HEINZ MARKETING

ON24

fast FWD

WORKSHOP WORKBOOK

A PLAYBOOK FOR BUILDING PREDICTABLE PIPELINE

INTRODUCTION TO THE WORKBOOK

WELCOME TO THE PREDICTABLE PIPELINE WORKBOOK. IN THESE PAGES, YOU'LL EXPLORE THE 10 FOUNDATIONS OF BUILDING A PREDICTABLE, RELIABLE PIPELINE FOR YOUR ORGANIZATION.

This workbook contains worksheets, templates and frameworks you can use to practice the work of building a predictable pipeline. Feel free to explore the workbook, use it its entirety or print off the sections that are relevant to you.

If you are joining us for a workshop, come with your materials filled out so you can share your work with other attendees, discuss it with our speakers and find new ways to refine what you've already done.

Finally, building predictable pipeline takes a team. We encourage you to share this workbook with your peers so you can more closely align on what needs to be done within your organization so you can accomplish your revenue goals.

TABLE OF CONTENTS

CHAPTER ONE

BUILDING YOUR IDEAL CUSTOMER PROFILE

INTRODUCTION

BEFORE YOU CAN GET TO WORK ON YOUR CONTENT, MESSAGING, OR CAMPAIGNS, IT'S IMPORTANT YOU FIRST ESTABLISH A CLEAR PICTURE OF YOUR IDEAL CUSTOMER USING AN IDEAL CUSTOMER PROFILE.

Your ideal customer profile will influence **everything your organization does.** Therefore, it's incredibly important to have clear definitions of your ideal customer, otherwise, your organization risks going after the wrong people, with the wrong message and the wrong content.

HOW DO WE THINK ABOUT THE IDEAL CUSTOMER PROFILE?

We think about the Ideal Customer Profile in 6 key areas:

01

COMPANY FIRMOGRAPHICS

like geography, industries and verticals, company size, and annual revenue.

02

EMPLOYEE DEMOGRAPHICS

like key titles, roles, functions, departments, and buying committee responsibilities of the employees that work there.

03

ACCOUNT TECHNOGRAPHICS

to identify the profile of their marketing technology stack.

04

COMPANY PSYCHOGRAPHICS

like the company's maturity in the market, their grand vision, their aspirations, and their core values.

05

BUYING SIGNALS

like virtual behaviors, engagement actions, and online interactions.

06

SITUATIONAL SIGNALS

like organizational changes, key events, and new product releases.

WHO IS MY IDEAL CUSTOMER?

First, write a few sentences about your ideal customer summarizing who they are. Think about this description as something you could easily provide to anyone in your organization, new or not, to give them an immediate, clear picture of who you're selling to.

WHAT DOES MY IDEAL CUSTOMER DO?

Second, think and write a few sentences about the work that your ideal customer does. What do they make? What do they sell? This helps further develop a profile of who your ideal customer is.

WHAT DOES MY IDEAL CUSTOMER VALUE?

Third, write a few sentences describing what your ideal customer believes are the most important values, skills, and/or traits of a new solution or purchase. This part is important because it helps ensure that your content, message, and processes align with the values of your ideal customer.

WHAT DOES MY IDEAL CUSTOMER ASPIRE TO?

Lastly, write a few sentences describing what your ideal customer aspires to. What is their grand company vision? Where do they want to be in the next 1, 2, 5, 10 years?

IDEAL CUSTOMER PROFILE

Now, complete the tables below using key attributes and information about your ideal customer.

COMPANY FIRMOGRAPHICS Geography Industries/Verticals Total Company Revenue/Size	**BUYING SIGNALS** Virtual Behaviors Engagement Actions
EMPLOYEE DEMOGRAPHICS Key Titles Key Functions/Departments/Roles	**SITUATIONAL SIGNALS** Organizational Changes Key Events New Product Releases

CHAPTER TWO

RECOGNIZING THE BUYING COMMITTEE

INTRODUCTION

TODAY'S BUYING COMMITTEES ARE MASSIVELY COMPLEX.

Many have upwards of seven people involved, and with a wide variety of roles and responsibilities. From C-suite and VPs; to directors and managers; to individual contributors; to roles your sales team might not even speak to at all.

To get the attention of your buyers, your campaigns must take this complex ecosystem into account. Every member of the buying committee needs to be addressed and their concerns satisfied.

Otherwise, you risk spending most of your time on just a small piece of the bigger buyer puzzle and potentially missing out on converting a critical role.

HOW DO WE THINK ABOUT THE BUYING COMMITTEE

We think about the buying committee by asking two questions:

01

WHAT IS THE BUYING SCENARIO?

02

WHO PLAYS A ROLE IN THAT BUYING SCENARIO?

WHAT IS THE BUYING SCENARIO?

WHEN WE ASK ABOUT THE BUYING SCENARIO, WE'RE REALLY ASKING ABOUT HOW A DECISION GETS MADE.

Understanding factors like purchase timeframes, number of buying centers and members, as well as what level a purchase decision can be made can massively help marketers and sellers more effectively plan and go to market with the right content, message, channels and expectations in mind.

Take the table below for example. In it, we've identified three distinct buying scenarios as observed by SiriusDecisions.

SCENARIO	DECISION AUTHORITY	PURCHASE TIMEFRAME	# OF BUYING CENTERS	# OF MEMBERS
COMMITTEE	Agreement at the executive leadership level	One to two quarters (or more)	Five (or more)	Six to 10 (or more)
CONSENSUS	Agreement across teams, functions or departments	One to two quarters (but no more)	Three to four	Three to five
INDEPENDENT	Agreement among individuals	Less than eight weeks	One to two	One to two

THE COMMITTEE SCENARIO:

A committee scenario is a highly complex purchasing process where deals must be brought forth to the executive leadership team for approval. It is a vertical, hierarchical, and structured process most typically associated with organizations with $500k or more in revenue. It is also most often associated with "solution selling." This scenario has the longest purchase timeframes as well as the greatest number of buying centers and buying members.

THE CONSENSUS SCENARIO:

A consensus scenario is a team-based decision, requiring multiple people from multiple teams to be involved. Here, the decision is horizontal, and it does not go to a senior-level executive team. However, this scenario is still moderately complex, requiring you to facilitate consensual, cross-functional decision-making across multiple buyer personas that must be influenced and informed in order to make a final decision.

THE INDEPENDENT SCENARIO:

An independent scenario is the simplest purchasing process where just one or two people are involved. Here, decisions remain within a specific function or department, which also makes it much easier to craft messaging, content, and campaigns. Deals associated with an independent scenario are typically transactional or e-commerce purchases.

WHO PLAYS A ROLE?

When we ask who plays a role in the buying scenario, we think about four distinct personas or roles:

DECISION MAKERS

who have the final decision on a purchase (i.e., they have Yes/No authority). Decision Makers fall into one of two categories:

Business Decision Makers, who are focused primarily on how the purchase impacts business ROI and revenue.

Technical Decision Makers, who are focused primarily on how the purchase impacts business technologies, processes and operations.

EXECUTIVE SPONSORS OR CHAMPIONS

who drive the purchase decision forward internally, acting as the primary spokesperson for your solution amongst their teams and the executive leadership.

PURCHASE INFLUENCERS

who may not have a direct role in the purchase decision, but they have influence over the outcome. They fall into one of two categories:

Business Influencers, who are focused primarily on how the purchase impacts business ROI and revenue.

Technical Influencers, who are focused primarily on how the purchase impacts business processes and operations.

USERS

who will use the product in their day-to-day jobs. They are directly impacted by the purchase and are focused on how the solution will help them be more efficient, effective, and productive.

THE BUYING SCENARIO

Now, fill out the table below with what your typical buying scenario is.

SCENARIO		DECISION AUTHORITY
AVERAGE DEAL SIZE	TYPICAL PURCHASE TIMEFRAME	# OF BUYING CENTERS
IDENTIFIED BUYING CENTERS	# OF MEMBERS	IDENTIFIED PERSONAS

BUYING PERSONAS

Next, think about the titles and roles of those buyers in that buying scenario and complete the table below. Be mindful that while some of these may not be people that sales or marketing speak to directly, their role in the buying committee is still highly important and should not be overlooked.

BUYING COMMITTEE PERSONAS

PERSONA ROLES	TITLES
Business Decision Makers	
Technical Decision Makers	
Sponsors	
Business Influencers	
Technical Influencers	
Users	

BUYING PERSONAS

The chart below is one method of further developing a persona. After you've validated your personas with your internal teams, try completing this chart for one of them. You'll be surprised at what kind of valuable information it can yield!

