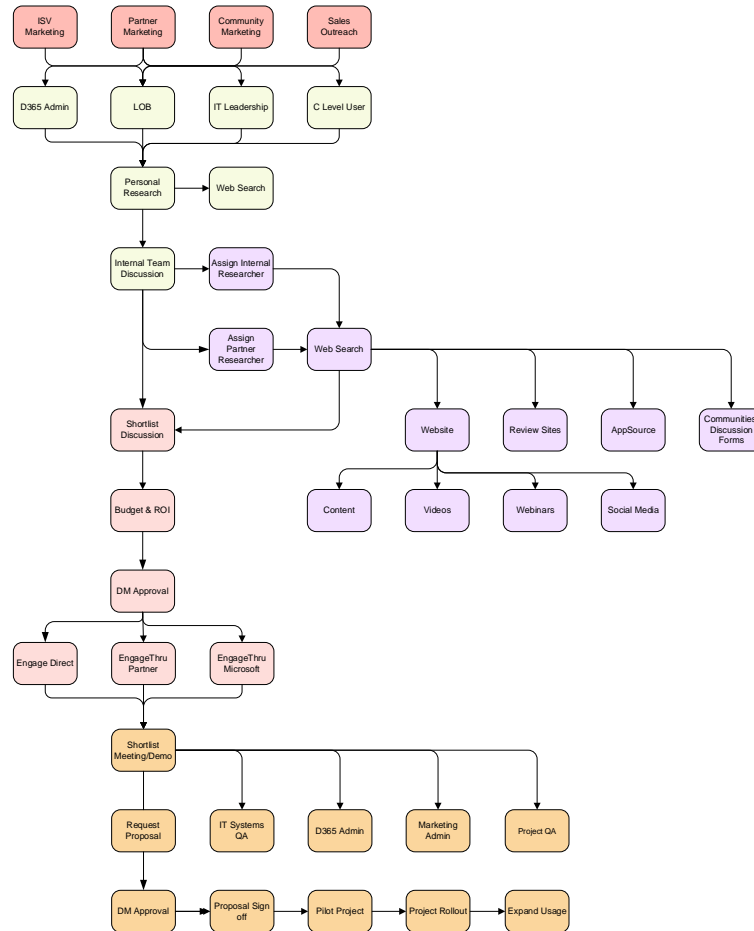# What We Will Cover

- Why do sales & marketing need to be aligned?
- What are the issues?
- Why is customer journey important?
- How does all of this help me?
- What's in Dynamics?
- What else?

