



# The STEM Marketing Field Guide

by Andrew Layton

# About This Guide

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This guide is meant to help STEM entrepreneurs quickly find a marketing approach that make sense for their unique type of business.

No multi-day strategy sessions, no focus groups, no seven-figure ad campaigns.

Just a sensible approach that starts with what you know and builds on what you learn through experimentation.

# About This Guide

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Think of this guide more like a **compass** than a **map**.

It is meant to help you choose a direction for your marketing while giving you the freedom to explore and pivot if necessary.

I hope you find it useful in your journey!

If you have any questions or feedback, please feel free to reach out to me directly at [andrew@americanlotus.co](mailto:andrew@americanlotus.co).

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INTRODUCTION

# Basic Principles



BASIC PRINCIPLES

# Consumer vs. STEM B2B Marketing

Marketing is a force multiplier  
for your business development —  
it educates and builds trust without  
requiring your physical presence.

Marketing for STEM is more about  
clarity and building relationships  
than clever slogans and expensive  
commercials.



# Consumer Marketing

Superbowl ads  
Impulse purchases  
One decision maker  
Easy to explain  
Independent  
Open-minded



# STEM B2B Marketing

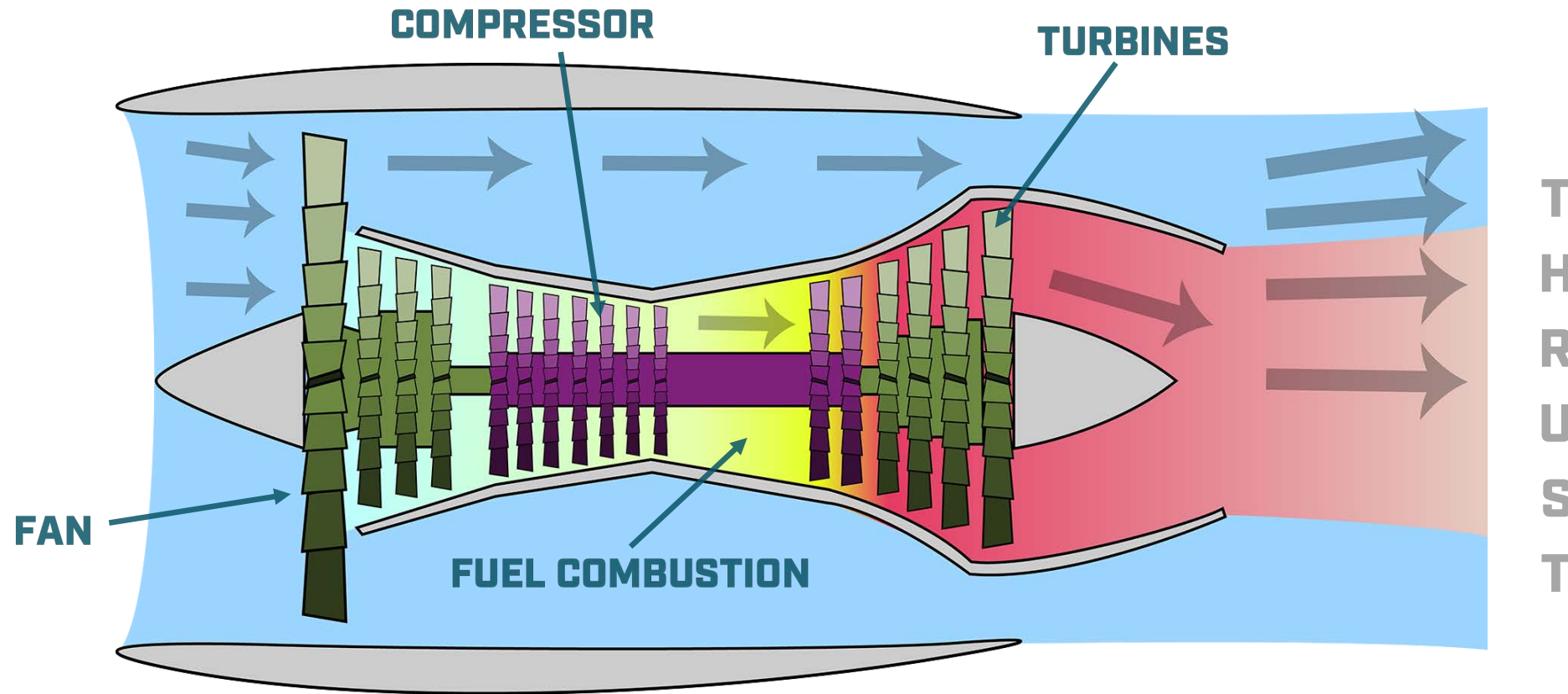
Conference posters  
Months of qualification  
Many decision makers  
Hard to explain  
Relationship-focused  
Skeptical



