



The Customer Journey

Demand Generation Model &
Building the Sales Playbook

Agenda

- ▶ Customer Journey Overview
- ▶ Top of Funnel: Awareness
- ▶ Middle of Funnel: Evaluation
- ▶ Bottom of Funnel: Customer Experience
- ▶ Sales Playbook



From Stranger to Brand Promoter

▶ Top of Funnel: Awareness

1. Creating Awareness
2. Initial Engagement
3. Subscribers / Followers
4. Conversion: Prospect to Lead

▶ Middle of Funnel: Evaluation

4. Sales Qualification: MQL to SQL
5. Building Prospect Excitement
6. Buyer Ascension: SQL to Customer

▶ Decision Event

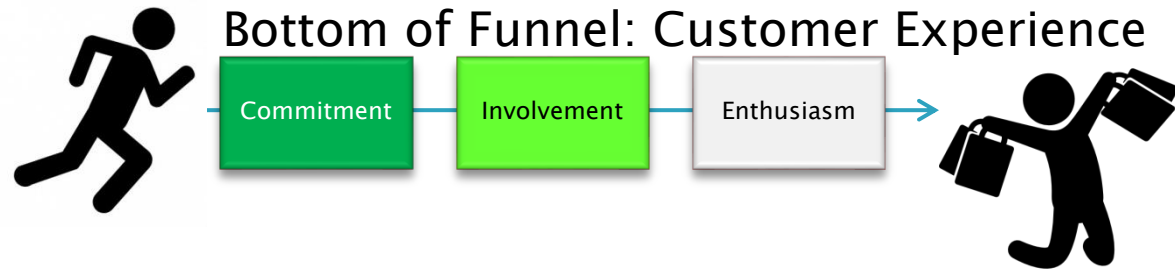
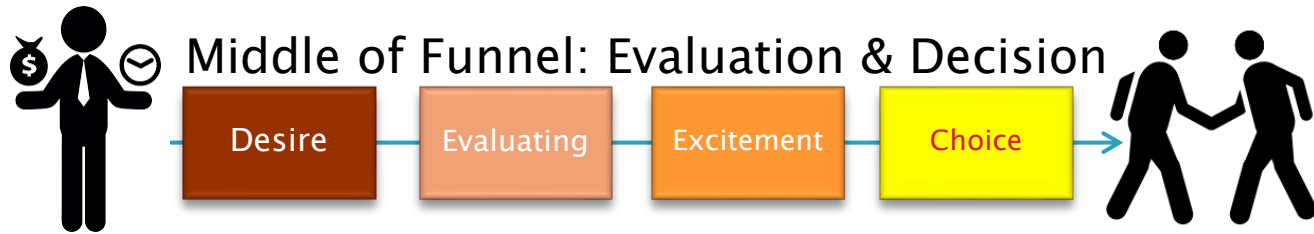
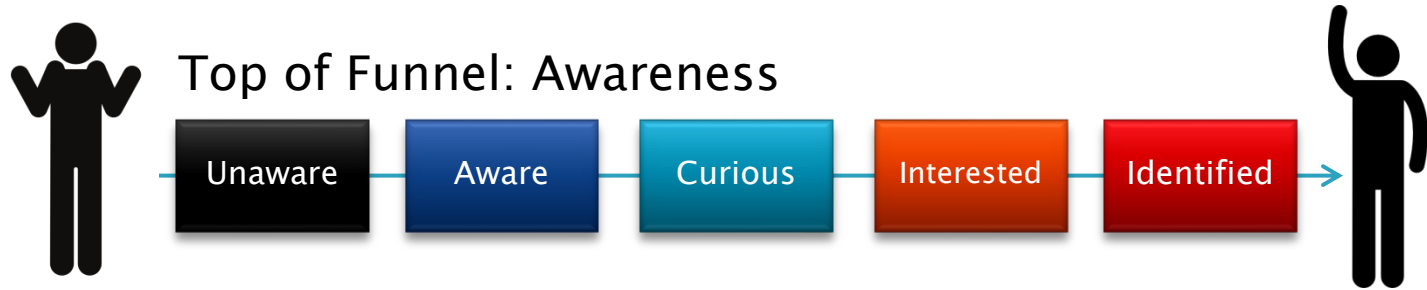
7. Commitment