The B2B Buying Process
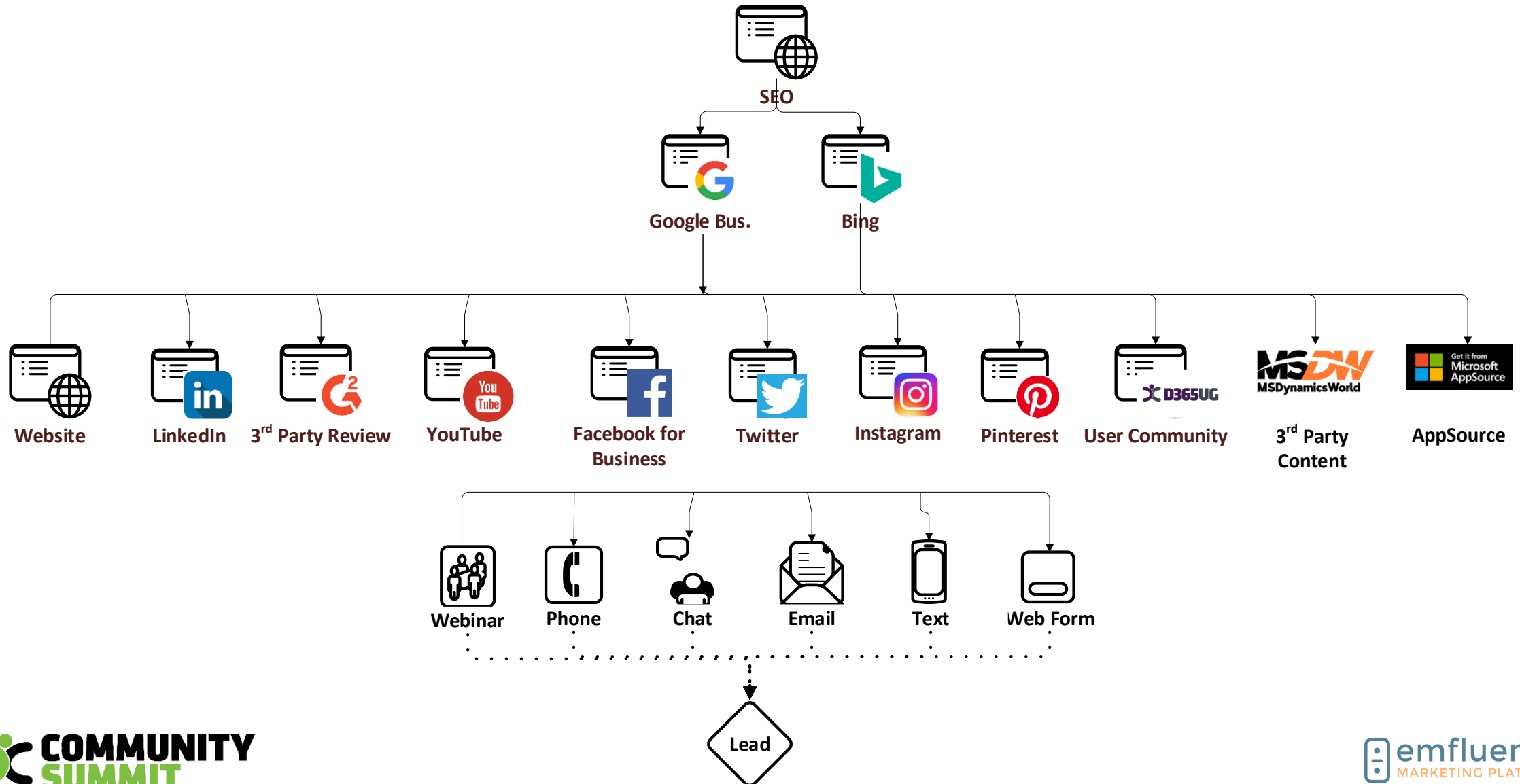
SEO

Google Bus.   Bing

Website   LinkedIn   3rd Party Review   YouTube   Facebook for Business   Twitter   Instagram   Pinterest   User Community   3rd Party Content   AppSource

