

# Marketing with Concur:

Tools & Resources

Get started now



# Welcome Marketers!

Welcome to the Concur Advisor programme.

We understand that part of making any programme successful is having the right tools and materials to promote and communicate our joint propositions.

Becoming a Concur Advisor is not a typical channel programme – we don't ask you to re-sell Concur but to simply refer your clients and we will do the selling. As a result, our marketing options may be slightly different to what you are used to. We approach our marketing like a self-service buffet – what is ours is yours. If you feel you can utilise it, we will do our best to help you. Our mantra is to make things as easy as possible for our Advisor partners to market and leverage all the materials that we create for your own use including our whitepapers, lead generation campaigns and collateral.

Please read through this guide and our marketing portal site ([info.concur.com/content/UKAdvisorMarketing](http://info.concur.com/content/UKAdvisorMarketing)) to understand all the marketing options available to you.

If there is anything that you would like to get involved with (or any questions), please reach out me, at [rachel.vandermerwe@concur.com](mailto:rachel.vandermerwe@concur.com)



Regards,

**Rachel van der Merwe**  
Sr. Manager, Channel Marketing

**Leverage: Our Brand**

**Share: PR & Social**

**Have your say: Blog**

**Promote: Website**

**Engage: Events**

**Growth: Lead  
Generation**

**Getting Started:  
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# Leverage: Our Brand

The Concur brand aims to come across in all our communication as **Clear, Optimistic and Knowledgeable**.

As a partner of Concur, should you want to use or mention the Concur name or logo in any press, collateral or website, this must be approved by a marketing contact at Concur. We aim to make this process as quick and easy as possible. Feel free to take a look at our brand site which will include usage guidelines and logos for download directly:  
[www.concurbrand.com](http://www.concurbrand.com) (username: Concur; password: Click.Done)

Should you have any queries, please contact Rachel van der Merwe at [rachel.vandermerwe@concur.com](mailto:rachel.vandermerwe@concur.com).

We have 3 logos that are available for your use :



CONCUR  
PLATINUM  
ADVISOR

# Share: PR & Social



16, 200 followers



27,200 likes



10,900 members



587 followers

Social Media is a big part of Concur's own marketing strategy, as we understand the importance and reach that it has.

We are happy to amplify any of your social media efforts around events or campaigns that we run in conjunction with you.

Tag us! @Concur

## What you need to do:

1

Provide us with your social media posts and any relevant hashtags along with timelines.

2

Make sure to connect to all your contacts at Concur, so we can also help amplify your message.

3

Provide us with plenty of lead time to coordinate with your launch to maximise impact.

# Have your say: Blog

The Concur blog is a great opportunity for you to use another channel to reach your target audience and build brand awareness. Moreover, it's mutually beneficial as link-building increases trust and credibility through social amplification.

We recognise that you bring a unique perspective and specialised knowledge in your area of expertise and as a result, we have carved out specific slots in our blog calendar dedicated for our Advisors.

Blog posts are shared with all our social media networks.

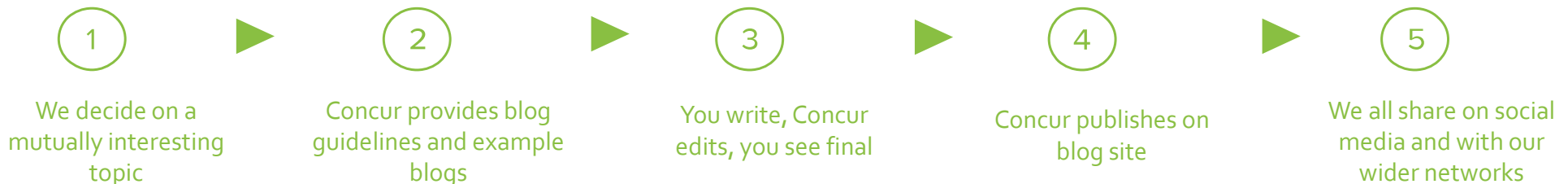
[www.concur.co.uk/blog](http://www.concur.co.uk/blog)



## A blog is...

- 400 – 500 words
- Includes a strong CTA (Call-to-Action)
- Includes supporting evidence, research to cite sources
- Helpful, interesting and relevant
- Builds an emotional connection with its audience
- Campaign related or helps Concur market itself (as an add-value to your solution)
- Answers: "So what, what's in it for me?" for the reader.