▶ Bottom of Funnel: Customer Experience

8. Monetization
9. Customer Success
10. Advocates and Promoters



The Psychographic Journey



SALES & MARKETING FUNNEL



MARKETING
[DEMAND]



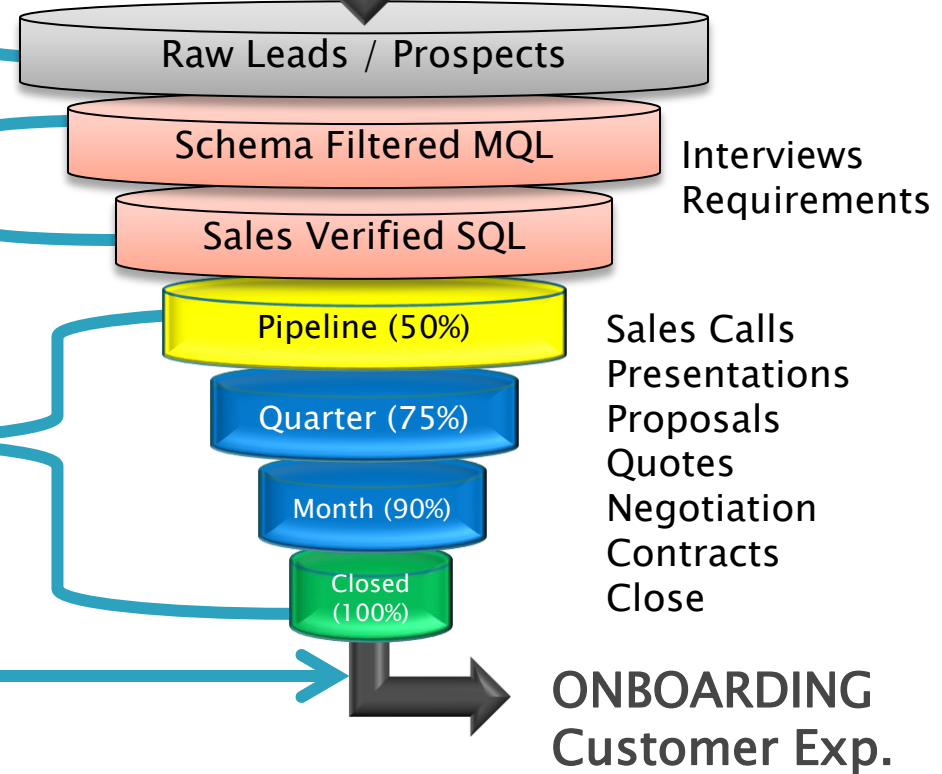
SDR
[LEADS]



BDR
[PIPELINE & FORECAST]



AE
[ACCOUNT MGMT.]



TOP OF FUNNEL (TOF)

