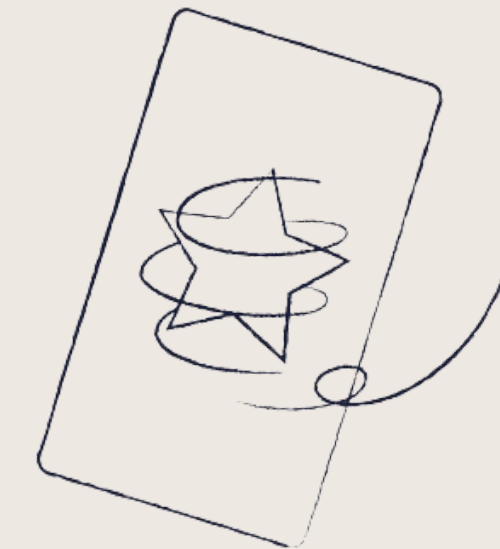
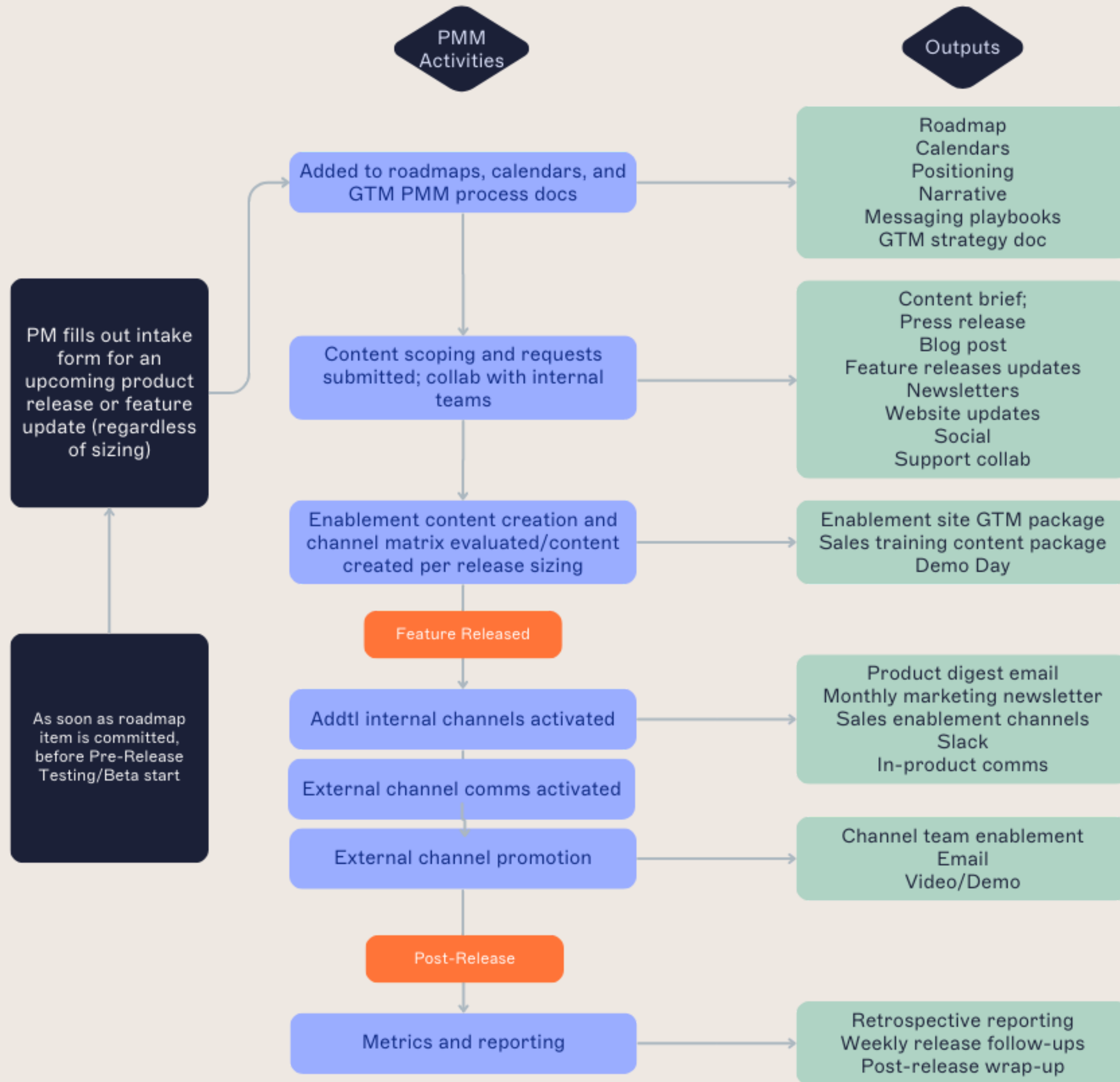