PERSONA ROLE

<table>
<tr>
<td colspan="2">
Functional Bias (how they approach decisions):

Why [our company]:</td>
<td>Titles:

Reports to:

Decision-Making /Influence Power:

Budget Approval:

Direct Reports:</td>
</tr>
<tr>
<td>Responsibilities:

Business Goals & Concerns:

Attitude & Reputation in the Industry:</td>
<td>How They Shop/Research:

Purchase Decision Criteria:

Where to Find Them:

Preferred Content:</td>
<td>Pain Points:

Use Cases:

Potential Objections:</td>
</tr>
</table>

CHAPTER THREE

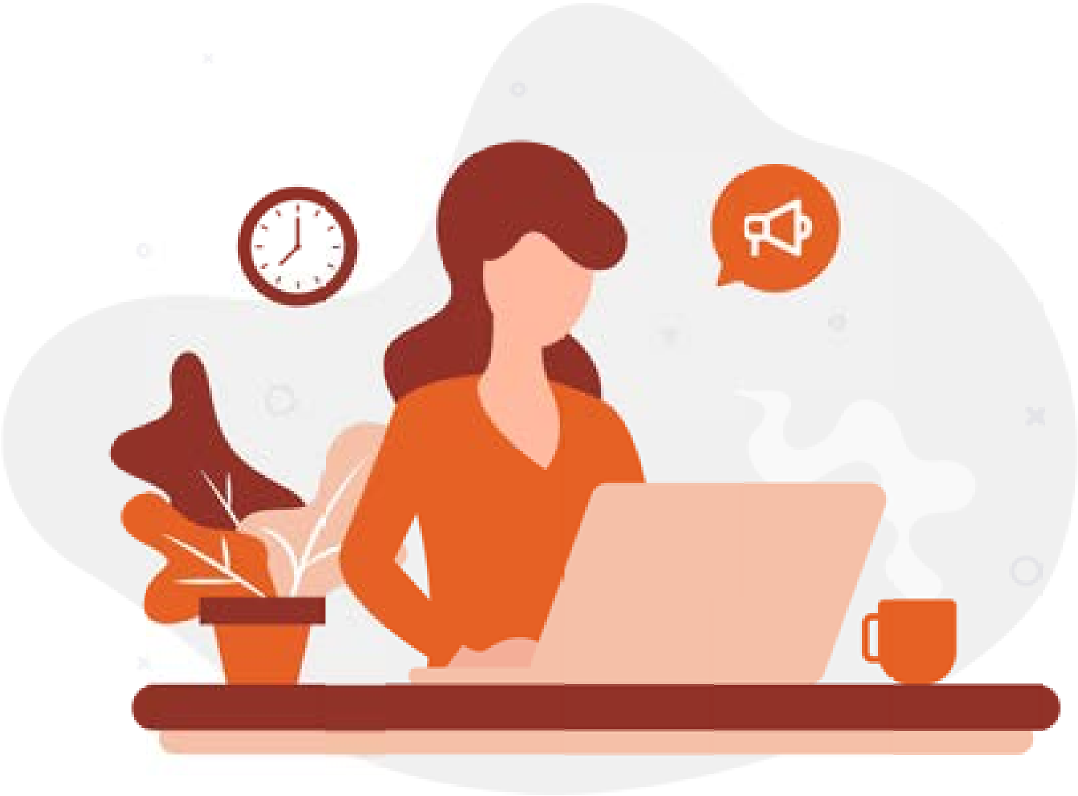
THE BUYER AND CUSTOMER JOURNEY

INTRODUCTION

THE BUYER'S JOURNEY IS NOT A LINEAR JOURNEY.

Customers can move forwards and backwards and they can move in any direction at any speed.

Still, there are guiding principles of the buyer and customer journey that marketers can account for. Let's explore them now.



HOW DO WE THINK ABOUT THE CUSTOMER JOURNEY?

We think about the customer journey through six primary lenses:

01

THE CUSTOMER STAGE

02

THE BUYER'S PARTICIPANTS

03

THE BUYER'S QUESTIONS

04

THE BUYER'S ACTIONS

05

THE BUYER'S NEEDS

06

OUR SALES AND MARKETING GOALS

In the following pages, we'll describe what makes up each of those lenses and how you can think about them for your own demand generation initiatives.

SIX CUSTOMER JOURNEY STAGES

WE THINK ABOUT THE CUSTOMER JOURNEY IN SIX PRIMARY STAGES.

The first three stages occur before someone becomes a customer, while the latter three stages occur after someone becomes a customer. Each stage is centered around a specific action or state that the buyer is in. These stages help us, as sellers and marketers, better understand what our buyers are looking for, what questions they have, and what they need.

		DESCRIPTION
PRE-CUSTOMER	AWARENESS	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.
	SOLUTION	The buyer is aware of their challenge and actively looking for solutions that address it.
	SELECTION	The buyer is ready to make a final purchase decision and become a customer.
CUSTOMER	SERVICE	The customer is onboarding and/or beginning to implement and utilize our solution.
	ENGAGEMENT	The customer is highly engaged with our solution and is eager to explore more ways to work with us.
	ADVOCACY/LOYALTY	The customer is a strong advocate for our solution after having such a positive experience with us.

STAGES, QUESTIONS, AND GOALS

WE THEN LIKE TO THINK ABOUT THE BUYER'S QUESTIONS AND OUR OWN SALES AND MARKETING GOALS AT EACH OF THE SIX CUSTOMER JOURNEY STAGES.

Buyers typically ask a specific kind of question or series of questions during each stage of the customer journey. And with those questions, also comes a goal for you and your team to achieve. These questions and goals are as follows:

		DESCRIPTION	BUYER'S QUESTIONS	OUR GOALS
PRE-CUSTOMER	AWARENESS	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.	• How do I address these issues? • How can I improve my organization?	Get the buyer to realize they have a problem, can't risk inaction, and give a name to their challenge.
	SOLUTION	The buyer is aware of their challenge and actively looking for solutions that address it.	• How are my peers addressing this? • What solutions have others tried? • What results have others seen? • What solution is the best fit for my business?	Prove to the prospect why and how our solution is a good fit for their organization. Get our solution onto their shortlist for the final decision.
	SELECTION	The buyer is ready to make a final purchase decision and become a customer.	• Are your other customers happy? • Can you really meet my needs? • Is this within my budget and resources? • Will you really make me successful?	Give our buyer the right push and validation they need to move forward with our solution.
CUSTOMER	SERVICE	The customer is onboarding and/ or beginning to implement and utilize our solution.	• How can we make sure we're fully utilizing your solution/services for the best ROI? • How will your solution enable success?	Ensure our customer is onboarded successfully, efficiently, and without friction. Provide our customer with the right resources, materials, and guidance to ensure they have a positive experience with us.
	ENGAGEMENT	The customer is highly engaged with our solution and is eager to explore more ways to work with us.	• How can we get more out of your solution? • How do our results compare with others? • What more can you do for us?	Give our customer new ways to expand/renew their current contract. Facilitate further engagement from our customer with our solution.
	ADVOCACY/LOYALTY	The customer is a strong advocate for our solution after having such a positive experience with us.	• How can I be an advocate for you?	Reward our customer's loyalty and celebrate their achievements publicly. Ask for referrals and testimonials.

ACTIONS AND NEEDS

NOW WE CAN START TO DIG DEEPER AT THE ACTIONS AND NEEDS THAT DRIVE PROGRESSION.

