

Collateral Matrix – Guidelines V. 4.0



Company Name: <Enter company name>

Product Name: <Enter product name>

- **Date:** <Enter date>
- **Contact:** <Enter your name>
- **Department:** <Enter department name>
- **Location:** <Enter location>
- **Email:** <Enter email address>
- **Telephone:** <Enter telephone number>

Document Revision History:

Date	Revision	Revised By	Approved By
<Enter date>	<Revision #>	<Enter your name>	<Enter name>

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1. Introduction

1.1. Document Objective

This document describes the various marketing communications collateral that may be produced in support of marketing the product/company.

2. The Collateral Matrix

2.1. Section Objective

This section describes the marketing communications collateral matrix.

2.2. Marketing Communications Collateral Matrix Glossary

- **Collateral:** Name of the collateral document.
- **Audience:** Intended audience of the collateral document.
- **Key MarCom Objectives:** Directives of what the collateral document aims to achieve and is measured by.
- **Key Messages:** The argument, idea or information the collateral document aims to convey to the intended audience.
- **Format:** The commonly accepted print format in North-America.

2.3. Marketing Communications Collateral Matrix

See below.

Collateral	Audience	Key MarCom Objectives	Key Messages	Format	Owner	Deadline
Case studies	<ul style="list-style-type: none"> • Journals and newspapers • Prospects • Sales channel 	Communicate success in stages: <ul style="list-style-type: none"> • Complete story • Post implementation benefits • Why beta client selected the product 	<ul style="list-style-type: none"> • Distinctive competence • Key messages to be honed as work is initiated on each piece • USP (unique selling proposition) 	Casual collateral on company letterhead until product 75% complete, then four color glossy version		
Company executive biographies	<ul style="list-style-type: none"> • Journals and newspapers • Prospects • Sales channel 	<ul style="list-style-type: none"> • Establish company credibility • Impress audience with skill set and level of executive experience • Inform audience about the company 	<ul style="list-style-type: none"> • Distinctive competence • Present key executives and provide biographical information which supports business strategy 	Front and back on company letterhead		
Company presentation (PowerPoint) (PMTK)	<ul style="list-style-type: none"> • Analysts • Industry experts • Journalists • Prospects • Sales channel 	<ul style="list-style-type: none"> • Establish company as successful entity with a purpose (vision, mission, leadership, and value.) • Establish company credibility • Inform audience about the company 	<ul style="list-style-type: none"> • Company background • Corporate mission statement • Distinctive competence • Key products and services 	PowerPoint and printed handouts		
Company presentation folder	<ul style="list-style-type: none"> • Journals and newspapers • Prospects • Sales channel 	<ul style="list-style-type: none"> • Establish company as successful entity with a purpose (vision, mission, leadership, and value.) • Establish company credibility • Inform audience about the company 	<ul style="list-style-type: none"> • Distinctive competence • Graphical articulation of new company identity and brand 	Four color pocket presentation folder		
Company profile (PMTK)	<ul style="list-style-type: none"> • Journals and newspapers • Prospects • Sales channel 	<ul style="list-style-type: none"> • Establish company as successful entity with a purpose (vision, mission, leadership, and value.) • Establish company credibility • Inform audience about the company 	<ul style="list-style-type: none"> • Company background • Corporate mission statement • Distinctive competence • Key products and services 	Front and back on company letterhead		
Company reference client list	<ul style="list-style-type: none"> • Journals and newspapers • Prospects • Sales channel 	<ul style="list-style-type: none"> • Establish company credibility 	<ul style="list-style-type: none"> • Company is successful because solves market problems in target markets 	Front and back on company letterhead		

Collateral	Audience	Key MarCom Objectives	Key Messages	Format	Owner	Deadline
Interactive demo: • CD-ROM version • Web version	• Journals and newspapers • Prospects • Sales channel • Web surfers	• Clarify any areas of confusion about product For both versions of demo: • Generate interest in learning more • Present product key features and benefits	• Distinctive competence • Key messages to be honed as work is initiated on each piece • USP (unique selling proposition)	• CD-ROM • Website		
Non-technical white paper	• Business decision makers (BDM)	• Generate strong interest in implementing this solution	• Distinctive competence • Product value and ROI • USP (unique selling proposition)	Company letterhead		
• Presentations for press tour • Presentations to introduce product to sales channel	• Journals and newspapers • Sales channel	• Inform and excite journals and newspapers about the product, resulting in press willingness to do a product review or write an article about the product • Inform and excite sales channel about the product and potential sales it can generate for them	• Distinctive competence • Key messages to be honed as work is initiated on each piece • USP (unique selling proposition)	PowerPoint and printed handouts		
Press releases: • Sales channel relationship • Product launch announcement	• Journals and newspapers • Sales channel	• Alert sales channel to product • Clarify relationship • Create media hype around product launch	• Distinctive competence • Key messages to be honed as work is initiated on each piece • USP (unique selling proposition)	Company letterhead		
Product backgrounder (PMTK)	• Analysts • Industry experts • Journalists • Prospects • Sales channel	• Inform of key features and benefits • Overview of market, product and company	• Distinctive competence • Product value and ROI • USP (unique selling proposition)	Company letterhead		

