NBS
Powered by Hubexo

Marketing Masterclass series

DIGITAL TOOLKIT

in collaboration with

STELLAR CX

Edify Content Studio

BeaconHouse
Professional Conferences and Events

SQUIDGY

SERIÖS GROUP

Lesniak Swann
Unfair competitive advantage

NBS
Powered by Hubexo

The aim of the toolkit

Our free digital toolkit follows the episodes released as part of our Marketing Masterclass series. It is designed to equip you with knowledge, templates, and best-practice guidance to help you connect with specifiers throughout the marketing cycle.

What you'll find in the toolkit

1 UNDERSTANDING YOUR AUDIENCE

- Customer personas
- Customer journey
- User-experience strategies

2 CONTENT MARKETING

- Content ideas for the specification audience
- Measuring content success

3 EVENTS & PAID SOCIAL

- Event marketing
- LinkedIn advertising
- Joining the dots

4 STRATEGIC PLANNING

- Data and marketing strategy

NBS
Powered by Hubexo

1 Understanding your audience

To develop an effective marketing strategy, start by understanding your target audience. A great first step is to create customer personas and map out their experience with your brand.

Customer Personas

A customer persona is a **semi-fictional representation of an ideal customer based on real data and research.** It helps businesses tailor their strategies by understanding their audience's characteristics, behaviours, and motivations.

Key elements of a persona:

- **Demographics**: Age, gender, income, job title, location, etc.
- **Psychographics**: Interests, values, lifestyle, and behaviours.
- **Goals & Pain Points**: Customer objectives and challenges they face.
- **Buying Habits**: How and where they make purchasing decisions.
- **Motivations & Needs**: What drives their engagement with a brand.

Why use personas?

They help businesses create targeted marketing, product development, and customer experiences.
Focusing on a well-defined individual rather than a broad audience ensures tailored messaging and engagement.

EXAMPLE SPECIFIER PERSONA

Name: Alex Walker
Role: Senior Architect & Specification Consultant
Industry: Architecture & Construction
Experience: 15+ years

Alex's needs:

- Prioritises sustainability, compliance, and efficiency.
- Uses BIM software, NBS Source, and CPD courses for research.
- Needs clear, reliable product data and certifications.

Alex's pain points:

- Time-consuming specification processes
- Finds inconsistent sustainability claims challenging to navigate

Decision drivers for Alex

- Relies on trusted platforms like NBS Source
- Prefers BIM-compatible products with verified EPDs
- Influenced by CPD learning, case studies, and peer recommendations

TOOLS AND RESOURCES

PERSONA & AUDIENCE BUILDING

HubSpot - Make my Personas

A TOOL THAT GUIDES YOU THROUGH PERSONA CREATION BY ASKING KEY QUESTIONS ABOUT YOUR AUDIENCE.

NBS Partner Platform - NBS Intelligence

OFFERS UNIQUE INSIGHTS INTO HOW SPECIFIERS ARE ENGAGING WITH YOUR PRODUCTS. YOU CAN SEE WHERE YOU'VE BEEN SPECIFIED, ON WHAT TYPE OF PROJECTS AS WELL AS ACCESS TO INDUSTRY AND COMPETITOR TRENDS.

GA Audience Insights

BASED ON USER INTERACTIONS WITH YOUR WEBSITE, IT PROVIDES DEMOGRAPHIC AND BEHAVIOURAL DATA TO HELP REFINE CUSTOMER PERSONAS.

CUSTOMER RESEARCH

SurveyMonkey

OR ANY OTHER SURVEY TOOLS YOU ALREADY USE WITHIN YOUR BUSINESS.

CUSTOMER EXPERIENCE METRICS

StellarCX

Customer Journey

The customer journey is the complete experience a customer has with a brand, covering all interactions from initial awareness to post-purchase engagement.

AWARENESS
Discovering the brand via marketing, word-of-mouth, or digital channels.

CONSIDERATION
Researching and evaluating products or services.