BASIC PRINCIPLES

# The Business Engine

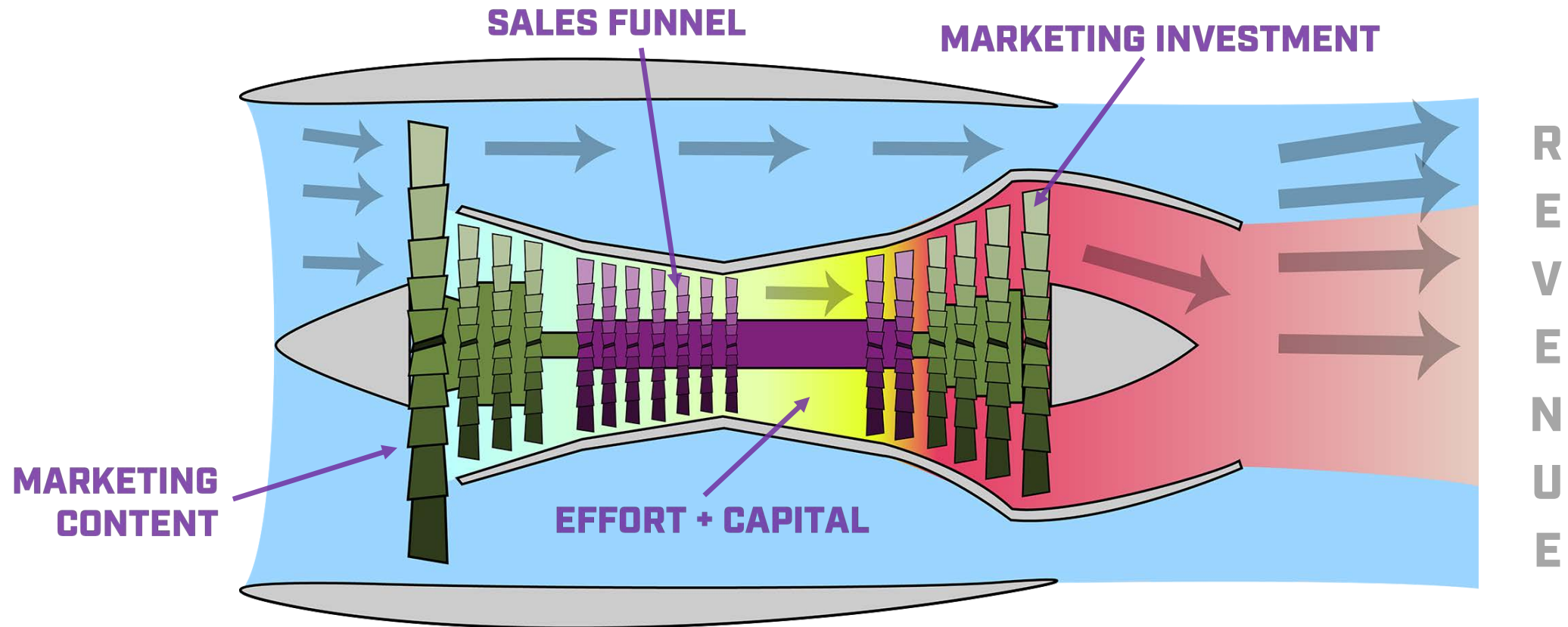
# Consider the jet engine:



A jet engine works by “borrowing” energy from the combustion process to drive other components. Together they produce far more thrust than burning the fuel alone.

In the same way, marketing borrows effort and capital from the business and reinvests it to generate more awareness, leads, and sales than you could on your own.

