



· SCALING YOUR SAAS ·

STRATEGIC MARKETING TACTICS FOR SAAS COMPANIES

BY KATY KATZ

INTURACT

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INTRODUCTION

There are as many as **2 million blog posts** published every day. When you couple those with thousands of eBooks and endless opinions of what worked for individual businesses, it's evident that the "surefire" path to success is ever-changing.

There is so much information available on what SaaS owners could be doing to grow their business. So we thought it would be helpful to distill information from our experiences on a few strategic marketing techniques that SaaS owners should focus on.

I wish we could hand you a magic recipe for marketing success that works for everyone. But the truth is that there is no one-size-fits all solution. Each of the strategies that are outlined in this book, however, have been proven to be successful for the majority of our clients. We hope that you find them helpful and discover the right mix for your business.



When to Start Marketing Your SaaS

So, you have a killer idea. You've done your research. And you've built an amazing product that is sure to drive people to subscribe in droves. Time to hit the press, right? **Wrong.**

ONE COMMON ROOKIE MISTAKE SAAS OWNERS MAKE IS IMPLEMENTING A MARKETING STRATEGY TOO SOON.

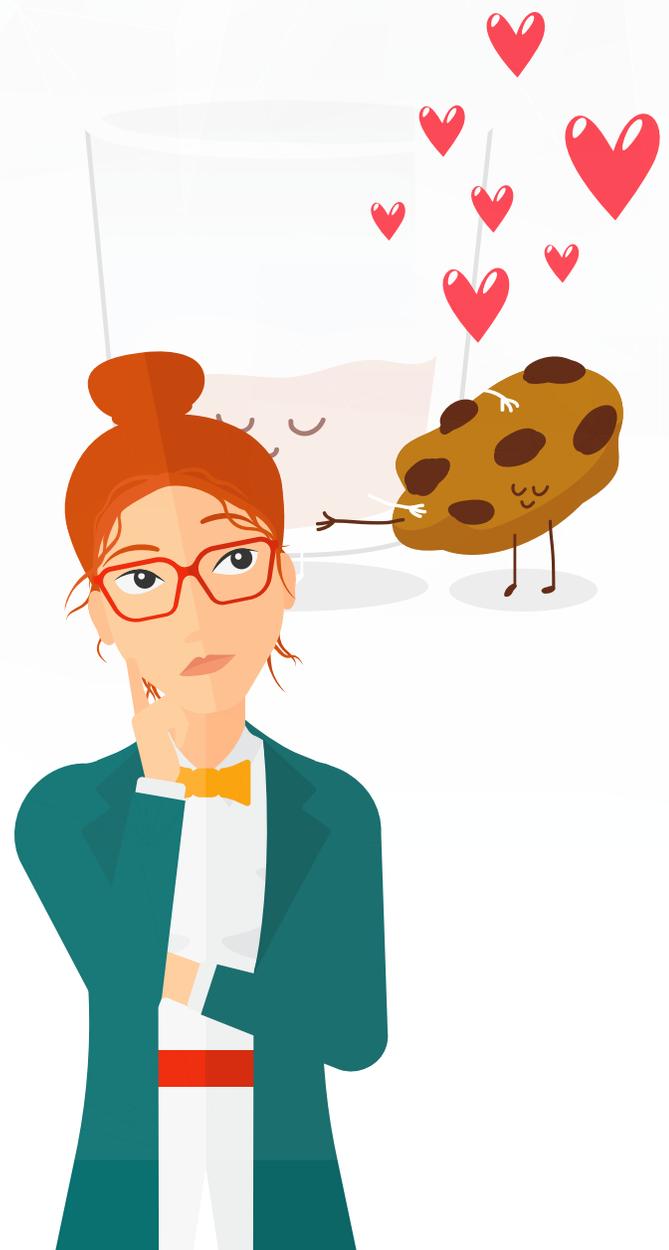
SaaS companies are not ready for a marketing strategy until they've reached product-market fit. Your business needs a solid foundation before you are ready to start jet-setting the growth.

Imagine you were tasked with creating the perfect chocolate chip cookie recipe. Your favorite growing up always included walnuts. So you set out to bake your most perfect *gooey, nutty, chocolatey recipe*. Everyone in your family loves it and your neighbors do too. You are sure you have a winner.

