



EXPERIENCE ESSENTIALS

Leading the complex buyer journey.



EXPERIENCE
ESSENTIALS
● Marketing

Just the basics

When you start a new project, you want to get oriented quickly. Get an overall view of the main goals and key messages. The other details will come as you go, once you've taken care of the basics.

There is a similar “basics-first” approach to becoming an experience business. In our multi-part Experience Essential series, we examine the basics of customer experience (CX)—the building blocks you'll want to have in place to create customer experience management (CXM) success.

In this installment of the Experience Essential series, we help you understand the basic tips and tools you need to build a demand marketing plan that covers the range of customer channels while personalizing at the individual level. Start creating demand programs that keep customers interested and your teams informed.

The customer experience

Customer experience management (CXM) is the leading edge of marketing, sales, and branding today. It goes beyond CRM which shows customers in the past. CXM shows what customers need right now, and in the future, and delivers it in real time, at scale, across every channel.

The challenge of understanding the buyer journey

Sarah, an HR director at a Chicago-based financial services company, is in the market for a payroll and benefits software system. Over the past few weeks, she and her team have narrowed the options down to two vendors. While Vendor A has offered generic marketing content, Vendor B seems to know exactly what information she needs at each step. Sarah tends to consume marketing content early in the morning and that's when Vendor B sends her their emails. They share customer examples from her industry and best practices that relate to her job function. An invitation to a live webcast even listed the start time in CT, her local time zone.

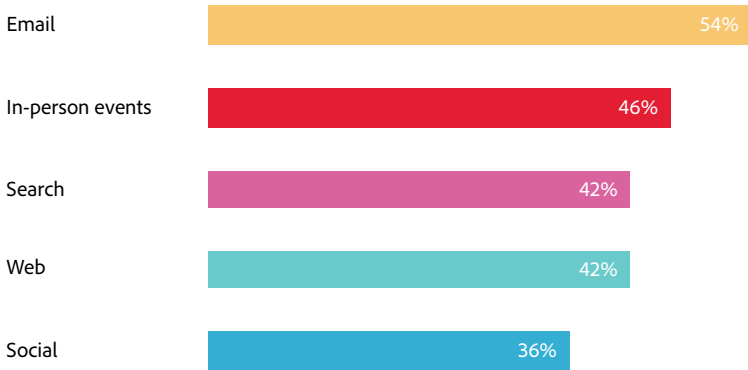
After downloading a buyer's guide from Vendor B's website, Sarah gets an email from a sales rep. He invites her to chat with him for half an hour—not to discuss the product, but to talk about strategies for persuading her boss and other key stakeholders to invest in an integrated payroll and benefits platform. Since she's right at the point where that kind of advice would be useful, she accepts the meeting.

This example shows real-time engagement at its best. The message from the sales rep is part of an ongoing conversation between the brand and the customer, and the value of taking the next step is clear to the customer.

In each organization that's considering your product, several people are engaging with your brand (and likely with your competitors as well) through a stream of micro-moments—when customers pick up a digital device to learn something and your brand has a chance to give them exactly what they need. Your buyers and influencers play different roles in the buying decision and have slightly different priorities. They're toggling between digital points of interaction, where they're consuming content

from the marketing team, and human interaction points, where the sales team is driving the conversation.

Most effective channel for driving early-stage engagement 2019



Source: DemandGen

In a 2019 survey by DemandGen, most B2B marketers (54 percent) said email was their most effective channel for driving early-stage engagement. Yet a significant number picked other channels, including in-person events (46 percent), search and web (tied at 42 percent), and social (36 percent).

In most B2B companies, what usually happens is marketing generates some leads and then passes them to sales. Sales typically has limited insight into the interactions those contacts have had with the brand. After this transfer, marketing keeps sending those qualified leads the same content they're sending to the unqualified leads at the top of the funnel.

But it doesn't have to be that way.

B2B customers are consumers too, and they want intuitive experiences that are as richly persuasive as those of top B2C brands. Marketing automation makes it possible to deliver experiences that matter to your customers at every stage of their journey. With the right tools, a deep understanding of your ideal customers, and a compelling product, you can engage each prospect in an ongoing conversation with your brand—with each customer-facing team engaging at the right time and with the right message.

Doing this requires a new kind of collaboration between marketing and sales. To attract the right prospects and convert them into loyal customers, they must work together to do three essential things: understand complex customer journeys, nurture long-lasting relationships, and measure and increase the business impact of marketing and sales activities across digital and human interaction points. This guide will show you how to get started.