# The business engine:



**This view of marketing helps to justify investment where it's needed and discourages activities that aren't focused on business objectives.**



PART ONE

# The Marketing Process



# The Marketing Process

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Identify the  
**CUSTOMER**

Map the  
**BUYING  
PROCESS**

Generate  
**CONTENT**

# The Marketing Process

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## STEP 1



Identify the  
**CUSTOMER**

Map the  
**BUYING  
PROCESS**

Generate  
**CONTENT**

# Know Thy Customer

Before creating any marketing content, you should have a complete picture of your ideal customer in mind. Start by choosing the market segment, then describe the ideal company within that segment, and finally profile the individuals at the company who will influence the purchase. This exercise will give clarity to your messaging and help you get the most out of your marketing budget.

# Choose a Market Area

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- Narrow your market down to a manageable area where you can add the most value
- Master one market area before entering others

CONSIDER:

**Industry**

**Market Size**

**Geographic Region**

**Competition**

**Regulatory Environment**

**Public vs. Private Sector**

# Define Your Ideal Customer



- Not all possible customers in your market will be a good fit
- Knowing your ideal customer makes it easier to create a strong value proposition

CONSIDER:

**Company Size**

**Annual Revenue**

**Sales Complexity**

**Support Burden**



# Identify Purchase Influencers

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- Find key decision makers in the buying process
- Understand their motives and concerns and create content that speaks to them

CONSIDER:

**Job Title**

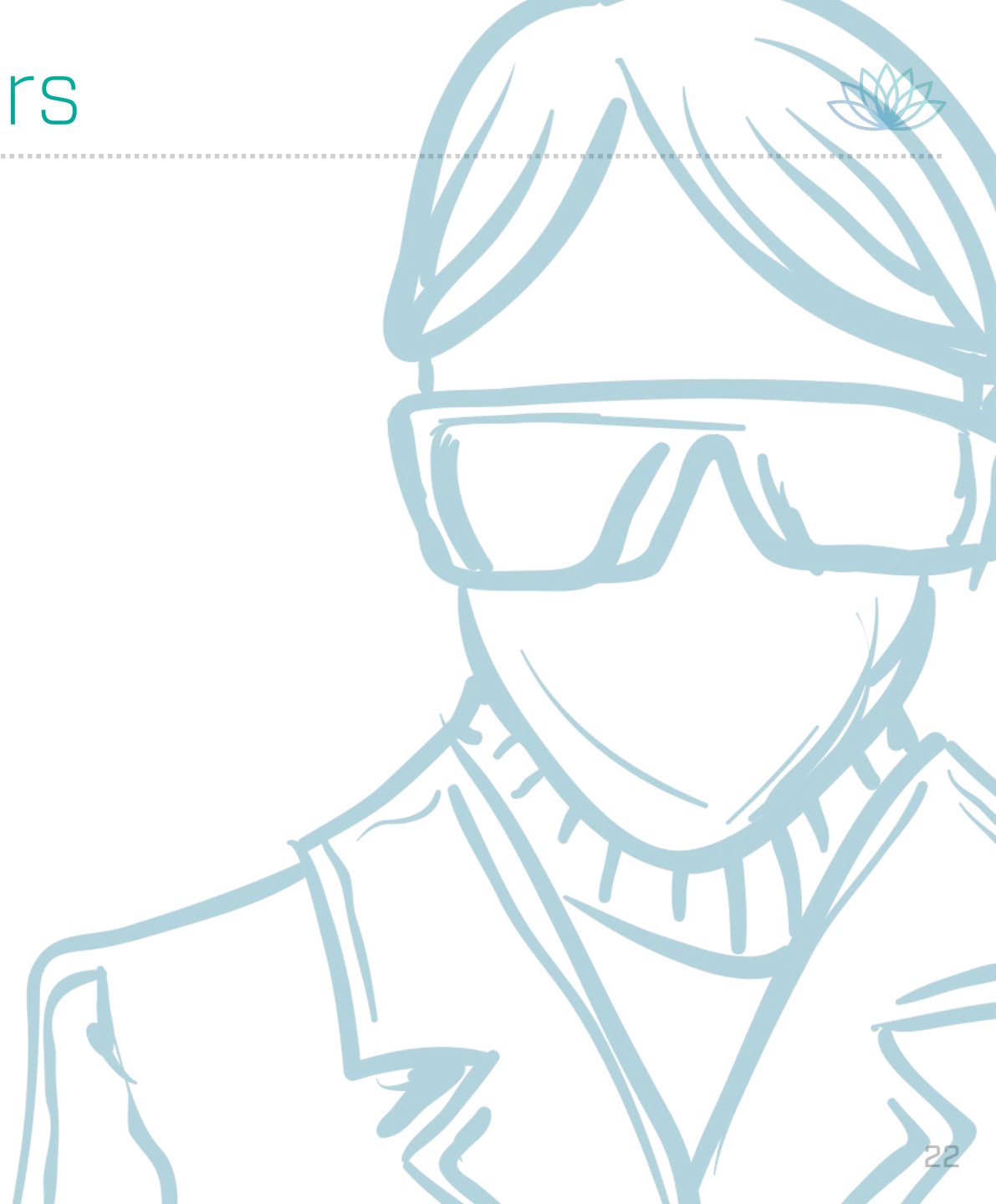
**Authority**

**Tech Expertise**

**Values**

**Motivation**

**Influence**



# The Marketing Process

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## STEP 2



Identify the  
**CUSTOMER**

Map the  
**BUYING  
PROCESS**

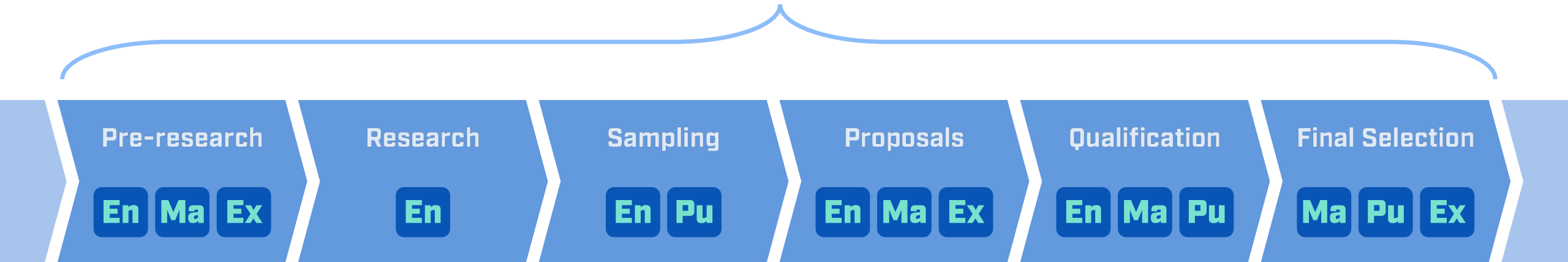
Generate  
**CONTENT**

# Map the Buying Process

Map the typical buying process from before a prospect takes action all the way through to the final signed contract. This should be a generalized outline — the actual process may vary a little from customer to customer. Knowing the common gates and gatekeepers will help you prepare effective marketing content for most scenarios.