Webinar   Phone   Chat   Email   Text   Web Form

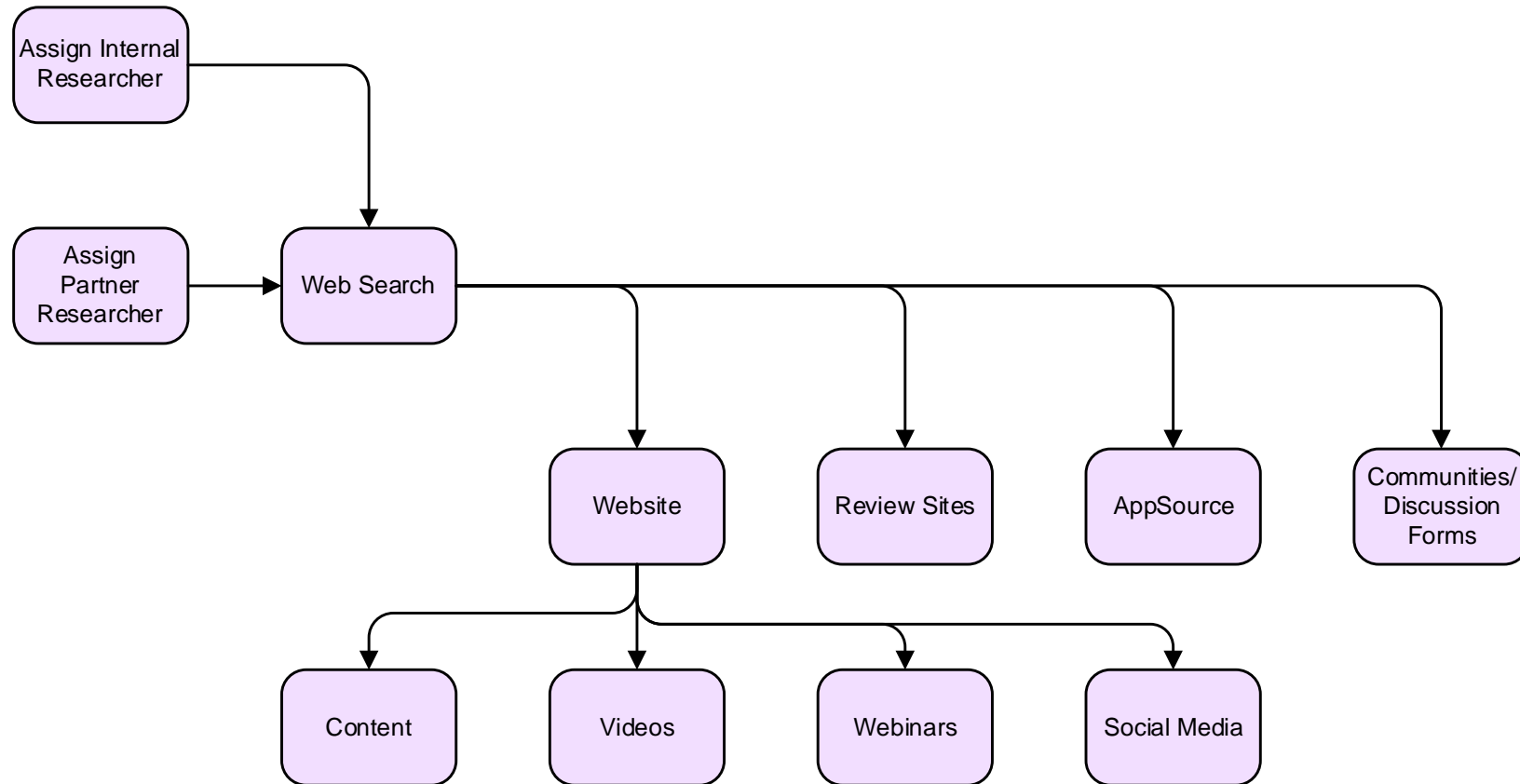Lead

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The B2B Buying Process

