

Building a Foundation for Sustainable Growth

Industrial Training Services (ITS) is a family and woman-owned business that helps their clients in the natural gas industry maintain safe and compliant programs through operator qualification (OQ) training, certification, and monitoring. For decades, ITS's industry-proven solutions, effective tools and dedicated team have made them the choice for the largest natural gas companies with the most complex programs across the United States.

Challenge

Until 2021, ITS didn't have a focused marketing approach. Their marketing team tactically supported the sales, product, and internal teams, but they didn't have a marketing leader and didn't consider their approach "strategic." In addition, ITS wasn't sure what the best structure would be for their marketing organization. As part of their strategic planning process, Stephanie Balmer, CEO of ITS, determined it was time to build a solid marketing foundation. Stephanie said, "We knew the business could only grow so far without a strong and confident marketing department. We needed a marketing leader to come in and help us develop the marketing department so that we could continue to grow the business."

Solution

Stephanie was introduced to Amy Connor, CEO & Owner of CMO-OnLoan, through a consultant who was helping ITS with its strategic plan. After several discovery meetings and conversations to determine the right approach, ITS hired CMO-OnLoan. Amy stated, "When I met with Stephanie, I knew CMO-OnLoan could make an immediate impact on their business. They had a best-in-class product, a strong team and a collaborative culture. They just needed guidance on how to build a foundation and align with the rest of the organization."

The scope for CMO-OnLoan had three primary focus areas that spanned strategic planning, implementation of key initiatives for short term impact, and support to embed marketing expertise and confidence in the ITS team.

Amy and the CMO-OnLoan team were focused on defining a growth roadmap that would both deliver results and allow for the flexibility needed in an environment fast-paced change.



KEY TAKEAWAYS

Industrial Training Services (ITS) leads operator qualification in the natural gas industry by helping clients maintain safe and compliant programs.

Having no marketing leader, Stephanie Balmer, ITS CEO, wanted an external resource to help build a marketing foundation.

ITS hired CMO-OnLoan to:

- a) Build and begin implementing a customized strategic marketing playbook that would be a foundation for sustainable growth
- b) Guide short-term priorities like developing initiative launch plans for upcoming product launches
- c) Coach and support the Marketing Officer

When asked about the engagement, Stephanie Balmer, ITS CEO stated, "Now we have the strategy and processes in place to confidently implement. We have a foundation for growth."

Solution, Continued

One of the first projects was updating the ITS brand architecture. The existing naming approach made it harder to build the core ITS brand, so ITS and CMO-OnLoan worked together on a revised structure that worked to build equity for ITS while also making it easy for customers to understand the differences between the various products and services. A second key project was defining the ITS promise and secret sauce that helped build a solid strategic foundation for all marketing communications.

With these and other brand strategy foundations in place, the team then shifted focus to implementation. CMO-OnLoan collaborated with sales consultant, Pam Beigh and her firm, SalesCORE to create an integrated KPI tracker and dashboard provided clarity on what was driving business results. CMO-OnLoan helped jumpstart several urgent initiatives by developing plans for upcoming product launches, building a plan for the website, and refreshing the sales booth. Additional implementation work including building a client engagement plan, an event strategy plan, a sales support plan and a content development process and calendar.

Throughout implementation, CMO-OnLoan met weekly with the marketing team to discuss projects and prioritize activities, share expertise, and provide coaching and support. In less than a year, the building blocks were in place, and the marketing team was confidently leading and managing the work their own.

Results

Stephanie and the ITS team were pleased with the results of the engagement. The specific outcomes include:

- Marketing results dashboard shows that marketing is impacting business and growth goals
- Marketing believes that they can proactively help grow the business
- Strong, consistent brand across all mediums
- Collaborate approach with sales and marketing
- Clear approval process for marketing activities and expenses

After the engagement was finished, Balmer stated, “Before CMO-OnLoan we weren’t clear on marketing’s role in growing the business. Now we have the strategy and processes in place to confidently implement. We have a foundation for growth.”

SERVICE HIGHLIGHTS

Build and Begin Implementing the Strategic Marketing Playbook

1. Brand Strategy
2. Communication Strategy
3. Marketing Plan
4. Resource Plan

Coaching and Support for the Marketing Team

Implementation Deliverables

- Brand Rollout-Plan
- Logo Refresh Brief
- Initiative Launch Plan
- Event Strategy and Plan
- Sales Support Plan
- Sales Booth Refresh Plan
- Website Plan
- Research Plan with Product
- Client Engagement Plan
- Renewal Segmentation
- Content Development Process & Calendar
- LinkedIn Plan & Training