

Pitching your marketing to effectively attract investment





Introduction

Attracting, pitching and securing investment is one of the most challenging aspects of setting up a new business or launching a new product or service. It is a time consuming and complicated process which needs to be well-planned.

You have an excellent product or service and you are excited about launching it... and what the future holds. But you also have a lot to think about, such as your business plan, financial forecasts and a go-to market strategy - all elements an investor will expect to see in the initial stages of your investment journey.

When it comes to your marketing, you may think, 'Why now? I don't need to think about marketing until I secure investment'. Marketing is a principal factor that should be considered from the start. It can also help you pitch your product and service effectively, which in itself can support you in securing investment.

This guide will explain each of the key stages of your investment journey and how marketing can play a pivotal role. It will guide you through the fundamental marketing aspects you need to consider and provide some practical tips on getting it right.

Samantha Vassallo
Managing Director



Attract

Marketing your opportunity to get in front of investors.



Pitch

The marketing elements investors will expect to see in your pitch.



Plan

Preparing your marketing strategy to help you secure investment.



Budget

Considerations when allocating a marketing budget.



Results

How you can demonstrate results to investors.

Attract - Marketing your opportunity to get in front of investors.

First things first, you need to be seen and heard across the right marketing channels to get in front of potential investors. They need to know that your idea, product or service exists. But it is also important that the fundamentals are right before getting out there. You only get one chance to create the right impression and make an impact.

Audience

Treat your potential investors as your target audience. Who are they? What are their motivations? What industry are they from? What investments interest them?

As with customers, you need to map out your investor persona to ensure that you target, attract and approach the right investors. It is important that there is the right synergy and that you are targeting the right type of investor, for instance are they business angels, venture capitalists, or private or corporate investors?

Part of your investor persona will look at investor behaviours such as what they read, what events they attend and what triggers their investment interests.

Message

Being 'on message' and having a clear, focused story from the start is crucial. Investors will ask a lot of questions, so you need to be able to articulate your messages quickly and succinctly.

Make sure your vision, ambitions and plans are consistent across all marketing channels, presentations and investment applications. And ensure any statistics, facts or market information is accurate. You do not want to be caught out in the initial stages.

And finally, think about what will interest your investors and how much or little they will need to know. Make your business story compelling and take them on your journey!



“You only get one chance to create the right impression and make an impact.”



Website

You may not want to invest at this stage into an 'all bells and whistles' website. But in the initial stages it is still important to have an online presence.

A simple website will be your shop window to get your investment proposition and business story across to potential investors. It is important to make the right impression, so invest time and money into getting it right from the start.



Public Relations (PR) and Content

PR can increase awareness of your products and services, and build your profile. It is also a fantastic way of getting your product or service in front of investors.

Thought leadership, articles and press releases featured in the right media outlets such as trade magazines, industry journals, online news sources and regional and national newspapers can help you raise profile. PR is also an effective way of highlighting your product or service Unique Selling Propositions (USPs) and building trust and credibility.

Generating quality content through blogs and articles and using them across your website and social media channels can also maximise your reach and help you engage with investors.

Social media

Social media can help you get in front of investors quickly. But it is important you use the right messages and content to create the right impression.

Do not underestimate the power of social media channels. LinkedIn, for example, can open a whole new world of opportunity as you can connect directly with investors and start conversations with them.

Social media is a fantastic way of sharing information with investors and marketing your business to them for free.

Industry events

Networking with other people in your industry and learning from your peers can be a useful way of building your business connections.

Not only will events help you build your network of contacts, they can help you to increase awareness of your business. And do not be afraid to ask your connections for introductions to new contacts!

Choose the right events to attend and do your research into the events that will get you in front connections that will help your business, and the investors you want to pitch your business to.



Pitch - The marketing elements investors will expect to see in your pitch.



The opportunity has arrived to pitch your business to investors. It is your time to make sure you communicate the right information, tell a compelling story and sell your investment opportunity.

