DIGITAL EXPERIENCES MESSAGING & BRANDING

OVERVIEW

With today's technology and the explosion in the number of touchpoints that buyers can access, it can be easy for organizations to forget about the foundations of relevant and consistent messaging, communications and branding in digital experiences. So often digital experiences are created outside of the remit of the creative and brand team. This playbook is for marketers that are looking to make sure that the experiences they provide are consistent, aligned to key messaging, and engage buyers to progress their journeys. Follow this playbook to review your current touchpoints and ensure they are providing the best experience possible.

OUTCOMES OF THIS PLAY

Improved messaging resonance

Ensuring your messaging is consistent and relevant will improve the perception buyers have of your brand. It will also ensure that they are not being confused by a disjointed brand experience.

Increased buyer engagement

With messaging that fits each stage of the buyer journey — both before and after the sale — you will increase buyer engagement. This can also lead to loyalty and advocacy.

PROCESS

Collate existing messaging, communications and brand guidelines

Before assessing your touchpoints and experiences, make sure you have to hand the reference documents that outline how you will communicate and present your organization. This will require interlock and collaboration with the appropriate members of the brand and communications team.

At the basics, these should include guidelines on messaging and communications (such as a tone of voice document or an internal presentation outlining your most important messages to key segments) and a brand style guide. If you have a buyer journey map created, make sure the key messages by buyer journey stage are present. If you have a complex brand hierarchy, or a differentiated set of products and services, look too to get the details for those.

If your organization has not created or updated versions of these documents, find an example of material that can act as an effective guide to compare other touchpoints against. This might be an authoritative ebook, presentation or even a long-form blog post or article.

Assess key buyer touchpoints (both pre- and post-sale) against these guidelines

If you have already read the playbook on 'Buyer Action: Experience Touchpoints That Drive Buyer Journeys' you may have already identified and documented the most important touchpoints in the buyer journey. Having this to hand will save you time with these next steps.

The touchpoints you assess should include both self-service options (such as those on your website) and two-way interactions (such as live webinars, live chat and sales presentations). As part of your assessment, ask yourself the following questions with each touchpoint you investigate:

- Are your key touchpoints consistent with your high-level messaging, communications and brand guidelines? Make sure to go beyond what is available on your site. Cover key emails, webinar presentations and videos, sales communications and live chat responses. Furthermore, don't forget to cover post-sale touchpoints, as these are critical for retention and account growth but often use the same channels as pre-sale. Make a note of any that are in need of a change.

- Do your touchpoints communicate relevant messages by buyer journey stage? For example, do your bottom-of-funnel assets (such as case studies or ROI calculators) deliver the messages relevant to this part of the journey? Do they convey the information that the buyer needs right now?

- Are your touchpoints sufficiently personalized to the buyer? Think beyond the basic elements of personalization such as first names and note any opportunities where these touchpoints can be made more relevant to them.

Assess key touchpoints for engagement and driving action

Ensuring your touchpoints are consistently aligned with your brand and messaging provides a solid foundation for a high-quality experience. But in order to maximize commercial success, your touchpoints should also engage your buyers and encourage them to take the actions that you want them to take.

At a minimum, check the following:

- Do each of your self-serve touchpoints provide clear and appropriate calls to action or signposts for the next step? Given that buyer journeys require multiple engagements, any touchpoint that does not lead to another is a missed opportunity. Even for your existing customers, there should be an action that enables them to deepen the relationship they have with your brand.

- For your two-way touchpoints (such webinars, demos or sales and customer success presentations), is there a clear next step communicated to your buyer? Again, each engagement presents an opportunity to drive your buyer towards the next target action.

Identify and prioritize improvements

After going through all your key touchpoints, it is likely that there is a long list of improvements to be actioned. Furthermore, the list might be so long that actioning every point might not be realistic, particularly if you will be reviewing your messaging, communications or brand in the future.

Therefore it is critical to identify and prioritize those improvements which are most important. If you have already read the playbook 'Marketing

Action: Optimizing and Improving Experiences' you will have likely have already used data to assess which touchpoints will drive the largest returns.

For self-serve touchpoints, break down improvements based on the impact they will have against the time, effort and resource required in actioning them.

Do the same for two-way interactions, but also bear in mind that changing the behaviors of your coworkers — whether in marketing, sales or customer success — can be a longer endeavor.

Upskill staff and champion the buyer experience

Making one-off improvements to your most important touchpoints will result in improvements, but for change to be lasting you need to have your co-workers onboard. This will mean that any experiences created in the future are more likely to align with your messaging and foster successful buyer engagement.

Points to cover include:

- Recommunicate your messaging, communications and brand guidelines and make them easy to find and access. Find out where your coworkers go to for their resources and place them there — whether that is a shared folder, playbook in your CRM, or page on your intranet. Different teams may turn to different locations, so make sure they can find them wherever they look.

- Emphasize the importance of experience. Schedule some time during a weekly meeting (including those outside of marketing) or a company update to reach the widest internal audience.

- Provide training and encouragement to key staff. Ideas include sessions on webinar presentation skills, communications training and providing access to third-party resources such as e-learning.

Establish repeatable processes to ensure best practice

Successful teams often rely on deploying a series of repeatable steps within their tasks and workflow.

To make improved messaging and engagement stick, look for areas where you can insert an action to check that.

For example:

- Add an action to review messaging, brand and engagement into your marketing checklists.

- Add an action in customer success team processes to check their new follow-up material against guidelines.

- Get buy-in to adapt sales plays so they include relevant and aligned content and materials.

DATA

Inputs

User-level engagement data from experience touchpoints (ideally within MAP/CRM) to identify key touchpoints.

Aggregate engagement data (e.g. ON24 Engagement Score, conversion rates) to assess baseline impact.

Inputs

- Impact on performance and engagement at key buyer touchpoints (e.g. CTA conversions, ON24 Engagement Score).
- Improvements in key marketing performance metrics e.g. contribution to pipeline.
- NPS

NEXT STEPS

Following the steps in this playbook may appear to be a daunting task, particularly given the other pressures that you and your team may be facing. As such, consider bringing in additional resources for some of the steps — for example, an agency may be able to carry out the assessment, or update elements of your online experience. Another approach is to start small and begin this audit on just one channel of content at first.

In addition, you will need to maintain the support of your coworkers and leaders in other teams. For this reason, avoid taking a 'brand police' approach, especially when working with sales.

Finally, for two-way engagements such as webinars, the right talent can make a big difference in achieving success. Encourage and nurture anyone that demonstrates the right attributes so they can provide a bar that others work towards.