Playbook

Sage Intacct Finance Professionals Campaign

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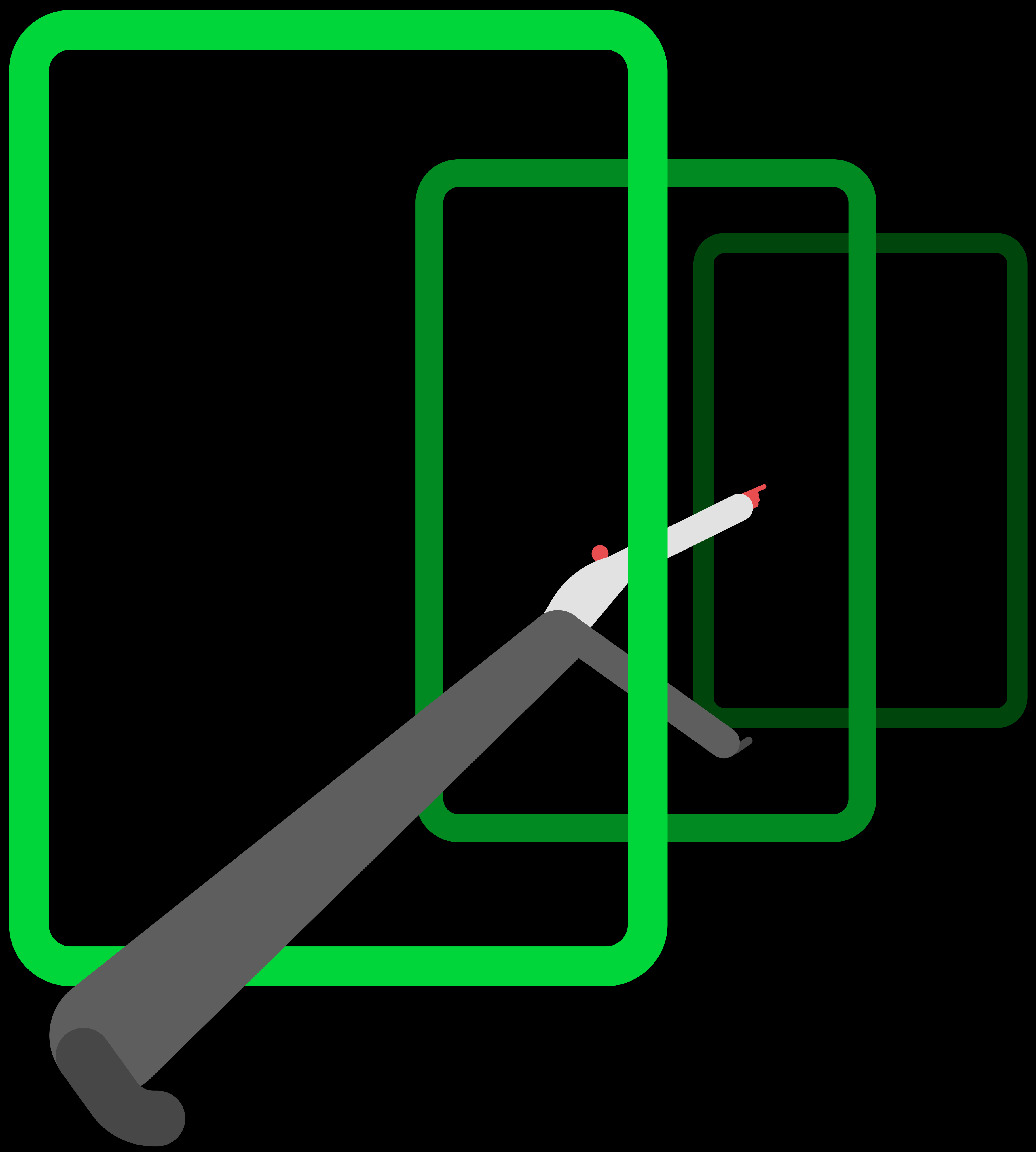


Introduction

The Sage Intacct Finance Professionals campaign sits under the wider 'Forward, together' framework, which targets CFOs and finance leaders. This playbook explains how you can utilize the assets that make up the campaign in both phase one and phase two.

Messaging Framework

Audience
CFOs and financial leaders are under increased stress to modernize their business, particularly now as a potential recession is looming. They need the right tools to collect accurate data and insights to make strategic decisions, bring value to the business and confidently stay ahead.

Campaign objective
We want to drive awareness that Sage has the modern, cloud-native financial management platform CFOs need to achieve their ambitions.

To do this, we use Imran for our hero content – a CFO whose role often involves wearing ‘many hats’. Like the one of a fire fighter when he’s called to put out all the ‘fires’ in the business.

Sage’s tools and advice can help CFOs like Imran wear all the hats they need to.

