

REBRANDING  
PLAN

**SAGE**  
integration « 

## GOAL:

To launch a company rebrand in 1Q 2020 to drive increased brand awareness and position us for market growth.

# How will we measure launch success?

## Increased brand awareness and engagement

Brand awareness is that important first step in the sales funnel. A strong brand helps shorten sales cycles and increases retention because people prefer doing business with companies they know and trust.

### KPIs we can track:

- Direct web traffic
- Search data
- Media coverage (placements, impressions, and shares)
- Brand recall/recognition via customer and prospect surveys in target markets
- Digital engagement and conversions
- Opportunity pipeline

**What additional measures of success are important to you?**



# PHASE ONE

REBRANDING PLAN

# Timeline – Phase One

Legal & Tax (ongoing)  
Create Message Track  
Co-Branding Aysco/DTS  
Business Cards  
Press Release COBRANDING  
Letter to All Clients

**End of October**

Client  
Communication  
Strategy

**End of November**

Digital Footprint Campaigns Prepared

**End of December**

# Rebranding Plan – Phase One

<b>LEGAL/TAX IMPLICATIONS</b> <i>(To run parallel with all other tasks)</i>	<ul style="list-style-type: none"><li>• MMB to work with Ice Miller on core legal workstreams</li><li>• Trademarking process can take up to 6 months. <i>(we can operate without trademark)</i></li><li>• File amendment to Articles of Organization with Ohio Secretary of State</li><li>• IRS name change notice</li><li>• Notice to Huntington Bank</li><li>• Tax and accounting considerations – to communicate with CSH and keep them in the loop on any changes – MMB to lead</li></ul>
<b>COMMUNICATION STRATEGY</b>	<ul style="list-style-type: none"><li>• Work with marketing agencies to create message track</li><li>• Create letter explaining brand change to current clients and technology partners</li><li>• Create note from CEO to all associates</li><li>• Create Press Release on Co-Branding</li></ul>
<b>PR</b>	<ul style="list-style-type: none"><li>• Business Cards for Eric, John, Rod &amp; Rick (Aysco &amp; DTS Powered by Sage)</li><li>• We will do a press release on Co-Branding</li><li>• The marketing agency will manage the responses from press release</li><li>• John will provide the marketing agency with a list of contacts for all the industry’s magazines and associations</li></ul>
<b>DIGITAL CAMPAIGNS</b>	<ul style="list-style-type: none"><li>• Marketing company to review digital platforms, such as Facebook, Instagram, and LinkedIn, etc.</li><li>• Marketing company will advise us on top 3 platforms and what messages are best for attracting new clients and building brand awareness</li><li>• Create training material for Associates to support and spread same message</li></ul>

# Legal & Tax Implications

- MMB to work with Ice Miller on core legal workstreams.
- Trademarking process can take up to 6 months. *(We can operate without a trademark.)*
- File amendment to Articles of Organization with Ohio Secretary of State.
- IRS name change notice – Important to do, certain clients double check the W-9 info vs. the IRS database and can cause issues *(if not a match, they won't pay you).*
- Notice to Huntington Bank.
- Tax and accounting considerations – to communicate with CSH and keep them in the loop on any changes – MMB to lead

# Communication Strategy

- Create Message Track
  - Create 100 & 200 word messaging story
  - Elevator pitch
- Create a messaging architecture
  - Who we are
  - A positioning statement
  - What we do
  - What value we deliver
  - Our differentiators
- Sales Enablement & Support
  - Letter to current clients & technology partners
  - Create note from CEO to all associates
  - Create PowerPoint presentations
  - Create case studies – The Home Depot and First Energy
- Create Co-Branding Press Release



# PR Campaigns

## PR Activities

- Co-Branding Business cards for Eric, John, Rod, & Rick
- Work with marketing agency to send out press release on co-branding
  - Marketing agency to manage responses
- Outbound mailer to customer and technology/contractor partners
- John will work with marketing agency to provide them POCs for industry magazines
  - Security Sales and Integration
  - Security System News
  - SDM
  - Security Integrator
  - Security Today
  - Security
  - Security Info Watch

# Digital Campaigns

## Digital Activities

- Set up landing pages for
  - LinkedIn
  - Twitter
  - Facebook

This gives us access to billions of potential customers and attraction to new clients and building brand awareness