At each stage of the customer journey, buyers complete a set of actions that progress them to the next stage. These actions are taken to answer their questions and are related to a specific need or set of needs at each stage. These actions and needs are as follows:

		DESCRIPTION	BUYER'S QUESTIONS	BUYER'S ACTIONS	BUYER'S NEEDS	OUR GOALS
PRE-CUSTOMER	AWARENESS	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.	• How do I address these issues? • How can I improve my organization?	Conducting general, educational research to more clearly understand their problem. Researching with general phrases and symptoms.	Diagnose their symptoms and give a specific name to their challenge. Help to understand the implications of inaction	Get the buyer to realize they have a problem, can't risk inaction, and give a name to their challenge.
PRE-CUSTOMER	SOLUTION	The buyer is aware of their challenge and actively looking for solutions that address it.	• How are my peers addressing this? • What solutions have others tried? • What results have others seen? • What solution is the best fit for my business?	Evaluating specific solutions after they're made aware of their challenges to find the best fit for their company. Researching specific use cases, tools and solutions, and capabilities.	Help to understand the effects of action. Best approaches to solve their problems. Right-fit solutions that match the maturity, values, and capabilities of the customer's organization.	Prove to the prospect why and how our solution is a good fit for their organization. Get our solution onto their shortlist for the final decision.
PRE-CUSTOMER	SELECTION	The buyer is ready to make a final purchase decision and become a customer.	• Are your other customers happy? • Can you really meet my needs? • Is this within my budget and resources? • Will you really make me successful?	Making a shortlist of solutions. Having conversations with sales reps. Ready to make a purchase decision and need a final push to validate which solution to move forward with.	Help validating the right purchase decision. Help understanding the benefits, investment, and outcomes of the purchase.	Give our buyer the right push and validation they need to move forward with our solution.
CUSTOMER	SERVICE	The customer is onboarding and/ or beginning to implement and utilize our solution.	• How can we make sure we're fully utilizing your solution/services for the best ROI? • How will your solution enable success?	Onboarding process Beginning Implementation Using the solution/service day to day.	Positive, frictionless onboarding Implementation guidance and best practices Timely, meaningful service Help ensuring that the solution/ service is being utilized appropriately, efficiently, and effectively.	Ensure our customer is onboarded successfully, efficiently, and without friction. Provide our customer with the right resources, materials, and guidance to ensure they have a positive experience with us.
CUSTOMER	ENGAGEMENT	The customer is highly engaged with our solution and is eager to explore more ways to work with us.	• How can we get more out of your solution? • How do our results compare with others? • What more can you do for us?	Fully utilizing and highly engaged with the solution/ service day to day. Wanting/eager to do more with the solution. Exploring new use cases.	Expansion options New use case opportunities	Give our customer new ways to expand/renew their current contract. Facilitate further engagement from our customer with our solution.
CUSTOMER	ADVOCACY/LOYALTY	The customer is a strong advocate for our solution after having such a positive experience with us.	• How can I be an advocate for you?	Actively promoting and referring their peers to your company. Talking about your company to their networks. Developing use cases and case studies for your business.	New use case opportunities Advocacy opportunities	Reward our customer's loyalty and celebrate their achievements publicly. Ask for referrals and testimonials.

BUYER PARTICIPANTS

FINALLY, LET'S TAKE A STEP BACK AND THINK ABOUT THE PERSONAS THAT ARE INVOLVED AT EACH STAGE.

Not every persona is active at every stage of the customer journey. Where a C-level executive might be heavily involved at the Selection stage, a mid-level manager might be highly active in the Solution stage, and an operations lead might take control at the Service stage. Understanding who in your target audiences' buying committees is most active and most engaged at each stage of the customer journey enables you provide the right content, with the right message, through the right channels to facilitate progression and conversion.

		DESCRIPTION	TYPICAL BUYER PARTICIPANTS [These participants will depend largely on your specific business model and how your customers typically make purchase decisions.]	BUYER'S QUESTIONS	BUYER'S ACTIONS	BUYER'S NEEDS	OUR GOALS
PRE-CUSTOMER	AWARENESS	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.		How do I address these issues? How can I improve my organization?	Conducting general, educational research to more clearly understand their problem. Researching with general phrases and symptoms.	Diagnose their symptoms and give a specific name to their challenge. Help to understand the implications of inaction	Get the buyer to realize they have a problem, can't risk inaction, and give a name to their challenge.
PRE-CUSTOMER	SOLUTION	The buyer is aware of their challenge and actively looking for solutions that address it.		How are my peers addressing this? What solutions have others tried? What results have others seen? What solution is the best fit for my business?	Evaluating specific solutions after they're made aware of their challenges to find the best fit for their company. Researching specific use cases, tools and solutions, and capabilities.	Help to understand the effects of action. Best approaches to solve their problems. Right-fit solutions that match the maturity, values, and capabilities of the customer's organization.	Prove to the prospect why and how our solution is a good fit for their organization. Get our solution onto their shortlist for the final decision.
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THE CUSTOMER JOURNEY

HERE IS WHAT A COMPLETE VIEW OF WHAT THE CUSTOMER JOURNEY COULD LOOK LIKE.

		DESCRIPTION	BUYER'S QUESTIONS	BUYER'S ACTIONS	BUYER'S NEEDS	OUR GOALS
PRE-CUSTOMER	AWARENESS	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.	How do I address these issues? How can I improve my organization?	Conducting general, educational research to more clearly understand their problem. Researching with general phrases and symptoms.	Diagnose their symptoms and give a specific name to their challenge. Help to understand the implications of inaction	Get the buyer to realize they have a problem, can't risk inaction, and give a name to their challenge.
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TYPICAL BUYER PARTICIPANTS [These participants will depend largely on your specific business model and how your customers typically make purchase decisions.]

WHAT DOES YOUR CUSTOMER JOURNEY LOOK LIKE? THINK ABOUT THE DIFFERENT COMPONENTS YOU JUST READ ABOUT AND FILL IN THE TABLE BELOW USING WHAT YOU KNOW ABOUT YOUR BUYERS AND THEIR JOURNEY FORWARD.

	CUSTOMER			PRE-CUSTOMER		
	ADVOCACY/LOYALTY	ENGAGEMENT	SERVICE	SELECTION	SOLUTION	AWARENESS
DESCRIPTION						
TYPICAL BUYER PARTICIPANTS (Which personas are involved in each stage of the customer journey?)						
BUYER'S QUESTIONS (What questions are our buyers asking at each stage of the customer journey?)						
BUYER'S ACTIONS ACTIVELY USING?) What are our buyers doing at each stage of the customer journey? What channels are they actively using?)						
BUYER'S NEEDS (What do our buyers need at each stage of the customer journey?)						
OUR GOALS (What are our goals—qualitative and quantitative—at each stage of the customer journey?)						

CHAPTER FOUR

MAKING YOUR MESSAGE

INTRODUCTION

PERSONALIZATION, RELEVANCE, EMPATHY AND TIMELINESS ARE THE CORE TENETS OF MARKETING AND SALES SUCCESS. BUT BUILDING THESE FOUNDATIONS INTO YOUR PIPELINE IS NO EASY TASK, ESPECIALLY AT-SCALE.

Unfortunately, there's no hidden switch or silver bullet here. The truth is that people respond to people. But being authentic and personal is about more than using first names in emails.

Meaningful messaging isn't another email about why your product is the best in the business. Meaningful messaging is all about your customers: what do they care about? What do they want? What do they value? What do they get? It's about giving, educating and providing useful resources when your customers need it most.

HOW DO WE THINK ABOUT MESSAGING?

We think about Messaging using four key components:

01

THE PRIMARY MESSAGE

which can be thought of as the main takeaway we want our audience to have when they think, read or hear about our solution. This message should be focused entirely around the outcomes of purchasing your solution. How is the purchaser enabled to achieve their goals with your solution?

02

THE CHALLENGE MESSAGES

which are the main challenges our audience faces that hinder their ability to achieve their goals. What are the roadblocks to their success? Where do they feel the most pressure coming from?

03

THE BENEFIT MESSAGES

which are the key benefits of purchasing your solution that address the challenges faced by our audience. These messages should, like the Primary Message, be focused entirely around the outcomes of purchasing your solution — communicating the end results of what your solution can actually accomplish for them.

THINK:
BY PURCHASING YOUR SOLUTION, WHAT'S IN IT FOR THEM?

04

THE SOLUTION FEATURES

which are the key product features that enable the outcomes expressed in the Benefit Messages. These should be product-specific—communicating what your solution does.

KEY GOALS AND CHALLENGES

First, think and write about your customers' primary goals and challenges. What do they want to achieve? What are they focused on? What challenges hinder their success?

Write three to four bullet points each about your customers' key goals and challenges.

WHAT ARE MY CUSTOMER'S GOALS?

WHAT ARE MY CUSTOMER'S CHALLENGES?

KEY BENEFITS AND FEATURES

Next, think and write about your solution's primary benefits and features. What outcomes does your solution enable? What's in it for your customers? What features enable this success?

Write three to four bullet points each about your own solution's key benefits and features.

WHAT ARE THE BENEFITS (OUTCOMES) OF USING MY SOLUTION?

WHAT ARE MY SOLUTION'S KEY FEATURES?

COMPLETE THE TABLE BELOW USING WHAT YOU WROTE ON THE PREVIOUS PAGES.

PRIMARY MESSAGE

CHALLENGE MESSAGES

What's challenging my audience?

BENEFIT MESSAGES

What are the outcomes of working with us?