Campaign structure

<table>
<tr><th>Funnel stage</th><th>Focus messages</th><th>Phase One CTA</th><th>Phase Two CTA</th></tr>
<tr><td rowspan="2">Top of Funnel
Account Intent: Consideration
Purpose: Education</td><td>Managing modern finance in unprecedented change</td><td rowspan="4">Get the report</td><td rowspan="4">Coffee break demo</td></tr>
<tr><td>We can help you manage your business to stay ahead of the curve</td></tr>
<tr><td>Middle of Funnel
Account Intent: Decision
Purpose: Solution Identification</td><td>Insight at your fingertips: real-time data and insight to make informed management decisions</td></tr>
<tr><td>Bottom of Funnel
Account Intent: Purchase
Purpose: Selection</td><td>Real-time visibility so you can stay ahead of the curve</td></tr>
</table>

Sage

Messaging Framework

The campaign offers two phases including a suite of assets that can be used in each decision-making stage of the buyer journey. This will help to support you in reaching more prospects. Start with phase one and drive prospects to your landing page in order to download the Modern Finance Report. Then continue to engage prospects with phase two that encourages prospects to request a Coffee Break Demo.

Phase one is broken out into three stages within the funnel. Using the hero content within the Education stage will ensure you are able to capture prospect data by offering the report which is downloadable from the landing page. Follow this with the social ads and banners within the Solution stage and finally Selection to ensure you are providing constant touch points for your prospects.

To make it as easy as possible for you to use the Finance Professionals campaign, we've provided two options for deployment; Sage Advance or download and run through your own marketing automation tool. Depending on your preference, and where you'd like to use the content, you can either launch the campaign using the capabilities of Sage Advance or add all the co-branding elements, and then download the content straight from the platform and implement on your own. Follow the steps in this playbook to find the best route to market for your company.

Using Sage Advance to support your campaigns

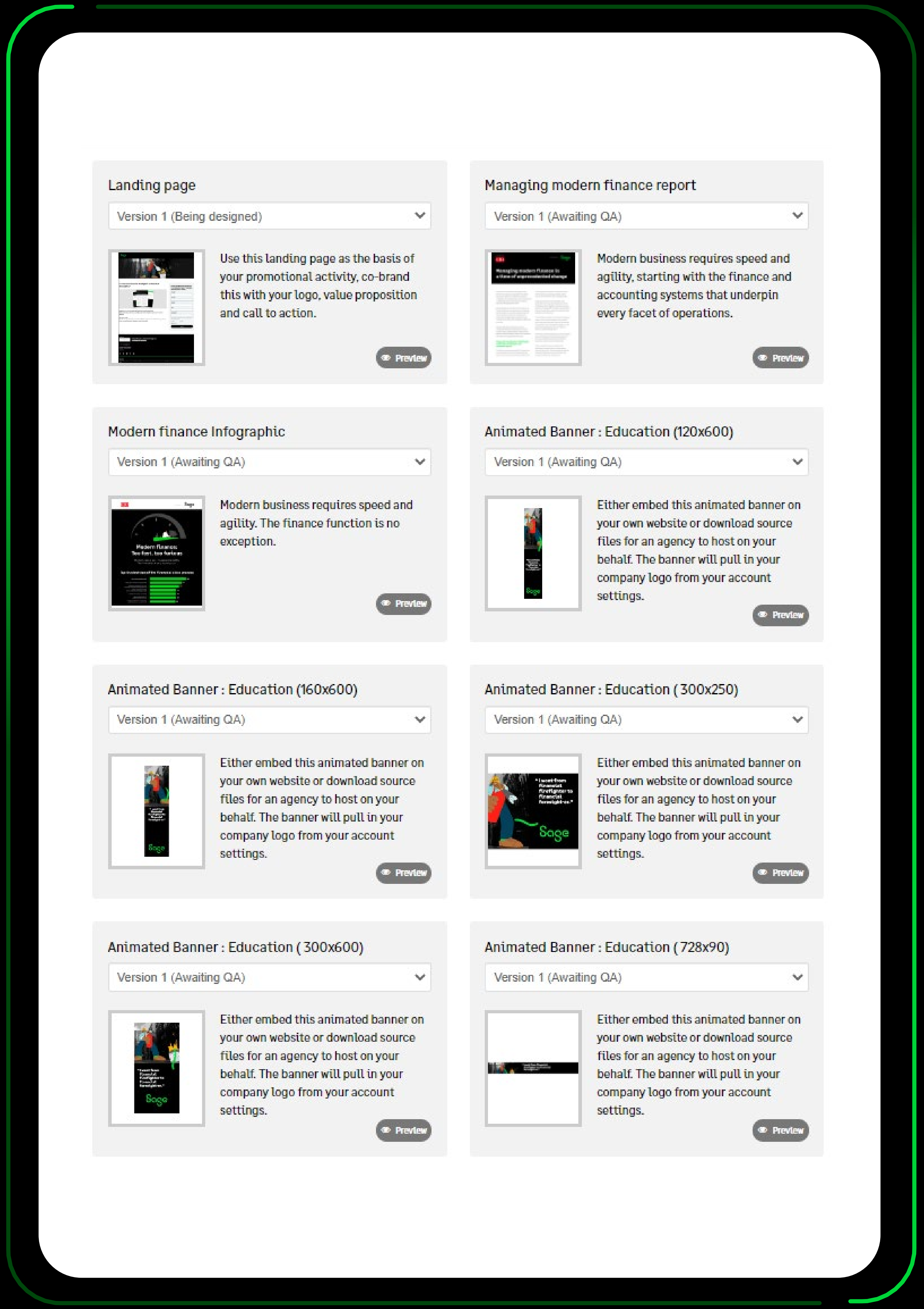
One of the easiest ways to launch your campaign is to host your landing page and send out emails and social posts through Sage Advance. Co-branding your campaign through the platform allows you to take advantage of the in-house reporting, instant landing page creation and hosting and automatic email and social post deployment - it's a one-time set up for the campaign.

