

*20/20 Vision for Marketing Breakthroughs*

## **A Customer Journey: YouTube, LinkedIn Groups, and Social Media Have Made Your B2B Sales Process Obsolete!**



By Mike Barr

For over 15 years Mr. Barr has helped companies develop Go-To-Market strategies that build market power and grow revenue.

**Link YOUR digital  
(and social)  
marketing activities  
to YOUR sales  
process and YOUR  
revenue**

# 20/20 Vision for Marketing Breakthroughs

## Executive Summary

Your customers via YouTube, on-line forums, magazine websites, and consultants via their blogs, industry groups and articles, have now created so much content for prospects that the purchase process has radically changed. Prospects can learn what they want to buy without ever talking with a sales representative and possibly without ever referring to the product's literature or web site. Such a major change in how customers/prospects learn requires revisiting your entire sales and marketing efforts.

Your prospects (and repeat customers) are still progressing through the same fundamental purchase process from unawareness, to selection, to purchase, to use. However, due to the way customers now obtain information their relationship with vendors has fundamentally changed. You must now link these tools to the customer's new educational journey in order to accomplish what you are actually trying to achieve – increased sales.

This paper outlines how to link YOUR digital (and social) marketing activities to YOUR sales process and YOUR revenue. The QDI Go-To-Market Workflow Model enables you to organize your sales and marketing activities into an overall workflow to help prospects move through their educational journey to the use of your product. This approach identifies the purpose of each activity and how you should measure their performance. **The result is an alignment of your sales process and sales/marketing support with the customer's journey to purchase and use your products/services.**

