



# PMI Marketing Portal User Guide

PMI Marketing Portal: Supporting member and credential holder acquisition and retention

## Table of Contents

<b>PMI Marketing Portal Introduction</b>	<b>2</b>
<b>PMI Practitioner Campaign Overview</b>	<b>2</b>
<b>Using the PMI Marketing Portal</b>	<b>3</b>
<b>Accessing the Marketing Portal</b>	<b>3</b>
<b>Where to Access</b>	<b>3</b>
<b>Logging In</b>	<b>3</b>
<b>Request an Account</b>	<b>3</b>
<b>How to Use the Marketing Portal</b>	<b>4</b>
<b>Choosing Your Role</b>	<b>5</b>
<b>Choosing Your Objective</b>	<b>5</b>
<b>Download Materials</b>	<b>6</b>
<b>Customize Materials</b>	<b>6</b>
<b>Ordering Pre-Printed Materials</b>	<b>7-8</b>
<b>Resources</b>	<b>8</b>
<b>PMI Brand Assets</b>	<b>9</b>
<b>PMI Brand Guidelines</b>	<b>9</b>
<b>Content Sharing</b>	<b>9</b>
<b>User Guide and FAQs</b>	<b>9</b>
<b>Provide Your Feedback and Contact Us</b>	<b>9</b>
<b>Contact Us</b>	<b>10</b>

## PMI Marketing Portal – An Introduction

Welcome to the PMI Marketing Portal—the quick and easy way to build marketing campaigns and materials for your marketing needs.

The PMI Marketing Portal was built to meet the needs of stakeholders who represent and market PMI and its products around the globe to practitioners, organizations and academic institutions. The needs that were communicated to us via a global needs assessment included:

- Consistent PMI messaging and graphical elements to use for marketing on a local level
- Marketing templates, such as newsletter, eblasts, print and online ads, flyers, postcards and event marketing templates
- Samples of marketing materials to use for ideas
- Project management content to use in local newsletters

In the Marketing Portal, you will find all the materials you need to market community membership, PMI membership, certification and other PMI products and services to your key audiences. In addition, guidelines for using the PMI branded materials, including access to brand standards, images, super graphics and PMI branded marketing templates are available to you 24/7 through the PMI Marketing Portal.

You will find that the PMI Marketing Portal provides professionally designed and written marketing materials that you can make your own—without having to hire graphic designers and copyeditors. The PMI Marketing Portal saves you time and money. Get started now to see how quickly you can create your own localized marketing campaign.

## PMI Practitioner Campaign Overview

PMI is currently utilizing an exciting campaign to increase awareness of project management and to encourage more project professionals to take advantage of all that PMI has to offer – from global credentials to professional development to local chapter membership.

**A “glocal” message:** The campaign has now been extended to community leaders and is customizable to meet your marketing objectives. “Glocal” refers to the **global** branding and universal message of PMI products and services, combined with the **local** messaging that community leaders can include in the materials to meet the needs of community members and potential members.

**The themes:** These messages assure your targeted audiences that being involved with PMI—via chapter membership, PMI membership and/or certification—can help them achieve greater success.

**Acquisition:** “Good things happen when you get involved with PMI” is our acquisition and awareness theme;

**Retention:** “Good things happen when you **stay** involved with PMI” is our retention theme.

**The audience:** The acquisition campaign is designed to speak to project management practitioners at three different levels of career maturity who are not yet fully engaged in the PMI global community. The retention campaign is also oriented towards career level but is positioned toward those who are already engaged with PMI.

The target audiences are:

1. Those starting their project management career
2. Those building their project management career
3. Those looking to advance their project teams and/or their own career

The approach: Each acquisition marketing piece encourages the audience to get involved by visiting [PMI.org/CareerCentral](http://PMI.org/CareerCentral). From there, they can join PMI and PMI communities, sign up for courses, access information on applying for a credential, and more. Similarly, retention materials encourage practitioners to visit [PMI.org/CareerCentral](http://PMI.org/CareerCentral) to learn more about how staying involved with PMI can help them further their career.