# Example Buying Process for a Large Customer



**En** = Engineer

**Ex** = Upper Management

**Ma** = Project Manager

**Pu** = Purchasing Agent

# The Marketing Process

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**STEP 3**



Identify the  
**CUSTOMER**

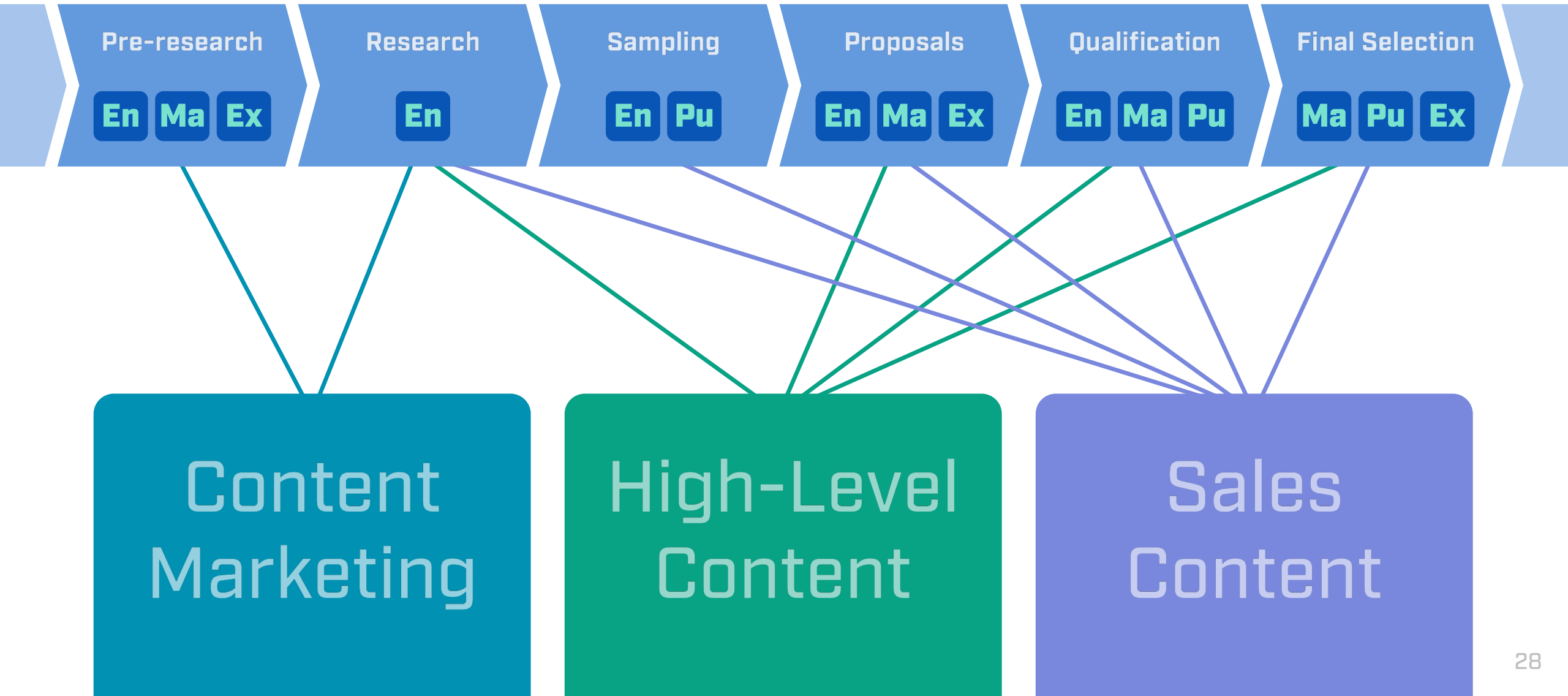
Map the  
**BUYING  
PROCESS**

Generate  
**CONTENT**

# Generate Content

The amount of marketing content you need to create can seem overwhelming. Start by prioritizing content that is most influential to closing sales, and then move backward through the buying process. This keeps the focus on revenue-generating activities, which will then support marketing efforts further upstream in the buying process.

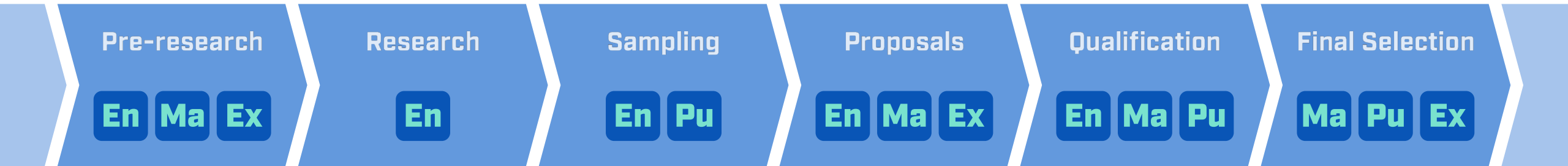
# Create Content for Each Stage



# Make Sales Content First

Your sales content explains the core value proposition for your product and should be created before anything else. While it's never too early to start a blog, it's best to focus most of your early energy on content that is directly related to enabling sales.