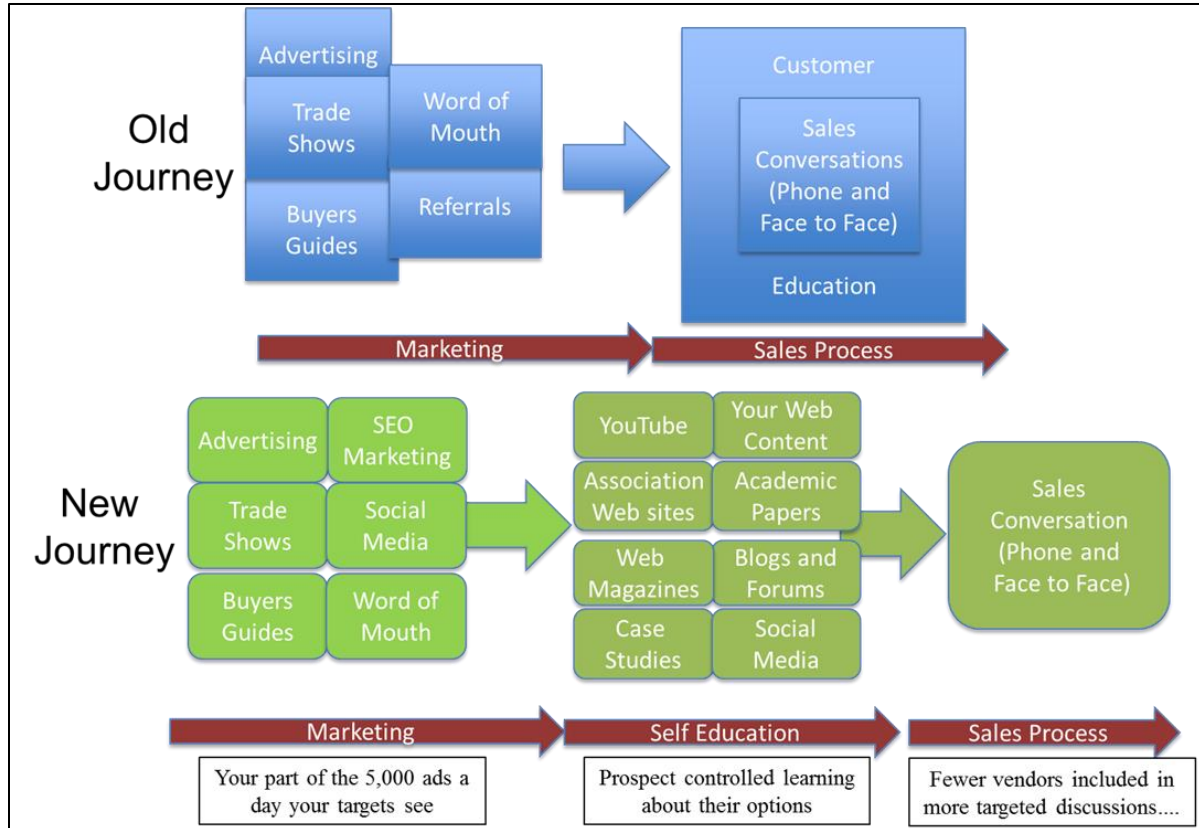
## Changing Environment

If you are like most of our clients, your marketing organization is creating new digital marketing and social media tools such as: YouTube videos, Facebook pages, Twitter feeds, Linked-In groups, micro sites, blogs, e-mail campaigns, web-advertising, content marketing, search engine rankings, etc.. However, these are no longer brand building activities where visits or "eyeballs" are the objective. You should measure your sales and marketing process steps by their effectiveness and efficiency at delivering prospects to the next step in the journey.

By listening to customers, you will see the stages of this customer journey are familiar. The radically new self-education options mean you must rebuild your sales and marketing process to serve these familiar stages by aligning your efforts with this new educational reality.

Most of your potential decision makers are searching the Internet to obtain information about their industry or help with their job. This means there is a point when someone is looking for information to help them / their business be more successful – that will lead to a purchase. What they find in this search will shape how they view the problem, what solutions they look at, how they evaluate the solutions, and what vendors they should talk to.

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*Because the Customer's Journey is customer-controlled education, you can no longer buy your way into their process with cold calls or traditional ads.*

When searching for information about how to address their problem, buyers will decide in a matter of seconds whether to use the tools you provide or go elsewhere. Prospects will choose your products if they are BETTER than the alternative – likewise, prospects will choose to listen to your marketing and sales assistance if it is BETTER than the alternative's. The new competitor is taking business because prospects view his solution as a better fit than yours, or the prospects find the competitor's self-education tools are easier to use than yours. You know where your customers are – they are on the Internet.

The question is, do you show up as the best solution to the PROBLEMS THEY HAVE when they are searching for help? You need to show them more than just your product; you need to show them you can help, and you may need to do it in an engaging way. For example, construction equipment manufacturer JCB just produced a video entitled "Vision of the Future." While a bit unconventional, its entertainment value is getting it found and viewed by buyers who never noticed anything from JCB before.

*Today the most important task is to get search engines, existing customers, and information sources telling the right customers to see how you can help.*

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From your organization's point of view you need to redesign your customer engagement. From your prospective customer's point of view, your customer engagement approach is obsolete.

This paper outlines the approach we have used to understand the customer's journey from unawareness - through purchase - to use of the product, so that we can design a go-to-market workflow that helps the customer move from seeing the problem, to seeing the value of our client's product, to using the solution.

Consider:

- 70% of B2B buyers use a search engine at the start of their buying process (Mediative)
- 80% of product research for future business purchases start with search (Pardot)
- 54% of B2B buyers "follow group discussions... to learn more" (DemandGen)
- 84% of B2B marketers use social media in some form (Aberdeen)

### Customer Journey

Prospects today search the Internet for information about their PROBLEM, which leads them to:

- Blogs where others have asked and anyone has answered
- YouTube videos about solutions posted by users (or manufacturer)
- Magazine/publication websites
- Association websites

We also know that prospective buyers want to learn about their options on their own schedule – they aren't going to wait for a sales person or for you to e-mail information. They find the information they want on the web.

This easy availability of information has also changed the information gathering process. Decision makers are now asking other people – let's call them researchers -- in the organization to gather information or assess options; even make recommendations. These people range from a gofer, to the user, to a subject matter expert.

In some cases these researchers don't want follow-up by vendors, so they will intentionally not call sales people; often they will not provide contact information at websites.

*While 5 years ago asking your sales force or channel for a demo was a common way for a customer to start their journey, they are now on the web looking for information – has your marketing mix changed appropriately?*

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Decision makers and researchers are educating themselves on potential solutions (products/services) to problems they see today; hence, the traffic of your digital marketing activities. Of course, some of the traffic is related to college students researching for a term paper and your suppliers looking to understand your business. Providing self-education sites, videos, and blogs, and seeing the use of these tools doesn't mean they are delivering the results you need.