Journey of a Product Release

Jen Brinkley
brinkljr@gmail.com



Product Release Flowchart + Outputs

Salesforce Integration GTM Strategy

Last Updated: Nov 12th
SPOA: PMM: Jen Brinkley; PM: Michael ~~Quinn~~
Early Access: Dec 2024; GA: Jan 2024
Key Documents:
Asana Board/Project
Product Spec - > here, Lucid chart

This document will outline how we will position SF Integration, our proposed messaging hierarchy, and our initial marketing strategy outline. Overview, objectives, key dates, product specs, ~~etc~~ related to the feature are captured in Asana in PMM's [Product Release Roadmap](#).

Goals - Product

1. 25 ~~tenants~~ complete connection flow
2. 15 tenants apply SFDC lists to ~~signatures~~

PMM:

1. Marketing Advisory Group testing and usage
a. 18% of group successfully tests the connection flow and apply SFDC lists to ~~signatures~~
b. Provides product feedback for GA + ~~iterations~~
2. Engagement with marketing GTM content increases from previous releases by 8%
a. By 12/31/2022, 30% of teams have used a x related feature within the past 90 ~~days~~
3. Goal

Competitive Landscape

We have evaluated competitor analyses and customer feedback to understand where we fit into the competitive matrix. The primary differentiator across all competitors will be Salesforce vs ~~HubSpot~~, however we also want to recognize how our tools and features compare at the product level. Below are summary findings that highlight our competitive advantage.

Competitor	Benefits Promoted	Exclaimer advantage
Moldessa - Integration with HubSpot	personalize their email communications connect your lists to your Moldessa campaigns and ensure that every email contains the most relevant content for your contacts.	Integration with Salesforce (Largest CRM by market share; Most common CRM used amongst our customer base)
OpenSource - Integration with HubSpot	<ul style="list-style-type: none"> Target email signature content based on HubSpot attributes Capture leads into HubSpot automatically when people interact with banners Centrally manage signatures within HubSpot sequence tools 	Integration with Salesforce (Largest CRM by market share; Most common CRM used amongst our customer base)

In summary, we plan to lean into the following key competitive advantages:

1. Seamless Integration with largest CRM
Description: Easily connect Exclaimer with Salesforce to effortlessly access and manage recipient lists, ensuring your messaging hits the mark every time.
2. Precision and Control
Description: Maintain accuracy by syncing recipient lists regularly, granting the power to apply or remove signatures at an individual or domain level, keeping your messaging relevant and impactful.

Positioning & Messaging

Our positioning centers on leading with refining an audience to tailor campaigns in email signatures to a targeted audience linked from Salesforce.

This messaging hierarchy incorporates feedback received from Sales and Product. We also plan to get direct feedback from customers through the new Marketing Advisory Group (if able in time) ~~and~~ will continue to refine this.

Overview:

<i>What is it and how does it help customers?</i>	Select from existing SFDC lists of contacts, opportunities and accounts when identifying recipients of a certain signature
<i>Customer Problems and Experiences</i>	Customers can't define recipients of signatures outside of an internal / external indication

Key Features:

Authorize Exclaimer to connect (and disconnect) with SFDC from within the Exclaimer product (Read only)
Allow Exclaimer to ingest list of contacts, accounts and opportunities that exist within SFDC
Ensure ongoing accuracy of lists via sync on a determined cadence (likely daily)
Allow users to apply a specific signature to ingested list(s) of contacts, accounts and opportunities that exist within SFDC (at individual contact and domain level)
Allow users to remove/unlink lists from signatures.