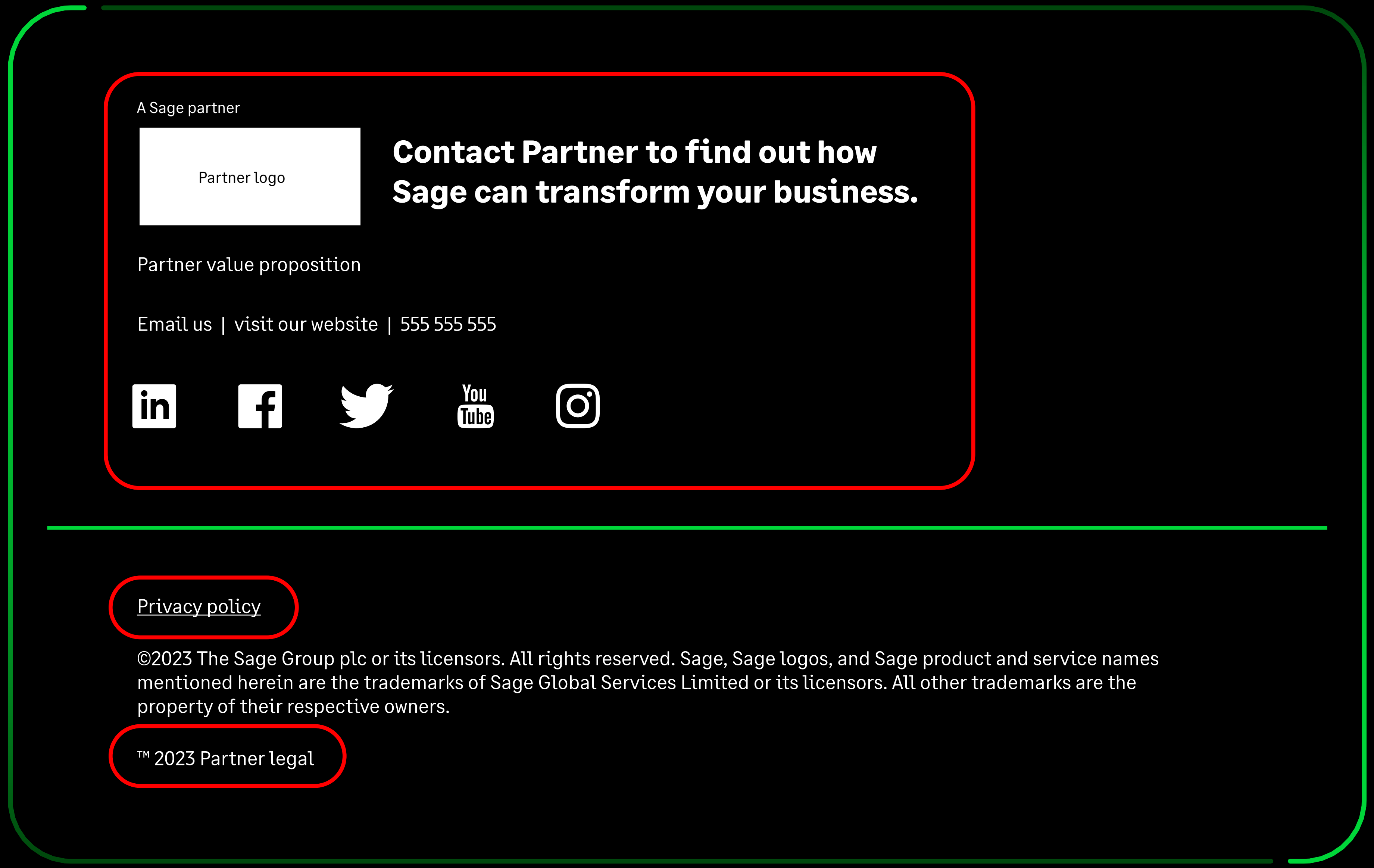
All assets can be accessed by setting up the campaign in Sage Advance.

Phase One		Phase Two	
Funnel stage	**Assets**	**Funnel stage**	**Assets**
Education	Landing page Email Animated display banners and social ads Blog posts Report Infographic	Nurture	Landing page 5 x Emails eBook Coffee Break Demo Report Infographic
Solution	Animated display banners and social ads	Awareness	Social ads LinkedIn InMails LinkedIn copy blocks
Selection	Animated display banners and social ads		

To co-brand and deploy your campaign using Sage Advance log into the platform and from the homepage, click through to Marketing Assets and Resources in the top navigation and 'View by campaign'. From here search for Finance Professionals and select 'View sub-campaign'. From here you'll be able to select from phase one and phase two, select 'view' on phase one to begin.

Each phase of campaign will include a preview of the assets available before you decide to co-brand the content. From here you'll be able to select which of the assets you'd like to use to make up your campaign. If, for example, you decided to launch your social ads using the campaign kit in the Resource Library you won't be obligated to co-brand it at this stage, you may decide to only use the landing page, email and banners.