- Training for Associates
  - App for associates
  - Instructions on following social media landing pages



# PHASE TWO

REBRANDING PLAN

# Timeline – Phase Two

SAGE Brand Change  
letter to Clients  
Launch web sites  
Social Media Releases

**January**

Sales Enablement &  
Support  
Face-to-face client  
meetings

**February**

SAGE Press  
Release  
Internal Events  
(Spirit Week)

**March**

Client Events  
Monthly Campaigns

**First Week of April**

# Rebranding Plan – Phase Two

<b>ACCOUNT-BASED MARKETING</b>	<ul style="list-style-type: none"> <li>• Send letter to announce brand change to SAGE</li> <li>• Face to Face meetings with key clients</li> <li>• Monthly campaigns - Create awareness for our current clients on equipment upgrades and why it is needed. i.e. NVRs Upgrades (windows 10), OSDP, etc.</li> </ul>
<b>SALES ENABLEMENT &amp; SUPPORT</b>	<ul style="list-style-type: none"> <li>• Create Marketing literature</li> <li>• Create phone scripts &amp; messages</li> <li>• Update HR documents and email signatures</li> <li>• Uniforms &amp; truck wraps</li> </ul>
<b>WEB</b>	<ul style="list-style-type: none"> <li>• <a href="http://www.sageintegration.com">www.sageintegration.com</a></li> <li>• Advertise and link speaking events on website</li> <li>• Consolidate traffic on all of our sites and generates reports</li> </ul>
<b>EVENTS</b>	<ul style="list-style-type: none"> <li>• Start to build lists of end users, consultants, etc.</li> <li>• Face to Face meetings with key clients &amp; prospects</li> <li>• Events to announce name change</li> <li>• Hold educational events and bring in subject matter expert speakers</li> <li>• Hold technology events in the key locations, Ohio and Georgia to start</li> </ul>
<b>BUDGET</b>	<ul style="list-style-type: none"> <li>• Marketing Agency - \$60,000 (\$10,000 per month)             <ul style="list-style-type: none"> <li>• Press Release - \$600</li> </ul> </li> <li>• Spirit Week - \$5000</li> <li>• Events             <ul style="list-style-type: none"> <li>• Travel &amp; Speaking Events - \$15000</li> <li>• Ohio - \$1000 &amp; Georgia - \$1000</li> </ul> </li> </ul>

# Account Based Marketing

## Marketing Activities

- Send letter to announce brand change to SAGE
  - Include 3 POCs and Phone Numbers on the letter
  - Send out letter in January 2020, include invite to F2F meeting
  - Create personalized form letters in WeSuite to send out
- Face to Face meetings
  - Rod, Rick, Eric & John will meet face to face with key clients
    - Feb-March 2020 timeframe
- Monthly campaigns to create awareness for our current and potential clients
  - Equipment upgrades, NVR upgrades, OSDP, Card reader technology, Camera technology, Software refresh, Battery replacement
  - April 2020 timeframe

# Sales Enablement & Support

- Create SAGE marketing literature
- Create client phone scripts
- Create on hold phone message
- Update email signatures
- Update Human Resource documents
- Create materials for onboarding new associates
- Order envelopes & letterhead
- Uniforms
- Truck wraps

# Web

- [www.sageintegration.com](http://www.sageintegration.com)
- Increase SEO
- Increase social media activity
- Increase public industry persona by listing speaking events on website
- Create content to drive potential clients to website
- Consolidate website traffic from Aysco/DTS to Sage
- Monitor and measure website analytics



# Events

- Start to build end user & consultant lists
- Attend ISC East in March
- Client events to celebrate new Branding
  - Determine best time to hold events with key clients
  - Ohio & Georgia
  - Target timeframe around or after April 1<sup>st</sup> 2020
- Hold educational events with expert speakers
- Hold technology events in key locations
- Internal launch event at each location
  - Spirit week leading up to event
  - Event signage
  - Procure swag

# Budget

- Marketing Agency - \$60,000 (\$10,000 per month)
  - Press Release - \$600
- Spirit Week - \$5000
- Events
  - Travel & Speaking Events - \$15000
  - Ohio - \$1000
  - Georgia - \$1000

# What's Next?

- Assign tasks to external marketing firms
- Assign tasks to internal associates
- Schedule progress updates to management & board
- Schedule post rebranding evaluation with team