Create conversations that matter

Understand complex customer journeys

When marketing and sales teams show they understand a customer's needs at each stage—and in each moment—of the buying process, that's real-time, dynamic engagement. It's an empathetic, customer-centered approach. And if you do it right, it will drive superior business results as measured in pipeline and revenue.

Data is the foundation of real-time engagement. You need full-journey customer intelligence, and to get that you need to measure every interaction and bring that data together for richer insights. You can then use those insights to identify and target the right prospects, capture their attention, and keep them engaged by delivering consistent, tailored messages across multiple channels.

Marketing automation helps with program design as well as execution. "We can't create a better experience until we can make the decision about what that better experience actually would be," said Eric Wittlake, senior analyst at TOPO. Marketing automation can help you decide, based on a combination of historical and real-time data, what the customer experience should be. It also provides the tools to deliver that experience—not to just a few customers, but to all of your target customers.

For example, GE Current, a leading provider of energy management systems, has adopted an account-based marketing (ABM) approach using marketing automation. Based on an engagement score, prospects are placed in a nurture program tailored to their stage in the buying journey. The

automation system is helping the company “tackle the challenges of being a new company by really allowing us to personalize and segment based on behavior,” said Lauren Aquilino, former revenue marketing manager at GE Current.

Automated email messages play a key role in dynamic engagement because they can be delivered at exactly the right moment. Since the data that drives real-time messages has a fast rate of decay, you need systems that let the data flow in a consistent, consumable way so that you can act on it quickly.



“To be hyper-relevant, we have to be timely. If we have the right message delivered at the wrong time, it’s the wrong message.”

Eric Wittlake
Senior Analyst, TOPO

While marketing automation is often used primarily for email programs, leading B2B enterprises are using it across multiple channels as part of their ABM and lead development programs. “The companies that are most successful in their account-based programs use on average eight different channels or tactics as a piece of their average program,” Wittlake said.

Research by Heinz Marketing found that while the number of channels matters, it's less important than the precision and integration of messages. The most effective ABM programs deliver relevant content across multiple touchpoints in a continuous way. “You can ultimately decrease budgets, you

can decrease the amount of work it takes or the amount of outbound effort by having more of that orchestration across channels," said Matt Heinz, the company's president.

The best consumer marketing companies have raised the bar for customer experiences. When you buy takeout at your favorite local restaurant and loyalty points get added to the app on your phone before you get the receipt via email, that level of real-time engagement becomes an expectation. But most B2B companies aren't able to capture the data they need to fuel similar experiences. "I'll say in B2B, because we haven't had a lot of that data, many of us haven't thought critically enough about what we would actually do if we did have it," Wittlake said.

The best marketing programs are highly customized for accounts as well as individuals. To truly master complex customer journeys, you have to do both.

While marketing automation is most often used by B2B companies, it can be just as helpful for consumer purchases that require thoughtful consideration, like buying a car or investing in new home fitness equipment. In other words, marketing automation should be part of the strategy in any business with complex customer journeys.



"In B2B, it's really easy to forget that we're still marketing to people. The more we market to the account, the less likely we are to create a message that resonates with the individual."

Matt Heinz

President, Heinz Marketing

Nurture to build long-lasting relationships

“At the end of the day, people buy from people who they like and people that they trust,” said David Lewis, CEO of DemandGen. That’s why a transactional approach won’t work for considered purchases. It’s why your marketing and sales teams need to be in lockstep. It’s also why you need an integrated technology stack with a marketing automation system at the center, serving as your customer engagement hub.

It’s a lot easier to nurture relationships with a large number of customers when you can engage with them programmatically, and that’s what marketing automation lets you do. At the beginning of the process, it can use data and artificial intelligence (AI) to help you figure out which companies or individuals would be a good fit for your product or service. Then you can reach out to those people using a variety of marketing channels and tools. As your target customers engage with your brand, your marketing automation system feeds valuable data to your CRM, CMS, and other key marketing systems.

When Carl Zeiss Meditec AG, a leader in optics technology, was getting ready to launch a new product, they used their marketing automation system to run a campaign targeting neurosurgeons. “We got at least one-third of the global audience looking at our website, and a large number of them registering for the online launch of our new product,” said Jochen Tham, head of global marketing communications.

If a physician visits the company’s website or watches a webcast, that’s really valuable for the company, Tham said. “And we want to make sure we track these sometimes really tiny signals. Our challenge is to make sure that we use their time wisely, and we address them with clinically relevant information. We needed a tool to engage at a very unthreatening level.”