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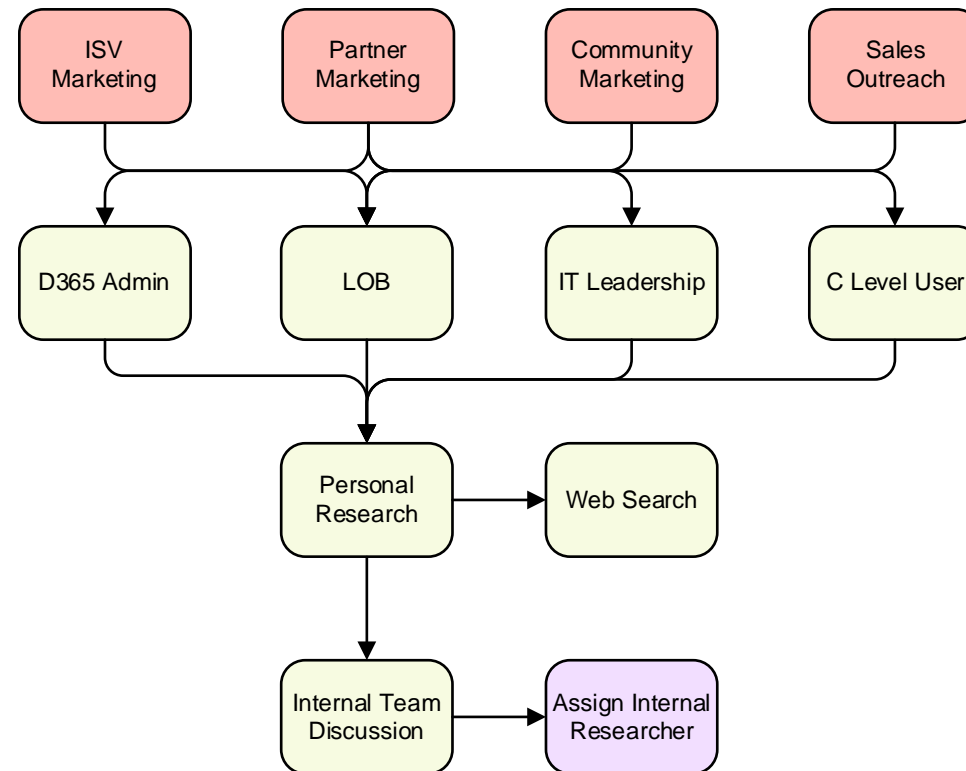
The B2B Buying Process
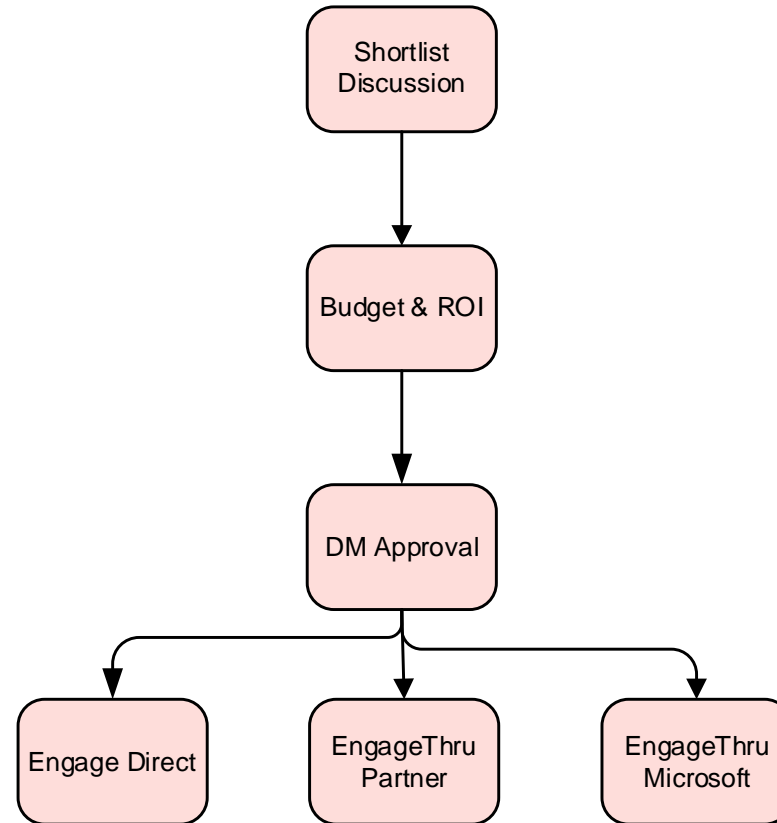
The B2B Buying Process