»» Prospect AWARENESS



TOF Awareness: Creating Awareness

Aware

▶ Advertising

- PPC/SEM (Google & Bing)
- Print & Display
- Retargeting / Remarketing



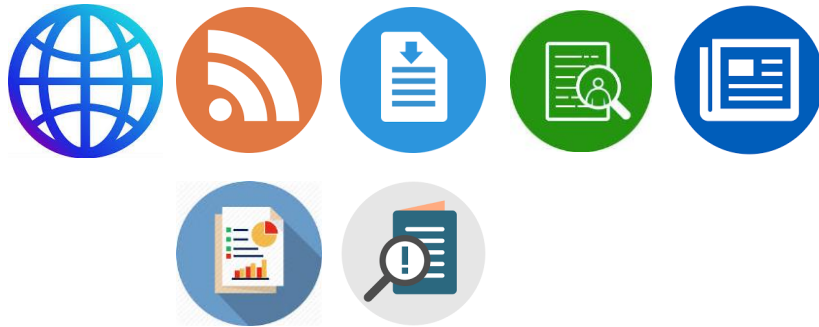
▶ Social Media

- LinkedIn, Facebook,
- Twitter, YouTube,
- Pinterest, Instagram



▶ Organic Search

- Website Content (SEO)
- Blog, White Papers
- Case Studies, PR,
- Infographics, Primary Research



TOF Awareness: Initial Engagement (Prospect's Investment of Time)

Curious

Interested

- ▶ Ungated Entry Point Offers (EPO)
(in addition to Organic Search Content)
 - Blog Posts
 - Podcasts
 - Videos
- ▶ Retargeting Campaigns
 - Additional Touches to past visitors
- ▶ Anonymous Engagement
 - But not invisible (e.g. Visualvisitor.com)



TOF Awareness: Subscribers / Followers

(Obtain Contact Info & Identity)

Identified

- ▶ Social Media Followers
- ▶ Podcast / Webinar Registration
- ▶ Contact Form
- ▶ Demo Request
- ▶ Newsletter Subscription
- ▶ Target Database Exports (for ABM)



TOF Awareness: Conversion

Desire

- ▶ **Gated Entry Point Offers:**
 - Interactive Engagement of Prospect's Time and/or Money
 - Very Low \$ or High-Discunt Introductory Offer
 - Webinar / Podcast Active Participation
 - Demo Participation
- ▶ **Conversion of Raw Prospect (Suspect) to Warm Market Qualified Lead (MQL)**
 - Prospect becomes Aware of Company Brand and Offerings
 - Company has Contact Info and Opt-in Interaction with Prospect
 - Sales Team Engagement
- ▶ **Channels**
 - Website, Landing Pages, Micro-sites, Referrals
 - Email Campaigns, PPC/SEM, Social Networks
 - Trade Events, Networking/Sponsored Events
- ▶ **CRM Capture**
 - Opt-in Reply and Targeted Database



TOF Awareness: Automation/Tools

▶ CRM

- Enterprise: Salesforce.com
- SMB: Zoho.com
- Startup: SugarCRM

▶ Marketing

- Enterprise: Pardot, Marketo
- SMB: Hubspot.com
- Startup: Zoho.com

▶ Target Database

- Discoverorg.com

▶ Email Campaigns

- Mail Chimp
- Constant Contact

▶ Analytics & Optimization

- Google, Alexa
- Visual Website Optimizer
- Virtual Visitor

▶ Social Media

- Hootsuite.com
- Klout.com
- Meetedgar.com
- Vidiq.com



MIDDLE OF FUNNEL (MOF)

»» Prospect EVALUATION



MOF Evaluation: Sales Qualification

Evaluating

▶ SQL Qualification Schema (B2B) – Weighted Score

- Need/Pain-Point & Solution Fit Validation
- Recruitment of an Inside Champion
- Identification of:
 - Economic Decision Maker
 - Relevant Recommenders and Influencers
 - Relevant competitors, if applicable
 - Incumbent vendors, if applicable
- Understanding of:
 - Project approval process within the organization
 - Funding process and available funding for the deal

▶ Convert MQL to SQL

- Lead becomes Opportunity/Deal in CRM



MOF Evaluation: Building Excitement

▶ Objective:

- To create understanding and desirability of what the solution “OUTCOME” (AFTER) will be like, in contrast to the status quo (BEFORE)
- People don't buy products/services – they buy desired *Outcomes*

▶ Education Tools:

- Reports, White Papers, Sales Collaterals, Case Studies/References, Handouts, Cheat Sheets, Resource Lists, Templates, Surveys, Assessments, etc.