Collateral	Audience	Key MarCom Objectives	Key Messages	Format	Owner	Deadline
Product brochure	<ul style="list-style-type: none"> • Business decision makers (BDM) • Journals and newspapers • Prospects • Sales channel 	<ul style="list-style-type: none"> • Create product awareness • Create understanding about market gap filled by product • Establish credibility • Satisfy questions on basic features and benefits from business and technical decision makers 	<ul style="list-style-type: none"> • Basic specifications and technical requirements • Company information • Key features and benefits • Market problem solved • Positioning statement • USP (unique selling proposition) 	Brochure – four color, double-sided, printed in four colors on gloss paper and folded		
Product datasheet	<ul style="list-style-type: none"> • Engineers • Technical decision makers (TDM) 	<ul style="list-style-type: none"> • Demonstrate product's overall technical compatibility with customer technical needs and technical environment 	<ul style="list-style-type: none"> • Advanced specifications and technical requirements • Product architecture 	Brochure – four color		
Product presentation (PowerPoint) (PMTK)	<ul style="list-style-type: none"> • Analysts • Industry experts • Journalists • Prospects • Sales channel 	<ul style="list-style-type: none"> • Create product awareness • Create understanding about market gap filled by product • Establish credibility • Satisfy questions on basic features and benefits from business and technical decision makers 	<ul style="list-style-type: none"> • Basic specifications and technical requirements • Company information • Key features and benefits • Market problem solved • Positioning statement • USP (unique selling proposition) 	PowerPoint and printed handouts		
Reviewer's guide	<ul style="list-style-type: none"> • Analysts • Industry experts • Journalists 	<ul style="list-style-type: none"> • Create clear understanding about how product works • Demonstrate key features and benefits • Provide hands-on experience with the product (subject to need) 	<ul style="list-style-type: none"> • Key points of differentiation from competing products • Product features and benefits • Product overview • USP (unique selling proposition) 	Spiral bound on company letterhead with cover		

Collateral	Audience	Key MarCom Objectives	Key Messages	Format	Owner	Deadline
Sales channel recruitment tools: • Proposal template • Qualifier form	• Product sales representatives • Prospective sales channels	Tell a consistent product story to prospective sales channels: • Answer all potential questions and objections • Determine if sales channel is good fit with the product and has good chances for success • Educate sales channel about the product, potential revenues, market	• Benefits to sales channel • Competitive landscape • Market size and trends • Product summary	• Company letterhead for qualifier form and proposal template • PowerPoint		
Sales channel sales tools: • Competitor Analysis matrix • Direct mail • PowerPoint • Proposal template • Qualifier form • Regional launch seminar • ROI report • ROI survey • Seminar-in-a-box	• Selected sales channels	All tools will provide some flexibility for customization while ensuring consistent product messages are communicated to prospects: • Clearly identify how the product stands above the competition • Direct mail to generate leads for seminars • Maintain consistent way of proposing product to prospects – use what works best in field • Motivate regional sales • Provide sales channel with standardized tools to sponsor their own seminars • Qualify best prospects for the product • ROI report • ROI survey	• Distinctive competence • Key messages to be honed as work is initiated on each piece • USP (unique selling proposition)	• Company letterhead • PowerPoint		

Collateral	Audience	Key MarCom Objectives	Key Messages	Format	Owner	Deadline
Technical white paper with technical illustrations	<ul style="list-style-type: none"> • Technical decision makers (TDM) 	<ul style="list-style-type: none"> • Answer TDM's technical questions • Create clear understanding and appreciation for the technical level of sophistication the product has, and for its capabilities • Generate strong interest in implementing this solution 	<ul style="list-style-type: none"> • Benefit of the technology behind the product (possibly include a very concise high level technology description if the technology is dramatically new) • USP (unique selling proposition) 	Company letterhead		
Web-based educational tools (subject matter test)	<ul style="list-style-type: none"> • Journals and newspapers • Prospects • Sales channel • Web surfers 	<ul style="list-style-type: none"> • Educate prospects about their level of knowledge regarding the product, leading them to the conclusion that they need to consider the product as a solution 	Test to help prospects determine: <ul style="list-style-type: none"> • How they compare with their peers • Their readiness for the product 	Web based education tool using multiple choice questions and instant feedback		