Your Customers are first self-educating, then they are choosing to engage you (your sales force, distributor, or dealer) when they are ready. If you don't already have research showing how your customers are self-educating before calling you – you are falling behind.

### **Rethinking how you help perspective buyers**

You can't stop the prospect from self-educating, but you can work with the tools they use to help them learn.

Historically, marketing and sales have provided much of the information buyers wanted and thus, customers kept us informed about where they were in the customer journey (i.e. "I am just collecting information, looking at some options for next year, comparing 3 vendors...").

Research is now showing as much as 50% of the customer's purchase process occurs before the "prospect" contacts any vendors. The customer journey map must start with how customers become aware they have a problem.

### **Building the New Customer Journey map requires new knowledge**

- 1) You need to know (not just think you know) what the researcher or perspective buyer is searching for so you can insure the search will lead to your tools.
- 2) You need to know what other sources they will explore such as industry sites, discussion groups, and distribution web sites.
- 3) You need to know what information format(s) is the most insightful (text, video, chat, simulation...) so you can match your content to their expectations / approach.
- 4) You need to know what they would return to these sites for, so you can build an on-line relationship with the researcher or decision maker.

To gather this knowledge we must step away from measuring each tool separately. People act as if knowing how many likes a Facebook page received is a substitute for knowing if the information helps the user move towards purchasing your solution.

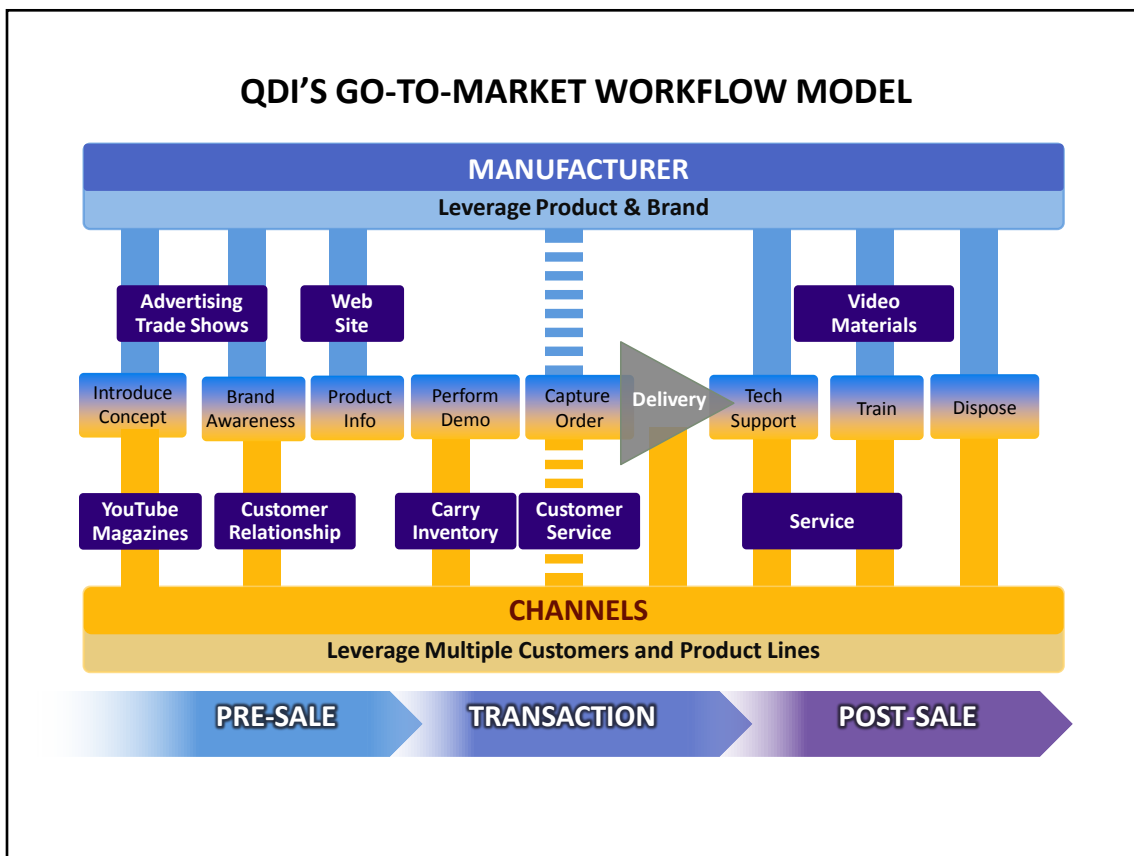
We must understand the stated and unstated purchase process needs – just like we do when we develop new product/service concepts.

