

Guide to Marketing Terms



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Content

What:

Content is all material used in relation to a brand, online or offline. It can be blogs, website pages, infographics, video, and much more. Content is essential when building awareness of your products and services. It's also an incredibly powerful tool in nurturing prospects through their buyer's journey into becoming leads by providing the right information at the right time. Best of all: content lives forever. It will accumulate authority over time and continue to gain value.

Why:

The purpose of a content strategy is to create engaging, relevant, and useful content that attracts and appeals to target personas. Today's savvy consumer begins his or her search online no matter the context. It's crucial to get the right message to the right customer at the right time; a brand-specific content strategy ensures that happens consistently and cohesively.

Objective:

We aim to generate organic traffic through human-readable, keyword-rich content. We will offer vital educational information to users, and position you as a leader within your industry. Lastly, this content will offer "landing spots" for other marketing efforts, creating an interconnected strategy.

Smart Content

What:

Smart content enables individual user customization within content. It allows us to display specific content based on viewer characteristics. This can be applied to CTAs, forms, emails, and general content blocks. Smart rules can be based on the following criteria types:

1. **Country:** display content to your viewer based on their country. The country is determined by the IP address of the visitor.
2. **Device type:** specify which device this smart content is centered around (mobile, tablet, or desktop). HubSpot looks at what is called the 'user agent' of your visitor's browser to determine their device type. Since this can sometimes be changed on the device, we cannot always guarantee accurate segmentation.



3. **Referral source:** show visitors your smart content based on how they found your site.
4. **Preferred language:** personalize your content based on the language set within the user's web browser.
5. **Contact list membership:** show a contact in your HubSpot database certain content dependent on whether or not they're a member of one of your HubSpot lists.
6. **Lifecycle stage:** this will look at the lifecycle stage property of a contact in your HubSpot database and display the relevant content based on the value of this field.

Why:

Smart content is powerful because it enables us to create an environment for a user that is optimized to get them to take an action. For example, if we see a user has interacted with specific pages, or downloaded a specific offer, it can trigger new content to display. This ensures that users aren't being served content, CTAs, forms, and emails that aren't relevant to them in their current buyer's stage.

Objective:

We aim to help the nurturing process for users on your website by serving up content meant specifically for them. This is intended to speed up the conversion process and get them further down the funnel. This will make the experience for the user seamless and convenient.

Distribution

What:

Distribution is the act of taking the content and ensuring it's posted on the most relevant channels with a frequency for success. It's all about getting the work out there and maximizing opportunity. This includes all formats of content, including downloadable resources, blogs, website copy, and videos.

Why:

Distribution creates impact. Within distribution, we have two fundamental goals: to target buyers and influencers to ensure you attract visits + contacts, and to gain maximum visibility and engagement within your industry + audience. It ensures dollars are well spent so we're not just pumping out content with no impact.



Objective:

We aim to leverage multiple channels in distributing existing and upcoming content for you. Through our efforts, we will experiment to find the most valuable and effective distribution methods and amp up efforts within that area.

Technical & SEO Optimization

What:

Technical SEO updates are the backbone of a website from a user experience and organic search perspective. They involve a variety of tasks, including things like optimizing metadata, setting up structural data, optimizing content with keywords, and much more. Without these updates, a website will not be optimized for search and users will have a poor experience, which leads to lower conversions and poor ROI.

Why:

Continually improving the technical and SEO elements of the website will ensure that the website stays competitive within the market. It will also support other areas of the campaign by creating a good user experience and improved organic visitors.

Objective:

We aim to improve the on-site elements for technical and search engine optimization for your website. Through our efforts, we intend to keep the website optimized and up-to-date.

Website Offers

What:

A website offer is a downloadable resource, online tool, or packaged information that helps a user better understand their problem and the solution you provide. This content should be high-value. The best offers are unique and would be highly difficult to find similar content elsewhere on the internet. There are two types of offers: Gated and Ungated.

Gated Offers: These are the highest value offerings and are typically things like online tools, ebooks, webinars, etc. The user is willing to exchange their contact information for the resource.