FEATURES

CHAPTER FIVE

CONTENT THAT CONVERTS

INTRODUCTION

CONTENT MARKETING IS THE LIFEBLOOD OF YOUR ENTIRE ORGANIZATION. YOUR CONTENT HELPS PROMOTE AWARENESS, FACILITATE CONSIDERATION, DRIVE DECISION AND CREATE POSITIVE, THOUGHTFUL EXPERIENCES FOR YOUR PROSPECTS AND CUSTOMERS ALIKE.

But content affects everyone differently and a one-size-fits-all approach isn’t viable anymore. People respond differently to different pieces of content. How can you ensure your content addresses these important points of difference between buyers?

HOW DO WE THINK ABOUT CONTENT?

We think about Content by answering five fundamental questions:

01

WHY WE NEED IT:

What goals does our content help us achieve? What functions in our pipeline does it serve?

02

WHO IT'S FOR:

Who is our content for? What portion of our marketable audience will care? What accounts will take notice? Which of our personas will engage?

03

WHAT IT IS:

What kind of content are we creating? What's our theme? What topics are we focusing on? What formats are we developing?

04

WHEN IT SUPPORTS:

When in our buyer's journey will this content be most effective? Awareness-driving lead generation? Consideration? Decision enablement?

05

WHERE IT'S PROMOTED:

Where will we promote our content? What channels will be utilized to ensure it's seen by the right people at the right time?

OBJECTIVES AND GOALS

Now, let's get started on your content strategy.

But before beginning your content development work, you should first define the objectives and goals of your content strategy to ensure that the content you create is the right content for the job.

Use the table below to identify the objectives and goals of your content strategy.

Remember: Objectives describe your desired outcomes. Goals describe your measures of success associated with those outcomes.

OBJECTIVES	GOALS

TARGET AUDIENCE

Based on your objectives and goals, identify what portion of your marketable audience you're creating your content for. This work will help define the parameters of your content strategy, enabling you to better tailor your content and make it more relevant for your audience.

CONTENT STRATEGY PROFILE	
GEOGRAPHY	
INDUSTRIES/VERTICALS	
COMPANY SIZE	
KEY BUYING COMMITTEE PERSONAS	
BUYER'S JOURNEY STAGES	

PRIMARY THEMES

Next, it's time to define what content you're creating.

To start, think about three primary themes that your content will revolve around. These themes will be utilized to guide what topics you write about.

HERE ARE SOME WAYS TO COME UP WITH YOUR THEMES:

Reference your messaging pillars and product benefits.

Conduct a competitive content assessment to identify what your competition does for content.

Conduct an assessment of business trends to confirm that the content you're creating is relevant and useful for your market.

PRIMARY THEMES

NOW, WRITE OUT THREE PRIMARY CONTENT THEMES BELOW.

We've also written in one theme that we'll use as an example in the following exercises.

EXAMPLE THEME

Digital Transformation

THEME 1

THEME 2

THEME 3

CONTENT TOPICS AND FORMATS

Now, with your themes outlined, identify some topics to write about. These can be specific or general, as we'll be diving deeper into these topics later. We've continued our example in the table below as well.

**As you do this, think about what stage of the buyer's journey each of these content topics support. You'll do more work to align content topics by buyer's journey stage on the next page.*

DIGITAL TRANSFORMATION

- Overcoming obstacles
- The requirements of digital transformation
- Digital transformation readiness
- The cost of reluctance to digital transformation
- The customer experience
- Bridging gaps

–

–

–

CONTENT IN THE CUSTOMER JOURNEY

LET'S DIG A LITTLE DEEPER INTO THE "WHO" AND "WHEN" FACTORS OF CONTENT.

The truth is, not all kinds of content are effective for every person in the buying committee or for every stage of the customer lifecycle. One size does not fit all, and marketers and sellers should align their content asset type to persona preferences at each stage of the customer journey.

From a people perspective, executives typically engage with more short-form, higher-level content (think bigger picture stuff). Whereas business-focused roles might be more interested in best practice guides and eBooks. And more technical folks might read analyst reports and data sheets. Keeping these differences in mind is important when crafting your content strategy.

From a format perspective, where blog posts and industry trend reports typically excel in earlier stages, case studies and data sheets are much stronger assets in the latter stages as a buyer moves from awareness to decision. And once they become a customer, the kind of content you utilize may change again, evolving into implementation guides and new product teasers.

Thinking about content in the context of the larger customer journey helps to ensure that you're creating and promoting the right content to the right people at the right time.

EARLIER, WE COVERED SIX STAGES OF THE CUSTOMER JOURNEY AND IDENTIFIED SOME PERSONAS. NOW, WE'LL GO OVER WHAT KINDS OF CONTENT FIT BEST WITHIN EACH STAGE, FOR EACH PERSONA GROUP.

CONTENT STRATEGY

Below, we've continued using our example theme to showcase how a matrix like this can help you better identify topics and formats for each persona at each stage of the customer journey. We do this because what an individual cares about in the early stages is vastly different from what they care about in the latter stages. And in order to engage these people with relevant content, we need to be sure to address those differences.

For now, we've focused on the three pre-customer stages of the customer journey. You'll also notice how we've grouped the personas into three categories based on their focus areas. We do this to make it easier to determine what content types will resonate best with what personas.

- **Executives and Leadership Teams** typically focus on overall profitability of the company
- **Business Personas** typically focus on ROI, revenue, and growth
- **Technical Personas** typically focus on technologies, processes, and operations

CONTENT THEME: DIGITAL TRANSFORMATION

	AWARENESS CONTENT	SOLUTION CONTENT	SELECTION CONTENT
EXECUTIVES & LEADERSHIP TEAMS	CXO Brief: Driving Digital Transformation and CXO Brief: Getting Over Digital Growing Pains	CXO Roundtable: How to Bridge Your Company's Biggest Digital Gaps CXO Roundtable: The Hidden Costs of Digital Stagnation, and CXO Brief: How Digital Transformation Starts with Executive Leadership	Driving Digital Transformation Together and Case Study: Getting Over Digital Growing Pains
BUSINESS PERSONAS	Best Practice Guide: Improving Digital ROI The CXO's Guide to Digital Transformation Webinar: Improving Digital's Impact	Guide: How to Drive Revenue with Digital Transformation Webinar: The Hidden Costs of Digital Stagnation Guide: How to Build a Digital Transformation Engine	Virtual Demo: Achieving Digital Transformation Together Case Study: Building the Foundations of Digital Transformation
TECHNICAL PERSONAS	Webinar: Driving Efficiency in Your Digital Transformation A Guide to Better Digital Transformation eBook: The Importance of Being Data-Driven in the Digital Age	Webinar: The Biggest Hurdles to Implementing Digital At-Scale Guide: How to Implement a Data-Driven Approach to Digital Transformation	Demo: Building Data-Driven, Digital Journey Together Case Study: Fostering a Data-Driven, Digital Company Culture
CONTENT FORMATS	Blog posts, webinars, executive summaries, industry reports, whitepapers, ebooks, tip sheets, infographics, checklists	ROI calculators, data sheets, case studies, webinars, virtual demo videos, how-to guides, reports	Analyst reviews, case studies, personalized virtual demos, product literature, references

CONTENT STRATEGY

NOW, COMPLETE THE TABLE BELOW USING ONE OF YOUR OWN THEMES!

	AWARENESS CONTENT	SOLUTION CONTENT	SELECTION CONTENT
EXECUTIVES & LEADERSHIP TEAMS			
BUSINESS PERSONAS			
TECHNICAL PERSONAS			
CONTENT FORMATS			

CHAPTER SIX

INTERNAL ROLES AND RESPONSIBILITIES

INTRODUCTION

FOR PREDICTABLE PIPELINE SUCCESS, YOU NEED TO HAVE THE RIGHT PEOPLE IN THE RIGHT SEATS OF YOUR SALES, MARKETING, AND CUSTOMER SUCCESS TEAMS.

When it comes to the roles and responsibilities of your internal teams, what we're really talking about is accountability.

For example, Who's accountable for what? When? And where? Who's responsible for the completion of work to support each pillar of your revenue generation engine?

To ensure your entire pipeline—from lead generation to customer success—runs predictably, you need to clearly define these roles and responsibilities so nothing falls through the cracks as you continue to grow.

HOW DO WE THINK ABOUT ROLES AND RESPONSIBILITIES?

