

## Marketing Audit for PEOs

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Audits are never fun, but they are informative.

Whether financial, operational, or with the IRS, an audit provides one clear benefit: it provides the time to look beneath the noise of day-to-day business and try to figure out what is going on beneath the surface.

This is also the benefit of a periodic marketing audit. It is easy to build up an unorganized library of marketing material that is guaranteed to present a confusing and unproductive view of your business. Continual edits, service changes, and time slowly break down the effectiveness of your marketing communications.

**Every communication with clients, employees, and prospects is an opportunity to position your PEO for growth and increased client satisfaction.** It's time for a marketing audit.

### Communication is Marketing

One of the things you will probably discover is that there is a lot more communication taking place than through your traditional marketing channels. **Every time you communicate, you not only convey your intended information, you also create an impression in the recipient's mind of yourself and your PEO.**

Here's a brief checklist of communications to include in your review. Every company has its own special cases, but in general, a marketing audit should minimally include:

- Web site;
- Sales collateral;
  - Sell sheets
  - Proposals
  - Presentations
- Sales communications (e-mail, letters, etc.);
- External articles;
- Client communications;
  - Client e-mails
  - Client Web portals
  - Forms (both internal and from vendors)
- Vendor communications; and
- Phone communications.

Not all of these are usually considered "marketing." **The truth of the matter is that clients, employees, and prospects put together their impression of your PEO by all of their interactions, not just the intended ones.** A badly worded letter from a vendor directly undermines the image your PEO has been working to convey in all your other marketing communications.

Here are some issues to keep in mind as you conduct your marketing audit.

### Branding, Look, and Feel

**It is easy to become carried away with trying to make everything your PEO produces have the same rigid "look and feel."** Every company has different preferences on how specifically everything should be presented on a page: colors, logos, fonts, etc. Marketing companies are great resources for creating these layouts, but there's no reason to put *everything* under their control. It's expensive and can put unneeded limitations on the effectiveness of your communications.

Some communications need to be more "polished" than others. Your sales and client collateral and Web site are well worth the time and effort to get looking right. Their look should be reflected in your other communications as well.



**Try to be consistent in your language and layout.** At first glance, does a letter and e-mail from your PEO look like they come from the same company? Using your logo consistently and choosing a font goes a long way towards making your communications uniform. Someone should be able to recognize a letter immediately as coming from your PEO.

### Communicate in the Language of Your Audience

Beyond English and Spanish, do you describe the benefits of using your PEO in terms that are the common language of business: profit, loss, efficiency, savings, growth, risk, and opportunity?

**Acronyms are dangerous.** When talking to others in this business, we use acronyms every day to speed up communications. To someone not familiar with what the acronyms mean, they confuse or even convey an unintended meaning. ERISA, FSA, POS, PPO, LTD, and STD are all alphabet soup until you give the reader the decoder key. "Employee leasing" is a vague and a somewhat threatening term, especially if you are an employee. Your audience will probably be able to eventually piece together what you mean, but why not help them out?

When you don't know who is going to read your communication, always initially spell out terms in every document. When you are talking about your professional employer organization (PEO), always assist your audience in translating our acronym-filled business.

### Fitting the Pieces Together

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Every communication should communicate three things:

- A clear, understandable message from your business to theirs;
- A good reflection of your PEO's value; and
- Consistency with your other messages.

**Remember, communications meant for one person are often read by people you never intended to see them.** Your current sales collateral often ends up in your client's mail. Make sure what you are telling your *prospects, clients, and employees* makes sense when they are looked at together. A sales message focused on cutting administrative costs might have a different impact to employees who depend on your efficient administration of their benefits and payroll.

Additionally, people change "audiences" over time—prospects become clients, employees refer prospects. Make sure your PEO's value proposition holds together.

### Value Communication and Solution Selling

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Highlight the business solution your PEO provides, not just the services you deliver. "Connect the dots" for your prospects. Always try to remember that your services are simply a way to deliver a good customer solution. Lead with the business solution and support your claims with your services.

What does your PEO do for its clients? What sets you apart from both your *direct competitors* (other PEOs) and your *indirect competitors* ("do it yourselves," payroll service providers, or the local health insurance broker)?

### Prospects Like to See Themselves

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One of the best ways to improve your prospecting communications is to ensure your prospects can "find themselves." If prospects can see similar industries or similar business problems being clearly solved in your communications, they will immediately feel more comfortable with your solution.

This can be done through references, case studies, business affiliations, or simply pictures. **Buying a proven solution to a problem is significantly more comfortable for a prospect than crafting a new solution.** It is always scariest for prospects to feel as if they are your first client in their particular field. Let your prospects see your successes and they will be more comfortable with your solution.

### Communication of Strength

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Prospects, clients, and employees all want a strong ally in your PEO. Do your best to show your strength.

What trade organizations do you belong to outside in your community? The business organizations your PEO belongs to

indicate quite a bit about what kind of business you are. Are you national or local? Are you focused on specific industries? Are you involved in your community?

There is no right answer to how to portray your affiliations, other than they should reflect your strength and trustworthiness. A strong PEO is proud of its affiliations, people, and community. Is your membership in NAPEO evident on your homepage and sales collateral?

Is the strength and experience of your leadership team accessible on your Web site? PEOs are a people business, so use that to your advantage—show off your people.

### The Sound of Your PEO

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Even with the rise of e-mail and online communications, the phone is still the most powerful communication tool. **The immediacy and interactivity of a phone call makes it the most difficult form of communication to control.**

When you call your main number, are you greeted the way you expected? Is there a professional and inviting polish to your call?

What happens when a call is misdirected? What happens when a call meant for your payroll department ends up in your sales department?

Try a little test. Call your external number from your cell phone and listen carefully to how your PEO sounds. If you're feeling adventurous, ask for your sales department and start asking questions related to payroll. See how long and how well they handle the confusion and get you to the person who can help.

In telephone support, a little bit of training goes a long way. Being able to convey a welcoming and inviting impression, even when the call goes wrong, has an immediate impact on the caller's perception of your PEO. Have a standard company phone greeting and take the time to create a good impression.

### Outcomes of the Marketing Audit

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The purpose of the marketing audit is not to proofread every marketing communication; it is to see if you've successfully put together the marketing puzzle. The missing pieces become obvious when you take the time to step back and look at the whole puzzle.

**No company's marketing is perfect; business changes too quickly. But a successful marketing audit should allow your PEO to address the most obvious shortcomings and plan for the steps ahead.**

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