Stats
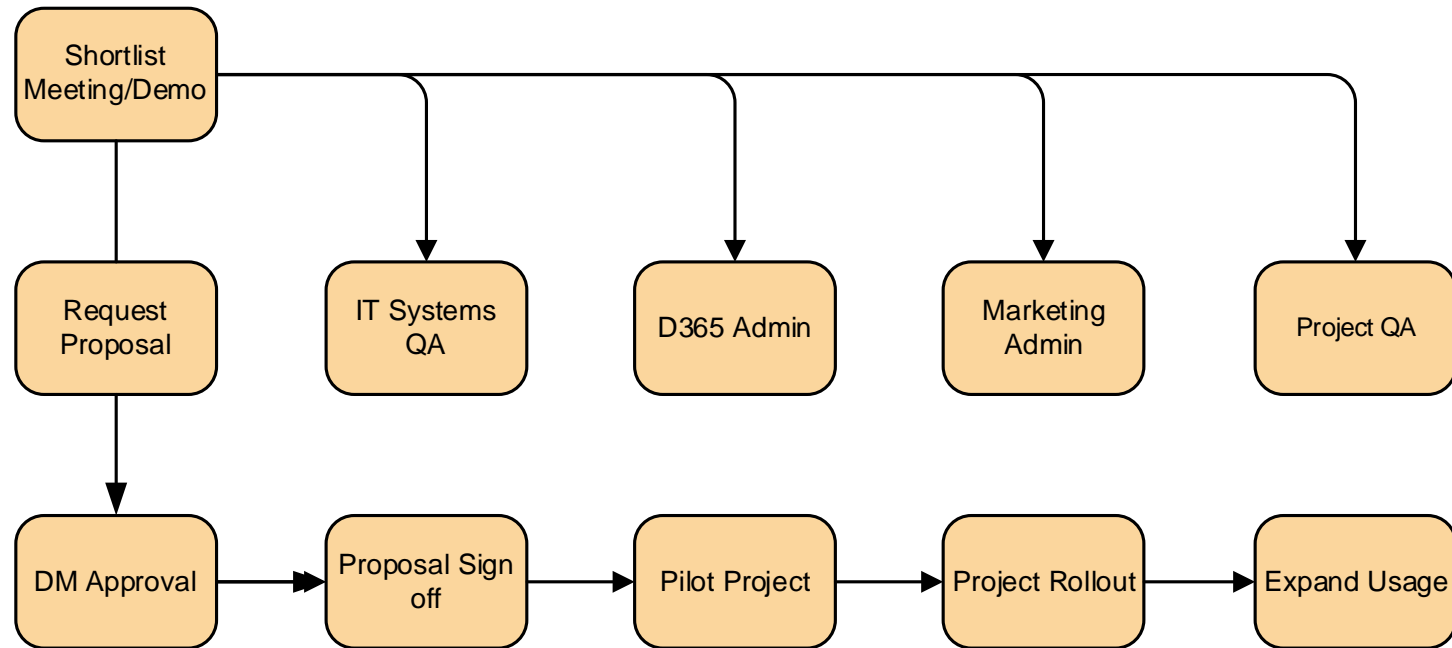
38% higher win rate

38% higher retention rate

209% more revenue from marketing

These are possible if your sales and marketing teams are aligned!

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What are the issues?

- Researcher isn't the decision-maker
- We aren't speaking the same language
- Marketing can't stop when the lead is passed to sales
- Personas aren't clearly defined

Why is the Customer Journey Important?

- You will be able to better **target your marketing**
- The assets you create will be of more help to **support the sales funnel**
- Your sales, marketing, customer success teams will be **aligned**
- Your **customer experience** will improve
- Better identify **problem areas** in your funnel

The Customer Journey

Sample Persona

Job Title / Industry:

Age:

Job Role

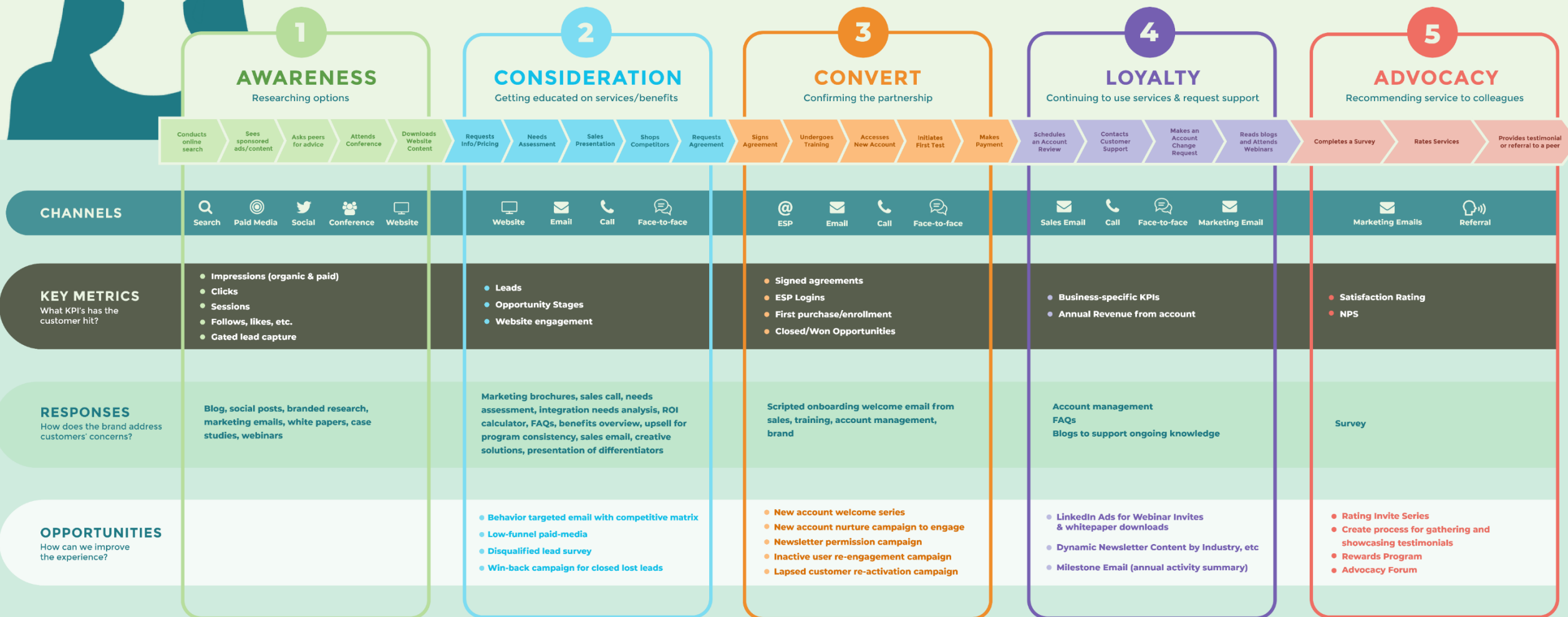|	**1 AWARENESS** Researching options	**2 CONSIDERATION** Getting educated on services/benefits	**3 CONVERT** Confirming the partnership	**4 LOYALTY** Continuing to use services & request support	**5 ADVOCACY** Recommending service to colleagues
	Conducts online search · Sees sponsored ads/content · Asks peers for advice · Attends Conference · Downloads Website Content	Requests Info/Pricing · Needs Assessment · Sales Presentation · Shops Competitors · Requests Agreement	Signs Agreement · Undergoes Training · Accesses New Account · Initiates First Test · Makes Payment	Schedules an Account Review · Contacts Customer Support · Makes an Account Change Request · Reads blogs and Attends Webinars	Completes a Survey · Rates Services · Provides testimonial or referral to a peer
CHANNELS	Search · Paid Media · Social · Conference · Website	Website · Email · Call · Face-to-face	ESP · Email · Call · Face-to-face	Sales Email · Call · Face-to-face · Marketing Email	Marketing Emails · Referral
KEY METRICS What KPI's has the customer hit?	• Impressions (organic & paid) • Clicks • Sessions • Follows, likes, etc. • Gated lead capture	• Leads • Opportunity Stages • Website engagement	• Signed agreements • ESP Logins • First purchase/enrollment • Closed/Won Opportunities	• Business-specific KPIs • Annual Revenue from account	• Satisfaction Rating • NPS
RESPONSES How does the brand address customers' concerns?	Blog, social posts, branded research, marketing emails, white papers, case studies, webinars	Marketing brochures, sales call, needs assessment, integration needs analysis, ROI calculator, FAQs, benefits overview, upsell for program consistency, sales email, creative solutions, presentation of differentiators	Scripted onboarding welcome email from sales, training, account management, brand	Account management FAQs Blogs to support ongoing knowledge	Survey
OPPORTUNITIES How can we improve the experience?		• Behavior targeted email with competitive matrix • Low-funnel paid-media • Disqualified lead survey • Win-back campaign for closed lost leads	• New account welcome series • New account nurture campaign to engage • Newsletter permission campaign • Inactive user re-engagement campaign • Lapsed customer re-activation campaign	• LinkedIn Ads for Webinar Invites & whitepaper downloads • Dynamic Newsletter Content by Industry, etc • Milestone Email (annual activity summary)	• Rating Invite Series • Create process for gathering and showcasing testimonials • Rewards Program • Advocacy Forum