## Using the PMI Marketing Portal

The PMI Marketing Portal is a comprehensive interface that allows you to choose the campaign materials that will help you to meet your marketing objectives, as well as the delivery method of those materials.

- The Marketing Portal takes you through two key steps to identify your marketing needs.
  - The first step is to select your role.
  - The second step is to choose your business/marketing objective (for example, Member Retention).
- The print and electronic materials can be delivered in multiple ways:
  - Electronic downloads of finished materials for immediate access;
  - Electronic templates that can be customized with your logo and text, then printed locally or from your desktop printer;
  - Pre-printed materials that can be ordered from PMI and shipped to your location.

You can customize the materials to promote community events, programs, membership and more. The pre-printed materials are useful for handing out at meetings and events. The downloadable files are especially helpful when you need quick access to materials.

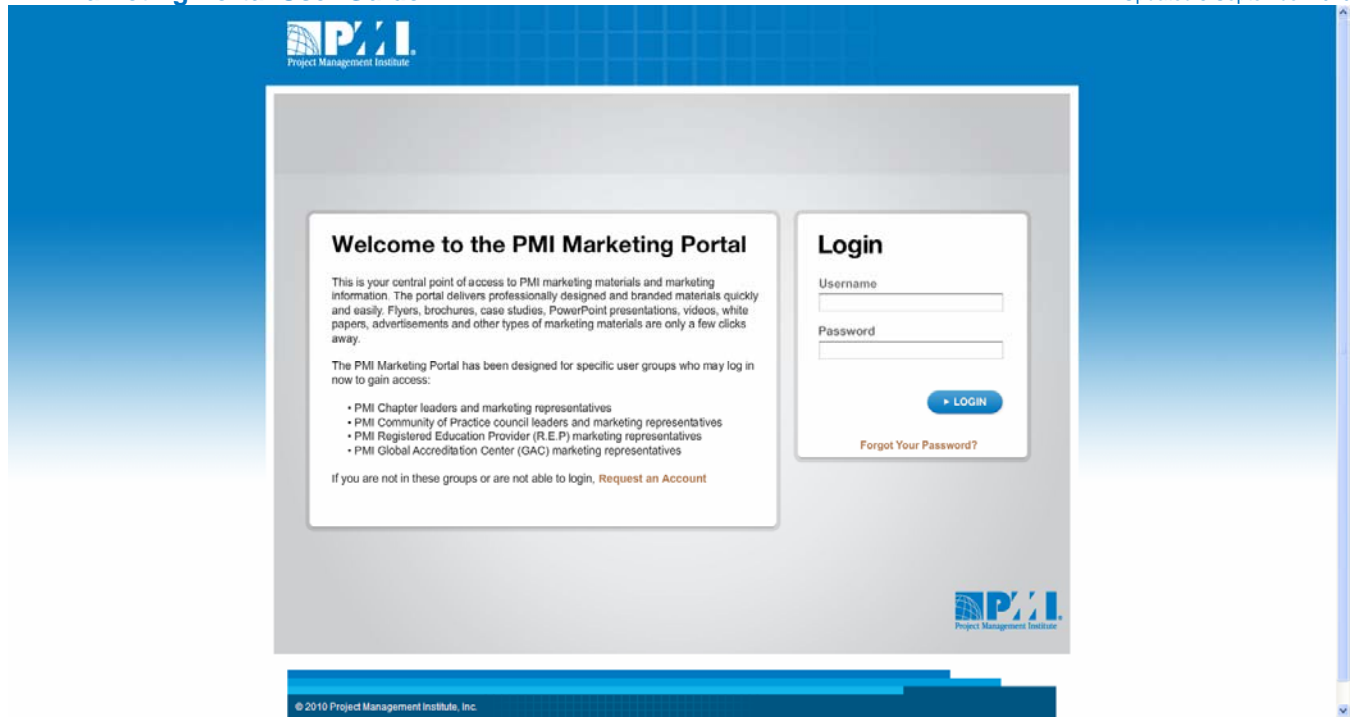
### **IMPORTANT:**

1. Please use the program navigation, NOT your browser navigation to move through the Marketing Portal. If browser navigation is used you may need to login again. Use the 'Change Your Role' link at the top of the window to navigate to the beginning of the Marketing Portal.
2. For maximum functionality, please disable your pop-up blocker or ensure that pop-ups from this site are allowed.

## Accessing the Marketing Portal

The Marketing Portal is user-friendly and easy to access at [www.PMI.org/MarketingPortal](http://www.PMI.org/MarketingPortal).

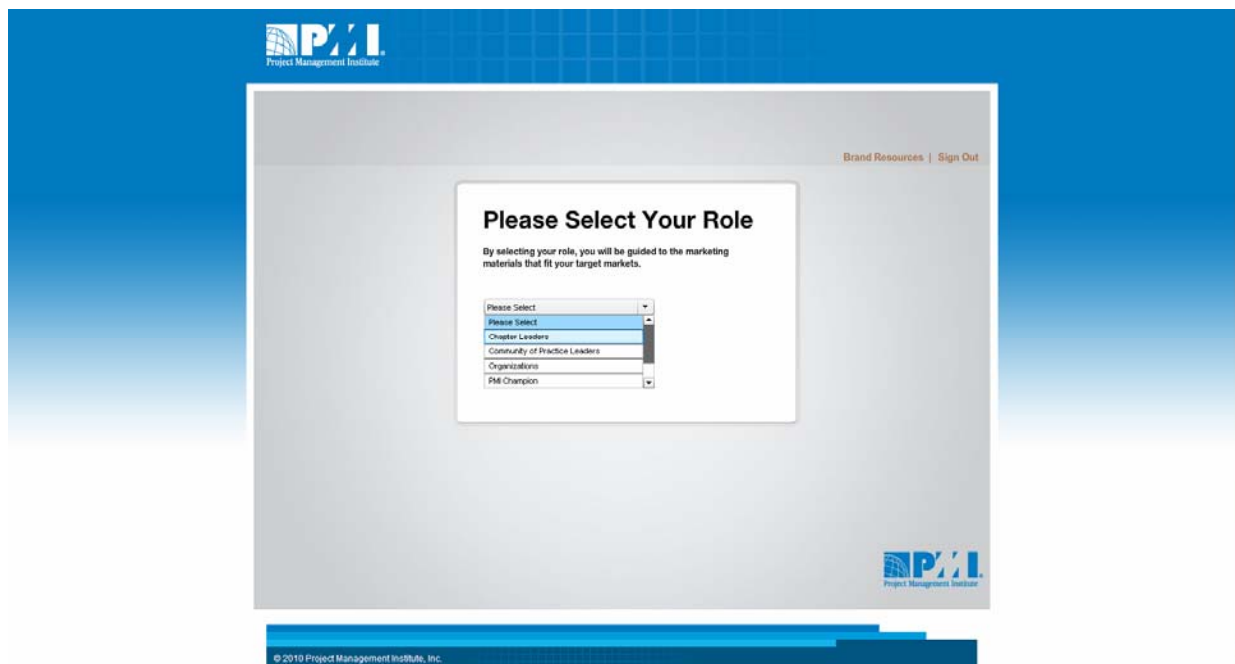
Please login to the Marketing Portal using the same username and password that you use to login to PMI.org.