Ungated Offers: These are best suited for high-level - or awareness - resources. Think: checklists, pricing guides, case studies, etc. This is the type of content users value, but wouldn't necessarily be willing to exchange their information for. It's also important to ungate information that you want to be very easy to access.

Why:

Offers are an important part of the inbound methodology. Gated offers enable us to acquire contact information and begin nurturing them through their buyer's journey. Ungated offers enable us to deliver highly valuable content to a user in a way that is convenient to them.

Objective:

We aim to deliver high-value information to users that positions you as an expert within the industry. This will help build trust and secure users as contacts within our system to begin the nurturing process.

Custom Website Tools

What:

Custom website tools typically consist of an online tool developed to answer a question or help a user in some way. This can include things like: calculators, workflows, flowcharts, digital ebooks, interactive maps, slider tools, etc.

Why:

Custom website tools can be highly effective because they engage the user and offer an opportunity for interaction. They can offer a solution that solves a difficult problem in a way that is user friendly. It can also be a very useful tool for sales teams to use.

Objective:

We aim to help users solve problems and get answers by creating a great user experience that results in high-quality information being shared to the right people at the right time. This positions you and can (depending on the value of the tool) offer an efficient way to acquire contacts.



Website Continuous Improvements

What:

Traditional website design can be cumbersome and inflexible. It typically involves a massive overhaul every few years, and leaves the website stagnant in-between. Website continuous improvements is a methodology in which we make small, incremental changes to a website over time. We measure the success or failure of each change, which leads the ongoing efforts.

Why:

This methodology enables us to focus on the *most* important aspects of a website, hone in on the best user experience, and make changes frequently for overall performance improvement. By basing changes on data rather than internal preferences, we are able to create a user experience that matters to the user.

Objective:

By initiating continuous improvements on your website, we aim to prioritize the most impactful website work, measure our work regularly, and create an overall great user experience.

Website Audit

What:

A website audit includes a comprehensive report of website performance that can cover things like:

- SEO performance
- Backlink rating
- Metadata assessment
- Content quality
- Link assessment
- Number and type of visitors
- Devices used
- Broken link assessment
- URL structure
- Image assessment
- Page speed scores
- Accessibility
 - Mobile-friendly rating
 - Keyword assessment
 - Facebook shareability
 - Conversion rate optimization



- Conversion opportunities (CTAs, etc)
- Design assessment
- Etc.

Why:

Assessing the website is an important part of ensuring the foundation of a campaign is strong and optimized to meet the overarching marketing goals. This audit can help us identify the areas that need to be improved, as well as the areas that are performing well and should be amped up.

Objective:

By performing a website audit for your website, we aim to provide a holistic understanding of how the website is performing and what opportunities may exist. This will help ensure that all marketing efforts are performed intentionally and with the highest chance for success.

Email Workflows

What:

A workflow is an automated set of marketing and/or sales emails that execute based on an action. Successful marketing and sales automation relies on triggering relevant and timely actions based on context. With the workflows tool, we are able to use the data we're collecting with HubSpot to engage with specific contacts in a relevant and contextual manner.

Why:

Workflows are an important part of the lead nurturing process. With workflows, we are able to serve up the right content at the right time to help the user get further into their buyer's journey. It's a way to engage new users and re-engage existing contacts.

Objective:

By creating strategic workflows for you, we aim to set a foundation for lead nurturing and have an impact on the overarching marketing goals.



Pop-Up CTAs

What:

Pop-up CTAs are built-in CTAs/forms that are placed strategically throughout the website to offer frictionless opportunities to convert.

Why:

By placing pop-up CTAs strategically to appear at the right place and time for optimized conversion we increase the likelihood that users will engage with specific content on the website. This can help with generating contacts or increasing exposure on specific content.

Objective:

By creating pop-up CTAs, we aim to create more opportunities for users to be served up content at the right time and in the right place.

Social Media

What:

Social media allows people to share and interact with content quickly, efficiently, and in real-time. There are numerous social media platforms available, which should be narrowed down to best fit the industry and desired outcome.