Customer Benefits:

1. Seamless Integration: Easily connect Exclaimer with Salesforce to effortlessly access recipient lists, ensuring your messaging hits the mark every time.
2. Targeted Signatures: Tailor signature content to specific lists and opportunities within Salesforce, boosting engagement with personalized communication.
3. Precision and Control: Maintain accuracy by syncing recipient lists regularly, keeping your messaging relevant and impactful.
4. Enhanced Engagement: Directly address the right audience, increasing the likelihood of your message resonating and fostering increased engagement with your recipient based targeted lists.

Positioning: This feature facilitates precise targeting and personalization in email signatures, ensuring that the right message reaches the right audience within the Salesforce ecosystem. By seamlessly integrating with Salesforce and empowering users to curate specific recipient lists, it elevates the impact of every interaction, fostering engagement and resonance.

	Connect with intent, resonate with impact. Seamlessly integrate Salesforce recipient lists into your email signature campaigns and watch your outreach soar. With precision targeting and insights, your audience will feel seen, heard, and valued. Unlock a new channel today with Exclaimer.
Persons (if applicable)	Marketing
Tagline/s	<ul style="list-style-type: none"> Unleash your Salesforce data's potential with Exclaimer's latest integration! 🚀 Personalize your email signature with precision, powered by our new Salesforce integration. Discover the ultimate duo for targeted email signatures and unlock the true potential of your Salesforce data. Unlock the power of your salesforce data + email signatures Precision in every signature: Tailor your email signature content with Salesforce integration.
Reasons to Believe	<ul style="list-style-type: none"> Data Empowerment: Leverage the wealth of powerful recipient list data in Salesforce to refine and enhance your email signature content. User-Defined Targeting: Define and target recipients based on attributes that matter to you, putting you in control of your signature-centric content.

	<ul style="list-style-type: none"> Effortless Integration: Connect and disconnect with Salesforce directly within the Exclaimer product, ensuring a smooth and user-friendly experience. Daily Sync for Accuracy: Keep your lists up to date with automated, daily syncs, ensuring the ongoing accuracy of your targeted campaigns.
Supporting Messages	<ul style="list-style-type: none"> Say goodbye to one-size-fits-all email signatures and hello to personalized signatures with our integration with Salesforce. Enjoy seamless control and targeted messaging with every email you send. Get started today and start seeing results! We're excited to announce that with our Salesforce integration, every email you send can now be tailored to perfection. No more boring, one-size-fits-all signatures. With personalized messaging that packs a punch, you'll be able to connect with your audience like never before. Give it a try and amplify your email game today! 🚀 Precision targeting, personalized impact. Seamlessly integrate your Salesforce lists and amplify your email with powerful, personalized signatures. Ready to boost your brand's impact? Stand out in your campaigns by harnessing the power of targeted recipient attributes, a foundational element for any marketing campaign.
Relevant Claims	<p>Authorize and Disconnect: Empower users to seamlessly connect and disconnect Exclaimer with SFDC directly within the product.</p> <p>Data Ingestion: Ingest lists of contacts, accounts, and opportunities from Salesforce, amplifying the potential for targeted email campaigns.</p> <p>Ongoing Accuracy: Daily syncs maintain the accuracy of lists, ensuring that your campaigns are always based on the latest information.</p> <p>Signature Application: Apply specific signatures to ingested lists at both individual contact and domain levels for precise targeting.</p> <p>User Control: Remove or unlink lists from signatures, putting users in complete control.</p>

Launch Strategy

Our marketing strategy aims to drive customer interest and trial. We will focus on promoting to our Marketing persona to strengthen our narrative of 'unlocking a new marketing channel' as well as building up our product to be attractive to our Marketing buyers. Our strategy is centered on moving customers through the marketing funnel by the following methods:

