

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, as well as resources for developing your marketing strategy.

Goal for this phase

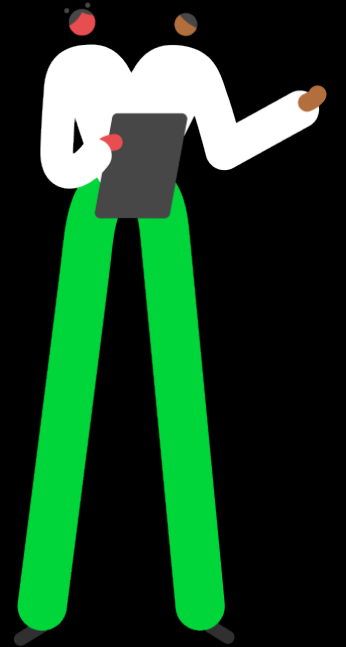
In this phase, develop a marketing plan to include with your Sage business plan.

Next steps

After successfully completing this phase, you 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



Days 1–7

Day 8

Days 9–30

Day 31+



Familiarize yourself with Sage platforms and tools

Sage Highspot

Download and customize 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 Partner

Days 1–7

Day 8

Days 9–30

Day 31+



Meet with Sage Partner Marketing team

Schedule a call with Sage experts to:

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

Get a jumpstart on success with valuable insights from the Sage Partner team.

Days 1–7

Day 8

Days 9–30

Day 31+




Write your marketing plan

Use Sage resources in the [Marketing Accelerator Education Series](#) to create a marketing 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 too 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](#)

Days 1–7

Day 8

Days 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.

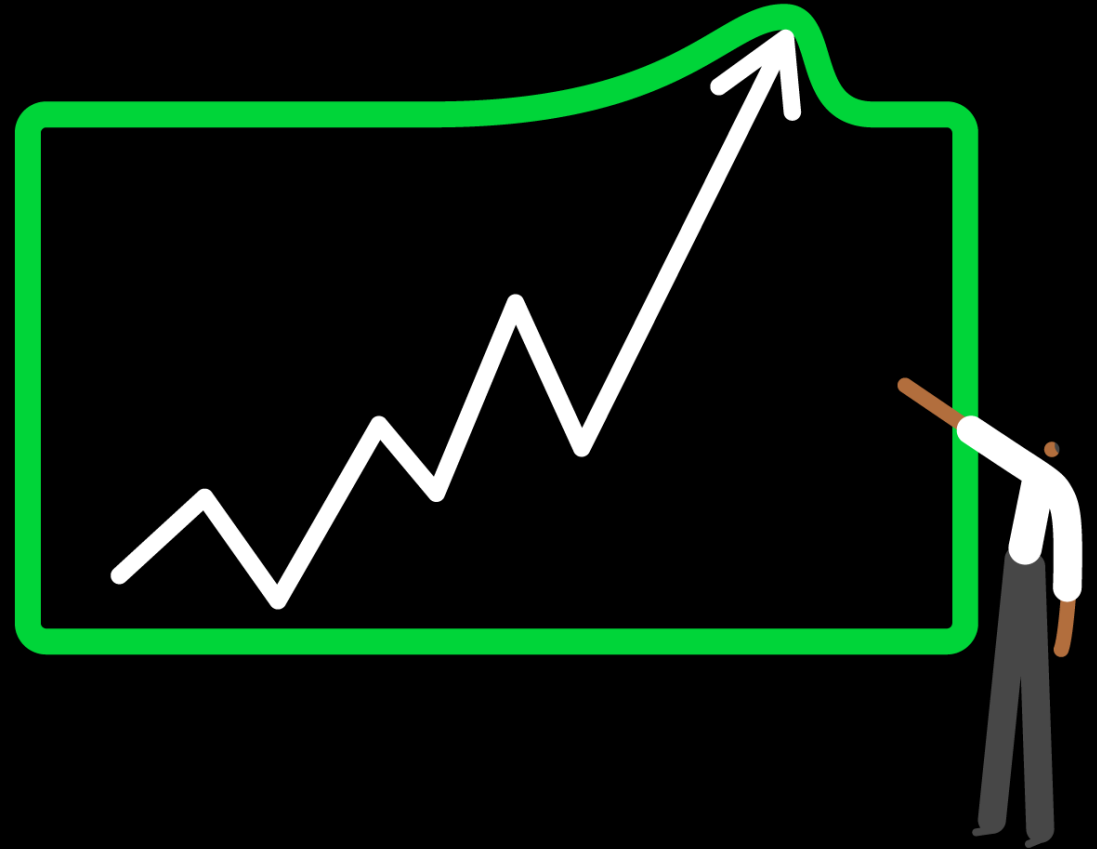
Add the final approved marketing plan to your business plan, so you can start using it on day one.

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

Congratulations: You're ready for the next phase!