Why:

Social media is an important avenue to begin connecting with the community and personas for brand exposure and to increase leads. According to research, social media marketing has a 100% higher lead-to-close rate than outbound marketing. 70% of the U.S. population has a profile on at least one social networking site, and on average, users spend two hours on social media every day. This makes it a great avenue to reach people where they're already spending time. Along with the amazing reach available, 71% of consumers who have had a positive experience with a brand on social media are likely to recommend the brand to their friends and family. This is great for word of mouth and to increase awareness.



Objective:

By focusing on social media presence, we aim to improve overall brand perception, become more present to the personas and general community, engage users with relevant content, and drive visits back to the website.

Paid Media

What:

Paid Media refers to external marketing efforts that involve a paid placement. It includes pay-per click advertising, display ads, social media paid, and branded content. Paid media is an essential component of revenue growth and brand awareness for online businesses. Paid media is a good way to open the door, even a crack. Paid media can increase website traffic, as well as brand awareness and exposure.

Why:

Paid Media outreach is an incredibly important aspect of outreach, especially when building brand and product awareness. Paid media is often a necessary component of a marketing campaign to compete within a market or obtain an increase in exposure and website visits.

Objective:

Our goal in executing Paid Media is to increase brand awareness, product/service awareness, and ultimately drive traffic back to the website.

Account Based Marketing (ABM)

What:

Account Based Marketing (ABM) is a strategic approach to business marketing that "flips the funnel" and focuses on individual accounts by using a combination of marketing and sales tactics. This must always start with a prospect hit list, which can be an existing list or one crafted based on data and research.



Why:

While ABM takes a more strategic approach to targeting your customer "hit list" on a personal level, this tactic typically takes longer to produce results. However, that doesn't mean it isn't powerful ... companies using ABM generate 200% more revenue for their marketing efforts compared to those that don't.

Account Based Marketing can help a company get in front of and target specific prospects that are the right "fit". This allows a company to have better control over incoming leads and qualify them from the start. It typically involves beginning one-to-one conversations with the prospect. This will be done by sending introductory messages on social platforms like LinkedIn through the profile of an individual within a company (typically in leadership or sales), utilizing organic and paid social media outreach, as well as monitoring and reporting.

Objective:

Our goal in executing Account Based Marketing is to connect with high-quality prospects, introduce the company and services/products, raise brand awareness, and slowly nurture prospects over time.

Public Relations (PR)

What:

Public Relations (PR) typically consists of research, list building, story/pitch creation, media relationship management, and general outreach. This process help ensure optimal exposure through a variety of mediums that are tailored towards the persona.

Why:

Public Relations helps create awareness about a brand and it's products/services. It's an important part of getting in front of the persona and influencers through the platforms they prefer and are already consuming. It can also include interacting directly with the persona for optimal results.

Objective:

We aim to create awareness through PR efforts, which will help set an entry point for other marketing and nurturing tactics. PR efforts will also position you as a thought leader within the industry.



Event Marketing

What:

Event marketing typically consists of a strategic approach to connecting with the persona in real life. It can include things like: event collateral, experiential marketing, pre-event exposure (PR, social media outreach, paid ads, etc.), day-of-event plans, and post-event plans for events like trade shows, conferences, speaking engagements, etc. Why: Event marketing is a powerful way to connect with a persona in a memorable way. Many people are heavily influenced by events and retain experiences at a much higher rate than other content delivery methods. This can offer users an opportunity to engage with a brand, product, or service before entering the sales cycle.

Objective:

By developing an event marketing plan, we aim to equip you with the tools needed to garner attention, expose their brand/product/service, and nurture prospects post-event.

Surveys

What:

Surveys are a way of acquiring user feedback to help identify strategic recommendations that aim to improve products, services, and brand awareness over time.

Why:

Conducting surveys is a useful way of gathering insight into what is important to your prospects/customers/employees/stakeholders/etc. Surveys give individuals a venue for open feedback, which is key in building a sense of ownership and value. It is an opportunity to establish two-way communication and involve individuals in the development process by giving them a direct voice. Survey research can save time and provide clarity where to invest time and money.



Objective:

By creating and distributing surveys on your behalf, we aim to streamline the feedback process, give clarity to ongoing efforts, and ensure that key individuals feel as if their opinion is valued.