SPECIFICATION
Decision-making process.

AFTERCARE
Support, problem resolution, and user experience.

ADVOCACY
Loyal customers sharing their positive experiences.

Customer Journey Mapping (CJM)
A visual representation of the journey helps businesses:

- Identify pain points (frustrations in the process).
- Recognise moments of joy (positive brand interactions).
- Highlight critical “moments of truth” (key decision points).

How to improve the journey?

- Analyse current experiences (“As Is” map).
- Identify areas for improvement and quick wins.
- Create an optimised future journey (“To Be” map).
- Use real customer insights and data to refine strategies.

By mapping the journey from the customer’s perspective, businesses can enhance satisfaction, build loyalty, and drive long-term success.

TOOLS AND RESOURCES

VISUALISATION TOOLS

Miro

GREAT FOR COLLABORATING AND INCLUDES JOURNEY MAP TEMPLATES.

Draw.io

BASIC TOOL TO CREATE FLOWCHARTS AND MAPS EASILY.

Lucidchart for Journey Mapping

ALLOWS TEAMS TO DESIGN DETAILED JOURNEY MAPS AND ANALYSE EACH STAGE IN DETAIL FOR GREATER UNDERSTANDING AND OPTIMISATION.

PROJECT MANAGEMENT

Trello

TRACK JOURNEYS AND TASKS USING A SIMPLE CARD, BOARD AND LIST FORMAT - GREAT FOR COLLABORATING WITH TEAM MEMBERS.

ClickUp

SIMILAR TO TRELLO - OFFERS JOURNEY MAPPING, THE ABILITY TO TRACK TASKS AND TEAM COLLABORATION.

User experience

Good user experience leads to **higher customer loyalty, stronger brand reputation** and **increased conversions** - everything you want to deliver from your marketing activity.

Key UX practices

ACCESSIBILITY
Inclusive design for all users with focus on

- Colour contrast
- Typography
- Alternative text
- Screen reader compatibility

USER RESEARCH
Essential for understanding user needs

- Customer surveys
- Feedback interviews
- Usability testing

ANALYTICS
Track user behaviour with key metrics

- Conversion rates
- Bounce rates
- Site search terms
- Device usage

Attract, Convert, Retain strategy

ATTRACT
First impressions
Intuitive navigation
Compelling content

CONVERT
Detailed product information
Clear CTAs

RETAIN
Continuous UX improvement
Accessible resources

TOOLS AND RESOURCES

USER RESEARCH

Dovetail

COLLECT, ANALYSE AND SHARE CUSTOMER INSIGHTS.

Figma

DESIGN INTERFACE TOOL FOR USER EXPERIENCE.

Adobe XD

DESIGN AND CREATE ASSETS AND EXPERIENCES FOR WEB AND MOBILE.

Hotjar

TRACKS USER BEHAVIOUR WITH HEATMAPS, RECORDINGS, AND SURVEYS.

ANALYTICS

Google Analytics

2 Content Marketing

Content Marketing builds brand awareness and positions you as a trusted voice in specification. Share insight-led content that helps specifiers cut through the noise and engage with what matters.

Content Marketing

NBS
Powered by Hubexo

Step 1: Understand your audience

- **Build on what they already know** - Avoid content that feels patronising by ensuring it's relevant, insightful, and adds genuine value.
- **Solve their problems, not just sell your products** - Specifiers want practical solutions. Make it easy for them to access the technical details, compliance information, and inspiration they need to make informed decisions.
- **Shift from a product-first to an audience-first mindset** - Focus on what specifiers really want to know: the features, benefits, and impact of your product.
- **Tap into internal expertise** - Your team's technical knowledge and industry insight are powerful assets. Content informed by internal experts is often more credible, useful, and aligned with what specifiers truly value.

Step 2: Define your content strategy
(different from the content plan!)

Goals & objectives - Align your content strategy with broader business and sales goals. Consider how content can support lead generation, drive specification, or build stronger relationships - beyond just marketing KPIs.

