

The Science and Technology
Entrepreneur's Guide to

Outsourced Marketing

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INTRODUCTION

What do we mean by *marketing*?

Although the word *marketing* by itself usually makes us think of cool ad campaigns and clever slogans, the term actually covers many different disciplines, some of which have little to do with advertising and communications. These include things like market research, competitive intelligence, pricing strategy, product development, and so on.

Many options exist for outsourcing all of these functions, but they generally fall outside the scope of this guide. Instead, I'm going to assume that much of your intelligence gathering and strategy have already been done, and that you understand your market well enough to be able to make strategic communications decisions when necessary.

Thus communications — specifically ***marketing communications*** — will be our main area of focus throughout most of this guide.

Marketing for science and technology

Before we dive into the specifics of outsourcing your marketing communications and collateral production, we need to go over some of the broader marketing challenges you will face as a science and technology company since they can greatly affect your communications strategy.

In my experience, much of the difficulty in B2B technical marketing stems from the assumption that a science and technology company can be promoted in the same way as a mainstream consumer brand. While it's true that many of the same principles will apply, the path to the desired outcome (sales and revenue) will actually be quite different.

The major differences between the two approaches can be summed up as follows:

Where consumer brands work by persuading large numbers of **individual people** to buy a product in a **short period of time**, B2B science and technology companies are usually trying to sell a much more complex product to a **group of decision makers** over a much **longer period of time**.

The technical nature of your product combined with the wide range of backgrounds on the buyer's purchasing team can make communicating with these prospects incredibly challenging.

More B2B technical marketing challenges

What are some of the other things that make marketing for science and technology especially challenging?

Different success metrics

Success can't always be measured for a B2B technical company in the same way that it can for mainstream brands. While you can develop your own ways of measuring success that suit your business model, it can still feel like you're doing something wrong simply because your situation doesn't look anything like what you read about in most marketing case studies.

Specialization and market size

More often than not, technical companies operate in a very specialized segment of a market, targeting a relatively small number of people. For example, your market could be doctors who only perform a certain type of procedure, owners of a specific piece of semiconductor processing equipment, or manufacturers of a specific type of jet engine.

Note that the market size in terms of monetary value can still be very large. There are just fewer people who control the distribution of that value, and they are typically not easily persuaded.

Limited market intelligence

Your product may be hyper-specific, to the point that conventional market

studies and research aren't able to tell you anything useful about the available market. Much of what you know about your market may have to be learned first-hand, through many trials and iterations. (This is actually ok.)

Skepticism

Scientists, engineers, medical professionals, etc., are all highly-trained skeptics that can instantly detect marketing fluff. Your Jedi mind tricks will not work here; you must learn to speak their language.

Multiple decision makers

Closing a sale with a single customer usually means persuading several people with different backgrounds from different parts of the organization. Your company may sink or swim based on its ability to translate value across organizational boundaries and professional backgrounds.

Sales cycle length

In many cases, several months or even *years* may elapse between an initial inquiry and the final closed sale. This makes it incredibly difficult to measure and evaluate marketing ROI — it's just not possible to make the connection to your marketing efforts in a meaningful way over such a long span of time.

What does all of this mean?

You shouldn't let these challenges keep you from going all-in with your technical marketing and branding. But you'll save yourself a lot of heartache

if you remember that marketing won't work the same way for your company as it does for mainstream brands.

Also keep in mind that marketing for science and technology is less about building the desire to buy now and more about helping prospects take individual steps through a complicated and sometimes treacherous buyer's journey.

You will have to be willing to experiment a little and ignore conventional wisdom here and there. It will probably take a while (at least six months), but you will gradually start to figure out what works for you, your team, and your sales process.

A brief word on market intelligence

If you're following [lean principles](#) in the process of building a new business, then a lot of your market intelligence will come in the form of feedback you receive directly from early customers.

But before you engage in customer development, you may need to commission some research to see if it's even worth the trouble to pursue a given market.