Industry & Competitor Research

What:

Industry and Competitor Research usually includes a comprehensive report on things like:

- Social media status and performance
- Website performance (backlinks, domain ranking, etc.)
- Website design
- Conversion opportunities
- Geographic/Market Research
- Keyword ranking
- Branding Similarities/Differences
- Paid media performance
- Etc

Why:

By assessing what competitors are doing and what is prevalent within the industry, we can identify areas to improve as well as identify opportunities to become an industry leader. This ensures that marketing efforts are strategically planned to meet or exceed the efforts put forth by competitors.

Objective:

By executing a competitor and industry audit, we aim to identify areas where you may need to amp efforts to compete with others in the market. We also aim to identify opportunities for you to stand out and become an industry leader by doing something unique within the industry.



Video

What:

Video content includes every type of motion-related content. This could include:

- Live action (think: interviews)
- Animated
- Stop Motion
- Video Blogs (vlogs)
- Video Podcasts (vodcasts)
- Webinars
- Etc

Video is becoming such a prevalent thing in the media we consume on a daily basis that users are beginning to expect it from all brands, no matter how big or small. As video consumption increases, so does the quantity of video on the web. Because of this, creating quality video content has never been more important. Creating high quality video content has less to do with the visual appeal and much more to do with creating content that is relevant, valuable, and impactful to the target viewer.

Why:

Video is far more engaging and captivating than nearly any other content format. We see this in some of the recent stats about video. For example, online shoppers who view demo videos are 1.81x more likely to purchase than non-viewers. Using the word 'video' in an email subject line boosts the open rates by 19%. Social video generates 1200% more shares than text and images combined. There are many stats like this that showcase the success of video. These are all reasons why brands should be investing in quality video content.

Objective:

By creating quality video content, we aim to create high-value content for users, deliver the right information at the right time, and present you as a professional and experienced brand with top-notch products/services.



Photography

What:

Photography is the the process and execution of capturing a brand, product, or service in a visual manner. The type of photography varies greatly based on the desired outcome, but the style should reflect the brand.

Why:

Humans are visual beings. The appearance of a product or company is sometimes the most vital aspect in the Awareness and Consideration stages of the buyer's journey. It helps the user visualize the brand, product, or service. It helps a user relate and feel connected. Photography is used in a myriad of ways, including within marketing materials (online and offline), website pages, blogs, social posts, and more.

Objective:

Our aim is to improve brand perception through professionally shot photos and connect to users. These images will represent you in every aspect of their business.

Brand Identity

What:

Having a strong brand does a few things:

Improves Recognition And Awareness: A brand is the face of an organization. It's the thing that people think of immediately when they think of you. It's an unconscious underlying theme to how people perceive your offerings.

Creates Uniqueness: The brand should set you apart from your competitors and create compelling motivation for your audience to choose you over them.

Creates Trust: A well-crafted brand immediately connects in a meaningful way to an organization's audience. By creating a relevant and impactful brand, the audience immediately sees the organization as more legitimate and worthy of trust.

Supports Advertising And Business: The brand should not only drive the messaging and appearance of the advertising, but it should drive the entire business. It should embody how



employees perform, the services and products provided, and the ultimate direction and future of the organization. Who do you want to become?

Brand can include everything from logo to mission statement to website elements to voice guide and beyond.

Why:

Brand is incredibly important to any organization or business. It's not just a logo. It's everything. It's the perception and reputation associated with your organization. The name, the logo, the typography, the colors, the messaging, the values, the product and service experience. All of those things combined should influence the emotion that someone has in relation to your organization. Branding should be ubiquitous, strategic, and consistent. Consistent not only in the look and feel, but also with how people experience the products and services ongoing

Objective:

By executing brand work, we aim to craft a powerful and positive perception of the company through consistent visuals and messaging. This branding will have a ripple effect on all other marketing efforts.

Lead Nurturing & Scoring

What:

Lead scoring lets you assign a value (a certain number of points) to each lead based on the professional information they've given you and how they've engaged with your website and brand across the internet. It helps sales and marketing teams prioritize leads and increase efficiency. There are different types of data that can be used for lead scoring, including: demographic information, company information, online behavior, email engagement, social media engagement, etc.