The Customer Journey

1 AWARENESS
Researching options

| Conducts online search | Sees sponsored ads/content | Asks peers for advice | Attends Conference | Downloads Website Content |

CHANNEL

- Search
- Paid Media
- Social
- Conference
- Website

KEY METRICS
What KPI's has the customer hit?

- Impressions (organic & paid)
- Clicks
- Sessions
- Follows, likes, etc.
- Gated lead capture

RESPONSE
How does the customers' co...

OPPORTUNITIES
How can we i... the experience...

Blog, social posts, branded research, marketing emails, white papers, case studies, webinars

...ATION
...vices/benefits

| Shops Competitors | Requests Agreement |

- Face-to-face

RESPONSE
...ll, needs ...s analysis, ROI ...view, upsell for ...review, creative ...erentiators

...competitive matrix

...d lost leads

3 CONVERT
Confirming the partnership

| Signs Agreement | Undergoes Training | Accesses New Account | Initiates First Test | Makes Payment |

- @ ESP
- Email
- Call
- Face-to-face

KEY METRICS
- Signed agreements
- ESP Logins
- First purchase/enrollment
- Closed/Won Opportunities

Scripted onboarding welcome email from sales, training, account management, brand

- New account welcome series
- New account nurture campaign to engage
- Newsletter permission campaign
- Inactive user re-engagement campaign
- Lapsed customer re-activation campaign

4 LOYALTY
Continuing to use services & request support

| Schedules an Account Review | Contacts Customer Support | Makes an Account Change Request | Reads blogs and Attends Webinars |

- Sales Email
- Call
- Face-to-face
- Marketing Email

KEY METRICS
- Business-specific KPIs
- Annual Revenue from account

Account management
FAQs
Blogs to support ongoing knowledge

- LinkedIn Ads for Webinar Invites & whitepaper downloads
- Dynamic Newsletter Content by Industry, etc
- Milestone Email (annual activity summary)

5 ADVOCACY
Recommending service to colleagues

| Completes a Survey | Rates Services | Provides testimonial or referral to a peer |

- Marketing Emails
- Referral

KEY METRICS
- Satisfaction Rating
- NPS

Survey

- Rating Invite Series
- Create process for gathering and showcasing testimonials
- Rewards Program
- Advocacy Forum

Customer Journey

Sample Perso[n]

Job Title / Industry:

Age:

Job Role

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1 AWARENESS
Researching options

Conducts online search → Sees sponsored ads/content → Asks peers for advice → Attends Conference → We...

2 CONSIDERATION
Getting educated on services/benefits

Requests Info/Pricing → Needs Assessment → Sales Presentation → Shops Competitors → Requests Agreement

Website · Email · Call · Face-to-face

- Leads
- Opportunity Stages
- Website engagement

3 CONVERT
Confirming the partnership

Undergoes Training → Accesses New Account → Initiates First Test → Makes Payment

Email · Call · Face-to-face

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Sales Email · Call · Face-to-face · Marketing Email

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Marketing Emails · Referral

CHANNELS

Search · Paid Media · Social · Conference · We...