I can't offer much advice on how to find a good market analyst, but I have worked with some incredibly skilled individuals in the field, as well as some whose "research" consisted of compiling results from a bunch of Google searches. And I can tell you there is a MASSIVE gap in usefulness between the two.

The former can give you solid, actionable information, which you can then use to enter a market with surgical precision. The latter will generally not be able to tell you anything you don't already know, or couldn't easily find on your own.

Find someone who knows how to mine for the data you need and can distill solid, quantitative recommendations from it. Once you experience that level of service, you will wonder how you ever lived without it.

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Should you outsource your marketing?

You may be thinking, “*Of course he will recommend outsourcing; that’s how he makes his living!*”

Fair point. But just hear me out for a second.

Prior to becoming a marketing consultant, I spent twelve years as an in-house technical marketer. And when I was young, naïve, and scared of losing my job, **I often made the case that insourcing was more economical than outsourcing.**

My reasoning at the time went something like this: I can do all of your graphics, shoot and edit video, set up print collateral, shoot still photos, and design your website, all for way less than it would cost to outsource. You could even give me a significant pay raise (which you should, because I’m obviously doing the work of like six people) and *you still would save money!*

But when I finally took an honest look at why I was pushing so hard to insource, I realized I was just trying to make myself indispensable and secure my position within the company.

In a strange way, my efforts at self-promotion worked quite well — everyone thought I was very talented and that I had an enviable job that allowed me to be creative all the time. But after several years, I had realized something

they all hadn't: **there was no way on earth I could be a great designer, developer, photographer, writer, and videographer all in one.**

I ended up burning out several times, and never did get that awesome salary bump I hoped for.

For a while, I felt my only option was to choose a specialty and become truly excellent at one discipline over all the others. Of course, the problem with that approach was that it still didn't have the best interests of the business in mind — they simply didn't need *one* of those skills *all* the time; they needed *all* of them *some* of the time.

How I learned to love outsourcing

Eventually, some projects came along that I simply could not do myself. We had to bring in specialized help from outside the company. And since I was the designated “creative guy,” I was given the responsibility to manage the project and the relationship with the outside contractor.

That first experience with outsourcing completely changed the way I thought about the practice. And as I began to shift my thinking away from simple self-preservation and toward finding the solution that was best for the business, I began to recognize how outsourcing could act as a force multiplier and produce better results faster than I ever could alone.

So, to answer the original question — yes, I do recommend outsourcing for small and mid-size companies, for one primary, business-focused reason:

Outsourcing provides rapid, scalable access to specialized services, when and where you need them.

You don't need to hire permanent full-time creative professionals (graphic designers and the like) who will spend most of their time either overloaded, underutilized, or generally mismanaged.

You also don't want to hire a jack-of-all-trades (like I was trying to be), as they will be most prone to overload, burnout, and a general lack of career direction. And when it comes to promoting your business, there is simply no way one person can be great at everything you need.

When is the right time to outsource?

In my opinion, the ability to ramp services up or down based on your needs at the moment plus the opportunity to work with the best people for a given job make outsourcing your marketing a no-brainer for most situations.

But there are some situations that make more sense than others, especially if you aren't a huge company.

When you're just starting the business

The early days (or even the early years) of a startup are often chaotic. And it's difficult to appear consistent to the outside world when things are changing behind the scenes on a near daily basis.

This may feel like the worst time to start investing in another complicated external relationship. But if you find the right people to manage your branding and communications, they can make you look like you know what you're doing while also freeing you up to focus on operations issues.

When you're getting ready to launch a new product

Product launches require a lot of messaging and positioning work, along with production of several marketing assets (website, graphics, data sheets, etc.). Using outside resources to temporarily scale up capacity and coordinate these activities can save your sanity and ensure that your

product actually makes it off the launch pad.

