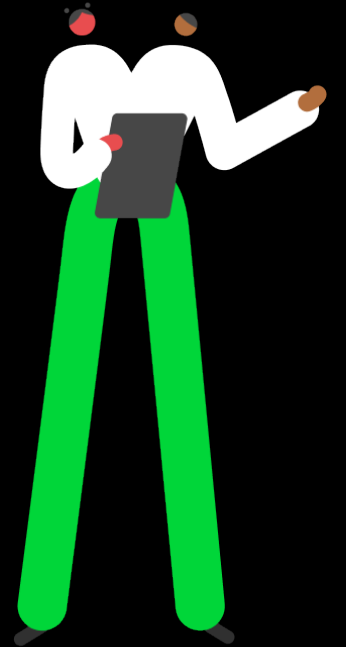
## Goal for this phase

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 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



Familiarise yourself  
with Sage platforms  
and tools



Meet with Sage Partner  
Marketing team  
to discuss TAM



Write your marketing  
plan using Sage  
resources



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](#)

## Co-marketing guidelines

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

## Sage partner logo

Sage Intacct Partners are required to use this logo for all co-branding initiatives. Request the logo kit from your PMM.

**Sage** Business Partner

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 go-to-market (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

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# 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: opportunity, strategy and 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 to. 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 from day one.

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

# Congratulations! You're ready for the next phase!

Checklist, by this point you have:

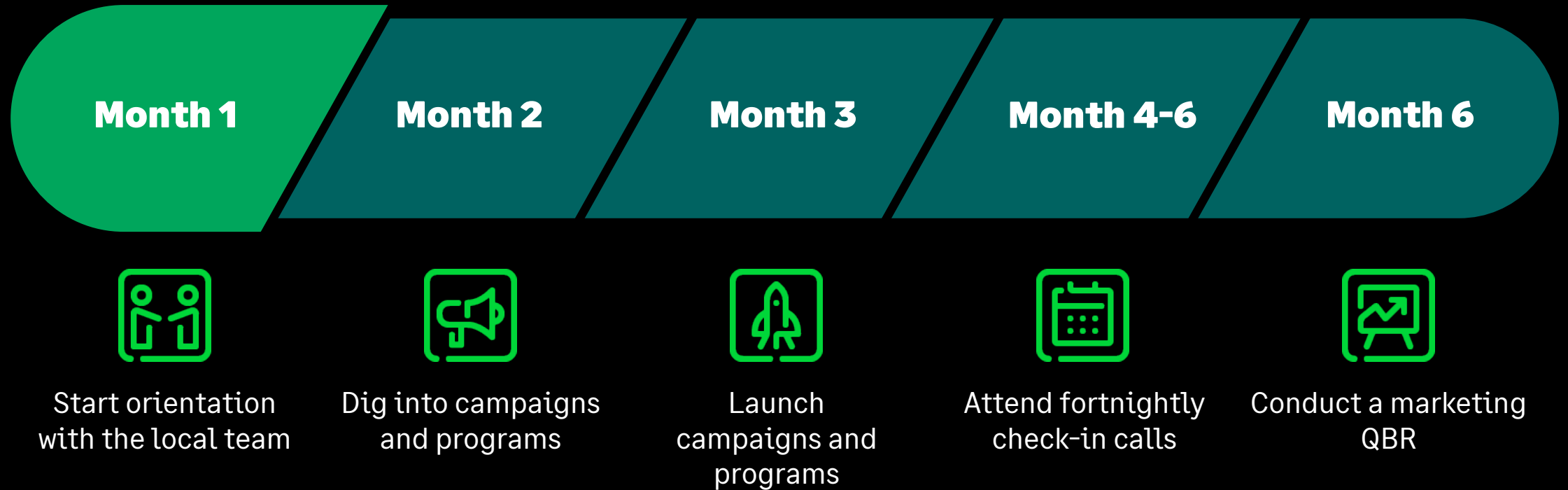
- A clear understanding of your target market and how you can differentiate
- A marketing plan for generating demand within your target audience
- A solid understanding of the Sage brand
- A login to the Sage partner platforms and familiarity with the benefits