# Make Sales Content First



## Sales content examples:

Product Landing Pages

Demo / Explainer Videos

FAQs

Case Studies

Product Literature

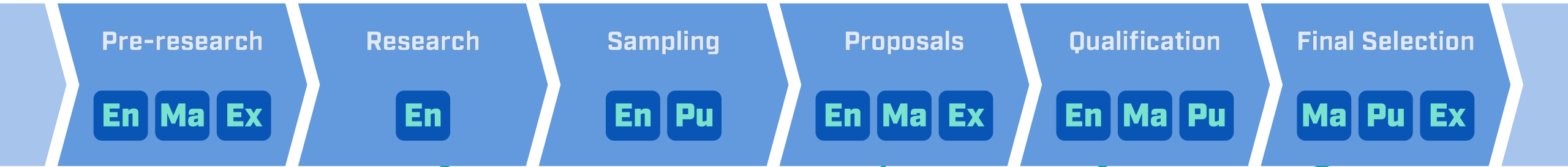
Data Sheets

Support Documentation

# Make High-Level Content Next

High-level content shows who you are and what you value as a company. It also highlights attributes that may be important to your customers, such as environmental impact, corporate responsibility, supply chain management, etc.

# Make High-Level Content Next



## High-level content examples:

“About Us” Pages

Company Overview Videos

Logistics Highlights

Certifications & Standards

Staff Profiles

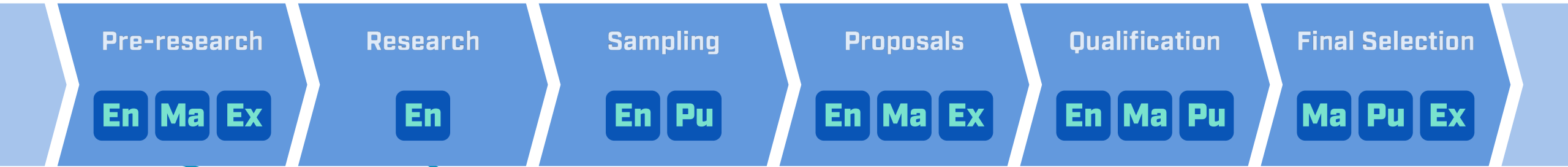
Social Responsibility



# Build Content Marketing Last

Content marketing takes time to bear fruit (which is why it's best to create sales content first). But this doesn't mean you should wait a long time to get started. Even in the early stages, content marketing can effectively show your expertise and build trust. Over time, your audience will grow to become a continuous source of qualified leads.

# Build Content Marketing Last



## Content marketing examples:

White Papers

Case Studies

Webinars

Ebooks

Support Docs

Blog Articles

Conference Posters

Presentations

Journal Articles



**PART TWO**

# Building Your Program



BUILDING YOUR PROGRAM

# Phase One: Build the Foundation

# Phase One: Build the Foundation

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Logo + Visual Brand



Website



Sales Collateral

# Logo + Visual Brand

The main purpose of your logo (along with your brand colors, typefaces, etc.) is to make it easy for people to recognize you. It's really that simple. A good design will convey a bit of your company's personality and be recognizable from a distance. But in the big picture your customers won't pick up any deep symbolism behind your logo, so there's no need to obsess over it too much.



## Level 1

\$

Use Fiverr, Upwork, or other online marketplace to get a basic logo design at the cheapest price.

Professional designers exist on these platforms too, but you will pay a little more [see Level 2].

## Level 2

\$\$

Hire a professional designer directly to create a few logo variations and build a style guide.

If you don't know any pro freelance designers, you can find one on the marketplaces or through agencies like Robert Half or Creative Circle.

## Level 3

\$\$\$

Work with a marketing or branding agency to develop a solid visual brand with logos and style guide.

Key advantages are streamlined processes and usually great quality, but can be a bit overkill, so make sure to work with a good creative director.

# Guidelines for Getting a Logo + Brand

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- Hire professionals!
- Get the best logo you can afford, but don't go over-the-top.
- Make sure it comes with a **style guide** — a set of instructions for how to use the logo and colors — to help other designers who will work on your marketing.
- Finish it quickly and move on to running the business (it's easy to get stuck tweaking a logo design).
- Use it! Apply it consistently to everything your company produces.