Channels & Tactics

We will implement our strategy by activating select direct-to-customer channels. Additionally, a key focus will be on empowering and creating staff advocates to promote our new feature. As part of this, we will bring them along in the process to build advocacy through the following tactics:

1. Staff Training
a. We will partner with Sales Enablement to build Salesforce Integration into their curriculum, sales meetings, content, and ~~more~~.
2. Consistent Promotion Integration
a. We will continue our partnership with the Customer Success team to build momentum to promote the Salesforce Integration into appropriate activities like ~~Q&A~~.
b. Ongoing touch points will be scheduled to build spotlights into ongoing staff comms (like the Monthly Marketing Newsletter)
3. Targeted Empowerment
a. A comprehensive package of collateral will be created and shared with staff to use on an ongoing basis, with unique assets to fit all staff ~~groups~~

Marketing Funnel	Channels
Build Excitement & Awareness	Email <ul style="list-style-type: none"> Pro plan marketing customers alerting of new feature Standard plan marketing customers to upgrade Organic Social Media : <ul style="list-style-type: none"> LinkedIn announcement FB announcement X announcement

	Sales Enablement <ul style="list-style-type: none"> Inclusion of feature in Pro/Upgrade LP Create individual LP for Salesforce Integration (vs individual one-sheets) One sheet and extended sheet for site Other website updates Training <ul style="list-style-type: none"> Demo Day Webinars
Drive Trial	Email <ul style="list-style-type: none"> Pro plan marketing customers alerting of new feature Standard plan marketing customers to upgrade In-Product <ul style="list-style-type: none"> Announcement - notification center by then? Upgrade UX icons FAQs - KB Videos - in OR sequences and/or on LPs Interactive Product Tour - update to include 'Integration' section

Product Release Intake Form

Product Release Intake Form

Please submit this form with as many details as possible. Most all are required fields in order for us to start working on your release. If you are unsure about some of these fields, or have a piece that is missing or coming up soon – please connect with our team so we can get your form submitted while we await the final piece/s for full submission. #content-request-pmm

Name *

Enter your name

Product Feature Name *

Example: Photo Sync

Enter your answer

Release Type *

Please indicate if this is for Beta or GA (or submitting info for both if close timelines)

☐ Beta

☐ GA

Tentative Release Date *

This can be tentative, but please give an estimated date (or beginning/middle/end of month). If submitted for both Beta and GA, please add Beta date first and we will connect with you on GA date.

Enter date range

Description: What is it and how does it help customers? *

Example: Customers can now automatically add professional headshots to their signature templates. Enabled from the "Manage User Data" section of the "Configuration" options, photos assigned to employees in either Azure Active Directory or Google Directory are automatically synced and applied to their signature.

PM(M) In-Product Requests

OverviewListBoardTimeline5 more...+

+ Add task

Filter

Sort: 1

Hide

Task name

In-Product Requests PMM

Customer Survey2

In-product rebrand GA4

Photo Sync GA5

Add task...

+ Add section

In-product rebrand GA

Location/Placement:
Home page announcement

Duration?:
2 weeks/served up once

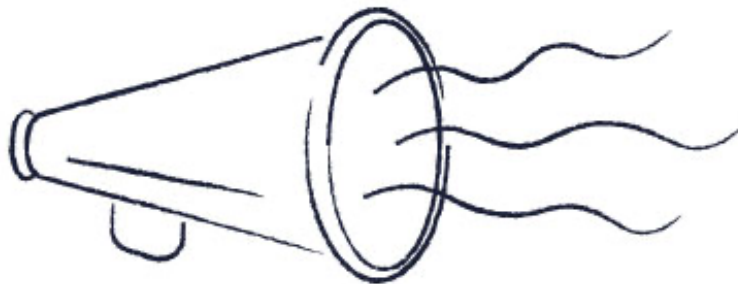
Copy/Message:
Exclaimer, amplified. (centered)

We're thrilled to unveil a new look in our platform as part of our recent rebranding. We optimized graphics and text to make them more accessible and reflect our brand identity.