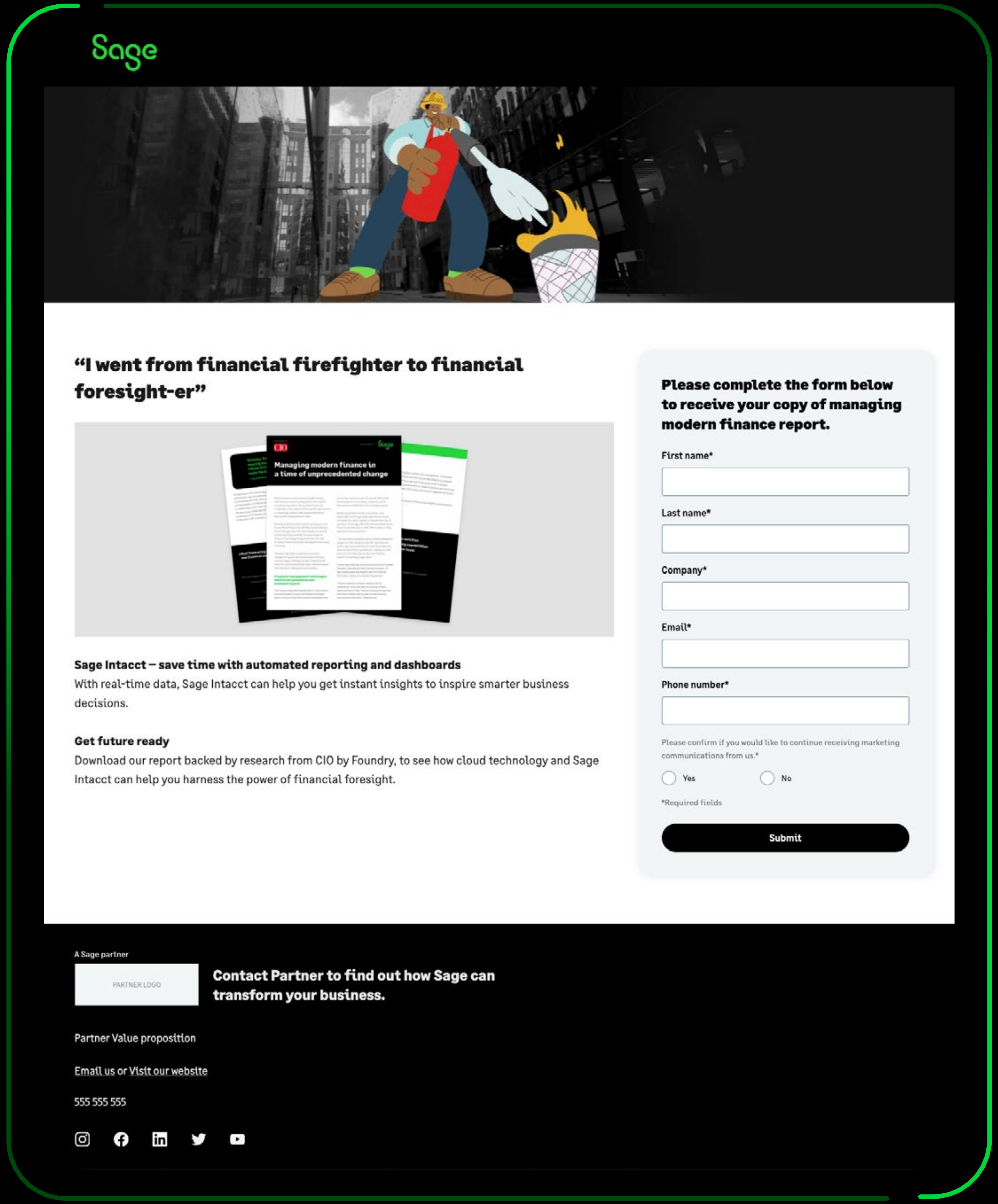
Each asset you select will include different elements of personalization; this includes your company logo, value proposition, company address, contact details and privacy policy.

These will all be pulled from your Account Settings so it's important these are kept up to date. All links will be pre-populated for you, hosting a co-branded version of the report with your details on the landing pages. All social and banner content will link back to your landing page automatically, check the short description of each email to determine where the call to action will take readers.

Campaign Phase one

Landing page
If you have opted to co-brand your landing page through Sage Advance you have two options for hosting, either via Sage Advance or on your own URL. If you'd like to use Sage Advance, your URL will be generated automatically allowing you to quickly publish the landing page with a click of a button. Alternatively, you can host the landing page on your own URL after you have added your personalization. To do this you'll be required to follow the steps outlined in our **Knowledgebase Article**.

Top tip: It's important to ensure you also review the thank you page, this will be the destination for when prospects complete your form.



Email
You have the ability to schedule your emails for sending through Sage Advance or download the HTML files to send out via your own email client. If you opt to use Sage Advance, you'll be required to select a data list from your uploaded lists, or upload a new list, and a time and date for your email to be scheduled. You can cancel or update your email broadcast at any time prior to an email being sent out.