*You invest thousands of dollars building the artwork for your nutty bits of delight and design a slogan around the nuttiest cookies in town. But then you start to sell and you realize that sales are slow. **Feedback is coming in that not only do many of your ideal customers not like nuts, but half of them are allergic!***

Your time and effort could have been optimized by following proper steps to achieve product-market fit. Now, that's not what this book is about. But it's important to note that if you're not there, you are not ready for this book. We have another book for you to start with:

.....
✔ **Pre-Marketing SaaS Initiatives: Working Through Problem-Solution Fit**



This is not to say that we think your product will sit changeless once you've reached market fit. We know there are many iterations and improvements that you will make along the way. But the foundation needs to be set first.

Sean Ellis says this foundation of product-market fit occurs when *at least 40 percent of your users say they would be "very disappointed" without your product. Can you say that yet about your SaaS? If you answered yes, great! Let's Read On.*

The SaaS Marketing Mix

Optimal SaaS marketing strategies include a blend of general digital marketing best practices combined with some strategies that are unique to the subscription world.

The strategies that we will be covering in this eBook include:

+ Customer Mapping

+ Content Strategy

- + Inbound Marketing
- + Customer Success

+ Content Distribution

- + Organic Outlets
- + Paid Amplification

+ Product Optimization

- + Free Trials
- + Onboarding
- + Up-selling and Cross-selling

+ Offline Market Traction

+ Empower Delighted Customers

+ Employee Success

1: Customer Mapping

All marketing strategy should stem from a deep understanding of the values that are important to your ideal customer.

IF YOU TAKE ONE THING AWAY FROM THIS EBOOK, IT SHOULD BE THIS FUNDAMENTAL TRUTH:
MARKETING EFFORTS SHOULD CENTER AROUND THE CUSTOMER'S VALUES.
REPEAT IT OVER AND OVER AGAIN. LIKE A MANTRA.

This may sound like a no-brainer, like something that they teach you in business 101. But the application of centering marketing materials around customer values is where many SaaS founders struggle.

Some owners make the mistake of composing their 'about page' with content entirely about their individual story. Instead, the about page should primarily be about what the customer will get out of their relationship with your brand.

Other owners make their information pages about the features of their products, when they should be about the benefits that the customer will receive by using the product.

It's these seemingly minor deviations, which are founded in **customer centricity**, that can have a major negative impact on your marketing efforts. **There are three steps to understanding your customer to avoid these common pitfalls.**



Research Your Ideal Customer & Their Values

Conduct customer development research to identify the values that are most important to your ideal customer. This work can be done through surveys, social media research, phone calls, and other means of outreach. Lincoln Murphy developed a very useful worksheet for Ideal Customer research which he shared on [Sixteen Ventures](#).

BOTTOM LINE, THE MOST IMPORTANT PART IS TO TALK DIRECTLY TO THE CUSTOMER AND TEST, TEST, TEST.

Some best practices to keep in mind:

- + Be specific with the information that you take down.
- + Record their language and dialogue.
- + Keep track of specific quotes, don't paraphrase.

As you work through this information, you will note commonalities that appear throughout your research. Find a process from a trusted source that walks you through all the important points.

✔ The worksheet Inturact uses with our clients for building value propositions is based on the book, [Value Proposition Design: How to Create Products and Services Customers Want](#). Check it out if you are looking to learn more about the value proposition process.

Complete the values worksheet while the data is still fresh in your mind. Patterns in the copy will naturally appear. These repeating phrases are the language and benefits that resonate most with your ideal customer.

THE CUSTOMER LANGUAGE AND VALUES SHOULD BE PRESENT THROUGHOUT EVERYTHING THAT YOU DO GOING FORWARD.

Customer-centric copywriting will ensure that you have language-market fit throughout your content. In other words, your product actually does what it says it does without being misconstrued and those benefits are those which are important to the customer.



Define Your Marketing Personas

Personas are a fictional representation of your target customer. They put a name and face to a cold demographic data set. And they help you build a personal, impactful marketing strategy.

Personas were made popular with the inbound marketing movement (which we will talk about in more detail in the coming sections). They are essential to most digital marketing guides today because of their usefulness in crafting more personalized marketing content.

THINK ABOUT IT THIS WAY. DO YOU THINK IT WOULD BE EASIER FOR YOU TO SELL YOUR PRODUCT TO A COMPLETE STRANGER OR A BUDDY FROM COLLEGE?