Why:

Lead scoring can be an efficient way to weed through the unqualified contacts and leads, and focus primarily on the leads that have the highest potential for conversion. This offers guidance to the sales team as well as leads marketing efforts.

Objective:

By initiating lead scoring, we aim to streamline the lead-to-conversion process and equip the sales team with a clear outlook on which leads are worth pursuing.



Sales Enablement

What:

Sales enablement is the collection of content, processes, and tools that enable a sales team to perform at maximum capacity. It is the process of aligning sales and marketing to equip the sales team with all the things needed to sell as effectively and efficiently as possible. This often includes things like: content organization, sales training, sales + marketing communication, marketing insights, Customer Relationship Management (CRM) tool integration with the CMS (content management system), etc.

Why:

Your sales team will thrive off an infrastructure that provides them with tools, resources, and information they need to continue the process of guiding prospects through their buyer's journey. Most of your marketing content needs an author or face behind it; making your sales team those voices of trusted authority on the subject matter help them nurture leads into customers. Defining a specific sales enablement strategy also ensures that content and tools are gathered efficiently to assist the sales team.

Objective:

By initiating sales enablement, we aim to streamline the process of bringing a lead from the prospect stage to becoming a customer. Our goal is to align marketing efforts and the marketing team with sales efforts and the sales team.

Podcasting

What:

A podcast is typically a series of audio files that follow a similar narrative or goal and attract a specific audience. They can be found on platforms like Apple Podcasts, Spotify, Stitcher, Overcast, etc.



Why:

Podcasts can be very powerful in providing high-value content to specific users in a format that is convenient and mobile. This give a brand the opportunity to reach the user, form connections, increase brand awareness, and showcase themselves as an expert.

Objective:

By crafting high quality podcast content, we aim to deliver provide value to the persona, create a positive brand perception, and position you as an expert within your industry.

Social Media Messenger Bots

What:

A Facebook Messenger bot is a chatbot that lives in Facebook Messenger, meaning it converses with the Facebook page and website visitors. The bot is visible on the site, but all conversations are stored in the Facebook Messenger app. This bot is set up with pre-determined questions to fit the need.

Why:

The advantages of using a Facebook Messenger bot are the low barrier to entry for both the client and your target audience. A [recent Nielsen survey](#) found that people think messaging is the second-best way to talk to a business. Messenger bots allow a business to:

- Reach your audience directly
- Save time and money on customer service
- Help identify leads
- Assist in closing e-commerce sales
- Re-engage customers

Objective:

By setting up a Facebook messenger bot, we aim to provide an easy option for your persona to reach out to you, and create an overall great user experience.



HubSpot Chatbots

What:

HubSpot Chatbots allow a business to automate and scale online chat conversations. A chat icon sits on your website (on pre-determined pages) ready to assist the visitor with any questions as needed. You can create bots to help qualify leads, book meetings, provide answers to common customer support questions, and more.

Why:

Chatbots allow businesses to connect with online visitors without the need to oversee the process. A [recent Nielsen survey](#) found that people think messaging is the second-best way to talk to a business. Chatbots allow a business to:

- Reach your audience directly
- Save time and money on customer service
- Identify leads
- Assist in closing e-commerce sales
- Re-engage customers

Objective:

By setting up chatbot on your website, we aim to provide an easy option for your persona to reach out to you, answer questions and provide service, and create an overall great user experience.

HubSpot Live Chat

What:

Live Chat allows you to connect with your website visitors in real time. A chat icon sits on your website (on pre-determined pages) ready to assist the visitor with any questions as needed.

Why:

Today's buyers want information and they want it now. Use live chat to connect prospects with people on your team - realtime. The software also gives you the ability to route customer inquiries to your service team, pass leads to the appropriate salespeople, and answer any questions from prospects at the right place and right time.



Objective:

By setting up live chat on your website, we aim to provide an easy option for your persona to reach out to you, route inquiries to the appropriate people, and meet your customers where they are. By providing real-time assistance, you create an overall great user experience.

Account Management & Reporting

What:

How do you know your marketing efforts are working? This is where Account Management and reporting come in. This is how we assess the efforts and make adjustments as needed. This will also influence upcoming campaigns. It typically consists of defining and reporting on Key Performance Indicators (KPIs) and other metrics during regular check-ins with the account manager.