▶ Solution Design:

- Requirements Gathering, Proposals/Quotes, ROI/TCO Analysis, Trials/Demos/Pilots



MOF Evaluation: Buyer Ascension

Choice

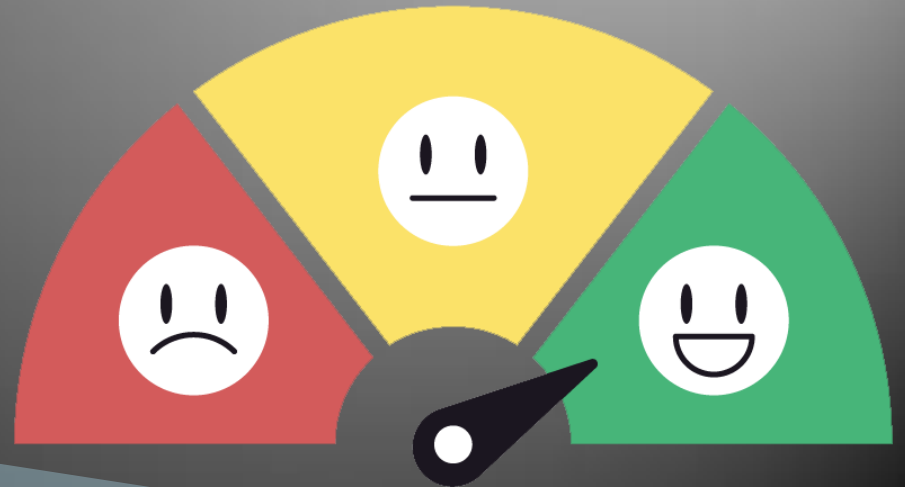
- ▶ Making the Core Offer
- ▶ Negotiation / Objection Handling
- ▶ Administrative Process
- ▶ Closing
- ▶ Onboard Initiation



Bottom of Funnel (BOF)



The Post-Sales
CUSTOMER EXPERIENCE



BOF Customer Experience: Monetization

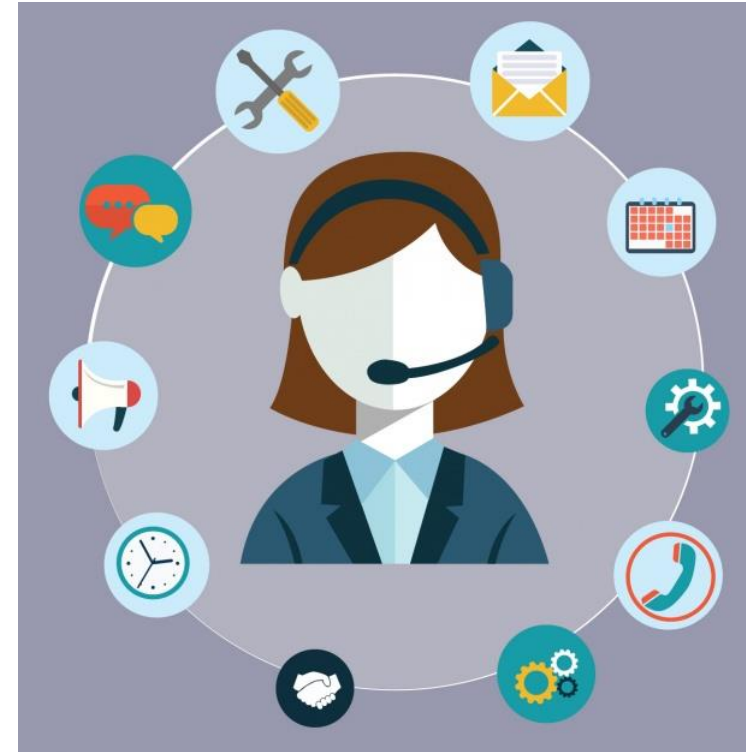
Commitment

- ▶ Contract Finalization
 - Legal review
 - Amendments
- ▶ Contract Execution
- ▶ Order Entry Process
- ▶ Customer Administrative Training
- ▶ Billing Process