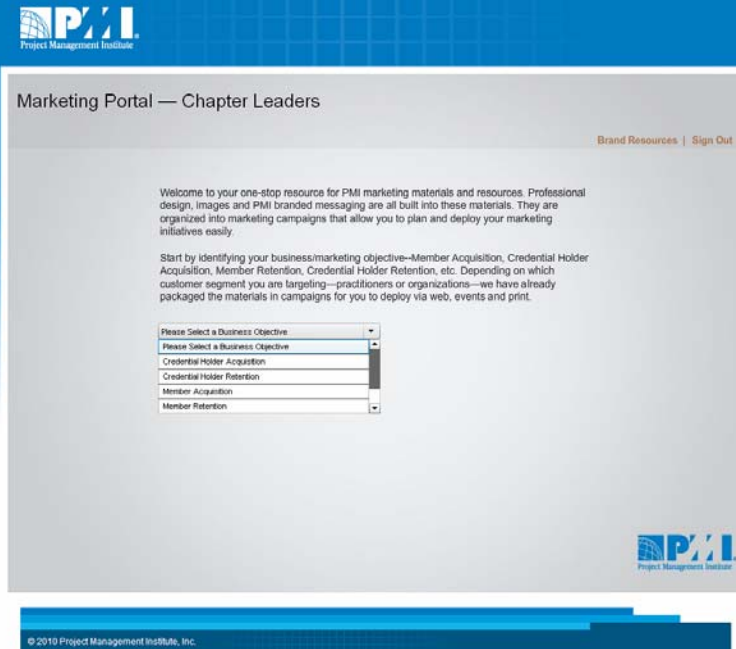
If you do not have an account, please select 'Request an Account' to contact us. If you have difficulty logging in, please contact [marketingportal@pmi.org](mailto:marketingportal@pmi.org).

## How to Use the Marketing Portal

Upon accessing the Portal, you will be asked to select your role:



Next you will need to select your marketing objective:



You will now see the materials available to support your marketing objective. Please use the scroll bar on the right to see all of the available choices. Roll-over an item with your mouse to see a pop-up description.

Double-click the thumbnail image to select the item you want.



Once you select an item, a new screen will open allowing you to see the item description, target audience, message, and the PMI products or services that the item supports.

**Marketing Portal — Chapter Leaders**

**Advance Flyer** X CLOSE

**Description**  
2-sided flyer with information on PMI products, services and opportunities appropriate for someone with 20+ years experience in project management. Includes leadership opportunities, PgMP®, PathPro, Career Headquarters, etc.

**Target Audience**  
Targeted at people advancing their project management career. These people have 20+ years experience in project management career.

**Message**  
Good Things Happen When You Get Involved with PMI.

**Products**  
PMI Leadership Institute  
Registered Education Providers (R.E.P.s)  
eSeminarsWorld  
Project Movie Web Self-Study Course  
PMI Career Headquarters  
PMI PathPro  
PMI Membership And Communities Certification Programs  
Exclusive PMI.ORG Content  
Publication Quizzes Online Course  
Special Project Team Volunteer  
Industry White Papers  
Professional Awards Program

Available Media ▶ DOWNLOAD ▶ CUSTOMIZE ▶ ORDER PRE-PRINTED

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**Marketing Portal — Chapter Leaders**

**Advance Flyer** X CLOSE

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2-sided flyer with information on PMI products, services and opportunities appropriate for someone with 20+ years experience in project management. Includes leadership opportunities, PgMP®, PathPro, Career Headquarters, etc.

**Target Audience**  
Targeted at people advancing their project management career. These people have 20+ years experience in project management career.

**Message**  
Good Things Happen When You Get Involved with PMI.

**Products**  
PMI Leadership Institute  
Registered Education Providers (R.E.P.s)  
eSeminarsWorld  
Project Movie Web Self-Study Course  
PMI Career Headquarters  
PMI PathPro  
PMI Membership And Communities Certification Programs  
Exclusive PMI.ORG Content  
Publication Quizzes Online Course  
Special Project Team Volunteer  
Industry White Papers  
Professional Awards Program

Available Media ▶ DOWNLOAD ▶ CUSTOMIZE ▶ ORDER PRE-PRINTED

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Select materials, such as print flyers or web ads are available in more than one size. If the item you chose is available in multiple sizes, please select the size you want from the 'Available Media' drop-down box located in the lower left portion of your screen.