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Awareness
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Convert
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- ...Logins
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- ...ed/Won Opportunities

Loyalty
- Business-specific KPIs
- Annual Revenue from account

Advocacy
- Satisfaction Rating
- NPS

RESPONSES
How does the brand address customers' concerns?

Awareness
Blog, social posts, branded research, marketing emails, white papers, case studies, webinars

Consideration
Marketing brochures, sales call, needs assessment, integration needs analysis, ROI calculator, FAQs, benefits overview, upsell for program consistency, sales email, creative solutions, presentation of differentiators

Convert
...ed onboarding welcome email from ...raining, account management,

Loyalty
Account management
FAQs
Blogs to support ongoing knowledge

Advocacy
Survey

OPPORTUNITIES
How can we improve the experience?

Consideration
- Behavior targeted email with competitive matrix
- Low-funnel paid-media
- Disqualified lead survey
- Win-back campaign for closed lost leads

Convert
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Advocacy
- Rating Invite Series
- Create process for gathering and showcasing testimonials
- Rewards Program
- Advocacy Forum

The Partner Journey

Sample Persona

Job Title / Industry:

Age:

Job Role

---

1 AWARENESS
Researching options

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2 CONSIDERATION
Getting educated on services/benefits

Requests Info/Pricing → Needs Assessment → Sales Presentation → Shops Competitors

3 CONVERT
Confirming the partnership

Signs Agreement → Undergoes Training → Accesses New Account → Initiates First Test → Makes Payment

ESP · Email · Call · Face-to-face

4 LOYALTY
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Contacts Customer Support → Makes an Account Change Request → Reads blogs and Attends Webinars

5 ADVOCACY
Recommending service to colleagues

Completes a Survey → Rates Services → Provides testimonial or referral to a peer

---

CHANNELS

Awareness: Search, Paid Media, Social, Conference, Website

Consideration: Website, Email, Call, Face-to-face

Convert:
- Signed agreements
- ESP Logins
- First purchase/enrollment
- Closed/Won Opportunities

Loyalty: ...il, Call, Face-to-face, Marketing Email

Advocacy: Marketing Emails, Referral

KEY METRICS
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Advocacy:
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Convert: Scripted onboarding welcome email from sales, training, account management, brand

Loyalty: ...unt management, ...s to support ongoing knowledge

Advocacy: Survey

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- Rating Invite Series
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The C...

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	Sales Email	Call	Face-to-face	Marketing Email		Marketing Emails	Referral

CHANNELS

Search | Paid Media | Social | Conference | Website

Website | Email | Call | Face-to-face

@ ESP

- Business-specific KPIs
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- Closed/W...

Account management
FAQs
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Scripted or... sales, train... brand

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How does this help me?

- You can download our workbook to get all the steps for this exercise.

- Today however we are going to talk specifically about the data that is in the CRM.

What's in Dynamics?

- ## Campaigns Entity

  Leverage both Lead Source and Source Campaign

- ## Competitor Entity

  Are you capturing who you're losing to at the Lead and Opportunity stage?

- ## Marketing Spend and Potential ROI

What do you want to achieve?

What you'll need to know first

How you're going to get it

New Targeted Campaigns

Data Points Needed

Entry of the Data

Cross-sell ⟶ Previous Purchase, Buyer Preference ⟶ Purchase history; customer input

Regional Promotion ⟶ Zip codes, territories, regions ⟶ Sales team

Contract Renewal ⟶ Contract end date and/or competitor ⟶ CRM date field, Competitor entity

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What else?

Does Dynamics capture what it needs to?

Does your tech stack support your journey?

Does your strategy need a tweak?

Can you improve inter-department communication?

Love this stuff?
Let's talk more.

Want to chat about email marketing, marketing automation, CRM?

linkedin.com/in/monicafrhoyer/

@MonicaFRHoyer

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Additional Resources

Learn more about the emfluence Marketing Platform at
more.emfluence.com/emfluence-for-dynamics

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Get our Customer Journey Workbook!
TO COME