Stakeholders - Identify the internal and external people you'll need to collaborate with - from product managers to sales teams and technical experts. Top tip: Use this list to guide an internal launch of your content strategy and secure buy-in early.

Audience groups - Define who you want to reach through your content marketing. Group your audiences based on their roles (e.g. architects, specifiers, contractors), needs and decision-making influence.

Messaging & calls-to-action - Think about the next step you want your audience to take. Do you want to drive traffic to a product page on NBS? Encourage CPD sign-ups? Promote related resources? Build in relevant CTAs and touchpoints to guide users through the journey.

Deliverables & KPIs - Set clear, measurable targets for your content marketing strategy. This will help you track performance and stay agile when reviewing and refining your approach.

Formats - Decide on the content formats that best suit your audience and objectives. This could include CPDs, technical articles, whitepapers, case studies, videos or infographics.

Content Marketing

NBS
Powered by Hubexo

Step 3: Content Creation

- **Use a planning and scheduling tool** – This helps you stay ahead of deadlines and coordinate across teams.
- **Balance creativity with organisation** – Content planning involves both admin and creative effort. Creating, compiling, drafting, and scheduling all play an important role.
- **Think multi-channel and repurpose where possible** – Maximise value by tailoring content to suit different platforms. For example, turn a case study into a LinkedIn post, or repurpose CPD content into an email series for specifiers.
- **Batch your content** – Allocate dedicated time to content creation and produce multiple pieces in one go. This approach keeps your content strategy on track when other business priorities arise.

Step 4: Smarketing

- Also known as **sales and marketing alignment** - here's how to achieve smarketing success:
    - **Treat sales as your customer** - hold internal launches for content delivery and campaigns.
    - Sales will have a list of **target accounts / customers** they want to reach - this should then be built into your marketing strategy. Then use the expertise from the Sales team to help generate ideas.
    - Have methods to measure the effectiveness of smarketing - **apply KPIs to the collaborative activity** to measure success.

TOOLS AND RESOURCES

UNDERSTANDING YOUR AUDIENCE

EPISODE 1 MARKETING MASTERCLASS: UNDERSTANDING YOUR AUDIENCE, AVAILABLE ON-DEMAND AND ACCESS THE DIGITAL TOOLKIT BASED ON THE CONTENT FROM EPISODE 1

CONTENT IDEA GENERATION

ANSWER THE PUBLIC

UBERSUGGEST

GOOGLE SEARCH CONSOLE

PLANNING TOOLS

ADOBE EXPRESS CONTENT SCHEDULER

TRELLO, **MONDAY.COM** AND **ASANA** (GREAT FOR AUTOMATIONS AND WIDER BUSINESS PLANNING).

AI / COPY EDITOR SUPPORT

CHAT GPT

GRAMMARLY

QUILLBOT

NBS
Powered by Hubexo

3 Social and Event Marketing

Combining the high-impact presence of live events with the precision and scale of paid social is one of the most powerful marketing strategies available to manufacturers.

Event Marketing

NBS
Powered by Hubexo

The Opportunity

Where Events Fit in Your Marketing Mix

Live events create opportunities for face-to-face connection, real-time product demos, and trust-building that digital ads can't match.

The Challenge

Standing out in a cluttered market

To stand out, brands must show up with purpose and value. Events offer a focused space to meet real audience needs, solve problems, and build lasting, trust-based relationships.

The Approach

Strategy Over Spontaneity

It starts with understanding the 'why', then moves through planning, promotion, engagement tactics and personalised follow-ups - all as part of a joined-up approach. Finally, measure performance to drive continuous improvement.

The Outcome

When it works, it really works

When done right, event marketing goes far beyond lead generation. It raises brand awareness and credibility, builds foundations for strong partnerships and creates standout experiences that leave a lasting impression.

80% of trade show attendees have buying power



HINTS AND TIPS

BE MEMORABLE, NOT GENERIC
Think beyond a branded pop-up - create an experience people want to engage with - set up demo stations or show product testing videos - something to kick-start conversations aside from a sales pitch.