When it comes to the roles and responsibilities that support a predictable, profitable pipeline, there 4 primary groups that come to mind. These are:

01
THE EXECUTIVE TEAM

02
THE MARKETING ORGANIZATION

03
THE SALES ORGANIZATION

04
THE CUSTOMER SUCCESS ORGANIZATION

Each of these 4 groups plays a critical role in ensuring prospects and customers alike have positive, frictionless experiences as they move from one journey stage to the next. And, when working in tandem towards unified goals, these groups enable your buyers to meaningfully experience and engage with your brand.

Let’s take a look at each of these groups on the following pages.

THE EXECUTIVE TEAM

THE MARKETING ORG Marketing Leader	THE SALES ORG Sales Leader	THE CUSTOMER SUCCESS ORG Customer Success Leader
Demand Generation	AE / AM	Customer Service
Content Marketing	BDR / SDR	Customer Training
Field Marketing	Inside Sales	Onboarding
Digital Marketing	Field Sales	Client Outcomes
Product Marketing	Channel Sales	Upsell/ Expansion/ Renewals
Partner Marketing	Sales Operations	Customer Operations
Customer Marketing		
Marketing Operations		
Corporate Communications		

THE EXECUTIVE TEAM

01 THE EXECUTIVE TEAM

02 THE MARKETING ORGANIZATION

03 THE SALES ORGANIZATION

04 THE CUSTOMER SUCCESS ORGANIZATION

The Executive Team is a group of company leaders and C-level executives. Depending on your organization, it may be made up of a single person or there might be multiple involved. Regardless, this team comes up with the grand ideas for the business, owns the big relationships, and is the spokesperson for the brand.

THE EXECUTIVE TEAM IS ULTIMATELY RESPONSIBLE FOR THE CULTURE, DIRECTION, AND VISION OF THE COMPANY.

THE MARKETING ORGANIZATION

01 THE EXECUTIVE TEAM

02 THE MARKETING ORGANIZATION

03 THE SALES ORGANIZATION

04 THE CUSTOMER SUCCESS ORGANIZATION

The Marketing Organization is accountable for all things marketing—from buyer personas to messaging to content to MQLs to marketing-influenced revenue.

Within the Marketing Organization, you have a Marketing Leader and Marketing Functions.

The Marketing Leader (like a CMO or VP of Marketing) works to ensure that the ideas of the Executive Team are communicated and executed effectively through the marketing campaigns and initiatives.

They are responsible for the overall marketing strategy; for ensuring the brand, voice, and reach of the company is consistent and meaningful; and for marketing's contribution to the bottom line.

Marketing Functions are subordinate to the Marketing Leader. Each of these play specific, but important, functional roles within the Marketing Organization like product marketing, content marketing, field marketing, digital marketing, and the like.

THEY ARE RESPONSIBLE FOR THE IMPLEMENTATION AND EXECUTION OF THE MARKETING STRATEGY AND ITS INDIVIDUAL COMPONENTS.

THE SALES ORGANIZATION

01 THE EXECUTIVE TEAM

02 THE MARKETING ORGANIZATION

03 THE SALES ORGANIZATION

04 THE CUSTOMER SUCCESS ORGANIZATION

THE SALES ORGANIZATION IS ACCOUNTABLE FOR ALL THINGS SALES—FROM CONVERTING MQLS TO CLOSING DEALS.

Within the Sales Organization, you have a Sales Leader and Sales Functions.

The Sales Leader (like a Head or VP of Sales) works to ensure that the ideas of the Executive Team are communicated and executed effectively through the way products are services are sold.

They are responsible for the overall sales strategy; for ensuring the experience of the customer through the sales process is positive; and for closed deals and company revenue.

Sales Functions are subordinate to the Sales Leader. Each of these play specific, but important, functional roles within the Sales Organization like account management and development, channel sales, sales operations, and the like.

They are responsible for the ongoing nurturing of leads, development of relationships, and sales processes to fulfill the sales strategy.

THE CUSTOMER SUCCESS ORGANIZATION

01 THE EXECUTIVE TEAM

02 THE MARKETING ORGANIZATION

03 THE SALES ORGANIZATION

04 THE CUSTOMER SUCCESS ORGANIZATION

The Customer Success Organization is accountable for all things customer success—from ensuring customers are onboarded successfully to the continued delivery of high-quality service to renewals and expansions.

Within the Customer Success Organization, you have a Customer Success Leader and Customer Success Functions.

The Customer Success Leader (like a Head or VP of Customer Success) works to ensure that the ideas of the Executive Team are communicated and executed effectively throughout the customer experience post-sale.

They are responsible for the overall customer experience strategy, building a post-sale experience for the customer that is memorable, positive, and frictionless.

Customer Success Functions are subordinate to the Customer Success Leader. Each of these play specific, but important, functional roles within the Customer Success Organization like client outcomes, onboarding, renewals, and customer operations.

THEY ARE RESPONSIBLE FOR THE DAY TO DAY CUSTOMER EXPERIENCE, WORKING DIRECTLY WITH CUSTOMERS TO HELP THEM ACHIEVE THEIR GOALS.

A UNIFIED REVENUE TEAM

01

THE EXECUTIVE TEAM

02

THE MARKETING ORGANIZATION

03

THE SALES ORGANIZATION

04

THE CUSTOMER SUCCESS ORGANIZATION

While marketing, sales, and customer success may operate separately, they should not operate in silos—they should operate as a single revenue generation team.

All are reliant on one another to support the visions of the Executive Team and to build predictable pipeline for the business.

Marketing creates the personas, content, and messaging that sales and customer success can utilize in their own programs. Marketing also delivers sales qualified leads.

Sales works closely with marketing to ensure lead hand-offs are frictionless for the buyer, and to get the right content, messaging, background, and lead history they need to effectively support the sales process. Sales also work with customer success to ensure the transition from lead to sale is a smooth one.

Customer success works with marketing to get the messaging and content they need to support their post-sale processes. They also work with sales to ensure a smooth transition from prospect to customer.

THESE ORGANIZATIONS ARE ALL UNDER A SINGLE REVENUE TEAM. AND IT'S IMPORTANT THAT YOU NOT ONLY UNDERSTAND WHAT ROLES THESE GROUPS PLAY, BUT ALSO THAT YOUR ORGANIZATION HAS THE RIGHT PEOPLE IN THE RIGHT SEATS TO SUPPORT THESE ROLES.

CHAPTER SEVEN

TOOLS (AND TECHNOLOGY) OF THE TRADE

INTRODUCTION

YOUR TOOLS AND TECHNOLOGIES ENABLE GREAT THINGS FOR YOUR ORGANIZATION. THEY HELP YOU WORK SMARTER, FASTER, AND MORE EFFECTIVELY.

The right tech stack can facilitate larger steps forward and more interesting, meaningful experiences for your prospects and customers. The wrong kinds of tools do little but add noise, complexity and poor experiences to an already complex ecosystem.

The marketing technology landscape can be your greatest friend or your greatest foe. It all depends on how you take control and bring order to the martech mayhem. How can you ensure your technology is the right fit for your organization?

HOW DO WE THINK ABOUT TOOLS AND TECHNOLOGY?

We think about Tools and Technology using six primary categories:

01

FOUNDATIONS

Foundational tools are the foundations of your business operations. They connect to numerous other tools and are core to the success of your sales, marketing, and customer success programs. Without them, it'd be incredibly challenging to do any kind of thoughtful, automated or timely campaigns

02

ORCHESTRATORS

Orchestration tools help marketers and sellers plan and orchestrate their efforts more seamlessly, efficiently and effectively.

03

IDENTIFIERS

Identification tools help identify prospect accounts/targets who fit within your target audience and ICP.

04

ATTENTION-GETTERS

Attention tools help capture the attention of prospects through inbound activities, SEO and social media.

05

ENGAGERS

Engagement tools enable people to engage with your business through outbound activities and website functionality

06

OPTIMIZERS

Optimization tools help you to analyze your data, enabling insights and actions that can be used to optimize performance of your business efforts.

You can use these categories to assess your current tech stack and identify redundancies and gaps.

THE TECHNOLOGY STACK

This diagram depicts one way to think about the interconnectedness of your different tools in your technology stack.

Starting with the **Foundational** tools, these are the backbone of our entire business operations. CRM, marketing automation, and website tools are categorized here.