There are vital marketing elements that investors will expect to see in your pitch. Some are fundamental to your overall investment presentation and to whether investors feel you are at the right stage in your journey to receive their money.

Your story

Tell a gripping story and set the scene for investors. Explain your idea, challenges, setbacks and opportunities. This will all help to build a picture of your journey, your determination to succeed and how you see your future.

Grab your potential investors' attention, hook them in and make a great first impression.

Market research

Summarise the market research you have undertaken to validate your product or service and understand its market appeal and future demand.

Examples of top-line information investors will want to understand:

- Is there a gap in the market?
- What are the industry trends?
- How big is the market opportunity?
- Who are your competitors?
- What do your customers look like?
- What is the revenue potential?

“It is your time to make sure you communicate the right information, tell a compelling story and sell your investment opportunity!”



Unique Selling Proposition (USP)

You will know from your market research - if this is undertaken thoroughly - what sets you apart in the market and what makes your offer different to that of your competitors.

Your USP is a statement which defines your point of difference. It should be strong, powerful and articulate how your proposition will solve a problem and resonate with your target customers.

Brand

Your brand is your business. It is not just a logo, it is the personality of your business, your ethos, values and approach – every touch point across your entire business. A strong brand should help shape your audiences' perceptions of your business in a positive way and appeal to them.

Your investors will buy into your brand. If your business ethos and values match theirs, there is an immediate synergy and investors will get a sense of what it will be like to work with you in the future.

Goals and budget

Investors will want to know when they will see results and what you want to achieve.

So set SMART goals:

- S** - Specific
- M** - Measurable
- A** - Achievable
- R** - Realistic
- T** - Timebound

It is important you set realistic goals based on your market research and market readiness, and allocate an accurate marketing budget to help you achieve this.

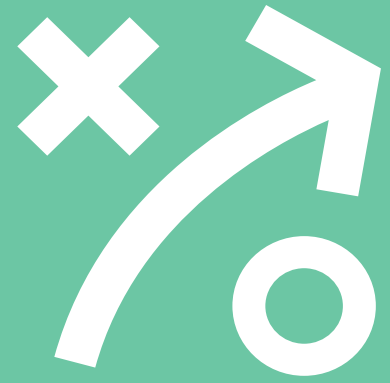
Customer experience

The customer is king. Customers are important in any business. Without them, you do not have a business. Investors will want to know how you will build loyalty and trust with your customers and keep them happy.

You need to explain what your customer approach is, what tactics you will use internally and externally, how you will measure satisfaction and fundamentally, how you will create the WOW factor. Keeping existing customers happy is easier than attracting new ones!



Plan - Preparing your marketing strategy to help you secure investment.



Once you have pitched your business and hooked investors in, the next stage is to tell them how you will use their investment. A proportion of your investment will need to be allocated towards marketing, but it is important to set out what your marketing strategy is and highlight your plan of attack.

We have provided a checklist below of the elements you need to include in your marketing strategy and plan to help you secure investment. We have a separate and more in-depth guides on putting together a marketing strategy and plan.



Market Insight

- Market landscape
- Competitor benchmark
 - Customer insight
- Buyer persona mapping
- Product / service research
 - SWOT analysis



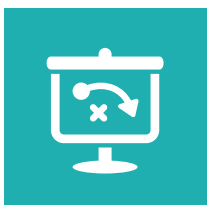
Brand

- Values and company ethos
 - Vision and mission
 - USP and proposition
 - Brand messaging
 - Company story
- Your logo and visual brand style



Strategic objectives

- Set out SMART objectives
 - Set out your critical success factors
- Make sure they are realistic and in line with market readiness



Plan

- Set out the relevant marketing channels and tactics to launch your product or service
- Develop a marketing schedule - who, what, when and how



Pre-launch set up

- Create the essential tools to deliver plan for example, website, media database, case studies



Track results

- Putting the right measurements in place to measure success

Budget - Considerations when allocating a marketing budget.

There are considerations when allocating a marketing budget such as will you outsource your marketing, hire someone to deliver it internally, or use a mix of the two? It is important that you consider the resource to deliver your strategy and plan in the initial stages, so that you can factor this in when moving forward.