Using marketing automation, you can execute a coordinated campaign from the very first touch through the post-purchase stages. If sales and marketing teams are tightly aligned, marketing can make sales aware of an increase in activity from a certain account, and sales can follow up with an appropriate message rather than sending out a generic email.

When your marketing automation solution is connected with your analytics, digital asset management (DAM), and optimization solutions, you can do the following:



Access a central repository of creative assets to power web and landing pages, marketing emails, ads, and sales templates.



Configure content fragments in your DAM and then use them in multiple channels and digital properties.



Define audience segments in your lead management solution, enrich them with engagement data from your DAM, and activate them for testing activities—giving you deeper insights that help you refine your content and your outreach methods.



Deploy tailored email messages that are triggered by a prospect's behavior, based on information that flows from your analytics solution to your marketing automation solution in real time.

The most advanced marketing automation systems can support robust ABM programs that include online and offline channels, including interaction points like events, webinars, and call center interactions. "It's not a pipe dream to say, 'We want to marry up our data from our call center and our trade shows and our web analytics and our CRM system,'" said Danny Dalton, industry strategy manager at Adobe. "Marketers are doing that today, whereas a few years ago, they weren't."

Most solutions also have artificial intelligence and machine-learning capabilities. Once a prospective customer has put your product on their short list, AI-powered marketing automation systems really start to shine. Rather than placing the contacts from that account in a generic nurture program, you can deliver a program that feels tailor-made for each individual. That's because at each step, AI can quickly sort through behavioral data and choose the offer or message that's most likely to move the conversation forward.

Show the impact you've made

Many B2B companies aren't getting the full value from their investments in marketing programs and tools because they aren't set up to measure the impact of those investments. "That's such an important step that a lot of organizations discount, and it leaves their programs dead in the water," Dalton said.

Data silos are a big part of the problem. When your marketing technology systems are tightly integrated, everyone has access to the same data and your teams can agree on the key metrics. Otherwise, each team uses the metrics available in their primary solution, and they're all different.

In particular, sharing data between your marketing automation and analytics solutions sets you up to do three things:

1. Consolidate your key performance indicator (KPI) reporting.

When everyone's reporting on the same KPIs, there's more transparency and accountability across the whole organization. And it's much easier for senior leadership to make midcourse corrections as needed.

2. Assign credit for key outcomes to specific channels, programs, and activities. Historical attribution is used in budget allocation decisions, so it's important to get that right. The most advanced marketing automation solutions also let you do instant attribution, which helps you provide timely, relevant experiences to your customers.

3. Analyze customer behavior in greater depth. You can get useful insights from looking at the behavior patterns of a certain customer segment, based on industry, job function, or geographic region, for example. But you'll get the most value from understanding your customers as individuals and as part of a specific company, so that you can plan and execute account-based programs—in close collaboration with the sales team, of course.

Fujitsu, one of the world's largest IT service providers, adopted a marketing automation platform so they could engage with their customers in a more personal way, including through ABM programs. Alex MacAdam, a marketing leader and operations specialist, said the new approach is driving a perception shift within the company. Instead of being viewed as a cost center, marketing is starting to be perceived "as a real value center worthy of continued investment."

At GE Current, using a marketing automation platform has helped the marketing team track the ROI of different programs and adjust their strategy to do more of what's working well. "The future of marketing is to have a hand in making decisions that are going to impact the company's bottom line," Aquilino said.

Keep marketing and sales in sync

When you're shifting to a dynamic engagement strategy, marketing and sales have to learn to work together in new ways.

TIP 1

Align your goals for each stage of the customer journey

All the teams involved in the customer journey—including marketing, sales, and customer success—need to decide what the ideal journey would look like. When you're mapping it out, make sure you agree on what the next outcome should be at each stage. It often happens that marketing and sales are working toward slightly different outcomes in ways that confuse or annoy customers.

You can't perfectly control the sequence of touches, but you can make sure your teams are working toward the same next outcome. As you're nudging prospects toward the next step, help them understand the value they'll get from taking it. "When we can start to say, 'Here's the value to you of taking a 30-minute phone call with one of our experts,' instead of, 'Here's the value of our solution, please talk to one of our experts,' that can make a big, big difference in program results," Wittlake said.

At Carl Zeiss Meditec, using a marketing automation platform has changed the way marketing and sales work together. "We align better with the sales organization, and especially on the local level," Tham said.

Fujitsu is also seeing closer cooperation between marketing and sales since adopting a marketing automation system. "We've got common agreement about what needs to be done to win," said MacAdam.