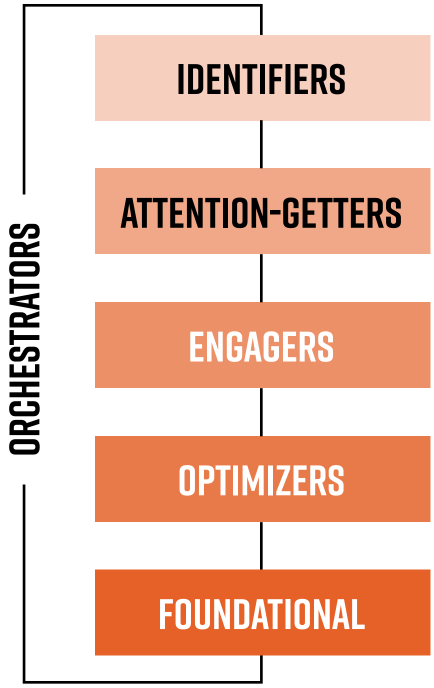
Then, moving to the top, we have the **Identifiers**. These tools help give names to the people we're marketing and selling to (if we don't know them already) or help us further develop the profiles of our audience, appending and updating key information.

Next are the **Attention-Getters.** These are your inbound tools that help get people's attention, piquing curiosity and interest.

Engagers come after. Once we have someone's attention, these tools help us further engage through outbound, content and web activities.

Then, the **Optimizers**—tools that help us pull relevant data so we can make inferences and data-driven decisions more easily.

Finally, spanning the entirety of our tech stack, we have **Orchestrators**. These tools help internal teams plan, orchestrate and project manage initiatives across people, teams and departments.



ALSO, YOU LIKELY HAVE TOOLS THAT FULFILL MULTIPLE FUNCTIONS. CRM SYSTEMS, MARKETING AUTOMATION PLATFORMS, EVENT AND VIRTUAL EVENT PLATFORMS AND CERTAIN ABM PLATFORMS ARE ALL EXAMPLES OF MULTI-PURPOSE TECHNOLOGIES.

HOW DO WE THINK ABOUT TOOLS AND TECHNOLOGY?

What about when it comes to selecting a new tool for your tech stack? Here are five steps to help you make the right decision:

01 **Understand** what tools you have, what tools you need, and what the tools you're considering are capable of doing.

02 **Evaluate** your needs, your goals, and how a new tool would not only fill a need, but enable your organization to achieve more.

03 **Prioritize** what your greatest needs, goals, desired outcomes are.

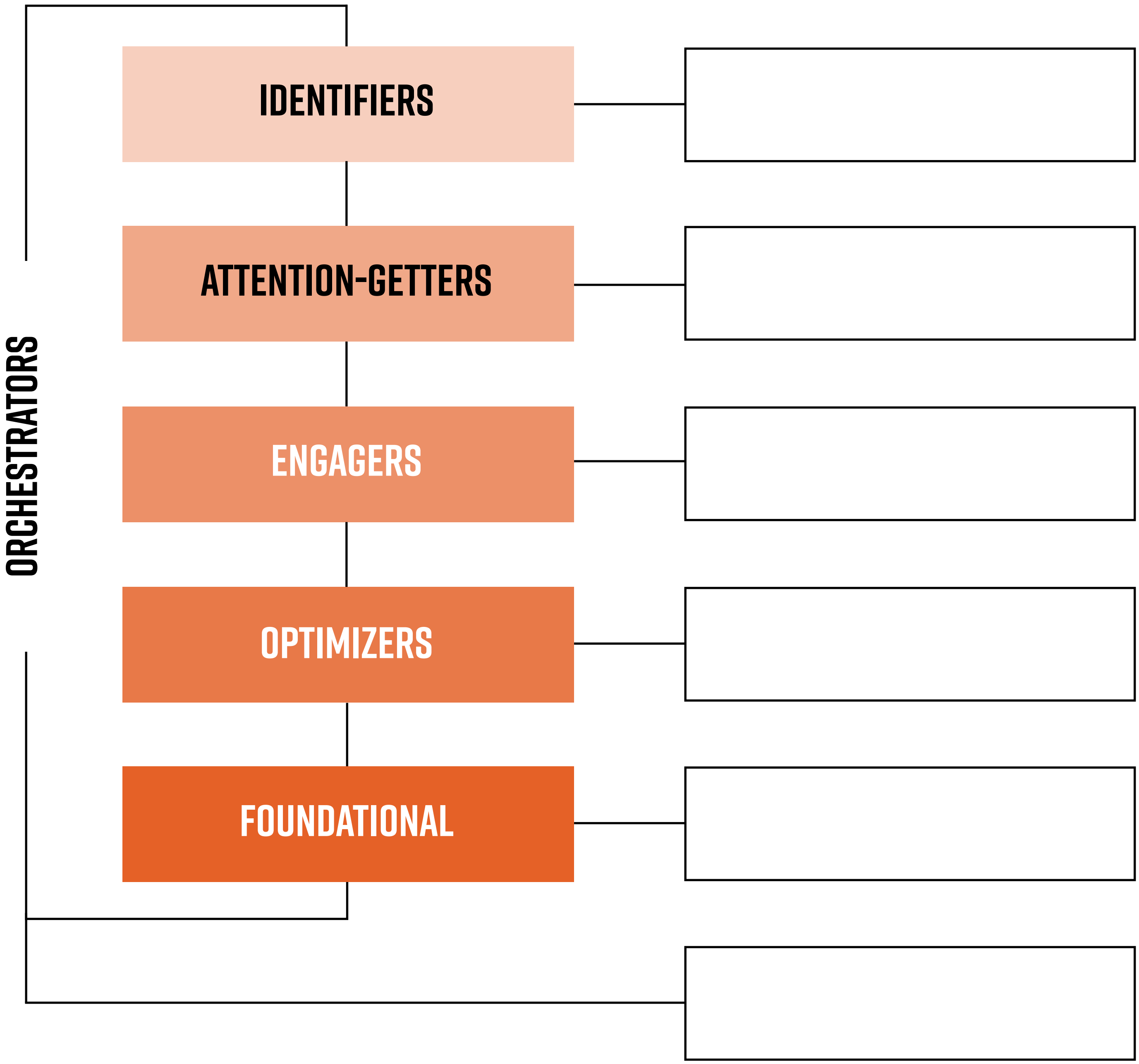
04 **Select** the tool that is the greatest fit for your organization and where it's headed.

05 **Measure** the effectiveness of the tool to ensure it's not only effective, but also being utilized effectively.

YOUR TECHNOLOGY STACK

How does your technology stack operate?

Write-in the names of your own tools and technologies to the corresponding categories.



CHAPTER EIGHT

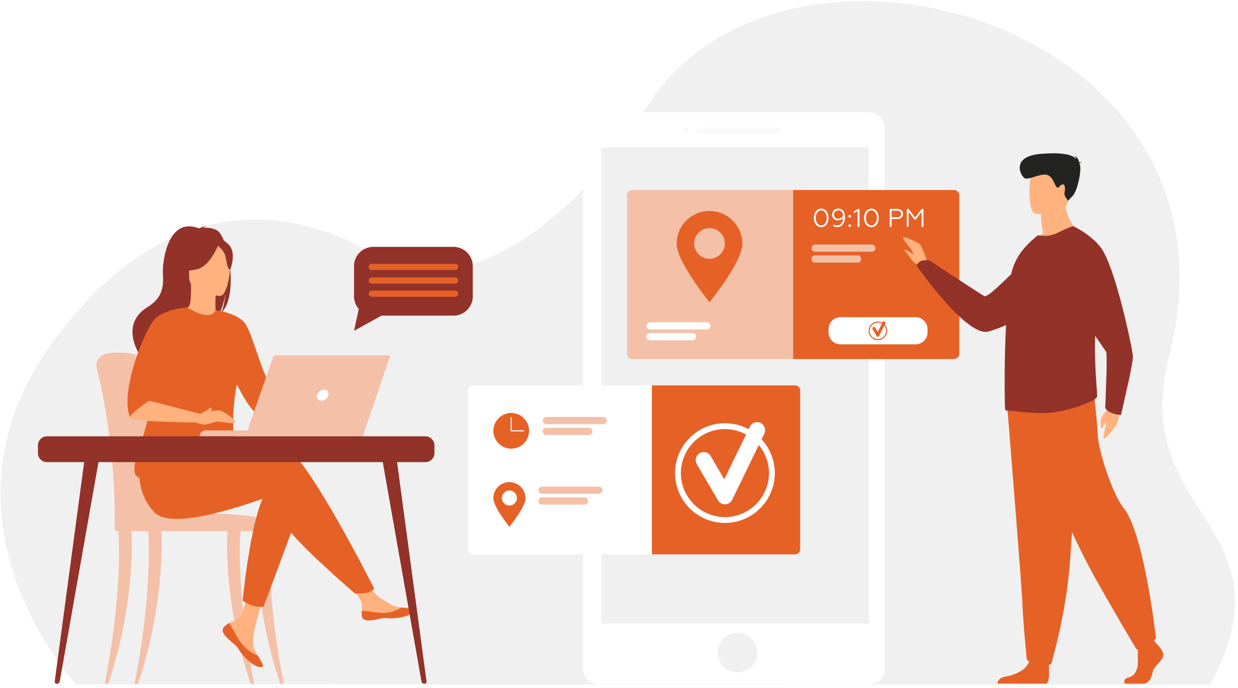
CAMPAIGN PLANNING

INTRODUCTION

REACHING AUDIENCES TODAY REQUIRES A STRATEGIC, WELL-DEFINED AND STRUCTURED APPROACH. MORE OFTEN THAN NOT, THAT MEANS COMING UP WITH A CAMPAIGN PLAN.