Don't worry, this doesn't affect our email signature software. It may look a little different, but it still has the same features you know and love.

Start Exploring (centered)

When is this needed by?:
Aug 22, 2023



Veronica M.

16:55

@Jen Brinkley

👏👏

Thanks for keeping the channel team up-to-date with marketing stuff 😊

@Jen Brinkley

Fantastic work from Jen, sharing tonnes of updates around new features and checking in with the Support team in case any customer issues have started to roll in.

Love the work!

❤️ 4 🍌 1 🥰 1 😊



Jen Brinkley

10:09

🚀 [New Feature Announcement] Photo Sync is live! 🚀

Customers can now automatically add professional headshots to their signature templates. Enabled from the 'Manage User Data' section of the 'Configuration' options, photos assigned to employees in either Azure Active Directory or Google Directory are automatically synced and applied to their signature. No more manual uploads and image sourcing.

Photo Sync is available on our **Pro plan** and can be discussed in conversations with both personas (IT and Marketing).

Customer benefits:

- **Strengthens connections** by personalizing and *humanizing* the signature with their photo
- **Builds trust and credibility** with customers. Research shows that human faces are powerful visual cues for enhancing trust.
- **Creates a consistent brand image** by reinforcing what their brand stands for and helps their audiences identify their company over email.

Resources and information:

- [GTM package](#) on enablement site
- [LinkedIn post](#) (show some love!)
- [Blog post](#)
- Knowledge Base articles ([Google](#) + [Microsoft](#))

Questions? You might find the answers you're looking for in the KB articles or in the enablement site content. Feel free to reach out to the PMM team with additional questions. Please use all normal escalation processes for any issues.

Social Feeds GTM Checklist

☆

On track

6

Share

Overview

List

Board

Timeline

Calendar

Workflow

Dashboard

Messages

Files

Gantt

+

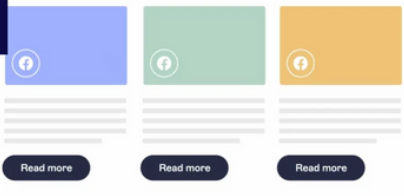
+ Add task

Filter

Sort: 1

Hide

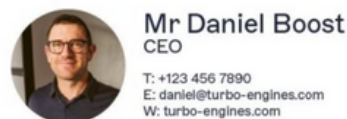
Task name	Assignee/s	Due date	Progress	Completi...
<div>✔ Social Feeds 2</div>	<div><div></div><div></div></div>	Jan 9 – 10	Complet...	
<div>✔ GTM Strategy Plan Finalized</div>	<div><div></div></div>	Sep 8, 2023	Complet...	
<div>✔ Content Brief Assets Created + Finalized</div>	<div><div></div><div></div></div>	Dec 13, 2023		
<div>✔ GA Confirmed and Launched</div>	<div><div></div></div>	Jan 9	Complet...	
Add task...				
Planning, Strategy, and Process Related				
<div>✔ Added to Product Release Calendar</div>	<div><div></div></div>	Sep 6, 2023	Complet...	Sep 6, 2023
<div>✔ GTM Launch Strategy & Plan 3</div>	<div><div></div></div>	Sep 8, 2023	Complet...	Sep 9, 2023
<div>✔ 'What's New' Product Updates 3</div>			Complet...	
<div>✔ GTM Package on Enablement Site 1</div>	<div><div></div></div>	Sep 20, 2023	Complet...	
<div>✔ Slack Announcement 1 2</div>	<div><div></div></div>		Complet...	
<div>✔ Official GA Confirmed</div>	<div><div></div></div>	Jan 9	Complet...	
<div>○ Product Digest Email Inclusion</div>	<div><div></div></div>		In Progr...	
<div>✔ Monthly Marketing Newsletter Inclusion</div>	<div><div></div></div>	Jan 3	In Progr...	