You probably answered your buddy because you know your friend. You know if they prefer pepperoni on their pizza or veggies, and how they celebrated after they finished their last final, and even the name they used to call their imaginary friend (eek!). In other words, you know what they like, what they are afraid of, and what motivates them.



You can use this knowledge to your advantage when crafting your pitch. That makes things a lot easier than going in for a cold sale knowing nothing about the prospects you want to speak to.

The concept is same for personas. You take all of your quantitative and qualitative data from your customer development research, find the common threads, and build personas for each of your revealed customer segments.

Give your personas a name, a story, and showcase their values and pain points. It can also be helpful to include a typical quote this persona would say which epitomizes their feelings and the goals that they are hoping to accomplish. Make sure that all of this information is tied back to your data. **Laura Klein rightly pointed out that many companies make the mistake of building personas that are “descriptive but not predictive.” Don’t do that.**

Ensure your personas are predictive and useful to your content creation by focusing on goals, motivations, and concerns; and founding your information in data. There are many great templates for personas online. Here is one to get you started:

✓ [A Guide To Create Detailed Buyer Personas](#)

Map Out the Customer's Journey

Now that you've got a handle on the values of your ideal customer and the personas you will be focusing on, it's time to map out the journey that they take from discovering your brand, to becoming a loyal customer and beyond.

Traditional inbound marketing defines the **buyer's journey** as having four stages: awareness, consideration, decision, and delight.

SAAS MARKETING IS A LITTLE DIFFERENT, HOWEVER, BECAUSE OF THE NATURE OF RETAINING AND MONETIZING CUSTOMERS IN A SUBSCRIPTION ENVIRONMENT.

We've identified five stages in what we call the SaaS Customer Cycle:

- + **Attract (Awareness + Trigger)**: identification of a problem + early research toward a solution
- + **Convert (Consideration)**: testing the waters - free trial, freemium, or demo initiation
- + **Close (Decision)**: selection of the right product
- + **Success (Retention + Monetization)**: overcoming success gaps to get the customer to their desired outcome so that they retain and increase their commitment
- + **Delight (Brand Advocacy)**: moments of happiness with the brand that inspire customer evangelism

**That's a lot to take in, I know. But don't worry - we'll go through all of these SaaS Customer Cycle stages in more detail in the sections 'Content Marketing' and 'Product Optimization.' There is also a visual representation of the SaaS Marketing Journey on the next page.

All of your website content should not only be specific to a persona, but should be mapped to a stage within the Customer Cycle so the appropriate call to action can be applied. This will help you develop content with a purpose that moves customers along in their journey and strengthens their relationship with your brand.

The formation of ideal customer value propositions, personas, and a SaaS Customer Cycle are time intensive processes that are not to be taken lightly. But they can and will make the difference between a mediocre marketing strategy and a winning one.

Once you have them in place, go get yourself a cookie (maybe one without nuts)! You are already ahead of 80 percent of other businesses. And you are ready for the next step!

Visual of Complete SaaS Marketing Journey

Let's take a look at the full SaaS Marketing Journey. This should visually help you understand the different stages and the Goals, Strategies and Primary KPIs for each. We will dive into this deeper and break down each section in the future. For now it is simply a great tool to help better understand the full SaaS Marketing landscape.



2: Content Marketing Strategy

As mentioned earlier, **SaaS content marketing strategies should always include two parts:**

- + **Potential customer acquisition** (attract, convert, close)
- + **Existing customer optimization** (retention, success, monetization, delight)

Inbound marketing is optimal for customer acquisition in a digital environment. Customer retention and monetization can be achieved with customer success content (more on this shortly).

Inbound Marketing

Inbound marketing as a concept is based on the belief that customers would rather be pulled into a product with useful information instead of having traditional, outbound calls and ads pushed onto them.

Successful inbound marketing is achieved by

- + Developing *useful* content,
- + For a specific *persona*,
- + That's mapped to a *phase* in the Customer Cycle,
- + In the *language* of the ideal customer.



There are numerous types of inbound content that SaaS companies should be developing to ensure a robust marketing mix, including:

- + Website content
- + Blog content
- + External publishing
- + Email

Each of these is described in more detail below.



+ Website Content

At the risk of sounding like a broken record, going forward you should continue to *assume that all of the things I said up until now remain constant.*

1. Make sure your value proposition is present throughout the website.
2. Target content for a specific persona.
3. Map each site page to a stage in the Customer Cycle.