Next, depending on the item you've selected, you will be able to choose to either 'Download', 'Customize', or 'Order Pre-printed'. Note, when selecting the 'Download' option, some items can be edited once they are saved to your computer. Some items will allow you to choose all options, while other items, such as the PMI slide template, are available for download only.

## Download Materials

If you select 'Download' you will be prompted to either 'Open' or 'Save' the file. If you select 'Open' a print-ready Adobe® PDF file will open in a new window. If you select 'Save' you will be able to access the print-ready Adobe® PDF file from the location to which you save it.

## Downloading a Powerpoint Presentation

If you are looking for a Powerpoint presentation template, please follow the steps below. A blank template will be made available in the Marketing Portal at a later date.

1. In the Business Objective menu, select 'Credential Holder Acquisition'.
2. Select 'PMI and the Project Manager PPT'.
3. In the Available Media menu, select Powerpoint Presentation.
4. Click on the Download button.
5. When the prompt comes up, select 'Save' and save the file to your computer.
6. Open the .PPTX file that you have saved to your computer.
7. All of the slides are editable, so you can use this presentation as a template, just replacing the existing text with your text.

## Download and Edit Materials

If you select 'Download and Edit', you will be prompted to download and save the file to your desktop where you can open it up and insert your own images and/or copy. Remember to save it with your own file name. The download and edit files are formatted using PMI branding, fonts and colors, so all you have to add is your messages, logo and images to meet your specific marketing needs.

## Customize Materials

This feature allows you to create your own messaging, upload a community logo and add your URL to a marketing piece. Default messaging is provided if you do not want to change the text, but, uploading a logo is required.

To use the customize feature:

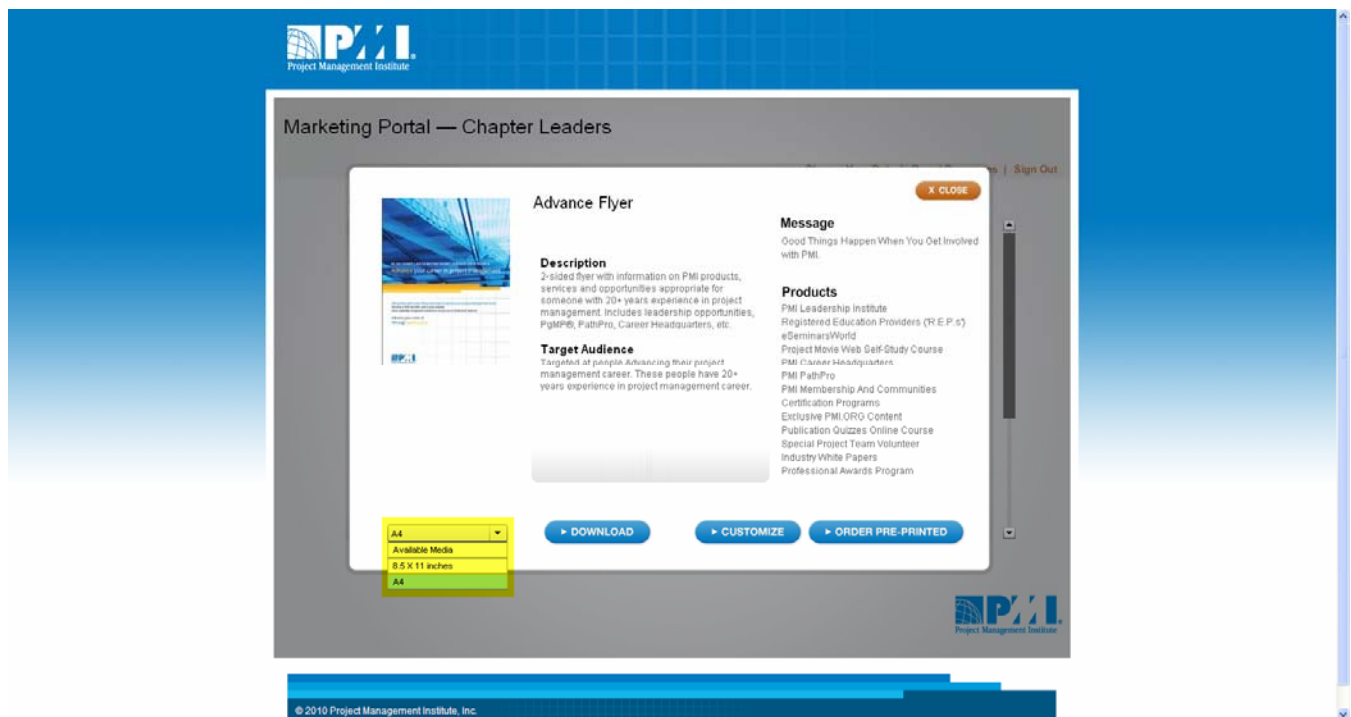
1. Pull down the Available Media menu and select the size you want.
2. Click on the Customize button.