Top tip: You're able to send emails out via Sage Advance from your own domain. To do this follow the steps outlined in our **Knowledgebase Article**.

Report
The main piece of content for this campaign is the Modern Finance Report, sponsored by CIO. This asset is automatically hosted on your landing page. It can only be accessed by a prospect once they have filled in the data capture form. As part of the platform features, the Report will automatically carry your company logo, company URL and value proposition. You can also download this as an individual asset as part of the campaign.

Alternatively, to use your report from the **Resource Library** to can either download it directly or you can create a link within Sage Advance specifically for this asset, making it really simple for you to link from your landing page.

Top tip: Your company details will be pulled from your Account Settings within Sage Advance so it's important that these are kept up to date.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Managing modern finance in a time of unprecedented change

Modern business requires speed and agility, starting with the finance and accounting systems that underpin every facet of operations. The pandemic introduced complications that underscored the need for responsiveness in a digital age, yet back-office systems still strain to keep up with changing business needs.

Business leaders know they must pick up the pace. A new Foundry MarketPulse survey identifies myriad challenges finance managers face, from data integrity and security to lost productivity caused by manual processes. As the pace of technology change accelerates, the need to revamp financial information management is becoming more acute.

Taking the right steps to modernize accounting management systems will help businesses of all sizes overcome legacy challenges and gain insights that will help them improve productivity, reduce costs, and prepare their business for rapid growth and innovation.

Financial management challenges: Inefficient procedures and outdated reports

The Foundry survey, which queried 408 U.S. financial and accounting leaders at small and midsized businesses, paints a picture of busy finance teams frustrated by time-consuming manual processes. For example, 81% said the time they spend on accounting, compliance, and the financial close inhibits their work on strategic projects.

Despite the prevalence of financial software, many leaders still comb through siloed departmental records and databases to piece together a comprehensive view of operations. On average, 39% of the tasks associated with the financial close take place outside of financial/accounting applications, the survey found.

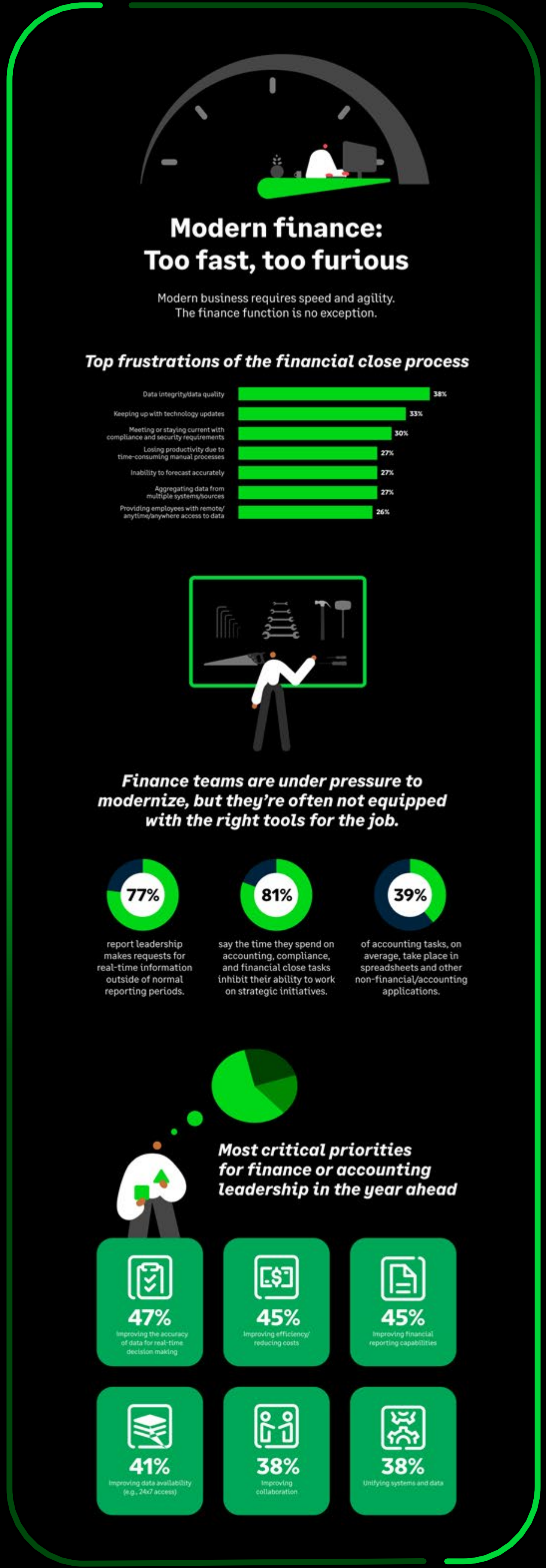
"The information contained in some financial management programs is often isolated and specific. Executives who need to report across silos have to search for the data they need and export it into a spreadsheet or database to make sense of it and create reports," says Scott Freedman, director of marketing at Sage Intacct.

Finance teams also feel hamstrung by a disconnect between the pace of business and their financial processes: 77% say company leadership requests real-time financial information outside of normal reporting periods.

"Finance is dynamic and ever-changing, but for organizations using entry-level accounting software, reports are stuck in time. They don't provide the real-time information leaders need to make accurate planning and forecasting decisions," Freedman says.