THESE THREE POINTS ARE MISSION CRITICAL FOR ANY SITE PAGE, LANDING PAGE, OR OTHER TYPE OF CONTENT ON YOUR WEBSITE TO ACHIEVE LANGUAGE-MARKET FIT.

SaaS marketing websites should have the bones of any good website but there are a few important factors that are especially important to subscription marketing:

+ Optimize the Pricing Page:

If you've been in the SaaS game for 5 minutes or 5 years, you know the SaaS pricing page is an important feature and conversion point of a SaaS website. This is because *SaaS pricing pages are a critical component of the Customer Cycle.* They typically have at least three pricing tiers, with specific calls to action to make the decision clear for the customer, and increase conversion. The biggest mistake SaaS companies make with their pricing page is highlighting the features of the product instead of benefits to the customer. To learn more about SaaS pricing pages, check out this blog post, "[The Top 10 SaaS Pricing Strategies.](#)"

START	PRO	ULTIMATE
\$15/month	\$25/month	\$35/month

Pro Tip: See the fourth bullet on "*Social Proof*" for advice on including customer reviews on your pricing page as well.

+ Optimize the Homepage:

Value prop. Value prop. Value prop. Maybe if I say it enough, the value props will magically appear like Beetlejuice! At least they hopefully won't be forgotten (because many companies miss this important step). The value prop should be front and center on both your homepage and other prominent website pages.

Pro Tip: Make sure the primary CTA (call-to-action) is properly mapped to the Customer Cycle. If your product is simple to understand you might have a Free-Trial CTA, but if it's a complex product it might be better to move the visitor to a 'How It Works' page to better map out the journey for them. This will help the potential customer to understand the product before committing to giving their info for a Demo or other offering.

+ Optimize the Landing Pages:

Your website should include landing pages for any event that is an important transition in the Customer Cycle. For example, product description pages or free trial pages. A landing page is a website page that has a form for collecting information from customer leads.

Pro Tip: Be sure to not include menu navigation or any distractions on the page that could keep the visitor from converting.

+ Provide Social Proof:

SaaS companies often like to use the tactic of including customer testimonials. This is good because it provides social proof, but customers know that you are putting your best foot forward by selecting the best reviews. Take it a step further by feeding live app store or Google reviews right on your website.

Pro Tip: Remember to choose reviews that demonstrate the typical language of your ideal customer as well as product benefits.

+ Blog Content

Gone are the days that blogs are solely used as personal journals or digital recipe books. A blog is an important part of the marketing mix where you can educate your customers at different stages of the SaaS Customer Cycle, helping to move them along their journey.

It's best to save the heavily self-promotional content that would help you close leads for landing pages and other sections of the website. Use your blog for the following stages of the SaaS Customer Cycle:

- + Attract
- + Convert
- + Success
- + Delight

The most common issue that marketers have with blogs is coming up with consistent content ideas. Utilize keyword analysis, forum conversations, social media, and digital research to identify strong topics. You should also pull from the data that you collected during customer development about various pain points your customers face along the way.

The key to a successful blog is developing a consistent content calendar that is tied to measurable objectives, and (you guessed it) is for a persona, at a stage in the Customer Cycle, in the language of the ideal customer.



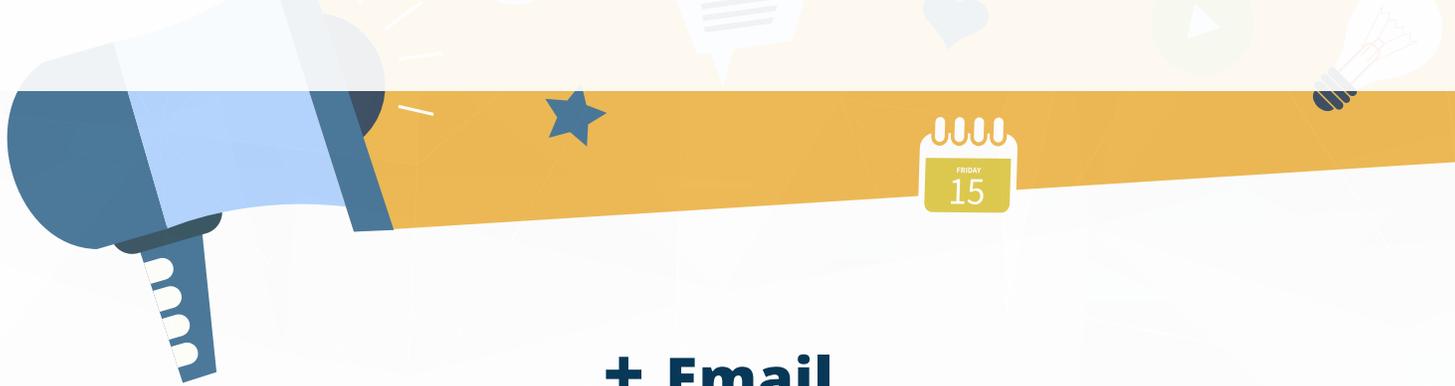
Check out our **CONTENT CREATION CHECKLIST** for everything that you should include in an optimized blog post, including SEO best practices.