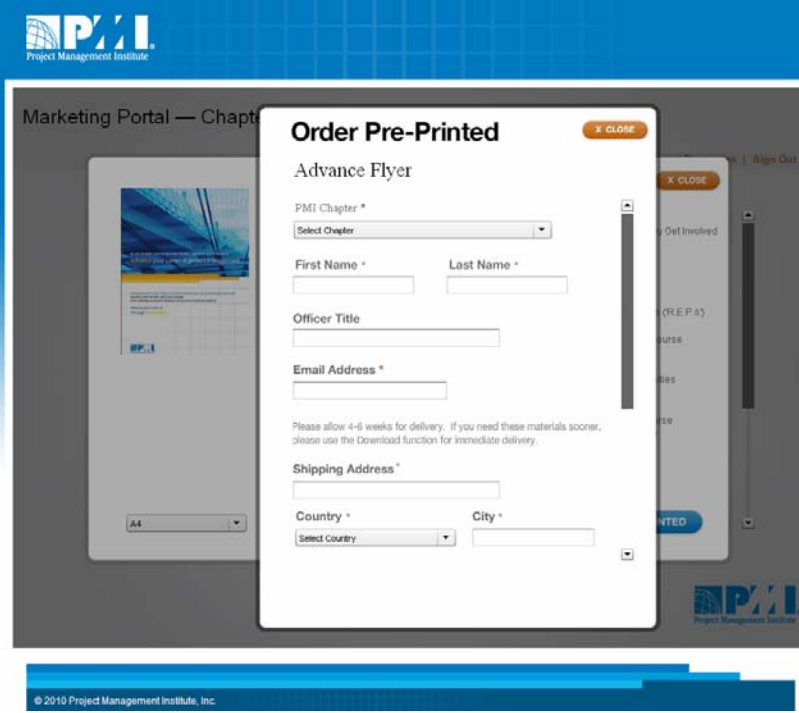
3. The screen that appears will allow you to edit the copy, section by section. Each section is shown in the sample in the right hand side of the screen.  
You have the choice to edit the copy or leave the default copy in place. Please note the character counts—if you exceed them, the additional characters will not appear on the flyer.
4. Once you have completed your copy edits, scroll down to upload your logo in Field H. **Uploading one logo (in JPG format) is required.** You also have the option to upload two additional logos (such as a logo of an event or sponsor logos). If you are only using your community logo, upload it in Field H, and leave fields I and J blank. Your logo will be re-sized automatically to fit within the defined area.
5. When you have edited the copy and uploaded your logo, select Edit Back from the top of the screen.
6. (Use the scroll bar if needed to start at the top with Field A). In Field A, upload your community logo again.
7. Edit the copy on the back of the flyer if desired, or leave the default copy in place.
8. When finished, select 'Preview Ad'. When your PDF appears, click OK.
9. Review the PDF. If you want to go back and change anything, close it and return to the edit screen. Select 'Edit Front' or 'Edit Back' to make your changes.
10. When you are satisfied with your changes select '**Save Final Version**' by providing your own file name and saving it to your computer.