## How it works: (avg. timeframe is 3 weeks from ① )



# Promote: Website

Your website is a great way of promoting our partnership and driving referral leads to Concur and ultimately easy revenue for your business.

Since all public mentions of Concur must be approved by Concur marketing, we want to make this as easy as possible for you, and included some pre-approved web copy in our [marketing portal](#) that you can post on your website. Alternatively, draft your own and send it through for a quick approval.



If you would like to link our Test Drive (currently our highest conversion tool) to your website, or any of our many other assets, don't forget to ask for a coded link so we can track all enquires back to you!

To read more about the test drive tool, please [click here](#)



## Examples of what other Advisors have written:



<http://www.dcs-solutions.co.uk/software/concur/>



<http://www.mysoftltd.co.uk/partners>



<http://www.miracle-dynamics.com/expense-management.html>

# Engage: Events



## Live events

We find that one of the easiest ways to drive referrals for the programme – and ultimately revenue for our Advisors is to invite Concur to your customer events!

It's really quite simple. Invite us, and we'll show up with relevant speakers, exhibition booths, freebies – you name it.



## Webinars

We are more than happy to present at your webinars or organise one on your behalf – provided that you drive the attendees. We can work with you on content and in some circumstances provide the platform to drive the webinar from.



**Anyone that we speak to at your event with interest we will track and report back to you.**

## Concur Driven Events:

At times we will provide events – typically informative networking lunches where we may approach you to invite some of your customers and prospects that we are currently speaking with. Some of these opportunities will require a financial investment, and some we'll take care of.



## Fusion Exchange:

We have an annual customer & prospect event held in London in which we have limited partner sponsored spaces available.

Contact Rachel van der Merwe if you are interested.

# Grow: Lead Generation



## Email Templates

Our whitepapers and e-books available on our resource centre ([www.concur.co.uk/resource-center](http://www.concur.co.uk/resource-center)) have corresponding email templates that we can provide you to deploy to your customers.

We can also provide you with unique links that allows tracking as well as social media copy to utilise.

See: [Marketing Portal for sample templates](#)



## Test Drive

Our test drive allows prospects to see our expense tool live. We have uploaded a selection of receipts and approvals for prospects to go and complete so they can see just how simple expenses can be.

We can provide you with a unique link that allows us to track any prospect who signs up for our test drive to you – ask us how.



## Collateral/Whitepapers/ Brochures

We have a large selection of research, whitepapers, e-books and brochures that we can provide you with. These are constantly updated and reviewed, so please reach out to get our best and most current selection.

Feel free to pass these onto your prospects, employees and customers to help educate and start the expenses conversation.



## Comprehensive marketing campaigns

Complete marketing campaigns are only available for our platinum elite advisor partners and are discussed on an as-needs basis.

Please contact Rachel van der Merwe if you are interested in conducting a joint marketing campaign.



# Get started: checklist



## Launching the programme

The launch is the first and important part of a successful partnership. Getting the word out there is key.

- ☐ Email programme launch to internal stakeholders, customers & prospects (sample template provided in the Marketing Portal)
- ☐ Ensure your business is signed up for training. Attend yourself.
- ☐ Understand the programme and Concur – Read provided materials
- ☐ Update your website with Concur partnership
- ☐ Follow Concur on social media – twitter, linkedin, facebook etc.



## Driving Engagement

Engagement is a continuous effort. Make sure to ask questions and include Concur where possible. We will do the same in return.

- ☐ Make sure to compensate and incentivise your reps appropriately with Concur referrals and closed deals.
- ☐ Share your events calendar and invite Concur to any upcoming events
- ☐ Provide Concur with contact details of internal stakeholders to be included in Advisor-wide communications
- ☐ Include Concur in your monthly/quarterly marketing plans



## Enablement

Educating sales and providing right tools and information to get comfortable to start a conversation around expenses.

- ☐ Provide feedback to Concur on what tools are missing and what format is needed.
- ☐ Include Concur with your own product suite in your sales collateral
- ☐ Ensure that your sales team has had a training session and demo with our Advisor team. Get them to download a test drive to see for themselves.



## Celebrate your success

Recognising successful members of your team are integral to keeping the programme momentum.

- ☐ Is this client a potential case study or reference? Concur has a team who can write, produce and publish case studies for you to use – part of the Advisor benefits.
- ☐ Recognise those who have passed qualified leads, leading to a sale – talk to us if you have any incentive ideas that you feel will work for your team.