Infographic
To supplement your conversations with prospective contacts, or to send out as part of your nurture activities, you're able to download a co-branded infographic including your company logo and value proposition.

Like your report, you'll be able to download this as an individual asset either via the **Resource Library** by downloading or generating a link, or download within the campaign.



Blog posts
You'll have access to five blog posts, these can also be accessed via the **Resource Library** in Sage Advance. Take the copy from each and use the five blog posts to upload to your own website. Share insights with your prospects on the changes within the finance industry and how Sage Intacct can support businesses.

Animated banners
You'll be able to co-brand and launch your animated banners in the following sizes:

- 120x600px
- 160x600px
- 300x250px
- 300x600px
- 728x90px
- 970x250px

Sage Advance will pull in your company logo from your account settings and place this on the final frame of your animated banner. There will be banners for every stage of the funnel. There are two options when publishing your animated banners. You can either download the source files to share with a marketing agency for hosting, or you can request a code from Sage Advance. The platform will automatically generate a code for each of your co-branded banners which you can then embed into your own website. Please note these are not display ads for use with Google AdWords or Programmatic Advertising.

Social posts
Co-branded social posts will be sent out directly through your social accounts via Sage Advance. Link your social accounts in Sage Advance **Account Settings** ahead of launching the posts. You'll be required to add the social post copy yourself, use the messaging framework to help you write the posts and think about what hashtags you might want to use to gain the most views/clicks.

Top tip: We recommend that you separate each stage of social content by one week. Use the autopilot feature for your social ads, and Sage Advance will send out your Education social ads first, followed by your Solution ads seven days later and end with your Selection ads a further seven days later.

Once you're happy with your personalized campaign, you can either **'Save and review'** to see a preview of the content before publishing the campaign, or simply go ahead and **publish the campaign**.

Downloading your co-branded content
Once you have co-branded all the assets you'd like to make up your campaign you will have the option to download the source files and use outside of Sage Advance.

This includes:

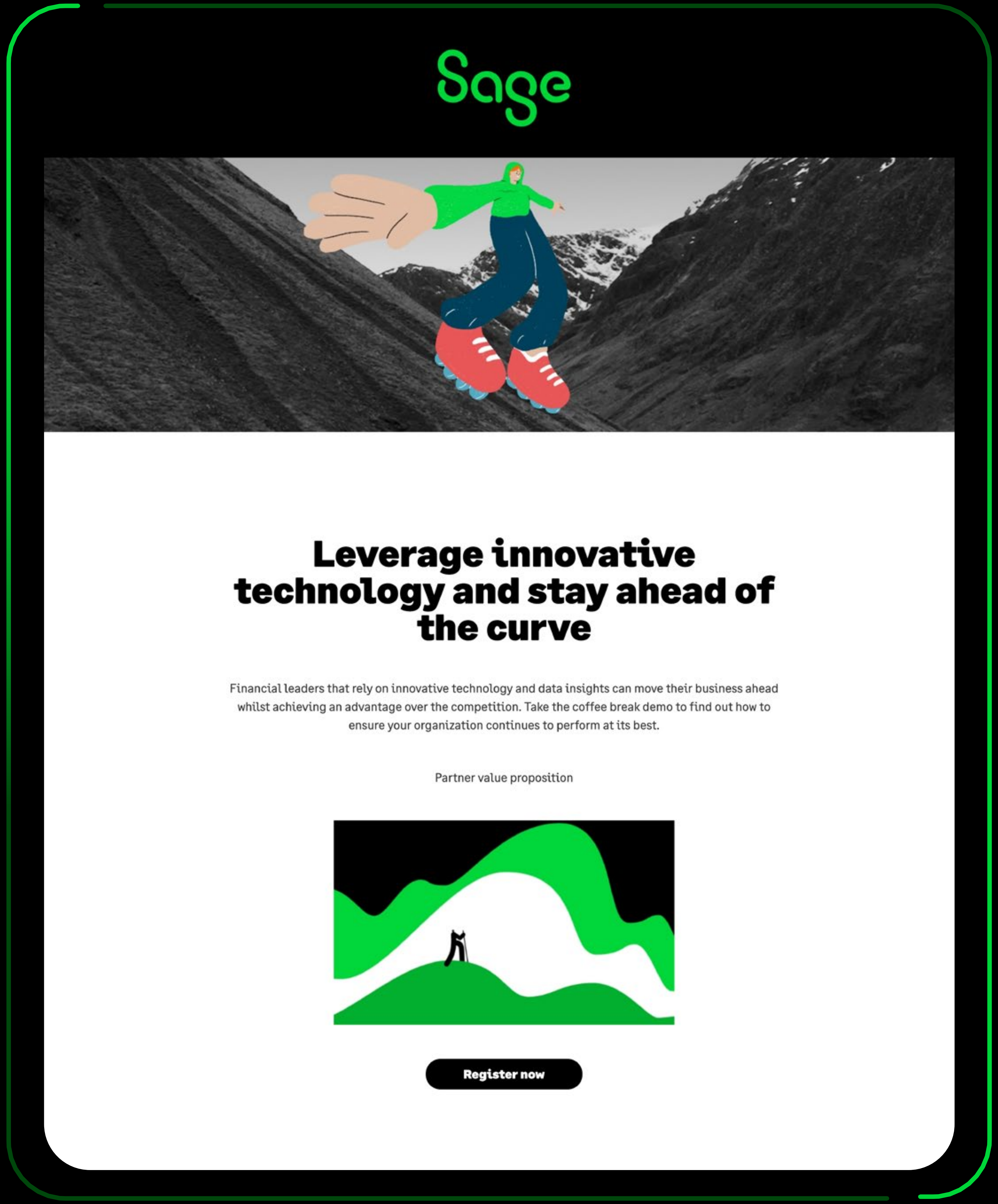
- Landing page
- Emails
- Infographic
- Report
- Blog posts
- Animated banners