Here is rule number one: Campaign plans must be written for the customer first! That's because campaigns must be understood at the persona level, the buyer's journey level and the buying scenario level.

An additional factor you need to consider? Buyer behavioral patterns are not linear.



HOW DO WE THINK ABOUT CAMPAIGNS?

We think about campaigns by answering eight central questions:

01

OBJECTIVES

What are the specific outcomes we hope to achieve with this campaign?

02

GOALS AND KPIS

How will we measure the effectiveness of our campaign?

03

TARGET PERSONAS AND BUYING STAGES

Who are we creating this campaign for?

04

CORE MESSAGE AND THEMES

What do we want our campaign to say and communicate?

05

INTERNAL TEAMS

Who is involved internally to help plan, orchestrate, and manage this campaign?

EXTERNAL TEAMS

Are there freelancers, copywriters, or agencies that should be accounted for too?

06

CHANNELS

What channels will we utilize throughout this campaign?

07

CONTENT

What content will we utilize throughout this campaign?

08

RESULTS

How has our campaign performed?

THE CAMPAIGN COMPONENTS

Below we've outlined the key components to a campaign plan.

OBJECTIVES	GOALS AND KPIS	CORE CAMPAIGN MESSAGE	CAMPAIGN THEMES
• Increase enterprise target account sales growth and gain efficiency to support revenue goals long-term • Increase velocity and conversion of key target accounts	• Engage with 50 named enterprise accounts • Generate 20 account responses • 20% MQL to SQL conversion rate	• Building predictability into your pipeline	• Business ROI • Predictable revenue • Scalable growth
TARGET PERSONAS	**ADDRESSED BUYING STAGES**	**CHANNELS**	**CONTENT**
• Business Decision Makers • Technical Decision Makers • Executive Sponsors • Purchase Influencers	• Awareness • Solution • Selection	• Email • Website • Social Media Advertising • Remarketing • Search • SEO	• Webinars • Whitepapers • Tip Sheets • Guides • Blog Posts

INTERNAL/EXTERNAL TEAMS	CAMPAIGN RESULTS
• Marketing • Marketing Operations • Sales • Ad Agency	

THE CAMPAIGN COMPONENTS

Now it's your turn. Complete the exercise below by identifying your key campaign components.

OBJECTIVES	GOALS AND KPIS	CORE CAMPAIGN MESSAGE	CAMPAIGN THEMES
TARGET PERSONAS	ADDRESSED BUYING STAGES	CHANNELS	CONTENT
INTERNAL/EXTERNAL TEAMS		CAMPAIGN RESULTS	

THE CAMPAIGN PLAN

AS YOU DEVELOP YOUR CAMPAIGNS, IT MIGHT BE HELPFUL TO START THINKING ABOUT THEM IN THE CONTEXT OF THE GREATER CUSTOMER JOURNEY.

Think about your channels, your messages, your content, your personas. And then think about how all of those pieces evolve as a buyer progresses from one touchpoint to the next.

Think about the decisions they're making and the experience they're having.

Align your campaign's lifespan to the journey of the customer to ensure that they're always seeing, reading, watching, and engaging with content that's relevant for them.

CHAPTER NINE

UNDERSTANDING INTENT

INTRODUCTION

The average B2B buyer today has conducted a lot of their own research before they ever engage with a salesperson. This means a lot of their buying journey has already been completed, likely without you even knowing.

So how do you ensure these buyers don't fly under the radar and end up going with a competitor?

Simple: you use intent data to fill in the gaps.

Let's take a look now.

HOW DO WE THINK ABOUT BUYING SIGNALS?

WE THINK ABOUT BUYING SIGNALS AS DIGITAL BEHAVIOR-BASED ACTIVITIES.

These are specific buyer behaviors and actions that happen across the internet (on both a first and third-party basis), linking those buyers to a specific topic, focus area, or solution. Here are a few categories and activities to think about:

CONTENT-BASED ACTIVITIES:

- Number of downloads of specific content
- Frequency of content downloads
- Time spent on specific content pages
- Spikes in content consumption

WEBSITE-BASED ACTIVITIES

- Websites/web pages visited
- Frequency of web pages visited
- Time spent on relevant web pages
- Spikes in relevant web page visits or time spent on relevant web pages

SEARCH-BASED ACTIVITIES

- Types of searches made
- Number of searches made on relevant topics
- Frequency of search made on relevant topics
- Spikes in searches on relevant topics

ENGAGEMENT-BASED ACTIVITIES

- Opens/clicks on specific campaigns
- Frequency of engagement
- Engagement over time
- Attendance of webinars
- Online subscriptions
- Product reviews written

USING INTENT DATA

To effectively act on intent data, savvy sellers and marketers must be able to put that data into the context of the greater customer journey: identifying fit, watching and listening for intent, understanding who the people are who are demonstrating that intent and responding accordingly based on the prior information.

IDENTIFY

Identify the fit of the buyer based on your ideal customer profile.

WATCH AND LISTEN

Watch and listen for your ideal buyers to demonstrate intent signals or indicate favorable situational conditions.

UNDERSTAND

Understand what types of buyers (based on persona, buying situation, and account) are demonstrating what types of actions.

RESPOND

Respond appropriately based on the type of buyer and the type of intent signals they demonstrate

USING INTENT DATA

When it comes to acting on intent signals, different types of buyers require different types of responses depending on the type of intent they demonstrate.

A marketing manager who has a surge in content downloads requires a different approach to responding to a CMO who attended a webinar which requires a different approach to responding to a CFO who visited multiple web pages, and so on.

But developing an intent-driven response plan can be incredibly overwhelming. To make it easier to get started, consider the framework below.

- It starts by thinking about the persona — this will ensure that your follow-up plan always puts the customer first.
- Then, identify the intent category you want to plan for as well as the three primary buyer's journey stages.
- From there, determine what follow-up messages, content, and channels you want to respond with for each buyer stage.

By doing all this for each of your personas and intent categories, you can more strategically plan the right responses with the right content using the right channels, all based on the buyer, the intent they demonstrated, and where they are in their buying journey.

PERSONA	Business Decision Maker		
INTENT CATEGORY	Content-based activities		
AWARENESS, SOLUTION, AND SELECTION	Top of Funnel	Middle of Funnel	Bottom of Funnel
FOLLOW-UP MESSAGE	A	B	C
FOLLOW-UP CONTENT	1. Executive brief 2. C-leader webinar	1. Executive brief 2. C-leader webinar 3. Case study	1. Case study 2. Peer-to-peer review 3. Demo
PRIMARY RESPONSE CHANNELS	i. Email ii. LinkedIn	i. Email ii. Phone iii. LinkedIn	i. Email ii. Phone iii. LinkedIn

UNDERSTANDING INTENT PLANNING AN INTENT-DRIVEN RESPONSE PLAN

Now, try to create your own plan! Fill in the table below based on your own messaging, content, and channels.

PERSONA	Business Decision Maker		
INTENT CATEGORY	Content-based activities		
AWARENESS, SOLUTION, SELECTION	Top of Funnel	Middle of Funnel	Bottom of Funnel
FOLLOW-UP MESSAGE	A	B	C
FOLLOW-UP CONTENT	1. 2.	1. 2. 3.	1. 2. 3.
PRIMARY RESPONSE CHANNELS	i. ii.	i. ii. iii.	i. ii. iii.

CHAPTER TEN

MEASURING SUCCESS

INTRODUCTION

WHEN IT COMES TO YOUR MEASURES OF SUCCESS, EVERY ORGANIZATION WILL LIKELY HAVE DIFFERENT VIEWS OF WHAT NEEDS TO BE TRACKED AND REPORTED ON.

On top of that, different campaigns also require different metrics. So determining what's most important will really depend on the context of your own situation.