Why:

Account management and reporting is a vital part of the partnership to ensure working together, hitting goals, and executing the right work at the right time for maximum effectiveness.

Objective:

By executing account management and reporting, we aim to stay on the same page, monitor metrics as they relate to the goals, and ultimately move forward together. We aim to keep a pulse on the business to assess impact of the campaign. This will enable us to be flexible and agile for maximum results.



Tool Stack:

What:

A tool stack is a collection of systems/processes/tools put into place to help a company achieve their goals. Tools are typically used to manage, monitor, streamline and report on various areas of business.

Why:

An effective tool stack can enable efficiencies and create a seamless back end management user experience. This allows companies to save time and money in the long run, as teams are able to accomplish more while showcasing the success or failure of efforts.

Objective:

By initiating/connecting a tool stack, we aim to provide value by creating efficiencies and making processes easier to achieve. We assess your current tools in place to make recommendations that make sense for you and your needs. Here are just a few of the integrations and tools that we often recommend:

HubSpot:

[See a full list of HubSpot capabilities here.](#)

[Marketing Software:](#)

The HubSpot marketing software is a marketing automation software that can be used with most website platforms. It brings together marketing efforts under one roof to maximize effectiveness while streamlining efforts. With the HubSpot marketing software you can track user metrics, build out contact profiles, schedule out posts and interact on social platforms, set up email workflows, improve and manage SEO, create Call-To-Action (CTA) buttons, track ad ROI, create blog and landing pages, list segmentation, and more. Pricing varies, based on size of contact list and desired tools.

[CMS/COS:](#)

HubSpot's Content Management System (CMS) is called the COS. It stands for Content Optimization System, and it is unique from a traditional CMS because it integrates all



marketing efforts seamlessly and was built to compliment inbound marketing efforts. Many other CMSs require many plugins and custom integrations. While the COS does have integration capabilities, many of its features are built in for simplicity. Pricing is typically around \$300/mo.

CRM:

The HubSpot CRM offers the tools you need to organize, track, and nurture your relationships with leads and customers. It includes contact management, contact and company insights, email integrations, email scheduling and more. The CRM is completely free.

Service Hub:

The HubSpot service hub is designed for advanced customer service teams. It is a full customer service software package that helps companies connect with customers, exceed their expectations, and automate processes. It includes things like ticketing, live chat, 1:1 video creation and hosting, and much more. Cost varies based on desired tools and company size.

HubSpot Integrations & Add-Ons:

[See a full list of integrations here.](#)

[See add-ons at the bottom of this page.](#)

Reporting Add-On:

See more customizable reports, templates, and dashboards sent automatically by email.

Ads Add-On:

Tie paid ads spend to leads and customers.

Platform Integration (Wordpress + HubSpot, etc):

HubSpot can work with other website platforms, like Wordpress. Connect your blog or website with your HubSpot tools to convert website visitors into leads and buyers.

Calendar Integration:

HubSpot can connect with Gmail, Outlook, and Office 365 to improve the scheduling process. This is a free feature.



Meeting Integration:

HubSpot offers integrations for meeting software, like Zoom or UberConference. This streamlines the process of connecting your meeting platforms with your marketing platform.

E-Commerce/Shopping Integration:

Hubspot can integrate with some e-commerce platforms, like WooCommerce, to help connect the platforms.

HotJar:

[HotJar](#) is a platform that allows you to quickly and easily see how users are consuming and using your website through visuals like heatmaps, polls and surveys, and video user recordings. The cost varies based on the size of the website and desired outcome.

Google Analytics:

[Google Analytics](#) offers in-depth insight into all levels of metrics within a website. That includes user data, device reporting, traffic insight, and much much more. Basic Google Analytics is free. The more in-depth Google Analytics 360 varies in cost based on website size and desired outcome.

Wista:

[Wistia](#) is professional video hosting for business (much like Vimeo or Vidyard) that offers video hosting, analytics, and CTA/annotations. It also allows for some customization of colors, buttons, etc. HubSpot coded CTAs can be embedded within Wistia videos for seamless integration of efforts.