BOF Customer Experience: Customer Success

- ▶ **Training & Education**
 - Webinars, Videos, Infographics, User Manuals, Consultation, Tips, Cheat sheets
 - Newsletter, Best-Practices Campaigns
- ▶ **Customer Support**
 - Help Desk, FAQs, Knowledge Base
 - User Forum / Blog
 - Escalation Process
- ▶ **Account Management**
 - Regular Account Maintenance Touches
 - Upsell / Cross-sell Opportunities
 - ROI Report Card
- ▶ **Mobile App**
 - iOS (Apple) & Android (Google)



BOF Customer Experience: Advocates and Promoters

Enthusiasm

▶ Developing Brand Advocates

- Passive, Reactive
- Testimonials, Case Studies, Blurbs, Videos
- Promotional Events, Referrals

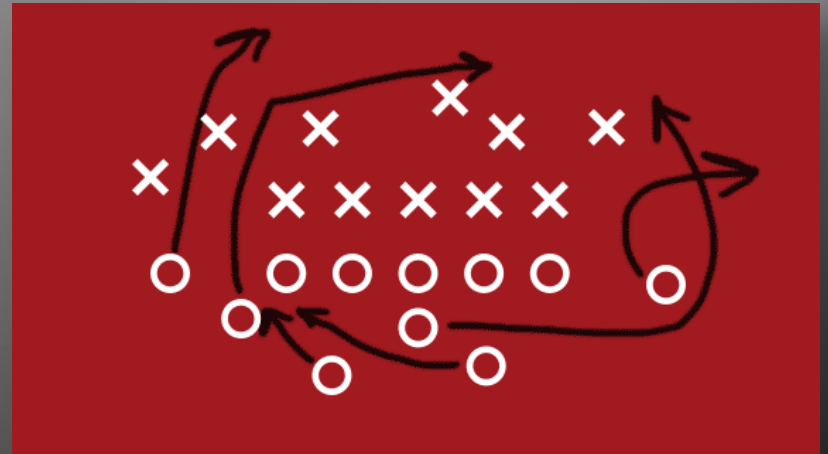
▶ Growing Brand Promoters

- Active, Proactive
- Social Media Influencers, Industry Experts, Product Reviewers, Partnerships
- Customer Loyalty Events
- Customer Advisory Board (CAB)



SALES PLAYBOOK

- » Documented Sales Process, Standards, and Resources



Sales Playbook Template

1. Company Overview
2. Products / Services
 - a. Pricing
 - b. Use Cases
3. Sales Process
4. Personas / ICP
5. Multi-Touch Cadences
6. Messaging
7. Examples / Scripts
8. CRM Conventions
9. Selling Methodology
10. Compensation Plan
11. KPIs
12. Resources / Assets

Roles and Responsibilities

▶ Marketing

- Manager (Dir./VP)
 - Webmaster
 - Graphics / Creative
 - MarCom Manager / PR
 - Digital Marketing Manager
 - CRM / Automation
 - Analytics / Optimization
 - Campaign Manager(s)
 - Product Manager(s)
 - Writers
 - Technical
 - Content / Copy
 - Social Media Manager / Blog
 - Market Researcher(s)
 - Marketing Support / Events Coord.