The channels and tactics you choose also determine the budget you require. For example, if you are selling online, a substantial proportion of your budget will go into your e-commerce website, SEO, PPC, content and digital advertising. If you are launching a new product aimed at researchers and scientists for lab use, then a key focus will be on PR and thought leadership in industry press and conferences, exhibitions and on-site demonstrations.

Here are examples of areas you need to consider for your marketing budget.



Research and market testing



Building blocks - logo, website, presentations



Ongoing delivery of your marketing



Marketing and sales materials



Events, conferences, expos and networks



Advertising, PR and media



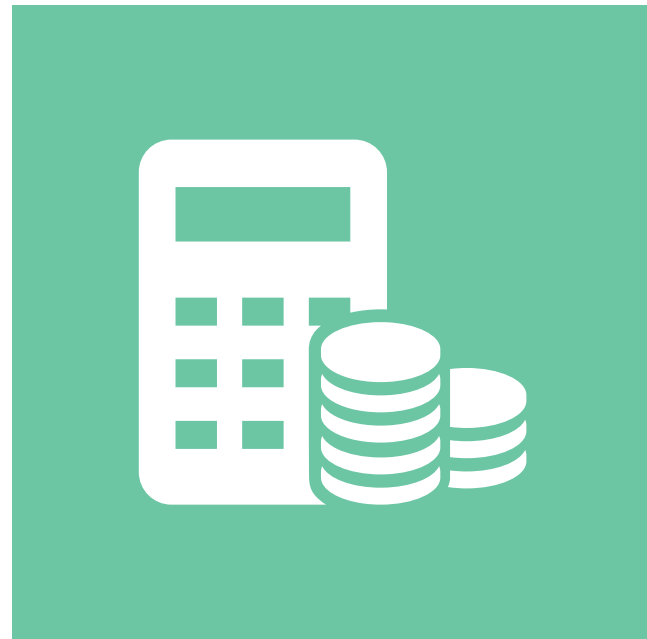
Content and campaigns



SEO, PPC and web management



Photography, video and animation



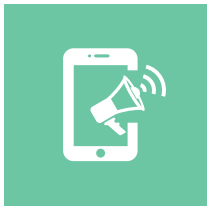
“The channels and tactics you choose also determine the budget you require.”

Results - How you can demonstrate results to investors



The results you present back to investors will depend on the objectives you have set out in your strategy, and of course the results they want to see. These will be sales and revenue orientated, however there are things you can present to show investors that your marketing activities are driving interest and demand in your products and services.

Here are examples of how you can measure your marketing tactics and campaigns.



PR

- Coverage & exposure
 - Use V actual
 - % of messages
- Impact on other tactics
 - Re-purpose reach
 - Interview requests
 - Direct enquiries



Website

- Website visitors
- Leads and conversions
- Popular pages & content
 - Traffic source
 - Search results
- Direct and referral traffic



Social Media

- Likes and comments
- Engagement and impressions
 - Conversion rates
 - Direct enquiries



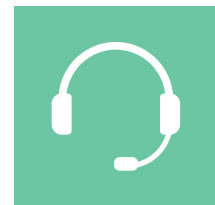
Events

- Connections made
 - Positive leads
- Opportunities created
 - Presentations
- Social media mentions



Digital campaigns

- Click throughs to website
 - Opens
 - Shares
 - Downloads
 - Data capture
- Direct enquiries



Sales campaigns

- Enquiries via email, website or telephone
- Click throughs to landing pages
 - Requests for information
- Click throughs to product/service pages
 - Direct sales as a result

Summary

Marketing will play a significant role in your investment journey, from attracting the right investors to launching your product or service, and beyond.

Marketing is a critical tool for any business. Your investors will need to understand what your marketing strategy and approach will be and will want the assurance that their investment is going to generate a positive return.

The areas covered in this guide are a good starting point for any entrepreneur looking to start a business, or a business owner looking to launch a new product or service... or indeed expand.