Campaign Phase two

Once you have completed co-branding and deploying phase one, you're able to move onto phase two. This allows you to engage more with prospects through more emails and call to actions through the landing page.

Landing page
Similar to your landing page in phase one, you have two options for hosting, either via Sage Advance or on your own URL. If you need support when hosting your landing page, you can access the steps outlined in our **Knowledgebase Article**.

This landing page hosts more content including the main call to action, the Coffee Break Demo. Prospects will use the form hosted at the bottom of the landing page to leave their details in exchange for the Coffee Break Demo. They can then continue to engage with your landing page by downloading the eBook, or Infographic, additionally, they can email you for more information.

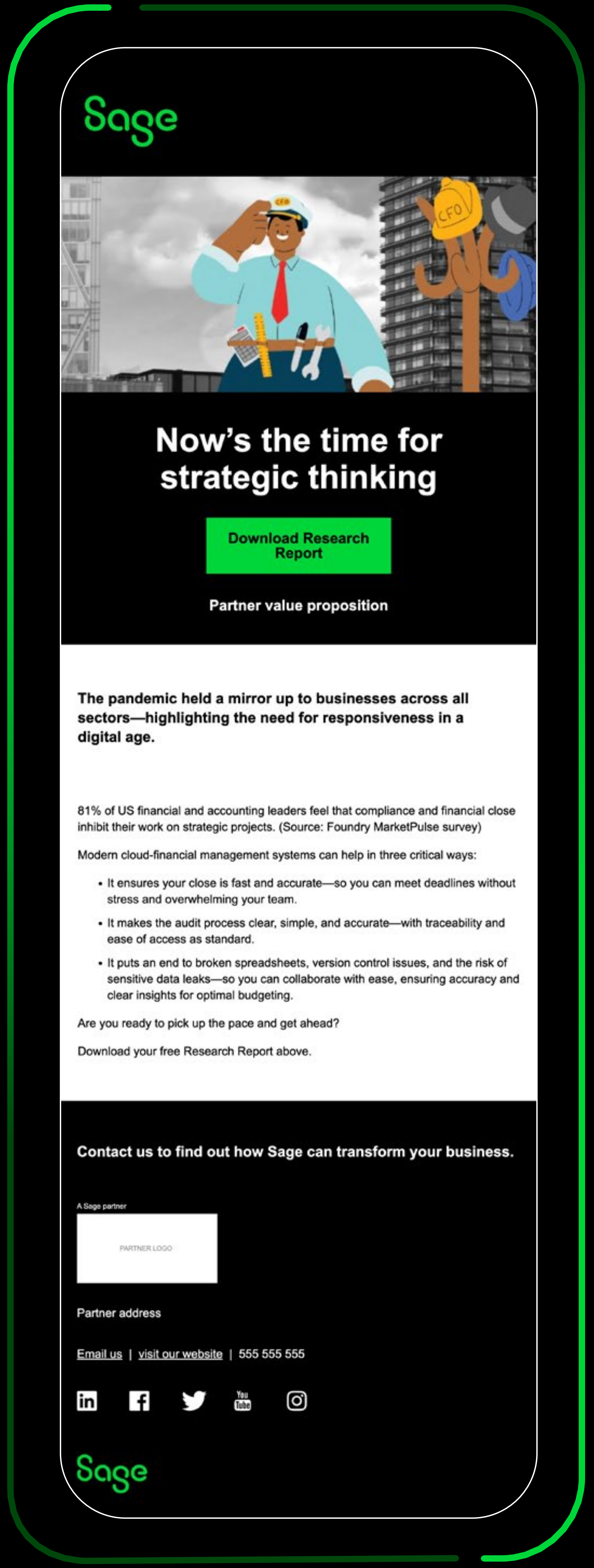


Top tip: It's important to ensure you also review the thank you page, this will be the destination for when prospects complete your form.

Emails
There are two options when deploying your emails, see phase one for details on scheduling your broadcast.

You have the option to select from five emails in phase two. Each email directs readers to a different call to action.