GET SOCIAL
Maximise content opportunities: tease your presence online, capture a pre-event stand set-up timelapse, share videos of your team and stand before people arrive. Everything is content!

MAKE THE DATA WORK FOR YOU
Use QR codes, track downloads, and always collect data that you'll **actually** use in your event follow-up strategy.

FOLLOW UP LIKE A HUMAN
Segment your leads, personalise your message, and speak to their specific interest - ideally while the event is still fresh in their mind (pre-planning is key!).

USE FRINGE EVENTS
Host a business breakfast or dinner, or office drop-in outside the main event - a perfect opportunity to develop relationships!



TOOLS AND RESOURCES

EVENTBRITE

Simple setup, built-in promotion tools, and integrations with email and social platforms.

RINGCENTRAL EVENTS

Formerly known as Hopin, end-to-end platform for hosting digital events, expos, and live Q&A.

SLIDO

Perfect for keeping attendees engaged during presentations or workshops.

UNBOUNCE

Drag-and-drop editor with A/B testing and strong lead-gen features - ideal for pre-event campaigns.

CROWDSIGNAL

Create fast, branded polls and feedback forms.

REMO

Interactive virtual venue mimicking real-world networking.

LinkedIn Advertising

NBS
Powered by Hubexo

Why LinkedIn Matters for Manufacturers

Reach decision-makers before they're ready to buy

LinkedIn helps manufacturers build early trust and visibility with engineers and procurement leads - long before buying decisions are made.

The Power of a Full-Funnel Approach

Guide prospects from scroll to sale

A full-funnel strategy nurtures buyers from awareness to conversion, avoiding wasted spend and creating more sustainable, long-term growth.

Aligning Content to the Funnel

The right message at the right moment

Tailor content to each stage - awareness, consideration, and conversion - so every ad speaks to the buyer's mindset and intent.

Getting the Foundations Right

No results without the right setup

Effective LinkedIn campaigns rely on smart targeting, strong creative, and accurate tracking - so you can measure, optimise, and scale success.

Proving Performance Over Time

Optimise for insight, not just output

LinkedIn success isn't instant. Track performance trends, refine based on real data, and give campaigns time to build brand familiarity and trust.

HINTS AND TIPS

TARGETING AND AUDIENCE

- Use job title, seniority, industry, and firmographics to reach decision-makers
- Use exclusions (e.g. students, competitors, irrelevant job functions) to avoid wasted impressions and protect your budget.
- Layer in CRM or website data to create custom audiences.
- Build separate audiences for each stage of the funnel (e.g. cold vs. retargeting).

CREATIVE & MESSAGING

- Align your message with the funnel stage: awareness is not the same as conversion.
- Keep video ads short and clear no one has time to watch a film.
- Use storytelling in carousel ads to showcase processes or customer journeys.
- Include clear but soft CTAs at the top of the funnel (e.g. "Learn More").
- Avoid jargon; write like a human, not a brochure.

AD FORMATS & CONTENT IDEAS

- Use video or single image ads to introduce your brand.
- Share brochures or calculators using document ads for lead generation.
- Use conversation ads to land in inboxes with tailored offers.
- Use team-written thought leadership posts to build authority.

MEASUREMENT & OPTIMISATION

- Always install the LinkedIn Insight Tag for tracking and retargeting.
- Use UTM parameters to track performance across platforms.
- Set up conversion tracking early - before launching campaigns.
- A/B test creative formats to optimise performance.
- Segment and follow up leads with relevant content post-capture.

Joining the dots

This final section brings everything together - content, paid social, and post-event follow-up - into one joined-up strategy.

NBS
Powered by Hubexo

BUILD ANTICIPATION

Use teaser videos, product reveals, or speaker intros to spark interest and emotional investment before the event even.

TARGET THE RIGHT PEOPLE WITH PAID SOCIAL

Don't waste budget on irrelevant clicks - use LinkedIn targeting to focus on seniority, industry, and job title that align with your ICP.