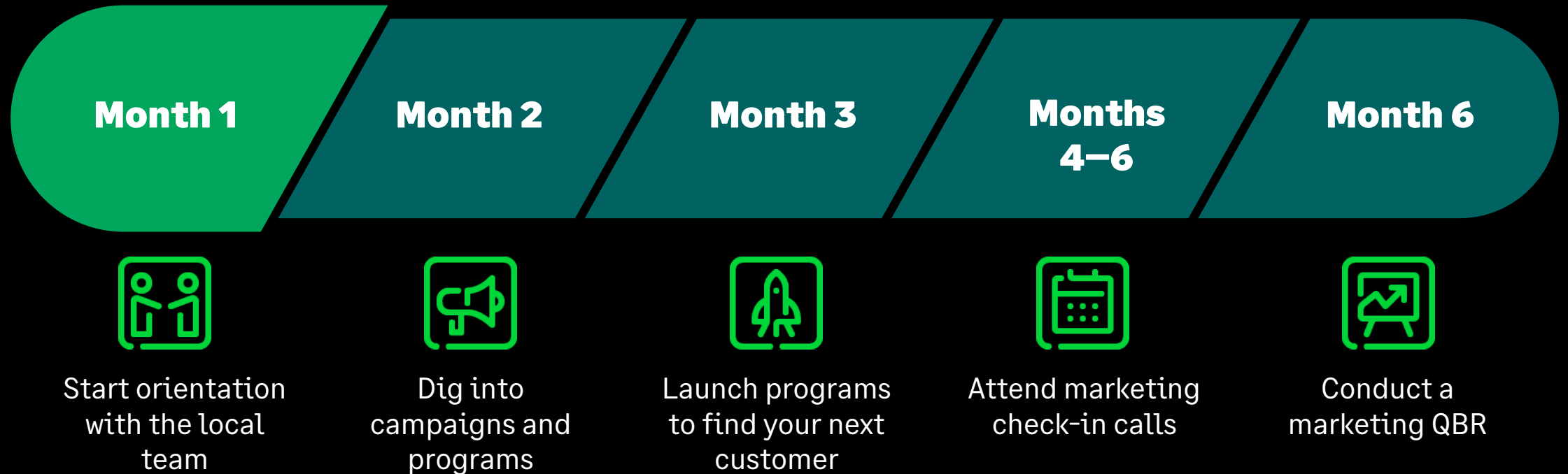
By this point, you have:

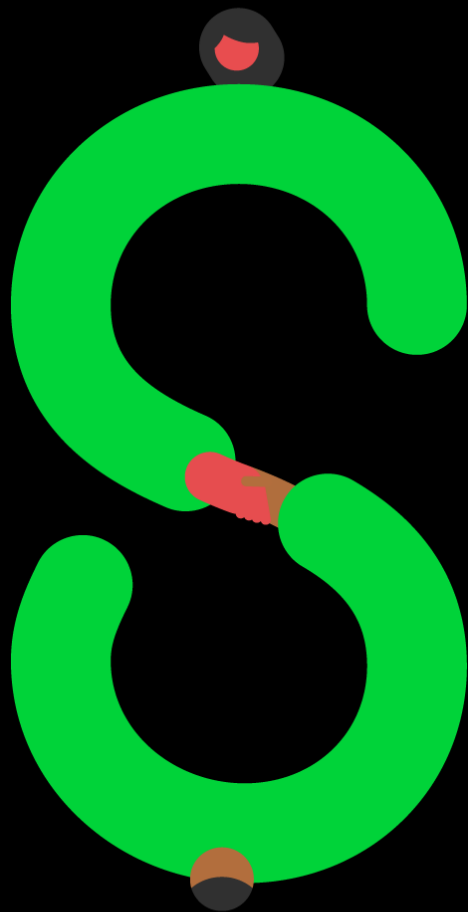
- A clear understanding of your target market and how you can differentiate
- A marketing plan for generating demand within your target audience
- A solid understanding of the Sage brand
- A login for Sage Partner platforms and a familiarity with benefits
- A training schedule set for Sage University



Sneak peek: Phase 2 milestones

The Phase 2 Marketing Onboarding playbook provides guidance to help you implement your marketing plan. The goal is to become independent in six months.





Description

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

Register for the platform

Request access through [Highspot](#)

- Login URL: sageintacct.highspot.com
- For email support: support@highspot.com

Explore resources and guides

- [Highspot User Guide page](#)
- [Sage Intacct Marketing & Sales Content](#)

Contact [Sage Partner Marketing Team](#) with questions.

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 resources and guides

[Read more about Sage University](#) and sort information by product, as well as types of training and courses.

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

Tactical activities

[Go back](#)

Activity	Considerations when writing your marketing plan
Add Sage offerings to your website	<ul style="list-style-type: none">• If you use an existing agency, how much do you need to budget?• If you use Dystrick, cost is approximately \$7,000 USD.
Publish a press release	<ul style="list-style-type: none">• You may write and distribute this Press Release upon Sage’s approval and process (more info included in Playbook, Phase 2).
Personalize, schedule, and publish blogs	<ul style="list-style-type: none">• Do you currently have a blog? If not, what’s your plan for starting one?• How will these blogs fit into your content pipeline?• Who will write the blogs?• Is there a budget implication to any of these decisions?
Create a plan for how you will find your next customer	<ul style="list-style-type: none">• What existing customers can you reach out too?• New prospects - Do you have a list or need to buy one?• When a lead is registered and approved, how will you move them through the sales funnel?• What do you need to budget in time and funds to support this program?

Tactical activities, slide 1 of 2

Tactical activities

Go back

Activity	Considerations when writing your marketing plan
Maximize Sage campaigns in a box via Highspot	<ul style="list-style-type: none">• What marketing automation tool or resource will you use to run campaigns?• Will one of the existing campaigns work for your target audience, or do you need to modify assets?<ul style="list-style-type: none">• Cloud Financials Done Right (for customers new to Sage, any vertical)• QuickBooks Switcher Campaign (Highspot)• Services Migration to Sage Intacct (Sage 100, 300)
Prepare for lead follow up	<ul style="list-style-type: none">• Do you want to work with the agency Sage recommends, or another agency for telemarketing?• Who will develop the call guide and supporting content?• How will you ensure a friendly hand-off with your sales team?• What do you need to budget in time and funds to support this program?

Tactical activities, slide 2 of 2