

# Collateral Matrix - Guidelines V. 2.1



**Company Name:** <Enter company name.>

**Product Name:** <Enter product name.>

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

Document Revision History:

Date	Revision	Revised By	Approved By
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Evaluation Copy

## 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

See below.

Collateral	Audience	Key MarCom Objectives	Key Messages	Format	Owner	Deadline
Case studies	<ul style="list-style-type: none"> <li>Journals and newspapers</li> <li>Prospects</li> <li>Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>Communicate success in stages:</li> <li>Complete story</li> <li>Post implementation benefits</li> <li>Why beta client selected the product</li> </ul>	<ul style="list-style-type: none"> <li>Distinctive competence</li> <li>Key messages to be honed as work is initiated on each piece</li> <li>USP (unique selling proposition)</li> </ul>	Casual collateral on company letterhead until product 75% complete, then four color glossy version		
Company executive biographies	<ul style="list-style-type: none"> <li>Journals and newspapers</li> <li>Prospects</li> <li>Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>Establish company credibility</li> <li>Impress audience with skill set and level of executive experience</li> <li>Inform audience about the company</li> </ul>	<ul style="list-style-type: none"> <li>Distinctive competence</li> <li>Present key executives and provide biographical information which supports business strategy</li> </ul>	Front and back on company letterhead		
Company presentation (PowerPoint) (PMTK)	<ul style="list-style-type: none"> <li>Analysts</li> <li>Industry experts</li> <li>Journalists</li> <li>Prospects</li> <li>Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>Establish company as successful entity with a purpose (vision, mission, leadership, and value.)</li> <li>Establish company credibility</li> <li>Inform audience about the company</li> </ul>	<ul style="list-style-type: none"> <li>Company background</li> <li>Corporate mission</li> <li>Distinctive competence</li> <li>Key products and services</li> </ul>	PowerPoint and printed handouts		
Company presentation folder	<ul style="list-style-type: none"> <li>Journals and newspapers</li> <li>Prospects</li> <li>Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>Establish company as successful entity with a purpose (vision, mission, leadership, and value.)</li> <li>Establish company credibility</li> <li>Inform audience about the company</li> </ul>	<ul style="list-style-type: none"> <li>Distinctive competence</li> <li>Graphical articulation of new company identity and brand</li> </ul>	Four color pocket presentation folder		
Company profile (PMTK)	<ul style="list-style-type: none"> <li>Journals and newspapers</li> <li>Prospects</li> <li>Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>Establish company as successful entity with a purpose (vision, mission, leadership, and value.)</li> <li>Establish company credibility</li> <li>Inform audience about the company</li> </ul>	<ul style="list-style-type: none"> <li>Company background</li> <li>Corporate mission</li> <li>Distinctive competence</li> <li>Key products and services</li> </ul>	Front and back on company letterhead		
Company reference client list	<ul style="list-style-type: none"> <li>Journals and newspapers</li> <li>Prospects</li> <li>Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>Establish company credibility</li> </ul>	<ul style="list-style-type: none"> <li>Company is successful because solves market problems in target markets</li> </ul>	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"> <li>• Business decision makers (BDM)</li> <li>• Journals and newspapers</li> <li>• Prospects</li> <li>• Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>• Create product awareness</li> <li>• Create understanding about market gap filled by product</li> <li>• Establish credibility</li> <li>• Satisfy questions on basic features and benefits from business and technical decision makers</li> </ul>	<ul style="list-style-type: none"> <li>• Basic specifications and technical requirements</li> <li>• Company information</li> <li>• Key features and benefits</li> <li>• Market problem solved</li> <li>• Positioning statement</li> <li>• USP (unique selling proposition)</li> </ul>	Brochure - four color, double-sided, printed in four colors on gloss paper and folded		
Product datasheet	<ul style="list-style-type: none"> <li>• Engineers</li> <li>• Technical decision makers (TDM)</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate product's overall technical compatibility with customer technical needs and technical environment</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced specifications and technical requirements</li> <li>• Product architecture</li> </ul>	Brochure - four color		
Product presentation (PowerPoint) (PMTK)	<ul style="list-style-type: none"> <li>• Analysts</li> <li>• Industry experts</li> <li>• Journalists</li> <li>• Prospects</li> <li>• Sales channel</li> </ul>	<ul style="list-style-type: none"> <li>• Create product awareness</li> <li>• Create understanding about market gap filled by product</li> <li>• Establish credibility</li> <li>• Satisfy questions on basic features and benefits from business and technical decision makers</li> </ul>	<ul style="list-style-type: none"> <li>• Basic specifications and technical requirements</li> <li>• Company information</li> <li>• Key features and benefits</li> <li>• Market problem solved</li> <li>• Positioning statement</li> <li>• USP (unique selling proposition)</li> </ul>	PowerPoint and printed handouts		
Reviewer's guide	<ul style="list-style-type: none"> <li>• Analysts</li> <li>• Industry experts</li> <li>• Journalists</li> </ul>	<ul style="list-style-type: none"> <li>• Create clear understanding about how product works</li> <li>• Demonstrate key features and benefits</li> <li>• Provide hands-on experience with the product (subject to need)</li> </ul>	<ul style="list-style-type: none"> <li>• Key points of differentiation from competing products</li> <li>• Product features and benefits</li> <li>• Product overview</li> <li>• USP (unique selling proposition)</li> </ul>	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: • Competitive 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"> <li>• Technical decision makers (TDM)</li> </ul>	<ul style="list-style-type: none"> <li>• Answer TDM's technical questions</li> <li>• Create clear understanding and appreciation for the technical level of sophistication the product has, and for its capabilities</li> <li>• Generate strong interest in implementing this solution</li> </ul>	<ul style="list-style-type: none"> <li>• Benefit of the technology behind the product (possibly include a very concise high level technology description if the technology is dramatically new)</li> <li>• USP (unique selling proposition)</li> </ul>	Company letterhead		
Web-based educational tools (subject matter test)	<ul style="list-style-type: none"> <li>• Journals and newspapers</li> <li>• Prospects</li> <li>• Sales channel</li> <li>• Web surfers</li> </ul>	<ul style="list-style-type: none"> <li>• Educate prospects about their level of knowledge regarding the product, leading them to conclusion that they need to consider the product as a solution</li> </ul>	Test to help prospects determine: <ul style="list-style-type: none"> <li>• How they compare with their peers</li> <li>• Their readiness for the product</li> </ul>	Web based education tool using multiple choice questions and instant feedback		