+ External Publishing

The best content marketing strategy includes content development for the business's website and content on other strategic locations. Guest posting on other sites with established audience bases and similar target markets helps to build the authority of thought leaders within your company, and by association, the brand.

Outlets are more receptive to guest contributors if an individual at the company has built up an authoritative presence of their own. This is a great way to growth hack authority for your brand as well. Some tips for building individual authority are discussed later in the section 'Outbound Traction.'

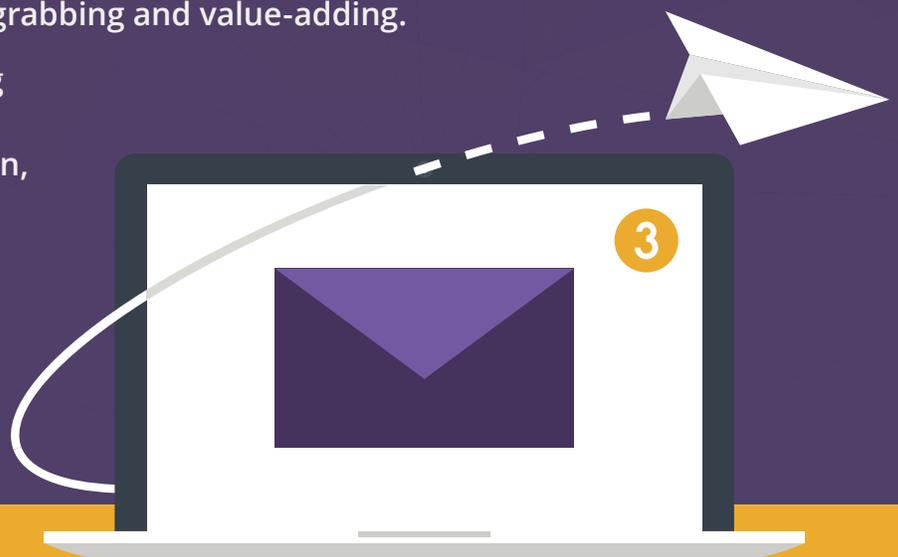


+ Email

You probably receive a lot of spam emails in your account, along with unwanted messaging from subscriptions that you purposefully or inadvertently entered into. If you're like me, you may have even started wondering if email still has a place.

It does! Email is just as important than ever and a well-executed nudge or drip campaign can make monumental differences in your customer conversion rate at the acquisition stage. The key is to make the email attention-grabbing and value-adding.

Email can also be useful for existing SaaS customers. Valuable, well-timed emails can help with retention, customer success (see the next section), and monetization.



+ Customer Success

A customer success content strategy is just as important to a SaaS company's marketing arsenal as an inbound marketing strategy.

We've all heard the old business adage, it's more expensive to acquire a new customer than retain an existing one. Nowhere is that more true than in a subscription environment where your metrics are centered around retaining and upselling existing customers.

By default, customer success content helps with retention (renewals) and monetization (up-sales and cross-sales) by educating customers about overcoming their success gaps with the product.

This is not to be confused with customer service - to which the goal is keeping customers happy. The goal of customer success is to help the customers achieve the goals they have set out to accomplish with your product.

Successful customers are not only more likely to retain, they are also more likely invest further in your product through an up-sale or a cross-sale.

Customer success is a big animal and a whole other eBook. Here is some further reading on customer success to help get you started.