When you want to give the impression that you are a much bigger company

To be clear, this isn't about bluffing or being deceptive. It's about showing people you can be trusted with their business. Because nothing says "we aren't ready for the big leagues" like a website, brochure, and pitch deck that all look like they came from different companies.

This means you need to actually have your house in order, so that the positive customer experience extends beyond the good impression they get when they first see your website or pitch deck. But consistent branding and messaging will reassure your prospects and make it easier to start building trust right off the bat.

Marketing communications management

Managing the marketing communications function of your business involves two main directives:

- 1. Content:** Develop your company's brand and messaging
- 2. Deliverables:** Oversee the production of all marketing collateral

You may be tempted to manage everything yourself, but you will soon realize that managing your company's brand along with production of all the communications assets can be a very time-consuming affair.

To get the most out of your marketing investment, you need someone other than yourself who has direct access to you and access to all of your business intelligence, as well as the ability to manage several concurrent projects and make sure they all stay on message.

To borrow the famous metaphor from Steve Jobs, this individual needs to excel at "playing the orchestra," as opposed to any single instrument. Above all, **they must be an excellent communicator.**

In-house management

One option for filling this role is to hire an in-house marketing communications manager.

In this scenario, you would still outsource virtually all of your collateral production, but your marcom manager would ensure that all freelancers and creative agencies follow your brand guidelines and that all of your messaging sounds like it's coming from the same company.

Note that this person must be a *manager* and not a *specialist*.

You may be tempted to hire a single “marketing communications specialist” hoping to find a jack-of-all-trades that can produce all the collateral as well as manage the company brand and messaging. This will ultimately lead to frustration for both parties — you will wish they could deliver better results faster, and they will often feel overwhelmed, unguided, and under-appreciated.

It can be helpful for an in-house marketing manager to have production experience so they will be better equipped to manage other creative professionals. But their ability to *create* things is not your main concern. You are looking for someone who can *manage* things.

Outsourced management

The next question is whether you can or should outsource this management function.

Can you? Absolutely. Marketing and branding agencies have existed for this very purpose for nearly as long as marketing has existed.

Should you? I generally recommend it because it allows you to get things off your plate that you may otherwise spend a lot of time on. But it really depends on your management style, work load, budget, etc.

Marketing agencies

A good agency will become like an extension of your management team, providing guidance and project management services to make sure your marketing works to streamline your business development.

The potential downsides are that they can be a little pricey for smaller businesses, and can easily be overkill for your needs if you are not a large company.

Many agencies are not specialized to a particular industry, and thus try to be all things to all companies. This is a major red flag, as it indicates they do not have a strong sense of direction for their own business, and therefore can't be expected to understand yours.

Furthermore, even if a specialized agency seems like a good fit with your technical business, you may not get the attention and devotion you expect if you are not one of their higher-paying clients.

That said, there are some fantastic agencies out there, and with some care and scrutiny, you can forge a great long-term partnership with your “agency of record.”

Contract marcom manager (micro-agency)

Another option is to work with an individual marketing consultant who acts as your contract marketing communications manager. I call this the **micro-agency model**, because while they may not have any full-time staff of their own, they will manage the production of marketing assets by leveraging their own network of creative professionals.

I typically operate as a micro-agency in my own consultancy. This allows me to keep things fairly lean while still being able to connect clients to high-quality talent and deliverables when they need them.

Working with freelancers

Working with freelancers can be a blast, as it gives you the chance to see your marketing ideas come to life. But as with all professional relationships, clear communication and understanding are essential to the success of the project.

Here are some guidelines to help ensure that your experience working with freelance talent is a good one.

Be clear about what you want to achieve with the project.

Clear objectives will help everyone involved to make better decisions. Although it may not seem necessary for a designer or illustrator to know how you plan to use the final deliverable, such information can really help them to do their job more effectively. They may even be able to provide you with suggestions during development that add significant value to the end product.

Make sure they *really* understand your technical concepts.

During the initial meetings about a project, take plenty of time to explain the concepts you will be working on together. Provide opportunities for them to ask questions and repeat concepts back to you so you can verify that you are both on the same page.