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By organizing this research with the focus and depth you would apply to new product concepts, we can learn what we need to help customers self-educate. The outcome of this effort could include deciding to support some of these sources, regularly monitor and participate in others, as well as improve your tools. Remember, your tools are everything from one tweet, to the corporate website, to entire industry specific sites.

### QDI's Marketing Workflow Model

Below is a generic version of QDI's Marketing Workflow Model. This model shows the customer's movement through the purchase/ownership process from presale activities, to purchase activities, to post-sales support. It links these stages with the required marketing, sales and support activities, and the vehicles manufacturers and distributors use to execute these activities.



Through an in-depth research process you should build a customer journey map of the "as is" process, then treat it as a workflow by determining what is needed at each step to help the prospect move toward the effective use of your product. This will define an objective and measurable outcome of each activity; ones you provide, ones you support, and ones you monitor.

### The research and workflow design process:

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Since the goal is to organize all of your sales and marketing activities into workflow functions, you should involve all of those groups in the process. Therefore, the team should include representatives from:

- Product marketing
- Marketing communications
- Digital marketing (especially if separate from traditional marketing communication)
- Sales
- Marketing strategy

This team also serves to bring sales, marketing, and strategy together on how to help our customer and grow the business. The proper use of the new tools is an outcome, not something forced on sales.

The team will then work through 4 steps:

1. Assemble internal perspectives and data
2. Gather prospect/customer input
3. Design a GTM (Go-To-Market) workflow
4. Implement

### **Step 1: Assemble internal perspectives and data**

The team should collect the internal information on:

- Industry
  - Trade Publications - list their on-line services
    - Directories
    - Product ratings
    - Searchable articles
    - YouTube channels
  - Associations
    - Forums for discussion including LinkedIn groups...
  - Large consulting organizations
    - Newsletters
    - Blogs and discussion groups
- Your organization
  - Content provided to magazines
  - Content available at your website(s) – brochures, configurators...
    - Traffic to the website and downloaded content
  - Posts and comments at other sites
    - Resources devoted to monitoring the content

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The team should interview key sales people and other stakeholders, having them walk through their interaction with customers. The questions outlined below can be a guide for these interviews. From these interviews, build a straw-man (or assumed customer journey) to serve as a guide in Step 2.

### Step 2: Gather Prospect/Customer Input

Now the team talks to typical prospects to gather the raw input on how they have been going through the entire process.

You need to learn:

- What process did the customer follow?
  - What source of the info did they use?
  - Who found the source?
  - How did they find the source?
  - Who did the research?
  - How long did the process take?
  - Did they return to the same sources more than once?
    - Why – so you can reinforce this behavior
    - How – such as bookmarks, so you can make it easy to revisit those sources
- What delivered the essential value?
  - Why was it valuable?
  - Could your firm have provided more valuable content?
  - Where do your competitive advantages fit in the learning process?
    - How do we help customers see the unique advantages of our solution?
- What would have been of additional value?
  - Where can our strengths provide unique solutions for customers?

The team must even consider current customers, how did they decide they might need to make another purchase, what work did they do before contacting you about making another purchase? What are they doing now to learn about your product, how to use it, fix it, or replace it?