- + [Customer Success Creates Revenue That Won't Quit](#)
- + [Customer Success by the Numbers: Using Data Science to Predict the Future](#)
- + [Inbound Marketing Alone Isn't Sufficient for SaaS Customer Success](#)



3: Content Marketing Distribution

Creating quality content is only a small part of the puzzle. It is equally important for your marketing plan to disseminate your work.

In the past, content distribution was 100 percent organic in inbound marketing. But as the digital landscape has grown and shifted, it's become necessary to include a blend of organic and paid distribution tactics.

Organic Outlets



Organic content distribution is any type of content traction that is not achieved with payment.

Your marketing strategy should include a mix of:

Social media:

Share your content as well as the content of others. And don't stop with just one post. Post it across all of your social platforms, multiple times, at different times of the day.

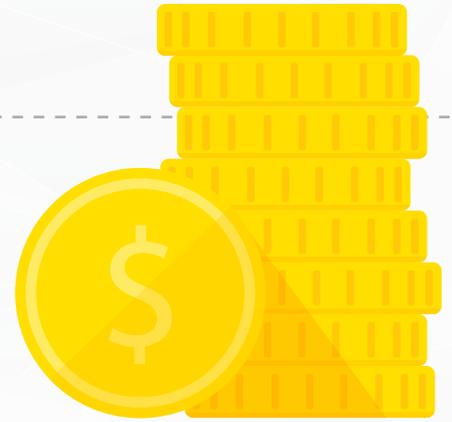
Directories:

These are like digital phone books. Be sure your website is listed in any **relevant directories** for your brand.

Forums:

People are engaging in these online communities more than ever. Communities like GrowthHackers.com, SaaS.Community, and Inbound.org are great places to start for the SaaS industry. Follow similar best practices for forums as you would with social media accounts.

Paid Outlets



Your organic marketing strategy should be complemented with paid campaigns. Some social platforms like Facebook are making it harder and harder for your own contacts to see your posts organically. Adding some paid media helps boost the work that you're doing to the next level and can move things along quicker than organic marketing.

Paid outlets you should consider include:

PPC and Social Advertisements:

Paid ads to your content is a great way to boost traffic and conversions quickly. Search and social signals from paid efforts can work to improve your organic rankings as well.

Remarketing and Retargeting:

Follow visitors to your website around the web with display advertisements to remind them of their interest in your brand.

Affiliate Placements and Content Suggestions:

Pay for product placement in venues that are closely related to your business. Also consider sharing your product with solutions like Outbrain which adds the "other posts from around the web you may be interested in" section to the bottom of prominent posts and articles.

4: Product Optimization

In sports, the best offense is a good defense. In SaaS, the best marketing strategy is a well-optimized product. When we mention optimized, we are simply talking about all the areas that help the customer achieve their desired outcome from your product.

All of the grassroots, feet-to-the-pavement efforts in the world won't help you get leads converted to customers if your product isn't properly optimized. And there are a few important areas on which to focus your efforts to maximize returns.

Free Trial / Freemium / Demo Optimization

There are many ways to allow your customer to get familiar with your brand and what you have to offer while at the same time minimizing their commitment. Some of these include free trials, freemium offers, or live demonstrations of your product.

It's important to consider your market and industry when choosing the best option for your SaaS. Although free trials and freemiums both have the word "free" in the title, they are not the same and do not serve the same purpose.

A free trial allows potential customers to try the full version of your product out for themselves. A freemium is a free, reduced-capacity version of your product that is available to people in perpetuity to help build awareness for your brand.

There are arguments against the conversion potential of freemium offers since they attract individuals looking for free solutions by design. Many successful companies such as Buffer and Slack, however, have built their brand off of their freemium product. In the end, it is up to the SaaS to decide what is best for their business.

✓ SaaS: Free Trial, Demo, or Neither?



What most experts can agree on is that an optimized free trial is the best tool for closing marketing leads that a SaaS company has. A free trial allows a prospective customer to experience your full product for themselves and empowers them to make an educated decision to sign up.

Now it's important to make note of this term "prospective." A common misconception in SaaS companies is that the marketer's job is done once a lead signs up for a free trial. This is far from the case.

Successful SaaS companies understand that the free trial period is the time to put your best foot forward. Free trial users are leads that are highly interested in your business, so much so that they want to try it for themselves. In inbound marketing for SaaS, we call this a "marketing qualified lead" or MQL.