# Website

Your website is the cornerstone of your marketing program. This is true even if you plan to use a more direct sales approach, since customers and other stakeholders will still rely on it as a source of authoritative info. It also has a huge advantage over other channels in that you own it outright — it is not subject to the ever-changing policies of other platforms like Facebook or YouTube.



## Level 1

\$

Build everything yourself using one of the popular website builders (Weebly, Squarespace, etc.) or one of the managed WordPress options.

Avoid the free versions of these platforms. They will display their branding everywhere and make you look unprofessional.

## Level 2

\$\$

Work with a professional designer to customize a theme on one of the popular website builders to match your brand.

Squarespace and managed (paid) WordPress are great options.

## Level 3

\$\$\$\$

Work with an agency to create a custom-designed and coded website.

Ideal for later-stage companies or companies whose website is part of the product (web apps, software-as-a-service).

# Guidelines for Websites

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- In the beginning, you absolutely do not need to pay someone \$10k+ for a custom-coded site (unless your site/app is part of your product).
- If someone offers a custom-coded site for less than \$5k, run away.
- **Recommended option:** have a designer customize a theme-based site with your brand (Squarespace or hosted WordPress are good options). Much cheaper than a custom-coded site but will still look very professional.

# Sales Collateral

Sales collateral are things like presentations, data sheets, brochures, and other product literature focused on sales enablement. Your sales process and customer expectations will help determine which pieces you need to make. Best to start with a few pieces (like a pitch deck and a brochure) and branch out from there to keep things manageable.



## Level 1

\$

Create your own pitch decks, data sheets, etc. from scratch in-house.

Can work for early-stage companies but is generally best avoided since it will may look unprofessional.

## Level 2

\$\$

Work with a designer to create templates for your basic collateral. Make sure they follow the style guide that came with your logo and brand design.

Use these templates to create or update your collateral in-house. May require special software.

## Level 3

\$\$\$

Work with a designer or agency to produce all sales collateral.

Generally the best option as it presents the most consistent and professional image to your customers. Also saves a ton of time.

# Guidelines for Sales Collateral

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- A solid pitch deck and brochure are a good place to start. Branch out from there based on customer interest.
- Print only what you need! Bulk discounts are tempting, but you're stuck with useless inventory if you need to make a change.
- Use the same messaging as the website so no one is confused.
- Hire professional designers! They will help you with flow and readability, not to mention branding and aesthetic appeal.



BUILDING YOUR PROGRAM

# Phase Two: Publish and Engage

# Phase 2: Publish and Engage

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Blog



Audio/Video



Social Media



Email



Good science and technology marketing lives in the Goldilocks Zone – technical enough to be credible, yet clear enough to be understood by most people in the customer organization.

Good marketing, like good science,  
involves experimentation — a  
willingness to test messaging and  
listen intently to how customers  
and the market respond.

# Blog

Your blog is the anchor for any content you produce outside of your standard product and company pages, and is a great way to show your expertise and personality. Use it to answer common technical questions, offer insight on industry issues, or otherwise provide value to your audience. Over time, you'll be able to see which content resonates and performs well in search engine results.



## Level 1

\$

Share occasional updates on product development, company news, etc.

Bare minimum of one post per quarter to let the world know you're still alive.

## Level 2

\$\$

Use the blog to build awareness around key areas of expertise and customer interest.

Commit to a posting schedule of at least one article per month.

Write articles internally or work with a freelance writer as needed.

## Level 3

\$\$\$

Use the blog as a cornerstone for your content marketing program.

Plan content to align with customer interests, sales pipelines/funnels, etc.

Most likely need to work with outside writers or an agency of some kind.

# Guidelines for Blogging

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- **Quality** is way more important than quantity with STEM content!
- Publish at least once a month if possible but find a schedule that works for you and be consistent.
- Keep it on your website. Do not host it somewhere else.
- Answer common questions from customers, prospects, etc. Offer high-value, no-strings-attached guidance and thought leadership.
- Write your own original content if possible, but don't be afraid to work with outside writers if necessary.

# Audio + Video

Audio and video have exploded in popularity as bandwidth and access to good production equipment have both increased. Unlike written content which requires the audience to visualize concepts in their mind's eye, video allows you to show them exactly what you mean. The downsides are that they can be resource-intensive and require lots of practice to develop good production skills.