Bear in mind most creative professionals will not possess the same technical

background as you or your audience. It may take a little extra time and patience to make sure they understand what you're talking about, but it will save tons of time and frustration later on.

You don't have to turn them into senior scientists by any means, but you also don't want to embarrass yourselves with nice-looking content that is technically incorrect. I've seen many such projects go for weeks in the wrong direction simply because the designer, writer, animator, etc. did not really understand the concepts the client was working with.

Provide course corrections and critique as early as possible . . .

The sooner you can let creatives know when something doesn't look or sound right, the more time, money, and all-around frustration you will save.

Many visual projects — such as illustrations or website designs — are done in stages, with rough sketches or “wireframes” completed early in the project to validate concepts before proceeding to a final render. You will want to **provide as much feedback as possible** during these early stages, as it will be much more time-consuming and expensive to make major adjustments later on when the deliverable is nearly complete.

. . . but don't micromanage.

If you haven't worked with creatives before, it can be hard to know when to give direction and when to step back and “let the professionals do their thing.”

An experienced freelancer will typically provide you with clear direction on when and how they will need your feedback. Less experienced (albeit talented) freelancers may be more timid about setting expectations and will quietly let people walk all over them.

To avoid veering off into micromanager territory, stick to these two main questions when evaluating a freelancer's work:

1. Does it achieve the objectives you defined at the beginning of the project?
2. Does it fit in with the rest of your brand?

If the answer to either of these is no, tell them why, and let *them* suggest a solution. Do your best not to prescribe specific solutions like “make this text bold” or “make the logo bigger.” A well-trained designer will have spent years studying typography, proportion, etc., so quibbling over whether the text should be bold or italic is not the best use of your time.

Finding freelancers

Finding good freelance help can be challenging if you don't know where to look. And one bad experience could completely turn you off the practice — because when their work doesn't look good, you don't look good.

Thankfully there are ways to improve your success rate with freelancers.

The absolute minimum requirements are that they have at least a year or two of work experience in their field (college doesn't count) and have at least a few examples of their work they can provide.

Friends and family

Friends and family are often the first line of defense when one is searching for freelance talent. While this can certainly make your search easier, it offers no guarantee that the talent you end up with will be the talent you actually need. Sometimes they end up being the talent who can't finish the job.

An important thing to keep in mind when working with friends or family is the potentially negative affect that an unpleasant work experience might have on your relationship.

It can also be difficult for either side to talk about money, with the freelancer-slash-family-member sometimes feeling obligated to “cut you a deal” because of your close relationship. Combine this with the added difficulty

of discussing expectations and critique, and you have a recipe for several awkward family reunions.

While there's no need to discriminate against friends and family for freelance work, you don't want to let their connection with you play any role in your decision to work with them other than sheer convenience. The same minimum requirements should apply to them as would apply to any stranger you found in a Google search.

Google search

Searching for freelance talent on Google can be a little intimidating if you don't know what to look for.

For example, running a simple search for web designers in your area may turn up several fully-staffed agencies and relatively few independent freelancers. This is fine if you're looking to partner with an agency on a large project, but can be frustrating if you're just looking for someone to whom you can delegate some design work.

To get the most out of your search, create a checklist of qualifiers that will help you narrow down the results quickly. Once you have a short list of candidates, check their portfolios, the quality of their personal websites, and their relevance to your industry.

The Google search method may be the most time consuming because you have to comb through several websites to create your short list, and then

you have to contact each candidate individually.

The spectrum of quality may be very broad, which is why it is important to have some idea of the level of quality you are looking for and how much you will be willing to spend before you contact people.

Online job boards (Upwork, Odesk, Craigslist, etc.)

To be frank, it is almost always in your best interest to avoid sites like [Upwork](#), [Fiverr](#), and Craigslist when searching for freelance talent.