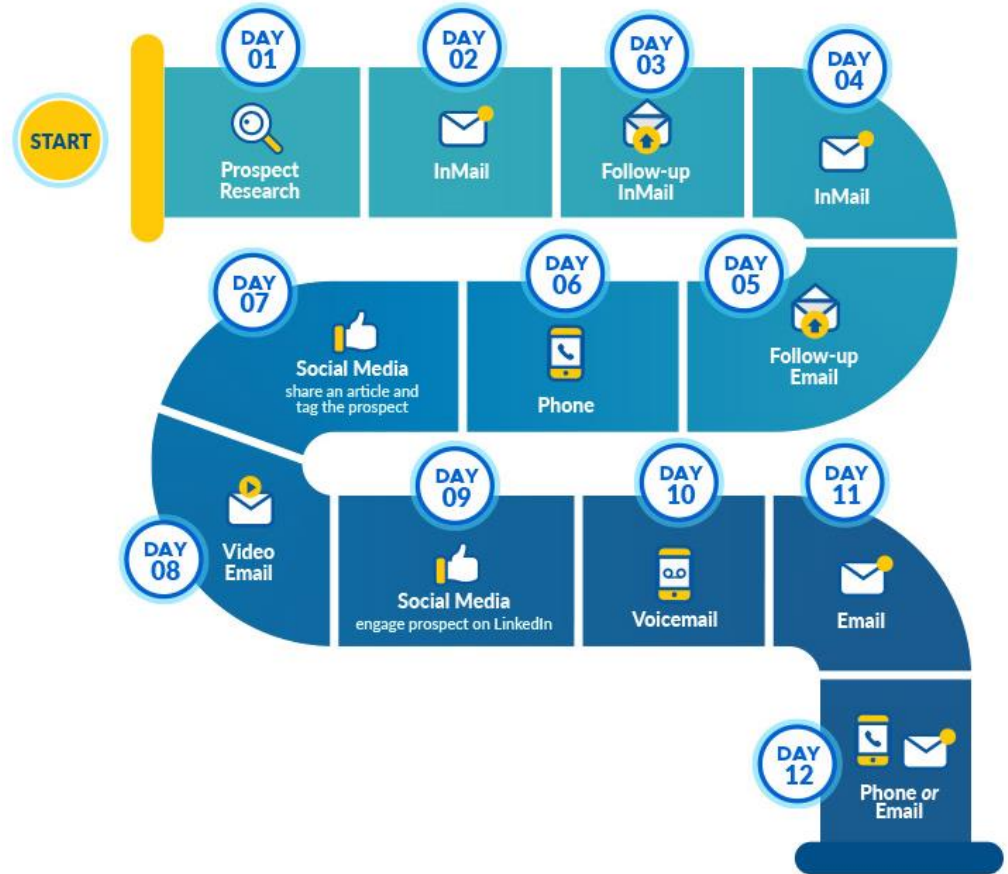
▶ Sales

- Manager (Dir./VP)
 - Account Executives (AE)
 - Business Development Reps (BDR)
 - Sales Development Reps (SDR)
 - Channel Manager / OEM / Partners
 - Systems Engineers (SE)
 - Sales Support



Sample Sales Cadence: SDRs

- ▶ 12-Day Window
- ▶ 11 Touches
 - Email
 - LinkedIn InMail
 - Phone
 - Video Mail
 - Social Media
 - Voicemail
- ▶ Advance Research



Sales Key Performance Indicators (KPI)

- ▶ Average Transaction Value (ATV) / Average Customer Value (ACV)
 - Can be interpolated to Lifetime Total Value (LTV)
- ▶ Average Sales Cycle (ASC) Time
- ▶ Raw Lead/Funnel Volume
- ▶ Ratio of Pipeline to Total Commit Forecast (Quarter and Month)
- ▶ Closure Rate of all Pipeline
- ▶ Win/Loss Rate of all Commit Forecast Revenue
- ▶ Closed Revenue & Percent of Total Team Quota attainment
- ▶ Team Productivity Ratio (number of sales team to gross revenue)



Marketing KPIs

- ▶ Average Customer Value (ACV)
 - Top-line revenue & Gross Margin
- ▶ Cost of Acquisition (COA) or Customer Acquisition Cost (CAC)
- ▶ Volume and Growth Rate of TOF Suspects/Prospects
- ▶ Volume and Growth Rate of MQLs
- ▶ Campaign Revenue Attribution (CRA)
- ▶ Campaign Metrics
 - Click-through-Rate (CTR)
 - Convert to Purchase (CTP)
 - Bounce Rates
 - Visitor Time/Depth onsite (Stickiness)