Email	Call to action
Email One	Research Report
Email Two	Directs people to the landing page to download the eBook
Email Three	Directs people to the landing page to download the infographic
Email Four	Directs people to the landing page to download the Coffee Break Demo
Email Five	Directs people to the landing page to find out more information



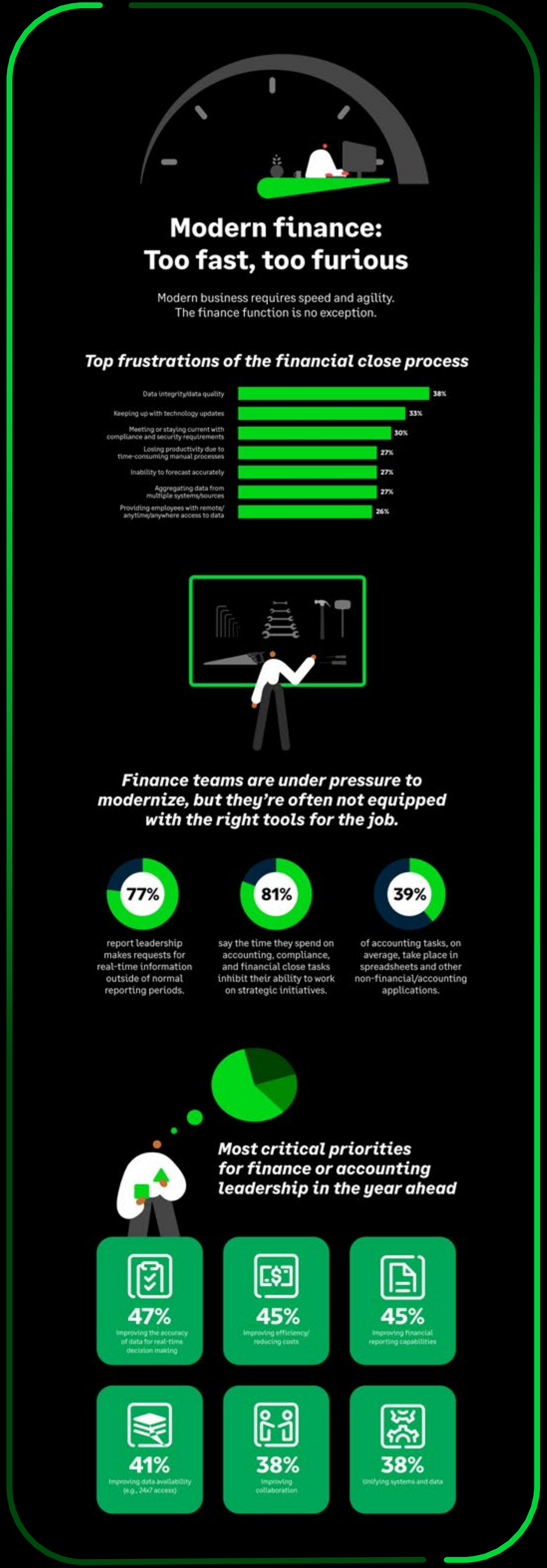
eBook
One of the call to actions on the landing page is the **' How financial leaders can build sustained business flexibility, resilience, and agility'** eBook. This asset is automatically hosted on your landing page. As part of the platform features, the eBook will automatically carry your company logo, company URL and value proposition. You can also download this as an individual asset as part of the campaign.

Alternatively, to use your report from the Resource Library to can either download it directly or you can create a link within Sage Advance specifically for this asset, making it really simple for you to link from your landing page.

Top tip: Your company details will be pulled from your Account Settings within Sage Advance so it's important that these are kept up to date.

Infographic
To supplement your conversations with prospective contacts, or to send out as part of your nurture activities, you're able to download a co-branded infographic which includes your company logo and value proposition.

Like your eBook, you'll be able to download this as an individual asset either via the **Resource Library** by downloading or generating a link, or download within the campaign.



Social posts
Co-branded social posts will be sent out directly through your social accounts via Sage Advance. Link your social accounts in Sage Advance **Account Settings** ahead of launching the posts. You can send out posts with images for any of the three available social platforms Facebook, LinkedIn, and Twitter.

Report
Another call to action from your landing page is the Modern Finance Report, sponsored by CIO. This asset is automatically hosted on your landing page. As part of the platform features, the Report will automatically carry your company logo, company URL and value proposition. You can also download this as an individual asset as part of the campaign.

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Downloading your co-branded content
Once you have co-branded all the assets you'd like to make up your campaign you will have the option to download the source files and use outside of Sage Advance.

This includes:

- Landing page
- Emails
- Infographic
- Report
- eBook

LinkedIn InMails & Copy blocks
Download these two PDFs in the campaign and use the copy supplied when speaking to potential prospects via LinkedIn.

There are two LinkedIn InMails you can use with a number of options for a subject line allowing you to test the success of different subject lines when speaking to prospects.

Similarly, you have five options of 20, 50, and 100 character copy blocks to choose from. Simply copy directly from the PDF document and paste into LinkedIn to share out via your own LinkedIn account.

When you take the copy from the document you can supplement the content with your own call to action and details around your specific offering, or you can share the content as it's been provided.

Please ensure you fill in any missing personal information from the messages before you send them out.

Campaign Support
If you have any questions about how to use the campaign, you can access our **Knowledge base** at any time for step by step instructions on any of the features within Sage Advance. Alternatively, for any technical questions head over to our **Helpdesk** for support with one of our experts.

You also have access to training through **Sage University**, allowing you to watch videos on how to create a campaign, and launch it to your prospects. For any additional support please contact your Partner Marketing Manager.

sage.com
1-877-897-6391