 Exciting News!

turni

Boost



New year, new email signature! 🚀

e! 🚀

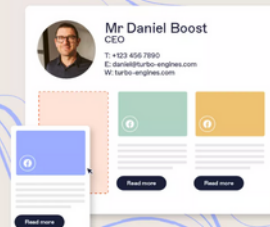
ere 🖱️ <https://lnkd.in/eW-MNZay>

Strategy #Newfeatures #ExclaimerEmail



Boost your social media with Social Feeds for email signatures

Copy Link    



listened. You can now boost your social media with Social Feeds for
Direct your audience to content on your Facebook feed and

[portal](#)

Supercharge your signatures with your Facebook feed, turning every email into an opportunity to boost your socials.

- *Expand social reach and engagement* by automatically inserting your last three posts in your signatures.
- *Measure performance* with the new Social Feeds analytics and analyze how signatures convert recipients to click-through and read posts.

Dismiss

Previewing  

Expand your social reach: Increase follower count and expand the audience for your Facebook social media content through your business emails.

Amplify engagement: Drive greater click-through-rates with more visual and interactive signature designs.

Measure the results: Improve the performance of your social media efforts with new insights provided in the Social Feeds Analytics dashboard.

Note: We are launching with Facebook to start, hopeful for other networks in the future.



The screenshot displays the Exclaimer software interface, specifically the 'Design' tab for creating a Facebook social feed. The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons and labels for Home, Configuration, Manage User Data, Manage Mail Flow, Outlook Signatures, Exchange On-Premises, Integrations, Signatures, Signatures Tester, Analytics, Account Settings, Troubleshooting, and Features Overview.
- Top Bar:** Shows the 'Design' tab and a 'Save' button.
- Design Area:**
 - Tool & Fields:** A dropdown menu.
 - Social Media:** A dropdown menu.
 - Social Feeds:** A dropdown menu.
 - Facebook Feed:** A dropdown menu.
 - Legal & Compliance:** A dropdown menu.
 - Images & Icons:** A dropdown menu.
 - Calendars:** A dropdown menu.
 - URL Codes:** A dropdown menu.
 - Feedback:** A dropdown menu.
- Preview Area:** Displays a Facebook Social Feed template with fields for:
 - DisplayName
 - JobTitle
 - Telephone
 - Email
 - LinkedIn
- Example output:** Shows a completed banner for 'Ms Aishlynn Banner, Marketing Director' with contact information and a signature.
- Bottom Bar:** Includes a language selector (English - UK) and a status bar with 'Terms & Conditions' and 'Privacy Statement' links.

Great for Marketing teams



Sales Enablement Initiative Examples

1

Sales playbook highlighting key features, benefits, and objection-handling tactics; create 'GTM package' which includes demo videos, internal sales decks/one-sheets in addition to externally facing sales enablement pieces that can be used in follow-ups.

2

Conduct internal training sessions for the Sales Team to familiarize them with SmartShip.

3

Demo Day types of structure - cadence TBD based on product release volume; inclusion in various sales meetings as well as slack channel announcements.

4

Continuous communication and feedback loops in place; 'enablement pod'

Jen Brinkley

🇺🇸

15:47

I have more updates and shout outs - a lot happening in ,our attention to these messages.

We will be covering all things NEW in product at the Demo Day next Friday (details above), but wanted to call out some things on the enablement site.

In case you missed it (+ some visuals in the PDF):

❤️ We launched a blog post and socials around 'New Year, New Signature'

- This covers new and upcoming features and gives you a quick overview of what they are and benefits of each. These are some powerful marketing focused features, so key to bring up to any marketing contacts.
- There is a link to the blog post in the promo pop-up you see when entering the [enablement site](#)

⚡ Social Feeds is LIVE

- Dedicated post with everything you need to know a couple of posts up
- See any issues with the feature? Please reach out to Scott Rulton and add me

📄 Several updates to enablement site content

- Updated Fact Sheets with all new and upcoming (near future) features
- Security Updates
- Whitepapers and infographics added
- Product page updates with new features (Campaign Management coming soon)
- Video Library has all updated/re-branded videos (linked on new Videos page)

PDF ▾

What's New - Enablement.pdf

PDF

Veronica M.