CREATE WITH A PURPOSE

Capture content at the event intentionally - know which formats you need for which channels (e.g. wide shots for YouTube, portraits for Reels).

LET CONTENT DO THE HEAVY LIFTING

Turn your event into a content engine: think testimonials, FAQs, demos, behind-the-scenes clips, blog posts, and thought leadership.

SEGMENT YOUR LEADS

Sort contacts into hot, warm, and early-stage buckets so your follow-up messaging feels personal, timely, and relevant.

NURTURE, DON'T POUNCE

Avoid immediate hard sells. Start with thank-you messages and low-pressure follow-up, especially for early-stage leads.

BLEND ORGANIC AND PAID FOR MAXIMUM REACH

Don't rely on just one channel. Amplify key content with paid social while your team posts organically. Together, they reinforce the message.

MEASURE THE WHOLE JOURNEY

Track from pre-event promo to post-event conversion using UTM links, CRM data, and retargeting insights to prove ROI.

4 Data and marketing strategy

The most effective marketing happens when creativity is driven by data. This toolkit shows how to connect insight with execution - combining analysis, clear messaging, and the NBS Partner Platform to turn engagement into specification results.

Connect data & creative

NBS
Powered by Hubexo

This section is designed to help you plan and deliver effective marketing activity that connects creativity with data-driven decision-making. It outlines the practical steps, tools, and focus areas that can help you strengthen engagement, target the right specifiers, and grow specification opportunities. Use it as a guide to structure your planning conversations

	STRATEGIC	CREATIVE	TOOLS
1. Start with commercial outcomes	Use CRM data to see which accounts or campaigns drove specifications last year. Focus reporting on specification growth, not vanity metrics.	Build campaigns that show how your products solve real project challenges - for example, helping architects meet sustainability or performance goals.	Use CRM to identify accounts and campaigns driving specs. Track growth in Power BI or Looker Studio. Integrate key data sources for a single view.
2. Turn data into decisions	Use insight regularly to spot shifts in specification behaviour or engagement. Act quickly when activity changes.	Bring data into creative reviews. Focus on messages and visuals proven to engage specifiers.	Use analytics dashboards to link marketing and specification data. Set alerts for engagement changes.
3. Target by context, not category	Target behaviour over job titles. Reach specifiers when they are researching or comparing, not after decisions are made.	Match creative to the stage of the journey: inspiration early, technical proof later. Keep tone and visuals consistent.	Segment audiences by behaviour in your CRM or LinkedIn. Use GA4 to track which content drives specification.
4. Use data when testing your value proposition	Test what drives specification - cost, compliance, performance, or sustainability. Change one element at a time to isolate what works.	Run creative tests to find which headlines, visuals, or messages perform best. Let audience behaviour shape your creative.	Run A/B tests on messages or visuals. Use Hotjar for engagement insight. Collect quick feedback via short surveys.
5. Link marketing data to specification data	Connect marketing, sales, and specification data to prove what drives results. Define what a qualified opportunity looks like and close the loop from campaign to specification.	Make every creative asset drive measurable action - for example, "Add to spec" or "Download guide".	Connect CRM and automation tools to link campaign and specification data. Use Partner Platform or Source analytics to see what drives specs.
6. Plan for predictive use of data	Identify when specification activity peaks by season or sector. Use trends to plan campaigns proactively.	Schedule creative refreshes ahead of forecasted spikes. Launch sector campaigns when engagement is highest.	Use Power BI or CRM dashboards to forecast specification trends. Apply historic data to plan around peak activity.
7. Journey coordination	Map the full customer journey from awareness to specification. Ensure every step connects logically.	Keep your creative story consistent across all touchpoints. Repurpose visuals and messaging for recognition.	Use automation workflows to trigger follow-ups. Track engagement and triggers with Google Tag Manager.
8. Use data governance as a brand strength	Keep data clean, compliant, and up to date. Regularly audit CRM and confirm consent preferences.	Reflect data integrity in your messaging. Make trust and transparency part of your brand tone.	Maintain data hygiene with HubSpot or OneTrust. Set clear internal rules for data handling and ownership.
9. Measure improvement, not just performance	Focus on what you learned, not just what happened. Capture insights to improve every campaign.	Review creative performance to see which messages and visuals deliver the strongest response.	Record learnings in Notion or Miro. Use a simple tracker to log test results and insights.