Whatever your investment reason, marketing has a vital role to play.

Waymark - Case Study

Background

Established in 2011, Waymark combines its experience of developing software solutions with its extensive business knowledge to reprogram business processes for improvement, automation, efficiency, and growth.

Following company growth over the past decade, Waymark required a new brand and messaging which reflected its evolution, as well as a marketing strategy to support the company in the next stage of its business journey.

Our Approach

To develop an informed marketing strategy, we worked closely with the Waymark team to gain an in-depth understanding of their offer and conducted thorough market research. This allowed us to advise on the most appropriate marketing tactics for Waymark, including strategic recommendations for a new website.

Harnessing this insight, we developed a new brand and visual style for Waymark and translated the technical intricacies of its offer to develop key messaging that allows the company to articulate clearly and consistently what it does and the USPs of its services and expertise.

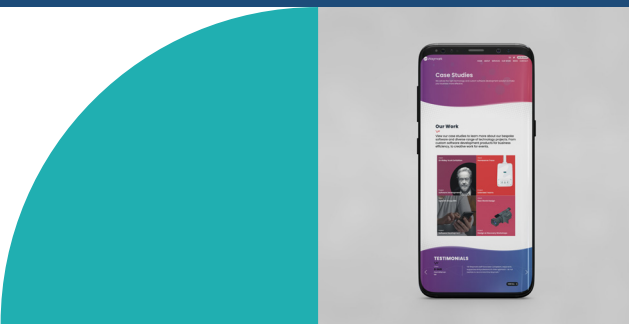
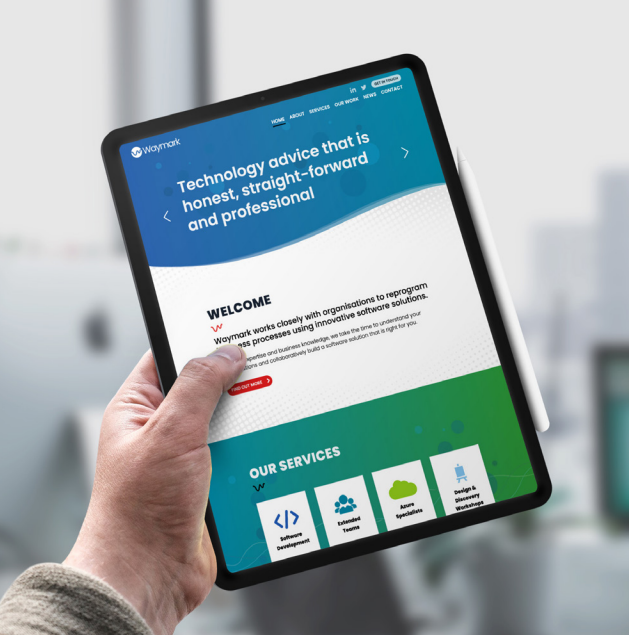
In line with the new brand, we created front-end designs for a website that Waymark could take forward into development, including page structure and functionality considerations. We used Waymark's new key messaging to create content for the site and conducted keyword research to support SEO for its core services.

Outcome

Horizon Works developed a positive and productive working relationship with Waymark and created all the tools the company needed to successfully launch its new brand and website, this included email marketing templates, social media visuals, and several case studies.

In addition, through the marketing strategy and the creation of a 6-month marketing plan we defined tactical marketing activity which will support Waymark's sales efforts and objective to further generate enquiries.

As Waymark embarks on the next stage of its business growth journey, it has a brand, messaging and marketing tools which reflect its ability to successfully reprogram companies through its extensive business knowledge and leading approach to technology.



snapshot360

The **B2B** Marketing Diagnostic

Snapshot360 is our free online diagnostic which reviews your marketing in minutes.

It measures your marketing strategy and focus, brand and market awareness, client relationships and experience, tactics, implementation and how you review results.

On completion you will be emailed a report outlining your scores in each of these areas and advice and tips on improvements.

What will Snapshot360 measure?