19 Dec at 09:03

@Jen Brinkley

Hard worker and helpful, is only 2 of the many words to describe you, your support to our distribution team is much appreciated 🌽🌽🌽🌽🌽 Enjoy your holiday

George Thomson

🇺🇸

07:03

@Jen Brinkley

Awesome just Awesome , thank you for the One Pager 🌽🌽🌽🌽🌽

❤️ 1

😊

Josh Queenton

11:05

FYI I was able to book a meeting today by sending the brochure in the enablement page that was shared with us. I am a firm believer in being able to send a asset to prospects to read when emailing them. Thank you both 😊

JL

🇺🇸

10:23

Amazing. Thanks for the update @Jen Brinkley . Great to see traction already. ❤️

To Joey's point I think this site solves a really big challenge for any business. The 'on-demand' culture of today means most people want to learn in the very moment they to and want instant access to an answer. This site does exactly that.

Amazing work again.

Shout out to @Jen Brinkley for creating the exclaimer enablement site!!! Found the assets I needed to send to a prospect with easy and booked a meeting out of it!!!!!! Big up!!! 🌽🌽🌽🌽🌽

sales_and_marketing_colab ▾ 93 🔊 ▾ 🔄 Try canvas

🔖 4 Pinned 🚀 Sales Decks & Demo Tal... 🧑 Marketing & IT Persona... +

Jen Brinkley

14:21

[NEW] Demo Day invite just hit your inbox* ❤️📧

This is a new initiative to showcase new and upcoming product features. Cadence of these will be determined by product release volume and updates, at least on a quarterly basis. We will review all upcoming (and recently launched) features with a 'show and tell' with our Product team and have collaborative discussions around messaging of these to ensure that all team members are well-equipped to represent these features effectively.

**If you didn't receive an invite, please message me and I'll add you.*

Why we're doing it:

- Knowledge Transfer: Ensure everyone is well-informed about the latest product updates.
- Alignment: To align teams on messaging, positioning, and understanding of the new features.
- Collaboration: To foster collaboration by encouraging discussions and sharing insights.
- Additional Channel: Everyone digests information differently and in different channels. We want to ensure we're reaching the vast majority of team members with the pertinent product updates.

(edited)

Demo Day_Jan-24.png ▾

Exclaimer Quarterly Platform Update

FY24Q2

Internal Only

Table of contents

[Updates on Sales Enablement Site](#)

A list of updates to the enablement site (updated versions of materials, new pages, and more)

[Recent Releases](#)

Key information and overview of recent releases

[What's Coming Next](#)

How new releases will propel our business strategy forward and solve customer problems

[Narrative & Messaging](#)

Clear workflows for customer business growth



Social Feeds (Facebook feed to start)

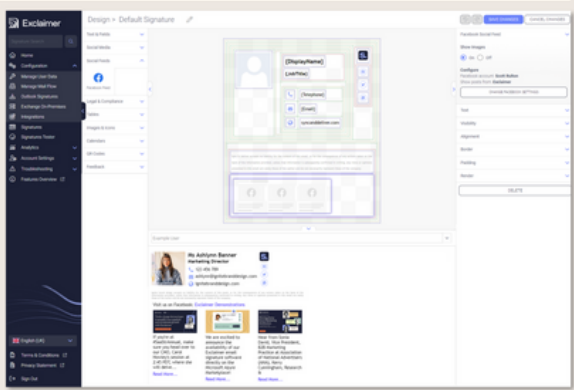
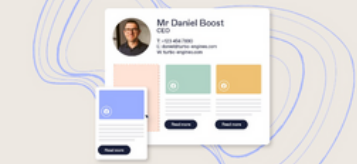
A boost for your socials. Supercharge social media engagement with every email sent.

Expand your social reach: Increase follower count and expand the audience for your Facebook social media content through your business emails.

Amplify engagement: Drive greater click-through-rates with more visual and interactive signature designs.

Measure the results: Improve the performance of your social media efforts with new insights provided in the Social Feeds Analytics dashboard.