## Level 1

\$

Record everything with a smartphone. Edit directly on the device or with cheap/free software.

You may be surprised how well you can do with this approach.

## Level 2

\$\$

Invest in your own video and audio gear; record and edit everything in-house with pro software.

— OR —

Hire an entry-level professional to record and edit using their own gear.

## Level 3

\$\$\$\$

Hire a production company to produce commercial-grade video and/or audio.

Generally best reserved for cornerstone content like product explainers and company overviews.

# Guidelines for Audio + Video

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- **Get good audio!** Viewers will accept poor video quality more than poor audio quality.
- Invest in some decent gear if you plan to do several videos or a podcast.
- Podcasts can be very effective when done well, but also can be labor intensive.
- Bundle projects together when working with outside agencies to maximize your investment.
- Save the big-budget stuff for cornerstone content — company profile videos, product explainer videos, etc.



# Social Media

Building an audience is one of the most important things a business can do, and social media offers one of the easiest ways to do it. Over time, this audience will help you build awareness and gather much-needed feedback from your market. Being active on social is an absolute must these days if you want to be taken seriously, since it has basically become the default corporate communication channel.



## Level 1

\$

Set up at least one network and post something manually *at least* once a month. This is the bare minimum to show you are alive and in business.

## Level 2

\$\$

Set up and maintain three or four main networks. Share original content and company updates **across all networks** at least once a week.

Invest in social media management software to streamline the posting process.

## Level 3

\$\$\$

Manage social media and public relations through an agency as part of your existing content marketing program.

— OR —

Hire a part-time social media / public relations manager.

# Guidelines for Social Media

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- Social media can be one of your most important distribution channels, especially for newer products and companies.
- Share your original content as much as possible and focus on providing value to followers (don't be too promotional).
- LinkedIn is by far the most popular and useful for B2B content. If you can only maintain one network, use this one.
- Facebook, Twitter, and sometimes Instagram are important for awareness and letting the world know you are a legitimate business.

# Email

Building an email list has long been a top recommendation for marketers. Although it's still recommended, increased regulation and competition have made it much more difficult in recent years. A good place to start is simply having readers opt-in to receiving alerts when you post new content to your blog. Then move to more advanced email lead-gen tactics as you develop your sales processes.



## Level 1

\$

Establish a basic list of email subscribers using one of the free or low-cost tools (e.g. Mailchimp, HubSpot, etc.).

Notify subscribers when new blogs are posted, etc.

Many of these tools let you build a small list before requiring you to pay.

## Level 2

\$\$

Add basic lead generation to the mix and begin integrating with sales/CRM processes.

Consider making high-value content available for download in exchange for an email address (a.k.a. gated content).

## Level 3

\$\$\$

Work with an agency or hire dedicated staff to manage a tightly-integrated email marketing program.

Leads move seamlessly through the funnel and into your CRM database via lead gen campaigns and consistent follow-up.

# Guidelines for Email

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- **Never ever buy or rent lists under any circumstances!**
- Instead, consider advertising in newsletters owned by conference organizers or industry publications.
- Anyone claiming to have a list of conference attendees for sale is definitely breaking the rules. Run away.
- The key word for email today is “opt-in.” Users **must** give you permission to add them to a list and market to them.
- Start with a list that lets people subscribe to your blog updates and grow from there as you get the hang of things.



BUILDING YOUR PROGRAM

# Other Marketing Channels



## TRADE SHOWS + CONFERENCES

- Showcase existing content at the booth, face-to-face meetings, etc.
- Repurpose content created specifically for the conference on your website, social channels, etc.

## PAID ADVERTISING

- Test messaging in low-cost channels first, then pay to amplify what performs best.
- Paid search ads can be very effective and a great place to test messaging. Can also be quite expensive, so work with a specialist if you can.





Questions or Comments?

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# About Andrew

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Andrew Layton is the owner of [American Lotus](#), a technical marketing consultancy based in Rolla, Missouri. Andrew has been helping technical businesses with marketing since 2005. He is also an accomplished [photographer](#), [musician](#), and amateur wine geek.



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