Planning checklist

Use this checklist to plan, deliver, and review your marketing activity with data-driven focus and creative clarity.

NBS
Powered by Hubexo

PLAN

- [ ] Define clear commercial objectives linked to specification growth.
- [ ] Review CRM and Partner Platform data to identify high-performing sectors, products, and specifiers.
- [ ] Revisit brand positioning - ensure messaging reflects current specifier needs.
- [ ] Choose 2-3 creative themes that connect brand value to real project challenges.

PREPARE

- [ ] Clean CRM data, update consent preferences, and remove duplicates.
- [ ] Analyse year-on-year performance to identify opportunities and gaps.
- [ ] Set SMART targets and define KPIs tied to specification outcomes.
- [ ] Allocate budget to proven channels, reserving test spend for innovation.

DELIVER

- [ ] Build a campaign calendar aligned with specification cycles and industry events.
- [ ] Plan creative production early - Source listings, CPDs, videos, and case studies.
- [ ] Use automation to coordinate journeys across email, Source, and digital channels.
- [ ] Ensure tracking and integrations (CRM, analytics, UTM codes) are in place before launch.

REVIEW

- [ ] Monitor dashboards monthly to track engagement, specifications, and performance.
- [ ] Analyse Partner Platform data alongside campaign metrics to link marketing to specification results.
- [ ] Hold quarterly reviews to refine messaging, targeting, and spend allocation.

IMPROVE

- [ ] Test and learn - A/B test creative and track which messages drive specification.
- [ ] Record key learnings and share insights across teams.
- [ ] Use predictive data to plan ahead of specification peaks.
- [ ] Refresh creative assets and campaigns based on proven engagement patterns.

How NBS can help

The NBS Partner Platform gives you powerful, real-time insight into how specifiers interact with your products.
Your NBS Account Manager can help you interpret this data, identify opportunities, and plan actions that turn insight into measurable specification growth.

ENHANCED ANALYSIS & REPORTING

A new reporting tool presents key specification and engagement metrics in an interactive visual dashboard.

Data can be exported into Excel format for detailed analysis, allowing users to monitor:

- Specification views and interactions
- BIM object downloads
- Monthly trends and engagement over time

SPECIFICATION TRENDS & YEAR-ON-YEAR ANALYSIS

Specification data can be reviewed annually to identify:

- Organisations that frequently specify your products
- New specifiers
- Previously active specifiers who have not specified your products in the current year

This enables proactive engagement and retention strategies.

ORGANISATION INSIGHTS

The Organisation tab allows users to search by company name and access a full view of their interaction history, including:

- Product search appearances
- Product views and specifications added
- BIM downloads
- Engagement over defined time periods

INSIGHTS & LEADS ADD-ONS

Insights Add-On – See which NBS Chorus projects align with your products and where specification demand is growing.

Leads Add-On – Identify live project opportunities and key organisations through Glenigan integration.

BIM OBJECT DOWNLOADS

Leverage BIM download data to understand which organisations are accessing your digital assets.

Use the Organisation tab to track whether these companies have also viewed your products, added you to specifications, or engaged in previous months or years.

RIBA CPD INSIGHTS

If you have created an on-demand RIBA CPD module, insights are available showing you which architects and specifiers have accessed your content.

This supports follow-up engagement and performance measurement of CPD initiatives.

Thank you for joining our masterclass!

Stay in the loop for future webinars!
Follow us on LinkedIn and subscribe to our events mailing list.

Check out our events and webinars

Follow NBS on LinkedIn