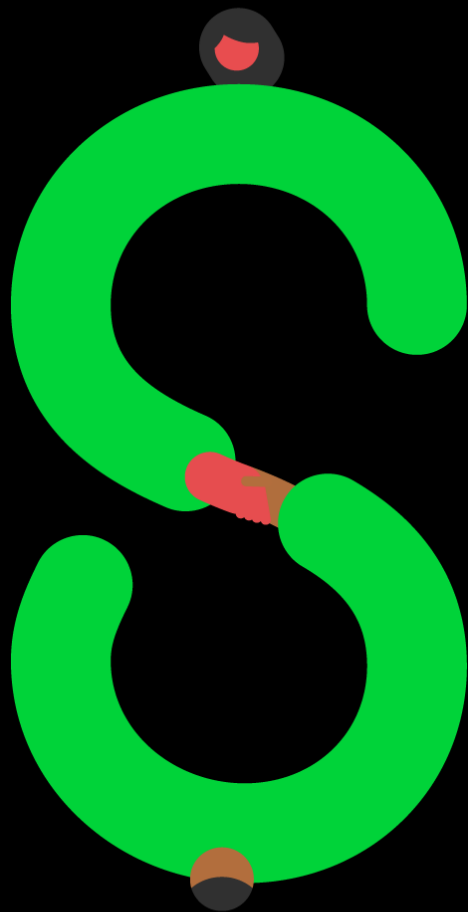




# Sneak peek! Phase 2 milestones

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.





## Description

Run and track campaigns using this marketing automation tool, with ready to use campaigns and assets for Sage Intacct, Sage 300, and Sage X3 across all participating verticals.

## Register through the platform

Sign-up directly through the [Sage Advance](#) platform

## Explore resources and guides

- For Sage Advance resources like introductory videos, user guides, and FAQ documents, visit the [Training Centre](#)

## Post-registration access

Once registered, you can access campaigns using the following steps:

1. Marketing Assets & Resources
2. View by campaign
3. Sage Products
4. Sage Intacct
5. Select the campaign you want to use

## Description

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

## Register through the platform

Request access through the [Highspot sign-up page](#)

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

## Explore the resources and guides

- [Highspot user guide](#)
- [Sage Intacct marketing and sales content](#)

## 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

To request access, create an account through the [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.

*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
<b>Add Sage offerings to your website</b>	<ul style="list-style-type: none"><li>• If you use an existing agency, how much do you need to budget?</li><li>• If you want to use the Dystrick plugin, talk to you PMM for more info</li></ul>
<b>Maximise SEO results</b>	<ul style="list-style-type: none"><li>• Are you planning to do pay per click? If so, what is your budget?</li><li>• Who will be the person in charge of SEO? Do you need to hire for it?</li></ul>
<b>Publish a press release</b>	<ul style="list-style-type: none"><li>• Do you have an internal PR resource to write and distribute this, or will you need to hire an outside agency?</li></ul>
<b>Personalise, schedule, and publish blogs</b>	<ul style="list-style-type: none"><li>• Do you currently have a blog? If not, what is your plan for starting one?</li><li>• How will these blogs fit into your content pipeline?</li><li>• Who will write them?</li><li>• Is there a budget implication to any of these decisions?</li></ul>

**Tactical activities, page 1 of 2**



Activity	Considerations for writing your marketing plan
<b>Prepare for telemarketing program</b>	<ul style="list-style-type: none"><li>• Do you want to work with one of the agencies recommend by Sage or another agency for telemarketing?</li><li>• Who will work with the telemarketing agency to develop the call guide and supporting content that agents use to engage potential clients?</li><li>• How will you ensure a warm hand off between the agency and your sales team?</li><li>• What do you need to budget in terms of time and funds to support this program?</li></ul>
<b>Maximise Sage campaigns in a box (CiB)</b>	<ul style="list-style-type: none"><li>• What marketing automation tool or resource will you use to run the campaigns?</li><li>• Will one of the existing campaigns work for your target audience, or do you need to modify the assets?<ul style="list-style-type: none"><li>• <a href="#">Finance Professionals Campaign – Phase 1</a> (new customers)</li><li>• <a href="#">Finance Professionals Campaign – Phase 2</a></li><li>• <a href="#">Sage 50 to Intacct</a></li><li>• <a href="#">Sage 300 to Intacct</a></li></ul></li></ul>