Market Focus and Direction



Brand Awareness



Market Awareness



Client Experience

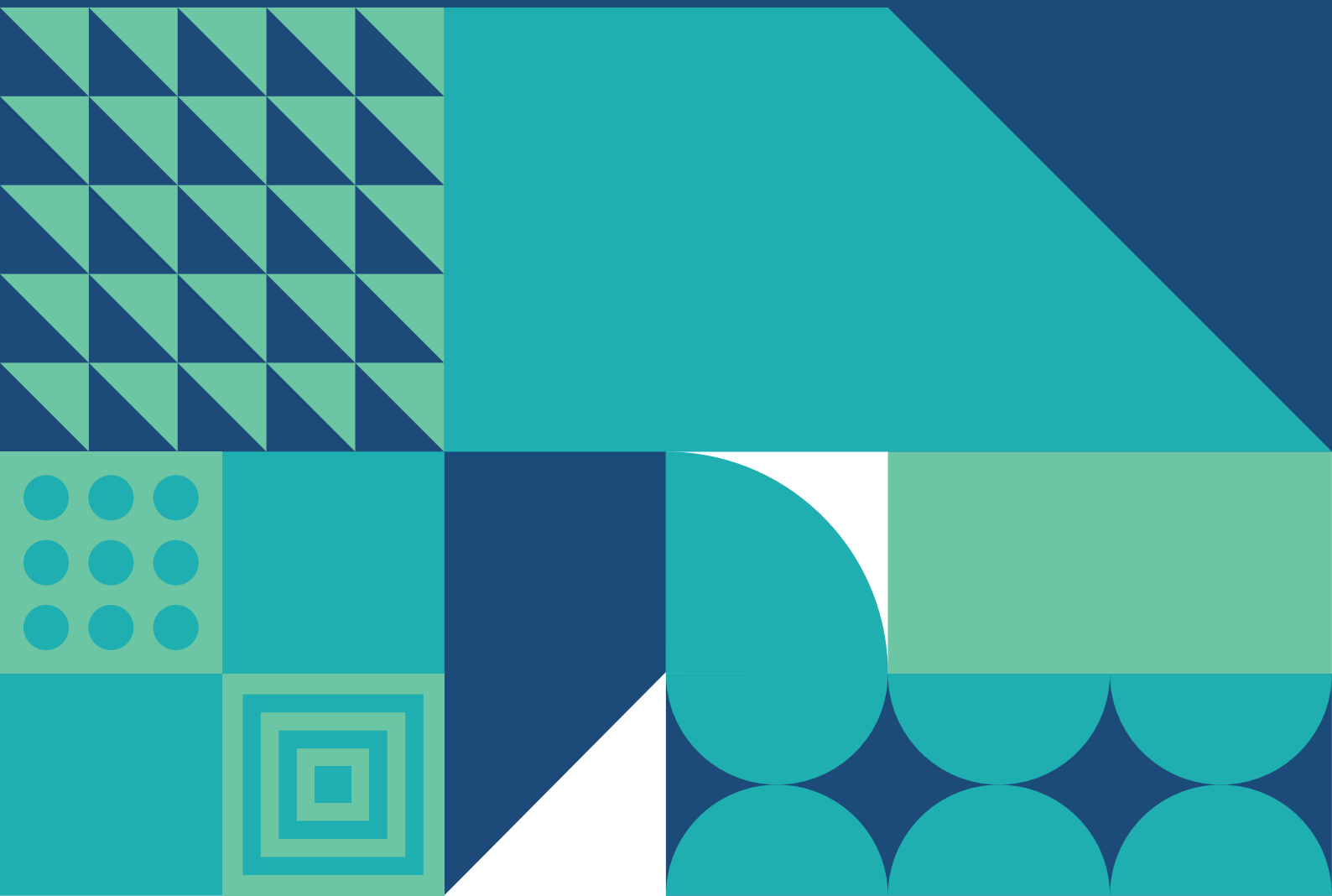


Market Implementation



TAKE THE TEST

www.horizonworks.co.uk/free-review



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