I'm not saying it's impossible to have a good experience on these platforms. But bottom-of-the-barrel pricing and numerous [horror stories](#) prevent many savvy freelancers from even considering these platforms as a last resort.

What remains is a largely unvetted pool of high-risk candidates who may be too desperate, too inexperienced, or too unreliable to provide the results you're looking for.

Staffing agencies

Reputable staffing agencies, such as [Creative Circle](#) and [The Creative Group](#), are in my opinion, one of the best ways to find qualified freelance help, and quickly. They are especially useful if you don't have an existing network of freelancers to choose from, or if you are in a hurry to get started on a particular project.

They take much better care of their freelance talent than any job board, and are present and readily available throughout the project to ensure that the relationship is going smoothly.

In my experience, there are virtually no downsides for the client. The only thing to keep in mind is that if you choose to work with a particular freelancer again within a certain time frame, you will have to continue working with them through the agency or possibly buy out their contract.

The two agencies I mentioned above are national organizations, with offices and talent scattered throughout North America.

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Website design and development

Every company's needs will be slightly different, so I won't get too specific about exactly what you need in a website.

Instead we'll look at different options for getting your website produced and when each of these levels might be appropriate for your business.

Entry level: Website builders

Price: As little as \$200/yr plus initial setup if you hire a designer

Ideal for: Startups; small companies with limited content

In the old days, if you wanted to build your own website, you absolutely *had* to know basic HTML, CSS, and some Javascript. Now, as long as you have basic design sense, you can customize a gorgeous pre-made template with your company brand elements without needing to know any code at all.

That may ruffle the feathers of some of my web design friends, but the fact is it just isn't worth it for many young science and technology companies to invest in a custom site while there is still a lot of change and upheaval going on inside the business.

Some of the popular names in the site builder space are [Wix](#), [Weebly](#), and [Squarespace](#). There are others, but they all tend to share the same basic features. Most have ways to integrate with Google apps (email, analytics, etc.) and many even offer basic ecommerce functionality.

Setting up your website yourself with one of these services can be pretty time consuming (despite what their marketing materials claim) even though you won't need to deal with code. For this reason, I usually recommend hiring a freelancer to do the initial setup for you, so they can ensure consistent branding and also do the legwork of finding suitable images and other content.

Intermediate: Custom-built website

Price: \$5,000 – \$10,000 plus hosting and maintenance

Ideal for: Established startups and small businesses that have had time to develop and stabilize their brands

The ever-increasing quality of site builders has greatly reduced the need for a completely custom website in the early growth stages of the business.

However . . . once the dust starts to settle and your company brand begins to take shape, building a web presence that is uniquely yours becomes more prudent. The need for a custom website may also arise when you outgrow the functionality of a site builder.

For example, if you generate a lot of leads through your website, you may eventually need to migrate to a more robust lead management platform or something that ties in with a CRM.

Or if you plan to add more content marketing resources to your site (articles, videos, courses, etc.), you will probably benefit from a more robust platform.

Plan to spend at least \$5,000 for a custom website. You can do it for less, but you will probably find the functionality is roughly the same as what you would get with a site builder (which costs *significantly* less).

Advanced: Enterprise website / app development

Price: \$20,000 – \$75,000 (or more) plus hosting and maintenance

Ideal for: Companies for whom the website is an integral part of the product or customer experience; established businesses with lots of content, robust product portfolios, etc.

The only time you should consider this level of web development as a startup is when the website itself is an integral part of your product or otherwise plays a large role in the customer experience.

An example might be an ecommerce website where customers purchase your products directly, and are able to access support, documentation, or other tightly integrated services based on their order history.

Another example could be when your website serves as the interface for the product. Customers could store and retrieve diagnostics data, or perhaps even run a piece of equipment remotely via the web interface.

The possibilities (and the price tag) are literally endless as you start to blur the line between corporate website and robust web application. But it is well worth the investment when the website is so directly tied to the product for which customers are paying.

