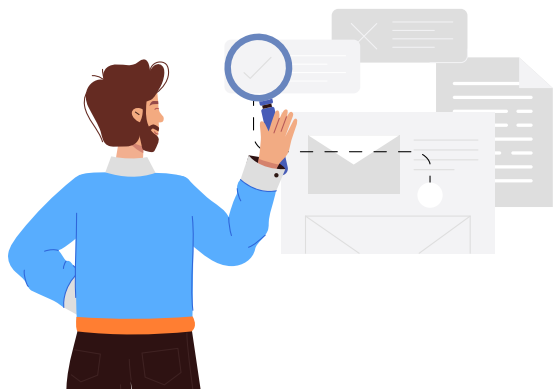




# PLANIFI PLATFORM ANALYTICS GO-TO-MARKET AD STRATEGY AND CONSULTATION

## OVERVIEW

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Planifi Platform Analytics (<https://planifi-pa.com/>), is a fully managed platform for enterprise planning, analytics, and consolidations needs. Planifi is built on a technology stack utilized by thousands of large enterprise customers today for mission-critical business planning (FP&A) and performance management.

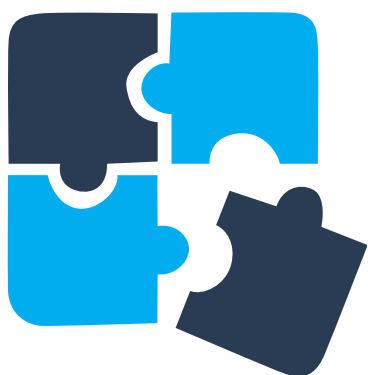
Planifi is the sister company of SimpleFi Solutions. SimpleFi delivers SAP analytics solutions for the office of the CFO and CIO. They were recently given a valuation of \$1.5 billion by Blackstone.

Planifi was looking to replicate the success of its parent company and needed a go-to-market strategy and actionable plan to build a consistent sales pipeline of ready-to-buy leads.

They began working with Annex IT Marketing due to our track record of success within the IT Consulting industry.

## CHALLENGES

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Planifi had been using cold outreach, social media, and LinkedIn Ads, but were not reaching the goals they were hoping to accomplish. They had been generating leads from these efforts, but they were not as qualified as they were hoping for. Most of the leads that were booking sales calls would show up to calls to collect info, but not end up converting to paying clients.

Running these lead generation strategies was very time-consuming for Planifi and required a specialized skillset with a long learning curve.

Planifi was aware that Google, Meta, and LinkedIn advertisements are an effective way to generate new clients in the IT space, but were unaware of where to start and didn't want to waste advertising spend without an effective strategy. This is where Annex IT Marketing came in.



# SOLUTION/STRATEGY



We determined that the best strategy to help PlaniFi achieve its goals was to build an actionable and scalable strategy and consult them on how this plan could be implemented to help them build a consistent sales pipeline and portfolio of new clients.

We began the process by conducting an in-depth interview to get an understanding of where they are currently at and where they needed to go. We also collected all the relevant information needed to construct the strategy.

We then conducted further research on their business, industry, target market and competitors. Based on this research and our previous experience and industry knowledge, we were able to determine the best solution to help them achieve their goals and produced an in-depth actionable plan for them to move forward. This plan is composed of conversion rate optimization strategies to improve the overall conversion rate of their website and landing pages as well as actionable plans to follow for Google, LinkedIn and Meta Ads.

## RESULTS



### Website Audit and Conversion Rate Optimization Plan

We began by researching the websites and landing pages of the most successful companies in the industry and followed up by conducting a complete audit of PlaniFi’s website to pinpoint actionable areas for improvement. We then combined our industry knowledge to create an optimization plan to improve their website and landing pages to convert the highly targeted traffic that will be coming in from PPC Ads.

**The plan included in-depth actions regarding how they could implement some of the following optimizations:**

- Simplify navigation and streamline the user interface to ensure visitors can easily find essential information and key features.
- Ensure that all calls-to-action (CTAs) are prominent and lead directly to actionable pages, such as forms or service details, to increase user engagement and conversion rates.
- Update the homepage and landing pages with concise, compelling content that clearly communicates the value propositions and benefits of using PlaniFi.
- Integrate advanced analytics tools to track user behaviour and engagement, allowing for data-driven decisions to refine marketing strategies and improve user journeys. (GA4, Hotjar)



# Advertising growth strategies for Linked in Ads + Google Search and Display Ads

Once the conversion action plan was complete, we shifted our focus to creating scalable strategies and an actionable plan for Google and LinkedIn Ads.

We started by researching and studying the advertisements of the most successful competitors. We pinpointed strengths and areas for improvement and created a brief highlighting how we could combine these points alongside our knowledge of what works on these platforms.



## Google Ads

We continued the plan by conducting keyword research and studying the trends of these keywords. We then developed strategies including ad copy creation, audiences, extensions, campaign + account structure, and creative ideas for display advertising. We then created a timeline for the plan.



## LinkedIn

We then crafted a lead generation strategy on Linked In which included pinpointing key decision makers to target, ideas for lead magnets and creative to use with the advertising, as well as compelling copy and an actionable strategy and timeline to implement these.

## CONSULTATION ON STRATEGY IMPLEMENTATION

Once we had finalized the strategies and growth plan, we then began by meeting with PlaniFi to review the plan and begin the consulting phase of the project.

We met with the Director of Business Development and consulted them on how all of these strategies could be implemented. We answered all of their questions and explained in depth how everything could implemented to help them reach their goals over the next 3-12 months.

## CONCLUSION AND NEXT STEPS



PlaniFi now has a clear actionable plan and instructions on how to build a consistent pipeline of new clients. We plan on working with PlaniFi regarding the implementation of these strategies as well as further consultations.