Still, that doesn't mean that there aren't fundamental ways to guide how you measure success.

HOW DO WE THINK ABOUT MEASURING SUCCESS?

WE THINK ABOUT MEASURING SUCCESS AS FIVE CYCLICAL STAGES:

GOAL SETTING:

At this stage, you should be identifying the goals and outcomes you want to achieve. You should also ensure that those goals and outcomes align to or influence the greater goals of the organization.

SELECTION:

Here, you're selecting the right metrics for your campaign.

ANALYSIS:

At this stage, you should be identifying the goals At this stage, you're analyzing the performance of your campaign.

BENCHMARKING:

This is where you benchmark your campaign's performance to historical performance as well as industry averages to identify where you excel, where you fall short, and where you could improve.

OPTIMIZATION:

Based on your analysis and benchmarks, you should be determining how you can improve your campaign to more effectively, efficiently meet your goals.

KEY METRICS

Next, let's talk about metrics. In the table below, we've outlined some common metrics for sales and marketing. You should be sure to choose the right metrics depending on your goals and in relation to the customer journey. At the start of the customer journey, you'll be focused on qualified leads. Towards the middle, you'll be focused on sales meetings. And near the end, you'll be focused on closed/won deals.

Below are a few examples of some key metrics you might be tracking.

	METRIC	PROGRESSION	GOALS
LEADS	Marketing Qualified Leads	Inquiry > MQL	XX (generated), XX% (conversion)
	Sales Qualified Leads	MQL > SQL	XX (generated), XX% (conversion)
	Sales Accepted Leads	SQL > SAL	XX (generated), XX% (conversion)
	Closed/Won Deals	SAL > Win	XX (won), XX% (conversion)
ACCOUNTS	Account Coverage / Reach	—	XX% (% of account reached)
	Account Engagement	—	XX% (% of account engaged)
PERFORMANCE	Cost per Lead / Account	—	$XX (per lead / account)
	Cost per Opportunity	—	$XX (per opportunity)
	Deal Velocity / Conversion Rate	—	XX%
	ROI	—	XX%

PROGRAMMATIC VS. REVENUE METRICS

But measuring metrics alone is just part of the job. And unfortunately, many marketers make the mistake of tracking activities over outcomes. The truth is that CMOs and other executive leaders don't care about the number of MQLs you're generating—they care about the impact those MQLs have on the pipeline.

That's why it's important to understand the differences between programmatic metrics and revenue metrics, and are able to tell a coherent story from one type of metric to the next.

- **Programmatic metrics** are what you'll typically use to gauge the performance of your campaigns. These are still metrics you should actively track, but aren't necessarily the ones that directly correlate to marketing's revenue impact.
- **Revenue metrics** on the other hand are what you'd show to your CEO, CFO, and board to document your contribution to company revenue and profit.

BELOW ARE A FEW EXAMPLES OF PROGRAMMATIC AND REVENUE METRICS.

PROGRAMMATIC METRICS	REVENUE METRICS
Email open and click rates	Marketing-qualified leads
Website visits and page views	Sales-qualified and sales-accepted leads
Content downloads	Cost per lead, account, and opportunity
Website form completions and abandonment rates	Deal velocity and conversion rates

THE DATA STORY

REMEMBER: NO MATTER WHAT METRICS YOU'RE TRACKING, THE STORY YOUR DATA TELLS IS THE MOST CRITICAL PIECE OF THE PUZZLE. WHO IS YOUR AUDIENCE FOR THIS STORY? WHAT STORY DO YOU NEED TO TELL? WHAT METRICS WILL HELP YOU TELL THAT STORY?

It's not just about reporting on programmatic metrics like MQLs, it's about understanding and communicating the impact that those MQLs have on the rest of your pipeline

But simply reporting on revenue metrics doesn't do your work justice either. When reporting on SALs, for example, it's also important to understand the metrics that led to those SALs. What was marketing's contribution to those numbers?

At the end of the day, it's about telling a holistic story that shows performance, impact, and outcomes.

SETTING YOUR GOALS

Using the framework below, identify two to three of your goals, as well as what measures of success you need to target and track in order to effectively achieve those goals. We've outlined an example for you below.

GOALS	MEASURES OF SUCCESS
Generate new marketing-driven pipeline	20 qualified leads
	10 meetings booked
	7 opportunities created
	3 deals closed/won

PUTTING IT ALL TOGETHER

ONE LAST EXERCISE...

To close this workbook, we have one last exercise for you.

ON THE FOLLOWING PAGES, YOU'LL BE ASKED TO FILL IN SEVERAL COMPONENTS BASED ON YOUR PERSONAS, BUYING COMMITTEES, MESSAGING, CONTENT, AND MEASURES OF SUCCESS.

Use what you've done previously on these topics to help you complete the exercise.
And thank you for reading our workbook!

WHAT DOES YOUR CUSTOMER JOURNEY LOOK LIKE? THINK ABOUT THE DIFFERENT COMPONENTS YOU JUST READ ABOUT AND FILL IN THE TABLE BELOW USING WHAT YOU KNOW ABOUT YOUR BUYERS AND THEIR JOURNEY FORWARD.

	CUSTOMER			PRE-CUSTOMER		
	ADVOCACY/LOYALTY	ENGAGEMENT	SERVICE	SELECTION	SOLUTION	AWARENESS
DESCRIPTION	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.	The buyer is aware of their challenge and actively looking for solutions that address it.	The buyer is ready to make a final purchase decision and become a customer.	The customer is onboarding and/or beginning to implement and utilize our solution.	The customer is highly engaged with our solution and is eager to explore more ways to work with us.	The customer is a strong advocate for our solution after having such a positive experience with us.
TYPICAL BUYER PARTICIPANTS (Which personas are involved in each stage of the customer journey?)						
BUYER'S QUESTIONS (What questions are our buyers asking at each stage of the customer journey?)						
BUYER'S ACTIONS What are our buyers doing at each stage of the custom-er journey? What channels are they actively using?)						
BUYER'S NEEDS (What do our buyers need at each stage of the customer journey?)						
OUR GOALS (What are our goals—qualitative and quantitative—at each stage of the customer journey?)						

WHAT DOES YOUR CUSTOMER JOURNEY LOOK LIKE? THINK ABOUT THE DIFFERENT COMPONENTS YOU JUST READ ABOUT AND FILL IN THE TABLE BELOW USING WHAT YOU KNOW ABOUT YOUR BUYERS AND THEIR JOURNEY FORWARD.

	CUSTOMER			PRE-CUSTOMER		
	ADVOCACY/LOYALTY	ENGAGEMENT	SERVICE	SELECTION	SOLUTION	AWARENESS
DESCRIPTION	The buyer is demonstrating the symptoms of a challenge and are aware of certain issues, but aren't yet sure how to best address them.	The buyer is aware of their challenge and actively looking for solutions that address it.	The buyer is ready to make a final purchase decision and become a customer.	The customer is onboarding and/or beginning to implement and utilize our solution.	The customer is highly engaged with our solution and is eager to explore more ways to work with us.	The customer is a strong advocate for our solution after having such a positive experience with us.
PRIMARY MESSAGE (What kind of message should we lead with at each stage of the customer journey?)						
CONTENT (What questions are our buyers asking at each stage of the customer journey?)						
CHANNELS (Which channels should we utilize most at each stage of the customer journey?)						
MEASURES OF SUCCESS (What kind of metrics are we tracking at each stage of the customer journey?)						
TEAMS (Who, internally and externally, will be involved/ responsible at each stage of the customer journey?)						

CONGRATULATIONS!
YOU'VE REACHED THE END OF THE WORKBOOK!
WONDERING WHERE TO GO FROM HERE?

CLICK HERE TO CONTINUE YOUR JOURNEY TO PREDICTABLE PIPELINE.

ON24 is on a mission to transform the way businesses engage with their audience, powering interactive, data-rich digital marketing experiences that drive a resilient revenue strategy. Through the ON24 Platform, marketers can create and deliver live, always-on and personalized virtual experiences, and capture audience behavior to turn engagement into actionable data. Headquartered in San Francisco, ON24 has a wide global footprint with eight offices in key regions, including London, Munich, Singapore, Stockholm and Sydney.

FOR MORE INFORMATION,
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Heinz Marketing is a B2B marketing and sales acceleration firm that delivers measurable revenue results. Every strategy, tactic, and action has a specific, measured purpose. Instead of focusing on the activities, we focus on the outcomes. What really matters is sales pipeline, closing business, and accelerating revenue.

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