## Ordering Pre-Printed Materials

To order pre-printed materials, select 'Order Pre-Printed'. Remember to first select the size from 'Available Media' if applicable.



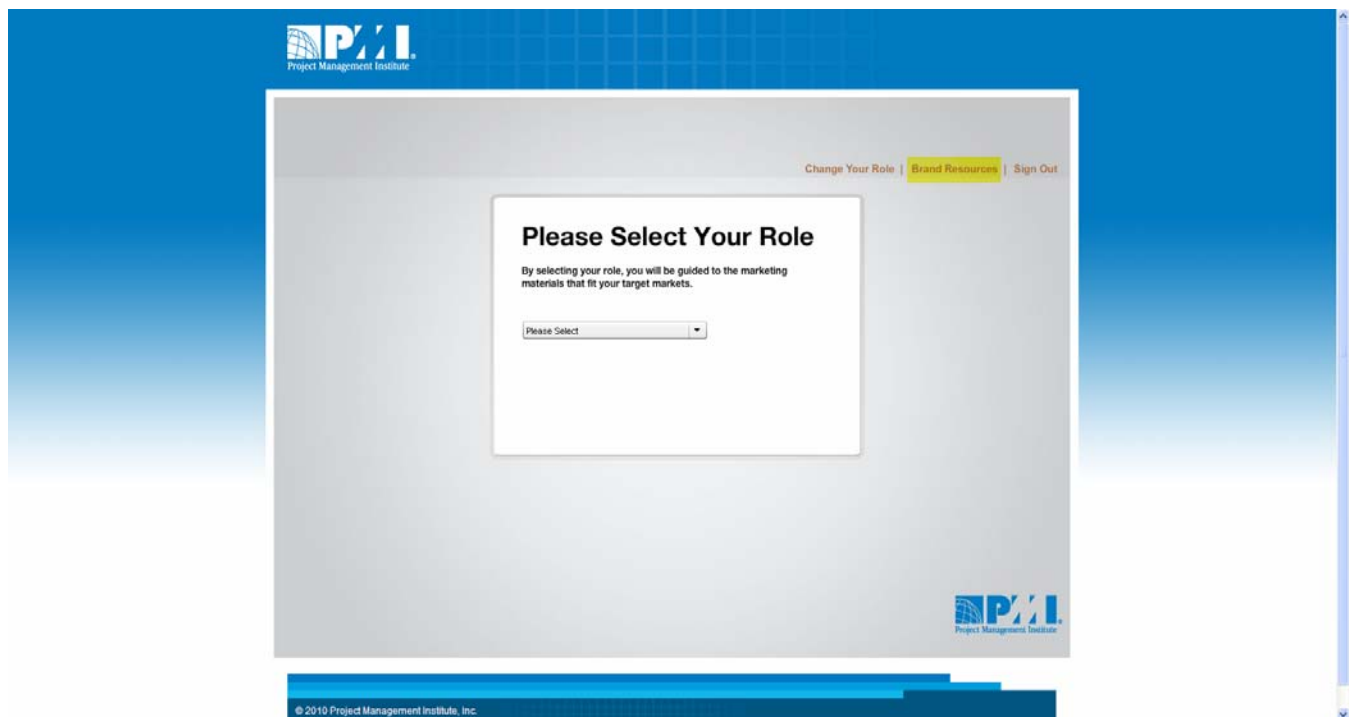
A pop-up window will appear.



