

OVERVIEW

Leads and opportunities generated by marketing mean little if they are not converted to paying customers. Fortunately, marketing technology can be of great value to sales teams. This playbook should be used by marketers (particularly in revenue operations) that want to provide sales teams with both the ability to engage prospects directly through digital experiences and to use engagement-driven insights in personalizing their one-to-one communications.

OUTCOMES OF THIS PLAY



Improved Buyer Experience

By providing sales with unique insight, their interactions with buyers will offer more value.



Increased and Accelerated Pipeline

Creating touchpoints where sales can interact early in the buying journey will increase pipeline and reduce time to closing deals.



Alignment with Sales

Helping sales teams to be more effective will improve relationships and your joint endeavors.

PROCESS

1. Identify relevant experience touchpoints for sales

Before looking to drive improvements in engagement between prospective buyers and sales, you should first list out the key touchpoints. You may have already done this by mapping out the buyer journey or by following steps in other playbooks.

Some examples of touchpoints might include:

- When buyers browse your website, generating data in your marketing automation system or web analytics.
- When buyers access content hubs and landing pages, sharing their data for access to information.
- Live chat on your website.

- Webinars with interactive options, such as Q&A, polls and content downloads.
- When buyers interact with sales-delivered content, such as proposal decks and case studies.

2. Break these touchpoints by self-driven and responsive engagement

When buyers interact with your brand, they can either do so in a self-driven fashion, or in response to sales activity. Self-driven engagement provides data to inform sales conversations, while responsive engagement options provide an option for sales teams to steer the buyer journey in a personalized fashion. Breaking your buyer touchpoints into these two categories allows you to discuss the potential plays that your sales team will use for each.

3. Connect with sales stakeholders to prioritize engagement actions and plays

Improving both the use of engagement data and the quality of interactions between buyers and sales should be an evolving and iterative process.

Meet with sales leaders and any champions you have in the sales team to present the touchpoints and collaboratively discuss how they can drive more effective sales plays. You should then agree on which ones to prioritize based on what is likely to be effective. Some examples might include:

- Developing personalized outreach strategies based on data from self-driven buyer behavior, such as web browsing and content downloads.
- Scheduling simulive demos where a designated salesperson answers live Q&A, or designating a sales person to answer live chat on the website at specified times.

- Changing existing outreach to make it more personalized, such as inserting customized fields that go beyond 'First name' and 'Company name'.
- Creating account-based and persona-based experiences that perform better and can become part of the sales toolkit.
- Informing sales of key engagements directly within their preferred workflow tools, whether CRM, email, or message notifications via Slack or Teams.

4. Design the improvement and deploy to a test group

Changing sales behavior is not an easy task and barriers may emerge during deployment—from incorrect contact-level data, to malfunctioning technology and tools. These can damage the buyer experience.

Teething problems are normal, but by working with a small test group or particular champions in sales, you can identify issues early and remedy them. Make sure to have technical problem solvers (such as your marketing operations or IT team) ready to respond.

Rolling out with a small and supportive group is critical to maintaining the support of sales. If a perception develops that new processes are not helpful, it will be far harder to roll out further improvements in the future.

5. Measure the impact and roll out iteratively

Maintaining the ongoing support of sales and the wider business will be based on how you can demonstrate success. As such, make sure to measure how your changes to buyer engagement with sales impact on performance.

DATA

Inputs

- User-level engagement data from experience touchpoints, ideally within your marketing automation platform or CRM.

Outputs

- Response metrics such as replies to sales outreach.
- Funnel and pipeline metrics, from MQL to total opportunity value.
- Buyer and account-level engagement scores.

NEXT STEPS

Being successful in improving the buyer experience with sales requires a strong and supportive relationship with your sales function. In particular, you will need support from sales leaders that will be driving their teams to make changes to the way they work. Make sure to continually prove the value of these improvements, while moving iteratively at a pace where sales can modify their habits and processes. Finally, also accept that not all changes will result in drastic improvements. Some may even fail entirely. This fact reinforces the need to work with supportive teams and champions, who will understand any problems as you navigate potential hurdles and fix teething problems.