Don't make the mistake of turning these valuable MQLs off with a half-functioning free-trial or decreased customer service. Show them what you've got and help them turn the dial from "prospect" to customer.

Some ways to optimize your free trial include:

- + Offering full access to your premium product
- + Providing hands-on customer support
- + Utilizing in-app customer success messaging
- + Sending concurrent drip email campaigns



Customer Onboarding

Congratulations! You're doing great if your business is converting leads into customers. At the end of the day, that's the most important thing, right? Guess what - the marketing team's job is still not done in the SaaS world.

The nature of a subscription business is to have your customers desire to *stick around*.

Help them help you by making the onboarding process smooth and seamless. A solid customer onboarding strategy follows a lot of the same best practices as an optimized free trial. Educate, educate, educate with in-app messages and email campaigns. Help your customer be successful and they will love using your product.

Pro Tip: Check out these tools to help you with your customer onboarding:

+ **LucidCharts** - Map out the flow of the onboarding journey.

+ **PowerPoint or Google Presentation** - Visualize the journey by creating screenshots of each step.

+ **Inspectlet** - View the screen of visitors and see how they are interacting throughout the process to understand confusion areas.

+ **Heap Analytics** - Create event based funnels by clicking on actions you want your users to take, and visualize drop-off areas in the process.

+ **Appcues** - Easily implement the onboarding processes that you have mapped out.

Monetization: Up-Selling and Cross-Selling

A third way to continue to market your product from the inside is to optimizing your monetization strategy for the opportunity to sell customers up into higher tiers or across to other offerings.

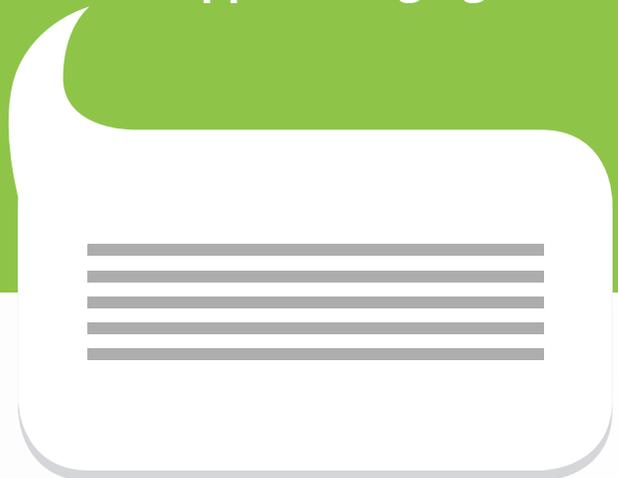
Much like the other practices mentioned above:

Up-sells and cross-sells can be optimized with strategic content marketing, especially with:

Email Marketing



In-App Messaging



Find opportunities to showcase when additional purchases will help your customer be more successful. Have expanded product offerings visible and don't expect them to ask to sign up on their own. Being proactive with a strategy is half the battle.

5: Offline Market Traction

The digital realm isn't the only place for SaaS companies to gain market traction. It's important to get out into the real world and include some three-dimensional marketing strategies in your mix, too.

While there may come a time that your business becomes large enough for television spots and print ads (I'm crossing my fingers for you), there are a couple of more targeted things you can do now to build your brand.

Trade Shows

Trade shows are a great way to get out and communicate with prospective and existing customers. The key is to pick events that your target market will join as an attendee. For example, SaaS events such as SaaStr are great for networking and learning from other SaaS companies, but if your business isn't to sell to SaaS companies, it's obviously not the best place for you to have a booth.

Find out what types of events your customers go to and make your presence known. If you are investing in a booth, be sure to take advantage of every opportunity to increase the foot traffic to your area.

Pro Tip: Some best practices to increase booth traffic include:

- + **Interactive offerings** - Games, trivia, and other fun offerings are not only a great way to drive traffic, but they also provide an opening for your sales team to communicate with the attendees.
- + **Giveaways** - A well-targeted giveaway provides you with an opportunity to collect email addresses from the attendees.
- + **Personalized social media interaction** - Jumping on the event hashtag and interacting with attendees will show the human side of your brand and help to build brand awareness.
- + **Live blogging** - Your business can add extra value for attendees by **recapping useful content** or providing other educational tips for the event.