Video production and photography

Entry level: Your own camera or smartphone

Like web design, video production and photography have become much more accessible over the past 15 years or so. First with the introduction of affordable digital video and still cameras, and more recently with the integration of excellent cameras into smartphones.

While you probably won't see many professionals shooting with their smartphones, it is entirely possible to shoot acceptable images and video in this way for product support documentation, behind-the-scenes features, social media, and many other projects that don't require high production value.

As usual, the major drawback is that shooting and editing everything yourself can take a lot of time. Even more so if you invest in dedicated gear and are aiming for high production quality.

Intermediate: Freelance photographers and videographers

Unless your company is stationed in Antarctica, there should be at least a handful of professional freelance photographers and videographers nearby. Many of them will charge hourly rates, though some will choose to charge a day rate or by project.

With the exception of specialized motion graphics or 3-D animation, these freelancers should be able to handle the bulk of your photo and video needs, at least for your first few years in business.

The main things to check when dealing with freelance photographers and videographers are quality and specialization. **Be sure to find someone who does commercial work and not just weddings or senior portraits.** Commercial photography and video require a different type of customer service than do these other specialties.

Also, make sure they will provide you with **full-resolution** copies of their output. You do not want to be stuck paying them over and over every time you need a particular image or video file.

However, most professional photographers and videographers will **not** provide raw source files or project files, which is fine, because you don't have time to mess with those anyway.

Advanced: Studios and production houses

When you need to make a real impression on your prospects or other stakeholders, there truly is no substitute for a big-budget photo or video shoot. I'll admit that much of what goes into these productions can seem excessive in the beginning, but such concerns usually evaporate once you see the final product.

Small to mid-size science and technology companies typically don't have

large audiences, so it may seem counterintuitive to invest in big-budget content. But there are some scenarios where it can really make sense to pull out all the stops.

Company profile videos

A strong, well-produced company profile video will not only show your prospective customers that you take your business seriously, but it will relieve the burden on your staff to present the “company overview presentation” flawlessly at every customer meeting.

If the company profile features your leadership team (and it should), it will effectively give a wider audience access to your team without them needing to be present at every meeting.

Thus the ROI for such a project would be a function of reduced travel expenses, time, and preparation required for stakeholder meetings, as opposed to its potential impact sales (which would be nearly impossible to measure anyway).

Explainer videos

For science and technology businesses, few pieces of communication are as important as the one explaining how your technology works. If your prospective customers, regulatory agencies, and even the general public can't understand it, then you will quickly lose traction.

This is why I recommend creating the best explainer videos you can afford.

Not only will working with real professionals make you feel extra confident about putting your baby in their hands, but you can also rest easy knowing your technology has been given the best possible outlet for explanation.

Print collateral

Since people have been accustomed to “printing” from word processors and other office apps for decades, they often assume commercial printing is done in much the same way, but with more paper.

In reality, it's a little more complicated than that. And to actually design for print requires a special combination of skills. Namely, the ability to create an effective print layout that's consistent with your brand **and** the technical knowledge to make it work on a commercial printing press.

This is why I don't recommend doing print design yourself unless you know the difference between CMYK and RGB, and have ample experience using professional page layout software (such as Adobe InDesign) to prepare files for commercial printing.

It's so easy to find a designer to do this for you that I can't think of any reason to do it yourself unless you just really enjoy it and have time to burn.

Be sure to find a designer who knows how to do print work. Be cautious when asking your web designer to prepare a print design for you, since it requires a different type of skill. Always make sure they have done print work before and can prepare press-ready files without any hand holding.

Did you find this guide useful?

Feel free to share it with anyone you know who is trying to grow and promote a science and technology business.

Have questions or suggestions? Send them to me:
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Hi, my name is Andrew Layton.

I help science and technology firms communicate complex information and streamline their business development through branding and positioning.

Need some help?

I offer a range of services for small and mid-size science and technology businesses to help them manage branding and marcom projects.

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