Next, use the individual customer's journey notes to create a table showing:

Row 1: The major stages customers move through

Row 2: What activity the customers need to accomplish/learn to move to the next stage

Row 3: What sources of information the customer is likely to use – regardless of whether you have anything to do with the content provided at that source



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For example, consider this scenario for a client's piece of equipment:

Customer Journey Stages (Example)						
Stage	Possible need	Learn about the problem	Learn about solutions	Compare alternatives	Evaluate alternatives	Purchase
Activity	New business opportunity	Manager realizes new Eq. required	View contact's solution View videos	Identify OEM and 3 <sup>rd</sup> party Eq. providers	Owner calls 2-3 known vendors for demo	Owner places the order
Info Sources	Owner requests a manager to look at the opportunity	<ul style="list-style-type: none"> <li>• Personal contacts</li> <li>• Magazine sites</li> <li>• YouTube videos</li> </ul>	<ul style="list-style-type: none"> <li>• Supplier websites</li> <li>• Auction websites</li> </ul>	At industry group or website ask others their experiences	Viewed by owner & manager	(Manager influences owners decision)

The team may find there is more than one path and should create a table for each path specific group of customers take.

### Step 3: Design a new Customer Journey workflow

Now add rows to transform the table into a plan to help customers in ways that lead to the purchase and use of your products:

Row 4: What content you will provide

Row 5: Where you will provide that content

- Locations you control
- Industry sites and how you will provide/influence the site's content

Row 6: Metrics and measurement methodology

- For example: Percentage of prospects that use the content via win/loss surveys

This process will give focus and objectives to your "content marketing" activities.

*Content marketing is NOT brand building; content marketing is the fuel for a customer journey that leads to the purchase and use of your product.*

The team may want to create a visual representation of the new customer journey and your workflow support to help your organization understand and support the new scenario.

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If you have more than one Customer Journey, repeat the process for each Customer Journey table.

### Step 4: Implement

Use the table(s) to assign who will be responsible in each column, for creating the content or working with the owner of the content/forum, to provide content and review what others post.

Implementation should include a trial period during which the team reviews progress on each activity's metrics. Refining the content and metrics helps more prospects move to a solution (driving higher sales).

*With decision makers searching the Internet for information the key is "hitting the bull's eye" with your message for the specific customer or customer segment. You now have to be on target to both connect (prospect finds you in their search) and influence (prospect stays to read your materials).*

### Example

A firm was exploring how to find future prospects by creating an industry focused website. Earlier research had detailed what information was most valuable to firms in this industry. A trial web site and SEO marketing (to draw people to the site) showed they could attract industry personnel. However, since visitors wouldn't register to obtain the information, the site didn't generate new leads.

By conducting Customer Journey research the firm learned:

- The industry data being used to attract users to the site didn't build repeat visits -- these prospects already had other sources for this information.
- However, prospects were searching for specific kinds of application and safety information that wasn't readily available. In addition, prospects would return to the website whenever they needed this type of application or safety information.
- The customer journey research also showed that some of the visits were at the beginning of self-education that would lead to shopping and purchase. Thus, usage behavior at the site would indicate the user was a potential prospect much earlier than the traditional sales contact.
- The research also revealed that while the initial objections to registering at the trial site still existed, there were situations where the user was willing to register and would later expect the registration to link to other interactions with the firm.

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Thus, by looking at the customer journey the firm saw how to re-purpose the site to help educate prospects in applications that lead to equipment purchases, and how to link this assistance with lead generation.

*For this firm, the industry information approach enabled it to connect and show solutions before the prospects have interacted with competitors.*

### Summary

The ubiquitous availability of information has changed how customers make B2B purchases. Using the Internet, digital marketing, and social media means you are using the new weapons, but until you organize them into a unified workflow you are still using an obsolete battle plan.

Creating an accurate customer journey map and building the right marketing workflow requires the same level of customer learning and focus that you undertake when creating a new product line. While this effort is significant, the new sales and marketing workflow will help more prospects through an educational process that leads to using your solutions – delivering increased sales along the way.

For additional examples of Customer Journey Maps or to discuss how QDI would approach leveraging your digital marketing to drive growth, give us a call.

Michael Barr  
(847) 566-2020 ex 225

Steve Bassill  
(847) 566-2020 ex 229

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### QDI Strategies, Inc.

1580 S. Milwaukee Ave, Ste. 620  
Libertyville, IL 60048  
Tel: 847-566-2020  
Fax: 847-281-9723  
[www.qdistrategies.com](http://www.qdistrategies.com)