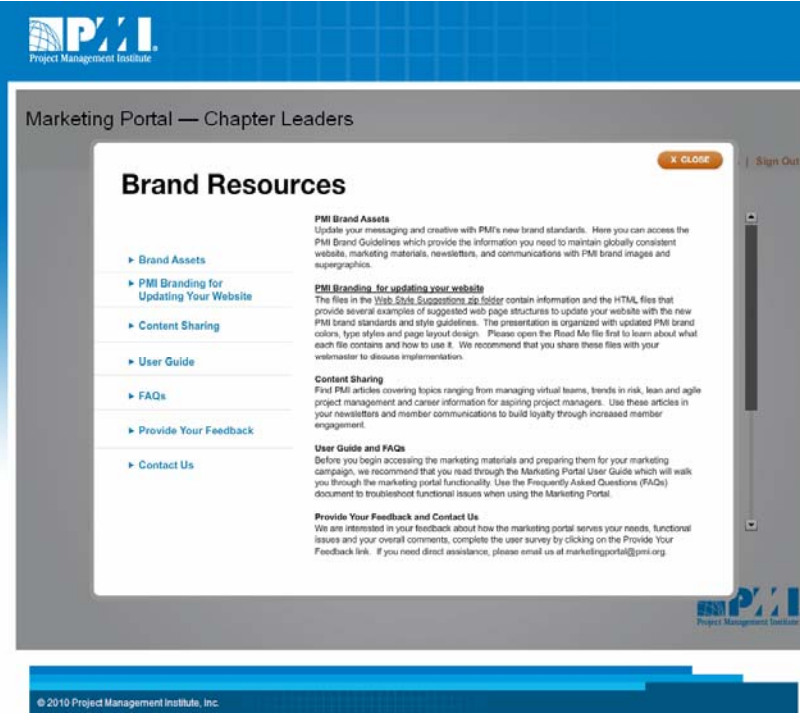
Complete the form and scroll down to click 'Order'.

**Please allow 4-6 weeks for delivery.** If you need the materials sooner, please use the Download function and print the materials locally. PMI Global will not reimburse printing costs.

## Resources



Select '**Brand Resources**' from the upper-right corner to access:



## PMI Brand Assets

Update your messaging and creative with PMI's new brand standards. Here you can access the **PMI Brand Guidelines** which provide the information you need to maintain a globally consistent website, marketing materials, newsletters, and communications with PMI brand images and super graphics.

## PMI Branding for Updating your Website

Access the files in the Web Style Suggestions zip folder to learn more about how to update your website with the new PMI brand standards and style guidelines. The presentation is organized with updated PMI brand colors, type styles and page layout design. Please open the Read Me file first to learn about what each file contains and how to use it. We recommend that you share these files with your webmaster to discuss implementation.

## Content Sharing

Find PMI articles covering topics ranging from managing virtual teams, trends in risk, lean and agile project management and career information for aspiring project managers. Use these articles in your newsletters and member communications to build loyalty through increased member engagement.

## User Guide and FAQs

Before you begin accessing the marketing materials and preparing them for your marketing campaign, we recommend that you read through this Marketing Portal User Guide which outlines the marketing portal functionality. Use the Frequently Asked Questions (FAQs) document to troubleshoot functional issues when using the Marketing Portal.

## Provide Your Feedback and Contact Us

We are interested in your feedback about how the marketing portal serves your needs, functional issues, and your overall comments. Complete the user survey by clicking on the 'Provide Your Feedback' link. If you need direct assistance, please email us at [MarketingPortal@pmi.org](mailto:MarketingPortal@pmi.org).

If you have questions about or need assistance with the Marketing Portal, please contact us at [MarketingPortal@pmi.org](mailto:MarketingPortal@pmi.org).

For questions related to the new PMI brand standards, please contact us at [BrandStandards@pmi.org](mailto:BrandStandards@pmi.org).