Note: We are launching with Facebook to start, hopeful for other networks in the future.



Great for Marketing teams

What's Coming Next

NOTE: Features and timelines are subject to change

Amplify *connectivity* with vCards

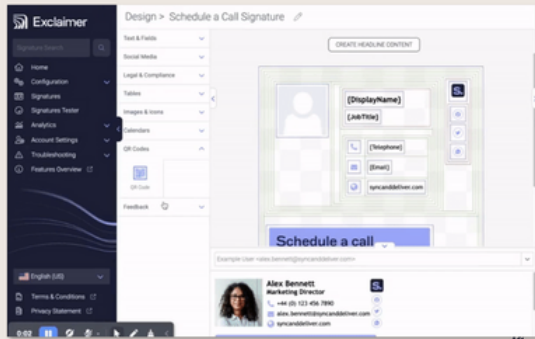
Ignite the power of digital business cards.



Amplify *connectivity* with our new vCard feature, making the sharing of contact details smoother than ever before. Seamlessly connect and leave a lasting impression with every email you send.

- Share contact information easily
- Ensure accuracy
- Streamline communication

Resources:
[Enablement Site materials](#)
[Blog post](#)



Pro Plan

NARRATIVE: Why brand trust matters more than ever

BUYER ROLE(S): MARKETING



Theme Asset Map

	First share one or some of the following:		Then		Lastly	
	CONSIDERATION		DECISION		PURCHASE	
Primary	Whitepaper : Maximizing ROI in a Competitive Landscape	Webinar : ABM strategies: How to max your owned channels	Product showcase demo Navattic Tour OR animation	Infographic – How to buy email signature management software	Apple Print Case Study	Infographic – What to expect with Exclaimer (the now what?) – easy to deploy message Include awards, etc.
Secondary	Blog article : tech trends and strategies		On-demand demo	Pitch Deck + Infographic – Email Sig. Use Cases	Signature Management Calculator Link OR use infographic version of calculator	G2 , Trust Radius Customer Quotes – IT Specific (potential industry specific) Customer Logo Slides
	Whitepaper : Your 2024 Growth Strategy	eBook : Rethinking email signatures (even though this says IT)				

communication is the future

ing features that impact all, especially marketing professionals

We're excited to unveil powerful new features that will give businesses a competitive edge. In today's fast-paced business world, staying ahead means adapting to the changing landscape of communication channels and customer expectations.

Build lasting relationships, one interaction at a time.

Our upcoming features will enable customers to create **authentic, personalized 1:1 connections** with their audience, resulting in unparalleled engagement.

In a world where digital communication has become cluttered and impersonal, it's time to rediscover meaningful interactions.

Connect to CRMs to target specific lists and contacts

Easily manage campaigns

Drive social media engagement and visibility by connecting feeds

Cut through the noise, connect genuinely, and thrive in the digital era.

Metrics + Reporting (Examples)

Customer Feedback: Collect feedback to gauge satisfaction and identify areas for improvement.

Awareness:

- Metrics: Website traffic, social media reach, impressions.
- KPIs: social media engagement, website visitors.

Interest:

- Metrics: Click-through rates (CTR) on content (newsletter, blog).
- KPIs: Content shares, conversion rates; filling out a form, downloading additional content, or any other goal relevant

Consideration:

- Metrics: Time spent on website.
- KPIs: Lead gen (form submissions), demo requests.

Intent:

- Metrics: trial sign-ups.
- KPIs: Conversion rates, trial-to-paid conversion rates.

Purchase:

- Metrics: Sales revenue, average transaction value, upgrades
- KPIs: CAC, CLV

Post-Purchase (Retention and Advocacy):

- Metrics: Customer satisfaction (NPS), repeat purchase rate.
- KPIs: Customer retention rate, referral rates.

Tools and Methodologies:

Google Analytics

Social Media Analytics Tools

Pardot

Salesforce

CRO Tools

Customer Feedback and Reviews Platforms (e.g., Trustpilot, G2 Crowd

Product Analysis Tools