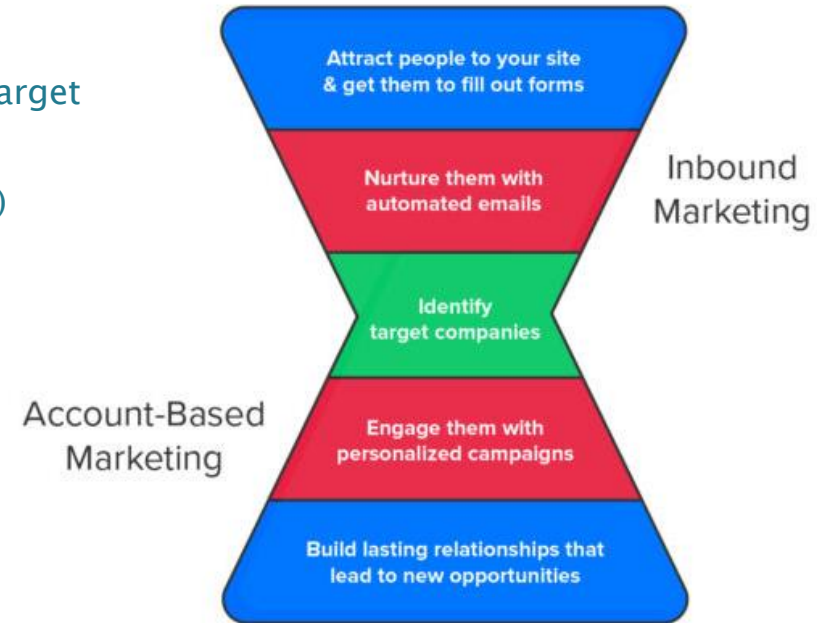
Sample Qualification Factors

- ▶ Is it an existing or new customer?
- ▶ Is there a defined need / pain point?
- ▶ What's the deal worth?
- ▶ Is there budget available?
- ▶ Is our solution a good fit & desirable outcome?
- ▶ What is the desired time frame for a solution?
- ▶ Who is the incumbent competitor, if any?
- ▶ Who is the primary decision maker and are we aligned with them?
- ▶ Is the educational burden in this opportunity high or low?
- ▶ What the best competitive strategy for this opportunity?
- ▶ What obstacles will we need to overcome in order to win this deal?



Inbound Marketing to Account-Based Marketing (ABM) Synergy

- ▶ Persona / Avatar / Ideal Customer Profile (ICP)
- ▶ Use ICP to extract Highly Segmented and Accurate Target Database – Discoverorg.com
- ▶ Design Email Offer Campaign (e.g. White Paper offer)
 - Email copy (Subject, Body)
 - Landing Page copy and download link to WP
 - CTA: Ungated, recipient link tracked on download
- ▶ Setup Campaign Cadence in Marketing Automation System – Hubspot.com
- ▶ Execute Campaign
- ▶ A/B & Multivariate Testing
 - vwo.com, unbounce.com, optimizely.com
- ▶ Analytics Assessment



“Not either/or, but both.”

Summary & Takeaways

- ▶ The Goal of Sales and Marketing is to produce satisfied happy customers
- ▶ The means of producing satisfied happy customers is to deliver an **OUTCOME** for a customer that:
 - Achieves a customer's desired goal
 - Solves a customer's problem / pain-point
 - Mitigates a customer's fear
- ▶ The key to successful Demand Generation is found in recognizing the Customer Journey and communicating the appropriate messaging and offers at the right time
- ▶ The key to successful Sales is executing a disciplined, documentable process of “Doing ALL the Right Things Right”
 - Unsuccessful Sales is either not knowing all the right things to do, or
 - Failure to execute the right steps correctly