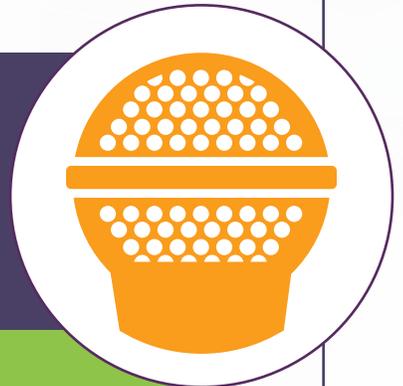
Growing an Influencer Status

Another way to grow your company's brand is by cultivating an influencer status for yourself or some of your employees. People like to see a face behind a brand; and outwardly showcasing your expertise on a topic is a great way to build trust.

Of course, nowadays with social media, blogging, and guest posting opportunities readily-available, a large part of influencer building can be done with your online presence. But before you zing me for including this point in offline methods - I would argue that the offline portions are even more important.

Building the perception of an individual as an influencer is skyrocketed by two things:

Speaking Engagements



Authorship (as in actual books)



Public speaking on a topic is a way to demonstrate that others are pulling you in as a thought leader (as opposed to you just self-proclaiming to be). And books are another tried and true way to take your influencer status to the next level.

6: Empower Delighted Customers

Customer testimonials are one of the most powerful **psychological triggers** marketers can utilize. When customers are successful with your product, and happy with your service (two separate things, remember), their personal or professional lives will improve at your hands.

Give these customers a reason to spread the word.

Delight them with the interactions that they experience with your brand. This can be as simple as providing helpful tips at the times that they are most needed, or going the extra mile with personalized social media interactions that show you care.



While you may have many happy customers, the percentage of people who are likely to share information online is small - the eighty / twenty rule applies here. Find these people and give them calls to action to share their story. And don't be afraid to reward the ones who do. You can create brand advocates for life with just a few tokens of appreciation.

Customer advocacy has an impact on your bottom line too. You will see an inherent decrease in your costs to acquire customers (CAC) and an increase in your overall customer lifetime value (LTV) if your customers are helping to spread the word for you.



7: Employee Success

Last, but definitely not least, never underestimate the marketing sway of your people. They are your army on the ground. The front lines of your business. And it often takes just one interaction with an employee for a customer to form a perception of your brand.

As we move further and further into a world where transparency is favored in business, it's your job to empower your employees to be successful at promoting your brand, too.

Part of your marketing strategy should be to give your employees the tools they need to promote your brand effectively:

Draft an elevator pitch for the company.

Make sure it utilizes the language and insights from the Customer Mapping section of the book and hand it out to all of your employees.

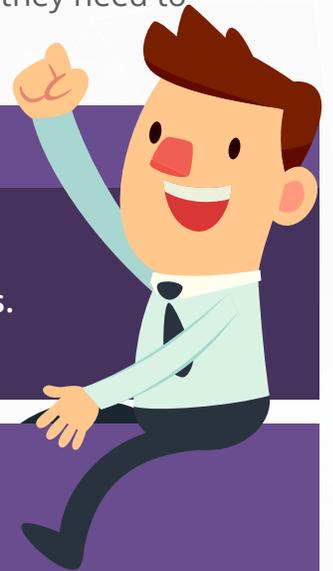
Define the best practices for your employee's personal social media accounts.

Tell them how much time you want them spending on their personal Twitter, LinkedIn, and industry forums to spread the word of your brand. Their social interactions are good for you - help them to feel that they are not only allowed but encouraged!

Open the door to creativity.

Give employees plenty of opportunities to contribute their ideas so that they will feel invested in the brand and prideful about where they work.

Build a kick-SaaS business - *but that is a topic for another eBook!*



8: Grow Your SaaS with Strategic Marketing

There you have it. Implementing these seven strategies into your SaaS marketing mix is guaranteed to give you results. The time-line, ratio, and budgets are the points that vary and will be important for you to determine.

Now if you've made it this far and feel you're ready to amp up your marketing game but you're not sure what that mix should look like, don't worry. We've got another eBook for that! Check out our '**Guide to Understanding and Building Your SaaS Marketing Budget**' and start planning your optimal strategy today. Or better yet, give us a call! We'd love to help!



**CALCULATE YOUR SAAS
MARKETING BUDGET**

INTURACT

Phone: 877.519.0555
Email: connect@inturact.com