TIP 2

Align your incentives to build trust between teams

Different objectives are a key barrier to marketing and sales alignment. If marketers are rewarded for lead volume, they don't have the right incentives. Ideally, marketing should be rewarded for contributing to opportunities that translate into revenue.

"Figuring out the question of attribution is where politics and egos start to play," said Heinz. "This is the most difficult part of sales and marketing alignment, in my mind—helping those teams see themselves as one revenue unit."

In a business with long buying cycles, who sourced a lead is much less important than what each team is doing to build and nurture relationships with the person and the account. That's why some companies, when they're assessing marketing's impact, are paying more attention to sales enablement metrics and less attention to demand generation metrics.

TIP 3

Align your messages to build trust with your customers

If marketing and sales are truly aligned, customers should be getting consistent messages at every stage of the buyer's journey. That consistency helps to establish trust between the customer and the brand. Marketing needs to keep sales informed about how customers in their target accounts are interacting with the brand through marketing channels. Once a sales rep starts talking to an account representative, marketing should stay engaged in the opportunity.



“If you think about the best buying experiences you’ve had, where you feel like you’ve been respected, where you feel like you’ve been heard, where you don’t feel like you’ve been pushed, in many cases that’s evidence of that stronger alignment between sales and marketing.”

Matt Heinz

President, Heinz Marketing

By the time prospects talk to a sales rep, they’re usually quite far along in their discovery process. At that point, Lewis said, “the role of marketing is really to be a trusted source of education and awareness. The role of sales is to be a trusted advisor.”

Sales and marketing alignment can accelerate the sales cycle, and it can also increase win rates. “The experience you provide during this process will often times put you as a frontrunner,” said Lewis, “even when the product may not be the best solution for them and certainly not the cheapest solution.”

Ask the right questions

In order to shift from linear campaign management to real-time dynamic engagement, all the teams involved—including marketing, sales, and customer success—should agree on what kind of customer experience you want to create.

Here are a few questions to get the discussion started:

Which target audiences are the best fit for our products or services?

Which marketing channels should we use to attract those customers?

Once they've started to engage with your brand:

- What specific steps do we want customers to take in the awareness stage? In the consideration stage?
- For each step, which channels will we use to invite them to take this step? What do they need to know or believe in order to take it? What's the value to them of taking it?
- How will marketing and sales communicate about those accounts during these early stages?

Once our sales team has qualified an opportunity:

- What specific steps do we want customers to take in the evaluation stage? In the purchase stage?
- For each step, which channels will we use to invite them to take this step? What do they need to know or believe in order to take it? What's the value to them of taking it?
- How will marketing and sales communicate about those accounts during these middle stages?

Once they've purchased our product:

- What specific steps do we want customers to take in the adoption stage? In the advocacy stage?
- For each step, which channels will we use to invite them to take this step? What do they need to know or believe in order to take it? What's the value to them of taking it?
- How will the customer success team communicate with marketing and sales during these later stages?

Dave Lewis suggests doing a sales and marketing workshop where you think about the clues customers give about their intentions in a retail setting—like turning over a price tag or picking up an item from a rack—and imagine what the equivalent behaviors might be in the context of your business. “We need to basically get on a whiteboard and say, ‘What would those behaviors look like in the digital world, either on our website or engaging with our content?’ And then, ‘What would we do if we saw those behaviors?’”

Connect your teams to connect with customers

When your marketing and sales teams are aligned and you're delivering consistent messages that are timely and relevant at each step, the customer journey becomes much more compelling for the customer. From your company's point of view, the whole process of attracting, engaging, and nurturing prospects becomes more efficient. It's also more transparent because everyone understands the value of what each team is contributing.

"There are companies that are figuring this out and tying these systems together, and tying these teams together, and tying these efforts together," said Dalton. "We're coming to a world of connection in B2B, both internally and in how companies are relating with customers."



"At the end of the day, people buy from people who they like and people that they trust,"

David Lewis
CEO of DemandGen

Adobe can help

Adobe's industry-leading Marketo Engage solution uses the power of marketing automation to help companies efficiently drive demand and build long-lasting customer relationships. Through seamless integration with Adobe Analytics, Experience Manager Assets, Target, and Audience Manager, Marketo Engage can help you to identify, attract, and nurture the right prospects for your business—and measure the impact of your marketing and sales enablement programs.

Learn more about how your marketing and sales teams can drive demand through the power of timely, relevant experiences.

[Get details](#)

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